



SW OAKVILLE

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 Oakville | | Oakville | |
|--|-------------|-----|----------|-----|
| | # | % | # | % |
| Population, 2016 | 37,723 | ... | 193,764 | ... |
| Population change, 2011 to 2016 | 1,353 | 4% | 11,244 | 6% |
| Total number of children 13 months to 12 years of age | 4,681 | 12% | 29,210 | 15% |
| Infant (13 to 18 months) | 143 | 3% | 815 | 3% |
| Toddler (19 to 30 months) | 308 | 7% | 1,733 | 6% |
| Preschool (31 to 3.8 years) | 416 | 9% | 2,324 | 8% |
| Kindergarten (3.8 to 5.8 years) | 719 | 15% | 4,296 | 15% |
| School-age (5.8 to 12 years) | 3,095 | 66% | 20,043 | 69% |
| Mother tongue not English | 10,045 | 27% | 63,130 | 33% |
| Recent immigrants | 1,245 | 3% | 10,165 | 5% |
| Total population aged 25 to 64 years with no certificate, diploma or degree | 1,060 | 3% | 4,090 | 2% |
| Total population aged 25 to 64 years with a postsecondary certificate, diploma or degree | 14,080 | 37% | 80,370 | 41% |
| Labour Force Participation Rate (Males and females) | 19,455 | 62% | 105,725 | 68% |
| Labour Force Participation Rate (Females) | 9,435 | 57% | 51,470 | 64% |
| Income | # | % | # | % |
| Total number of households in after-tax income of households | 14,540 | ... | 66,240 | ... |
| \$0 to \$29,999 | 1,805 | 12% | 7,205 | 11% |
| \$30,000 to \$59,999 | 3,210 | 22% | 12,075 | 18% |
| \$60,000 to \$99,999 | 3,505 | 24% | 15,565 | 23% |
| \$100,000 to \$124,999 | 1,610 | 11% | 7,930 | 12% |
| \$125,000 and over | 4,400 | 30% | 23,440 | 35% |
| In low income in 2015 based on after-tax low-income measure (LIM-AT) | 3,420 | 24% | 18,670 | 35% |

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.

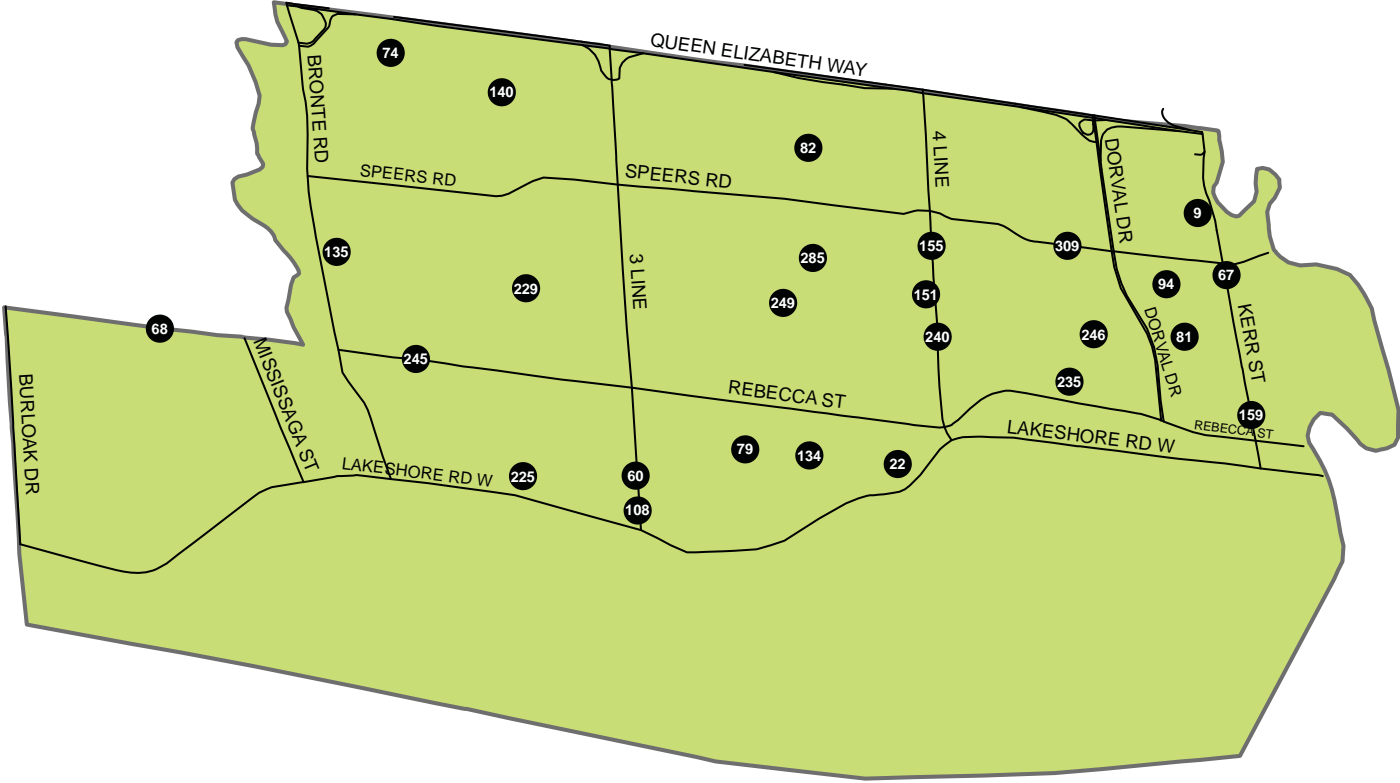
Statistics Canada randomly rounds each individual value either up or down to a multiple of '5' or '10'. As a result, when these data are summed or grouped, the total value may not match the individual values since totals and sub-totals are independently rounded. Similarly, percentages, which are calculated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

