



NW BURLINGTON

Child Care Market Analysis

MAY 2019



Census data Demographics

This section provides statistical information about the market area. The demographic profile of a population is vital to understanding who lives in the community and what their needs for services are. Characteristics such as age, language, education, work force participation and income can be a predictor of service use.

Child care demand in Halton

While there are many factors driving the use of child care, there are three main factors that appear to be particularly influential in Halton – female participation in the labour force, newcomer status, and income level.

Analysis of female labour force participation rates (LFP) reveals substantial variation across Halton with East Milton showing the highest female LFP of 73 per cent and South West Oakville with the lowest rate of 57 per cent. From 2011 to 2016, the female LFP rose for North East Burlington and South East Oakville. However, decreases in rates were noticed across most of the rest of the Region. For Halton, a one per cent decrease in LFP translates into 1,472 less females not in the labour force and unlikely to need child care.

Another key factor in Halton is newcomer status where using child care differs greatly depending on the length of time a person has lived in Canada. Kindergarten Parent Survey results for 2018 indicate families who reported always having lived in Canada use child care much more (84 per cent) than those who have lived in Canada for 10 years or less (53 per cent). We also know that child care use differs by income level where families who earn a higher income are more likely to use licensed child care. Families that earn more than \$150,000 annually use child care at a rate of 84 per cent as compared to 48 per cent of families with an annual income of less than \$50,000. Considering these and other variables (alone or factored together) can help to better understand what the actual demand may be in an area.



Characteristic	NW Burlington		Burlington	
	#	%	#	%
Population, 2016	32,372	...	183,314	...
Population change, 2011 to 2016	342	1%	7,535	4%
Total number of children 13 months to 12 years of age	4,240	13%	24,645	13%
Infant (13 to 18 months)	160	4%	915	4%
Toddler (19 to 30 months)	328	8%	1,830	7%
Preschool (31 to 3.8 years)	411	10%	2,310	9%
Kindergarten (3.8 to 5.8 years)	701	17%	3,995	16%
School-age (5.8 to 12 years)	2,640	62%	15,595	63%
Mother tongue not English	5,115	16%	35,170	19%
Recent immigrants	400	1%	4,125	2%
Total population aged 25 to 64 years with no certificate, diploma or degree	1,125	3%	4,925	3%
Total population aged 25 to 64 years with a postsecondary certificate, diploma or degree	11,800	36%	70,495	38%
Labour Force Participation Rate (Males and females)	18,205	68%	101,635	68%
Labour Force Participation Rate (Females)	8,970	65%	49,925	64%
Income	#	%	#	%
Total number of households in after-tax income of households	12,110	...	71,355	...
\$0 to \$29,999	1,065	9%	7,785	11%
\$30,000 to \$59,999	2,855	24%	16,955	24%
\$60,000 to \$99,999	3,825	32%	20,700	29%
\$100,000 to \$124,999	1,650	14%	8,840	12%
\$125,000 and over	2,690	22%	17,085	24%
In low income in 2015 based on after-tax low-income measure (LIM-AT)	2,145	18%	13,195	19%

Low Income Measure After-Tax (LIM-AT): A fixed per cent (50%) of median adjusted economic family income, where "adjusted" indicates that family needs are taken into account.

