



# SW 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	SW Burlington		Burlington	
	#	%	#	%
Population, 2016	40,048	...	183,314	...
Population change, 2011 to 2016	2,077	5%	7,535	4%
Total number of children 13 months to 12 years of age	3,835	10%	24,645	13%
Infant (13 to 18 months)	170	4%	915	4%
Toddler (19 to 30 months)	330	9%	1,830	7%
Preschool (31 to 3.8 years)	400	10%	2,310	9%
Kindergarten (3.8 to 5.8 years)	641	17%	3,995	16%
School-age (5.8 to 12 years)	2,294	60%	15,595	63%
Mother tongue not English	6,880	17%	35,170	19%
Recent immigrants	1,195	3%	4,125	2%
Total population aged 25 to 64 years with no certificate, diploma or degree	1,495	4%	4,925	3%
Total population aged 25 to 64 years with a postsecondary certificate, diploma or degree	14,540	36%	70,495	38%
Labour Force Participation Rate (Males and females)	21,865	63%	101,635	68%
Labour Force Participation Rate (Females)	10,720	58%	49,925	64%
<b>Income</b>	<b>#</b>	<b>%</b>	<b>#</b>	<b>%</b>
Total number of households in after-tax income of households	18,865	...	71,355	...
\$0 to \$29,999	3,230	17%	7,785	11%
\$30,000 to \$59,999	5,830	31%	16,955	24%
\$60,000 to \$99,999	5,175	27%	20,700	29%
\$100,000 to \$124,999	1,630	9%	8,840	12%
\$125,000 and over	3,025	16%	17,085	24%
In low income in 2015 based on after-tax low-income measure (LIM-AT)	4,310	23%	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.

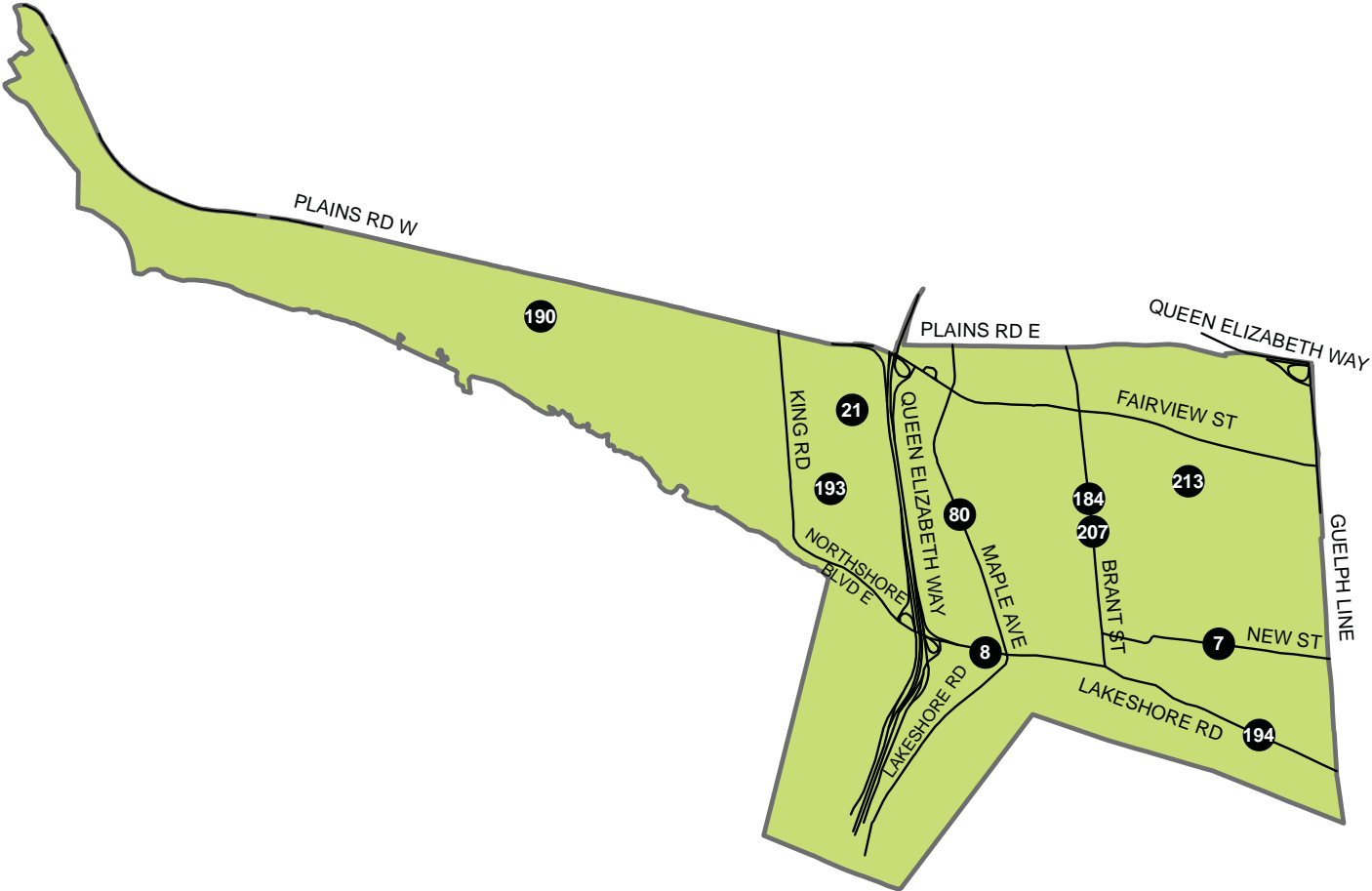
Statistics Canada randomly rounds each individual value either up or down to a multiple of '5' or '10'. As a result, when these data are summed or grouped, the total value may not match the individual values since totals and sub-totals are independently rounded. Similarly, percentages, which are calculated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