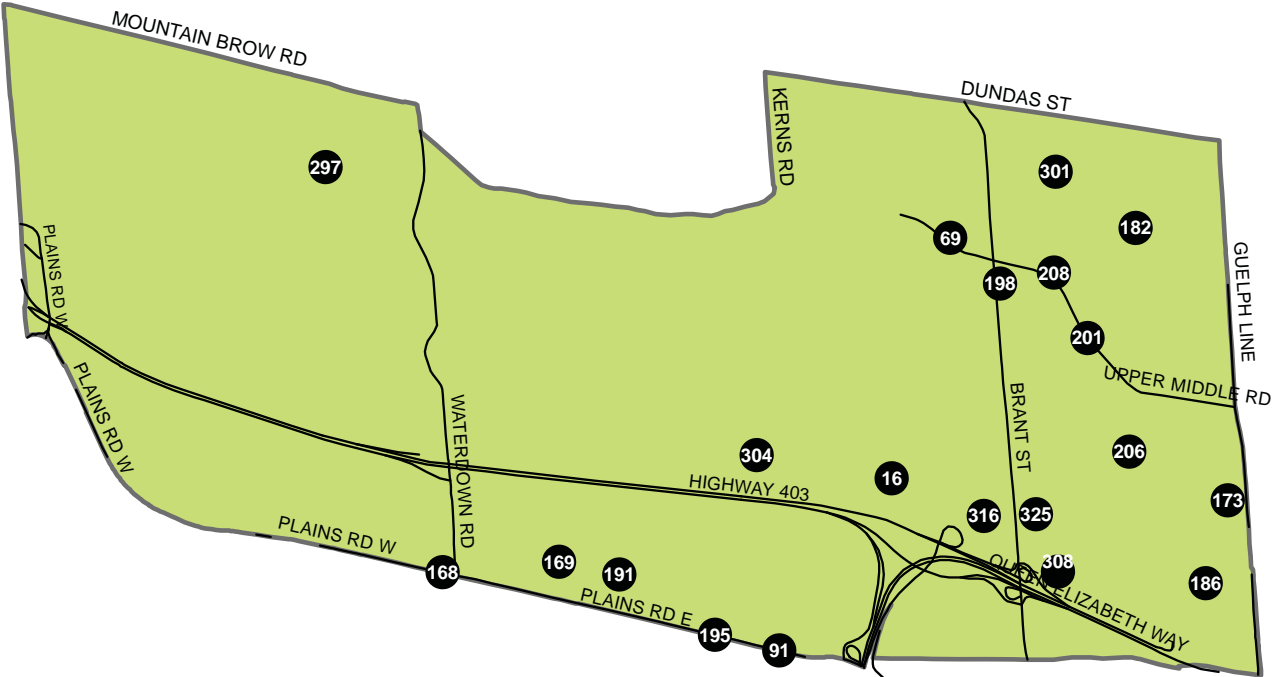
Statistics Canada randomly rounds each individual value either up or down to a multiple of '5' or '10'. As a result, when these data are summed or grouped, the total value may not match the individual values since totals and sub-totals are independently rounded. Similarly, percentages, which are calculated on rounded data, may not necessarily add up to 100 percent.

SOURCE: Statistics Canada, Census 2016

Supply of child care services NW Burlington

This map shows the location of full-day licensed child care centres within the market area.

* Map excludes nursery school programs and private-home child care providers, as well as full-day child care programs or before and after-school programs licensed after March 11, 2019.



Licensed full-day and before and after-school programs

The following table lists licensed full-day child care programs and before and after-school programs operating in the market area. Information on location, licensed capacity and market rate specific to each program are provided.

Legend	Site name	CCSMA ¹	Licensed capacity ²						(\$) ³ Market rate ³			
			Total capacity	INF	TOD	PRE	JK/SK	SA	INF	TOD	PRE	SA/BAS
16	Burlington Children's Centre	Yes	141	20	34	72	0	15	\$73.33	\$61.83	\$51.95	\$25.51
304	Fern Hill - North Service Road	No	16	0	0	16	0	0	*	*	†	*
69	Kidlogic - Burlington	Yes	116	10	30	76	0	0	\$69.60	\$54.85	\$53.60	*
325	Lakewood Montessori	No	55	0	15	40	0	0	*	†	†	*
91	MacFadyen Preschool Academy	Yes	49	10	15	24	0	0	\$78.96	\$71.07	\$66.96	*
316	Ressel School at Willowbrae Academy	Yes	171	20	45	63	13	30	\$78.00	\$67.50	\$58.80	*
308	Tiny Hoppers	Yes	49	10	15	24	0	0	\$75.00	\$65.00	\$57.00	*
297	Waterdown Montessori	No	68	0	20	48	0	0	*	†	†	*
168	Wee Care Educational Services	Yes	84	10	15	44	0	15	\$80.00	\$70.00	\$60.00	\$41.00
169	Wee Care Educational Services - Downsview	Yes	84	10	15	44	0	15	\$80.00	\$70.00	\$60.00	\$41.00
173	Woodland Children's Centre	Yes	164	20	40	104	0	0	\$75.00	\$60.00	\$52.00	*
301	Today's Family - Brant Hills	Yes	85	0	0	0	40	45	*	*	*	\$30.55
182	YMCA Ham/Burl - SACC - Bruce T. Lindley	Yes	104	0	0	0	52	52	*	*	*	\$24.50
186	YMCA Ham/Burl - SACC - Clarksdale	Yes	86	0	0	0	26	60	*	*	*	\$24.50
191	YMCA Ham/Burl - SACC - Holy Rosary	Yes	56	0	0	0	26	30	*	*	*	\$24.50
195	YMCA Ham/Burl - SACC - Maplehurst	Yes	86	0	0	0	26	60	*	*	*	\$24.50
198	YMCA Ham/Burl - SACC - Paul A. Fisher	Yes	80	0	0	0	26	54	*	*	*	\$24.50
201	YMCA Ham/Burl - SACC - Rolling Meadows	Yes	112	0	0	0	52	60	*	*	*	\$24.50
206	YMCA Ham/Burl - SACC - St. Gabriel	Yes	86	0	0	0	26	60	*	*	*	\$24.50
208	YMCA Ham/Burl - SACC - St. Mark's School	Yes	56	0	0	0	26	30	*	*	*	\$24.50

* Rate not applicable

† Rate not available

¹ A Child Care Service Management Agreement (CCSMA) is the agreement between a licensed child care operator (or licensed home child care agency) and Halton Region which allows access to funding that supports high quality, inclusive, and affordable child care in Halton.

² Licensed capacity for infant, toddler, preschool, junior and senior kindergarten, and school-age spaces from the Ontario Child Care Management System (OCCMS) on March 11, 2019.

³ Market rate is the parent fee paid to a service provider for the cost of a child care space. A market rate is provided only for licensed child care programs with a Child Care Service Management Agreement who offer core child care services such as full-day programming for infants, toddlers and preschoolers, or before and after-school programs for school-age children. The market rate is as of March 11, 2019.

Child care Market analysis

Our goal is to help you develop an effective business plan by providing data relevant to a particular market area. The tables below summarize key information about licensed full-day centre-based child care and before and after-school programs operating in the vicinity. It does not include data from nursery school programs or private-home child care providers. Average market rates by space type and municipality are shown to provide comparative data about prices across Halton. A market rate is the full cost of the child care space charged by service providers.

Description	NW Burlington		Burlington		Halton	
	#	%	#	%	#	%
Total number of licensed full-day child care programs and before and after-school programs	20	...	84	...	279	...
Total licensed capacity	1,748	...	7,870	...	27,662	...
Infant spaces	110	6%	261	3%	795	3%
Toddler spaces	244	14%	843	11%	2,742	10%
Preschool spaces	555	32%	1,751	22%	5,821	21%
Kindergarten spaces	313	18%	2,093	27%	7,169	26%
School-age spaces	526	30%	2,922	37%	11,135	40%
Programs with a licensed capacity of >75 spaces or more	13	65%	50	60%	163	58%
Programs with a Child Care Service Management Agreement	18	90%	81	96%	263	94%
Programs with a Memorandum of Understanding ¹	8	40%	38	45%	130	47%
Programs participating in Quality First (QF)	17	85%	76	90%	242	87%
QF Level 1 Foundational	6	35%	20	26%	53	22%
QF Level 2 Developmental	1	6%	7	9%	20	8%
QF Level 3 Progressive	10	59%	49	64%	166	69%

¹ An agreement with Inclusion Services that supports quality inclusion of children with special needs in licensed centre-based and private-home child care programs.