**SOURCE:** Statistics Canada, Census 2016

# Supply of child care services SW 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 <sup>1</sup>	Licensed capacity <sup>2</sup>						(\$) <sup>3</sup> Market rate <sup>3</sup>			
			Total capacity	INF	TOD	PRE	JK/SK	SA	INF	TOD	PRE	SA/BAS
7	Brant Children's Centre - Burlington Baptist	Yes	80	0	0	24	26	30	*	*	\$49.80	\$17.60
21	Centre Copains-Copines	Yes	117	0	15	20	52	30	*	\$42.00	\$38.60	\$17.07
80	Les Coccinelles D'Oakville - Renaissance	Yes	87	0	15	16	26	30	*	\$63.75	\$56.25	\$19.00
8	YMCA Ham/Burl - Brant Child Care Centre	Yes	34	0	10	24	0	0	*	\$57.00	\$48.00	*
184	YMCA Ham/Burl - SACC - Central	Yes	81	0	0	0	26	55	*	*	*	\$24.50
190	YMCA Ham/Burl - SACC - Glenview	Yes	56	0	0	0	26	30	*	*	*	\$24.25
193	YMCA Ham/Burl - SACC - King's Road	Yes	56	0	0	0	26	30	*	*	*	\$24.50
194	YMCA Ham/Burl - SACC - Lakeshore	Yes	86	0	0	0	26	60	*	*	*	\$24.50
207	YMCA Ham/Burl - SACC - St. John	Yes	73	0	0	0	26	47	*	*	*	\$24.50
213	YMCA Ham/Burl - SACC - Tom Thomson	Yes	86	0	0	0	26	60	*	*	*	\$24.50

\* Rate not applicable

<sup>1</sup> 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.

<sup>2</sup> 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.

<sup>3</sup> 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	SW Burlington		Burlington		Halton	
	#	%	#	%	#	%
Total number of licensed full-day child care programs and before and after-school programs	10	...	84	...	279	...
Total licensed capacity	756	...	7,870	...	27,662	...
Infant spaces	0	0%	261	3%	795	3%
Toddler spaces	40	5%	843	11%	2,742	10%
Preschool spaces	84	11%	1,751	22%	5,821	21%
Kindergarten spaces	260	34%	2,093	27%	7,169	26%
School-age spaces	372	49%	2,922	37%	11,135	40%
Programs with a licensed capacity of >75 spaces or more	6	60%	50	60%	163	58%
Programs with a Child Care Service Management Agreement	10	100%	81	96%	263	94%
Programs with a Memorandum of Understanding <sup>1</sup>	3	30%	38	45%	130	47%
Programs participating in Quality First (QF)	9	90%	76	90%	242	87%
QF Level 1 Foundational	1	11%	20	26%	53	22%
QF Level 2 Developmental	1	11%	7	9%	20	8%
QF Level 3 Progressive	7	78%	49	64%	166	69%