Average market rate ¹	Burlington	Milton	Oakville	Halton Hills	Halton
Infant full-day	\$73.48	\$72.04	\$72.44	\$67.70	\$72.44
Toddler full-day	\$59.90	\$58.35	\$60.30	\$53.37	\$59.36
Preschool full-day	\$53.48	\$52.21	\$57.00	\$48.15	\$54.45
School-age before and after-school (JK-12 years)	\$25.50	\$24.00	\$25.18	\$22.62	\$24.71

¹ A market rate is available only for licensed child care programs with a Child Care Service Management Agreement. Information from nursery school programs and private-home day care agencies are not included in the calculation of the average market rates. The market average equals the sum of all current available values in each category divided by the total number of programs in the category.

Child care need: The current outlook for North West Burlington

Understanding the patterns of demand and supply allows for focused efforts to shape supply to match child care demand. Comparing demand data (child care utilization rates) with the current supply of licensed spaces allows us to estimate met/unmet need. Whether an area is operating in excess or shortage of licensed child care space is shown below.

Market area	Infant		Toddler		Preschool		School-age	
	Met/unmet need	Number of licensed child care spaces	Met/unmet need	Number of licensed child care spaces	Met/unmet need	Number of licensed child care spaces	Met/unmet need	Number of licensed child care spaces
NW Burlington	Excess	+ 51 to 75 spaces	Excess	+ 76 to 100 spaces	Excess	+ Over 200 spaces	Excess	+ 0 to 25 spaces
Burlington	Excess	+ 51 to 75 spaces	Excess	+ 101 to 150 spaces	Excess	+ Over 200 spaces	Excess	+ 0 to 25 spaces
Halton	Excess	+ 151 to 200 spaces	Excess	+ Over 200 spaces	Excess	+ Over 200 spaces	Excess	+ Over 200 spaces

Community assets

Halton private-home child care agencies

Agency name	Head office address	Locale	Postal code	Service area
A Child's Place Home Day Care Agency	10588 Eighth Line RR#2	Georgetown	L7G 4S5	Georgetown, Acton
Cherish Private Home Child Care	410 Bronte Street South	Milton	L9T 0H8	Milton, Georgetown, Acton
Halton Day Care Services	298 Bussel Crescent	Milton	L9T 0W4	Milton, Oakville
Little Leaders Home Daycare Agency	1513 Pembroke Drive	Oakville	L6H 1V6	Milton, Oakville, Burlington
Today's Family Licensed Home Early Learning and Child Care	44 Greendale Drive	Hamilton	L9C 5Z4	Burlington
Wee Watch – Burlington (Friendly Faces Day Care Services Inc.)	5144 Cherryhill Crescent	Burlington	L7L 4C2	Burlington
Wee Watch - Milton (Paradise Home Day Care Services Inc.)	1551 Dorian Crescent	Milton	L9E 1H6	Milton
Wee Watch - Oakville (Bronte Day Care Services Inc.)	59 Fairwood Place	Burlington	L7T 1E4	Oakville

Burlington

EarlyON Child and Family Centres (Main and satellite locations)

EarlyON Child and Family Centres provide a broad set of free programs and resources for children aged 0 to 6, and their families and caregivers. EarlyON Child and Family Centres are funded by Halton Region. Reach Out Centre for Kids (ROCK) operates the EarlyON programs in the Burlington area.

Site name	Address	Municipality	Postal code
Cumberland	710 Cumberland Avenue	Burlington	L7N 3M9
Aldershot - satellite location	645 Plains Road East	Burlington	L7T 4J5
Haber - satellite location (school year)	3040 Tim Dobbie Drive	Burlington	L7M 0M3

Community and recreation centres

Building name	Address	Municipality	Postal code
Haber Recreation Centre	3040 Tim Dobbie Drive	Burlington	L7M 0M4
Brant Hills Community Centre	2255 Brant Street	Burlington	L7P 5C8
Tansley Woods Community Centre	1996 Itabashi Way	Burlington	L7M 4J8
Sherwood Forest Community Centre	5290 Fairview Street	Burlington	L7L 6B7

North West Burlington

Nursery schools

Site name	Address	Municipality	Postal code	Licensed capacity
Burlington Montessori Preschool	2464 Dundas Street, R.R. #1	Burlington	L7R 3X4	24
East Plains Co-operative Preschool	375 Plains Road East	Burlington	L7T 2C7	48

Social housing: Family and all-ages communities

Building	Address	Municipality	Postal code	Number of units
Cavendish Co-op	2118 Pear Tree Lane	Burlington	L7P 4L3	72
Nelson Co-op	1026 Glendor Avenue	Burlington	L7R 4M7	118
Van Norman Place	1380 Guelph Line	Burlington	L7P 4X3	54
Victoria Village	2461 Whittaker Drive	Burlington	L7P 4A2	30
Wellington Square Co-op	205 Plains Road West	Burlington	L7T 4H3	91

Places of worship

Name	Address	Municipality	Postal code	Child care program available on-site		
				Full-day program	Nursery school	Child care program name
Brant Hills Presbyterian Church	2138 Brant Street	Burlington	L7P 3W5	No	No	
Burlington Christian Fellowship	2054 Mountainside Drive	Burlington	L7P 1A8	Yes	No	Lakewood Montessori
Calvary Baptist Church	2458 St. Frances Drive	Burlington	L7P 1V5	No	No	
Compass Point Bible Church	1500 Kerns Road	Burlington	L7P 3A7	No	No	
Eaglesfield Community Church	2501 Eaglesfield Drive	Burlington	L7P 3Z7	No	No	
East Plains United Church	375 Plains Road East	Burlington	L7T 2C7	No	Yes	East Plains Co-operative Preschool
Faith Christian Reformed Church	2265 Mountainside Drive	Burlington	L7P 3K9	No	No	
Holy Rosary Roman Catholic Church	287 Plains Road East	Burlington	L7T 2C7	No	No	
Mountain Grove Christadelphians	1525 Mountain Grove Avenue	Burlington	L7P 2H4	No	No	
Nelson United Church	2437 Dundas Street West	Burlington	L7R 3X4	No	No	
North Burlington Baptist Church	1377 Walkers Line	Burlington	L7R 3X5	No	No	
Prince Of Peace Lutheran Church	1299 Brant Street	Burlington	L7P 1X7	No	No	
Rehoboth Canadian Reformed Church of Burlington	1225 Highway #5	Burlington	L7R 3X4	No	No	
St. Gabriel Roman Catholic Church	2261 Parkway Drive	Burlington	L7P 1S9	No	No	
St. John's Anglican Church	2464 Dundas Street, RR#1	Burlington	L7P 0S8	No	No	
St. Stephen United Church	2258 Parkway Drive	Burlington	L7P 1T1	No	No	

Schools

Elementary schools	Address	Municipality	Postal code	School board
Brant Hills	2330 Duncaster Drive	Burlington	L7P 4C3	Halton District
Bruce T. Lindley	2510 Cavendish Drive	Burlington	L7P 4K5	Halton District
Clarksdale	2399 Mountainside Drive	Burlington	L7P 1C6	Halton District
Holy Rosary	261 Plains Road East	Burlington	L7T 2C7	Halton Catholic
Maplehurst	481 Plains Road East	Burlington	L7T 2E2	Halton District
Paul A. Fisher	2175 Cavendish Drive	Burlington	L7P 3J8	Halton District
Rolling Meadows	1522 Mountain Grove Avenue	Burlington	L7P 2H5	Halton District
St. Gabriel	2227 Parkway Drive	Burlington	L7P 1S9	Halton Catholic
St. Marks	2145 Upper Middle Road	Burlington	L7P 4G1	Halton Catholic
Secondary schools	Address	Municipality	Postal code	School board
M. M. Robinson	2425 Upper Middle Road	Burlington	L7P 3N9	Halton District

Source: Board School Identification Database (BSID) / Ontario School Information System (OnSIS) as updated/maintained by boards, March 2019.