<sup>1</sup> 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 <sup>1</sup>	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

<sup>1</sup> 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 South 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
SW Burlington	Shortage	- 26 to 50 spaces	Shortage	- 76 to 100 spaces	Shortage	- 101 to 150 spaces	Shortage	- 26 to 50 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

## South West Burlington

### Social housing: Family and all-ages communities

Building	Address	Municipality	Postal code	Number of units
Brant Park Co-op	1161 Northshore Boulevard East	Burlington	L7S 1C3	N/A
Brant Court	708 and 710 Brant Street	Burlington	L7R 2H5	16
Carey House (Cheshire Homes)	1407 Ontario Street	Burlington	L7S 1G3	10
Churchill Co-op Apartments	2405 Lakeshore Road	Burlington	L7R 1B8	N/A
Don Quixote Co-op	1315 Maple Crossing Boulevard	Burlington	L7S 2K8	57
Maple Crossing	1300 Maple Crossing	Burlington	L7S 2K7	91
Stoa Co-op	456 Brock Avenue	Burlington	L7S 1M9	82

## Nursery schools

Site name	Address	Municipality	Postal code	Licensed capacity
Burlington Montessori Preschool - St. Lukes	1382 Ontario Street	Burlington	L7S 1G1	24
Little Friends Pre-School	2421 New Street	Burlington	L7R 1K1	24
St. Christopher's Preschool	662 Guelph Line	Burlington	L7R 3M8	24

## Places of worship

Name	Address	Municipality	Postal code	Child care program available on-site		
				Full-day program	Nursery school	Child care program name
Burlington Baptist Church	2225 New Street	Burlington	L7R 1J2	Yes	No	Brant Children's Centre
Guru Ravidas Gurdwara Sahib Sikh Temple	2284 Queensway Drive	Burlington	L7R 3T2	No	No	
Holy Protection of the Blessed Virgin Mary Ukrainian Catholic Church	419 Pearl Street	Burlington	L7R 2N2	No	No	
Knox Presbyterian Church	461 Elizabeth Street	Burlington	L7R 4B1	No	No	
Living Waters Church	831 Legion Road	Burlington	L7S 1T6	No	No	
Parish Church of St. Luke (the)	1371 Elgin Street	Burlington	L7S 1G1	No	No	
Paroisse St-Philippe	472 Locust Street	Burlington	L7S 1V1	No	No	
St. Adalbert Catholic Parish	464 Plains Road West	Burlington	L7T 1H2	No	No	
St. Christopher's Anglican Church	662 Guelph Line	Burlington	L7R 3M8	No	Yes	St. Christopher's Preschool
St. Georges Anglican Church	1295 North Service Road	Burlington	L7R 4M2	No	No	
St. John the Baptist Roman Catholic Parish	2016 Blairholm Avenue	Burlington	L7R 1V4	No	No	
St. Matthew on-the-Plains Anglican Church	126 Plains Road East	Burlington	L7T 2C3	No	No	
Wellington Square United Church	2121 Caroline Street	Burlington	L7R 1L7	No	No	
West Plains United Church	549 Plains Road West	Burlington	L7T 1H1	No	No	

## Schools

Elementary schools	Address	Municipality	Postal code	School board
Aldershot	50 Fairwood Place West	Burlington	L7T 1E5	Halton District
Burlington Central	1433 Baldwin Street	Burlington	L7S 1K4	Halton District
Central	638 Brant Street	Burlington	L7R 2H2	Halton District
Glenview	143 Townsend Avenue East	Burlington	L7T1 Z1	Halton District
King's Road	660 Greenwood Drive	Burlington	L7T 3P3	Halton District
Lakeshore	2243 Lakeshore Road	Burlington	L7R 1B1	Halton District
Renaissance	1226 Lockhart Road	Burlington	L7S 1H1	French Public
Saint-Philippe	901 Francis Road	Burlington	L7T 3Y3	French Catholic
St. John	653 Brant Street	Burlington	L7R 2H1	Halton Catholic
Tom Thomson	2171 Prospect Street	Burlington	L7R 1Z6	Halton District
Secondary schools	Address	Municipality	Postal code	School board
Aldershot	50 Fairwood Place West	Burlington	L7T 1E5	Halton District
Burlington Central	1433 Baldwin Street	Burlington	L7S 1K4	Halton District

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