SOURCE: Statistics Canada, Census 2016

Supply of child care services SW Oakville

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 |
| 9 | Brightpath - Oakville | Yes | 122 | 29 | 45 | 48 | 0 | 0 | \$72.64 | \$66.21 | \$60.46 | * |
| 155 | Cradle2Kinder | Yes | 64 | 9 | 15 | 40 | 0 | 0 | \$69.00 | \$62.50 | \$57.50 | * |
| 60 | Hopedale Montessori School | Yes | 34 | 0 | 10 | 24 | 0 | 0 | * | \$51.35 | \$51.35 | * |
| 68 | Kidex Academy | Yes | 49 | 10 | 15 | 24 | 0 | 0 | \$70.00 | \$67.00 | \$65.00 | * |
| 309 | Kidsopolis | No | 10 | 0 | 0 | 10 | 0 | 0 | * | * | † | * |
| 74 | Kinderhuis Montessori Preschool | No | 45 | 6 | 15 | 24 | 0 | 0 | † | † | † | * |
| 79 | Les Coccinelles D'Oakville - Patricia Picknell | Yes | 74 | 0 | 0 | 24 | 20 | 30 | * | \$63.75 | \$56.25 | \$19.00 |
| 81 | Les Coccinelles D'Oakville - Ste. Marie | Yes | 161 | 0 | 15 | 23 | 52 | 71 | * | \$63.75 | \$56.25 | \$19.00 |
| 82 | Les Petites Perles | Yes | 87 | 10 | 25 | 24 | 13 | 15 | \$63.75 | \$58.65 | \$55.00 | \$16.90 |
| 94 | Margaret Drive Regional Child Care Centre | Yes | 42 | 0 | 10 | 32 | 0 | 0 | * | \$53.02 | \$48.85 | * |
| 108 | Oakville Christian School | No | 24 | 0 | 0 | 24 | 0 | 0 | * | * | † | * |
| 134 | Sedgewick Crescent Regional Child Care Centre | Yes | 39 | 0 | 15 | 24 | 0 | 0 | * | \$53.02 | \$48.85 | * |
| 135 | Seedlings Children's Centre | Yes | 39 | 0 | 15 | 24 | 0 | 0 | * | \$51.00 | \$48.00 | * |
| 140 | Smart Little Children Daycare Centre | Yes | 149 | 10 | 30 | 68 | 26 | 15 | \$67.40 | \$61.40 | \$56.30 | \$27.00 |
| 22 | Tanglewood | Yes | 55 | 0 | 23 | 32 | 0 | 0 | * | \$72.00 | \$72.00 | * |
| 159 | Thistleoaks Child Care Centre | Yes | 190 | 10 | 30 | 47 | 20 | 83 | \$70.00 | \$60.00 | \$52.00 | \$21.00 |
| 285 | Today's Family - Brookdale | Yes | 120 | 0 | 0 | 0 | 40 | 80 | * | * | * | \$30.55 |
| 67 | Kerr Street After-school Program | Yes | 45 | 0 | 0 | 0 | 0 | 45 | * | * | * | \$23.00 |
| 225 | YMCA Oakville - SACC - Eastview | Yes | 104 | 0 | 0 | 0 | 52 | 52 | * | * | * | \$25.00 |
| 229 | YMCA Oakville - SACC - Gladys Speers | Yes | 102 | 0 | 0 | 0 | 52 | 50 | * | * | * | \$25.00 |
| 235 | YMCA Oakville - SACC - Morden | Yes | 56 | 0 | 0 | 0 | 26 | 30 | * | * | * | \$25.00 |
| 240 | YMCA Oakville - SACC - Pinegrove | Yes | 133 | 0 | 0 | 0 | 0 | 133 | * | * | * | \$25.00 |
| 245 | YMCA Oakville - SACC - St. Dominic | Yes | 111 | 0 | 0 | 0 | 52 | 59 | * | * | * | \$25.00 |
| 246 | YMCA Oakville - SACC - St. James | Yes | 46 | 0 | 0 | 0 | 26 | 20 | * | * | * | \$25.00 |
| 249 | YMCA Oakville - SACC - St. Joseph | Yes | 103 | 0 | 0 | 0 | 52 | 51 | * | * | * | \$25.00 |

* 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 | SW Oakville | | Oakville | | Halton | |
|--|-------------|-----|----------|-----|--------|-----|
| | # | % | # | % | # | % |
| Total number of licensed full-day child care programs and before and after-school programs | 25 | ... | 112 | ... | 279 | ... |
| Total licensed capacity | 2,004 | ... | 10,473 | ... | 27,662 | ... |
| Infant spaces | 84 | 4% | 317 | 3% | 795 | 3% |
| Toddler spaces | 263 | 13% | 1,142 | 11% | 2,742 | 10% |
| Preschool spaces | 492 | 25% | 2,366 | 23% | 5,821 | 21% |
| Kindergarten spaces | 431 | 22% | 2,564 | 24% | 7,169 | 26% |
| School-age spaces | 734 | 37% | 4,084 | 39% | 11,135 | 40% |
| Programs with a licensed capacity of >75 spaces or more | 11 | 44% | 57 | 51% | 163 | 58% |
| Programs with a Child Care Service Management Agreement | 23 | 92% | 101 | 90% | 263 | 94% |
| Programs with a Memorandum of Understanding ¹ | 14 | 56% | 59 | 53% | 130 | 47% |
| Programs participating in Quality First (QF) | 22 | 88% | 93 | 83% | 242 | 87% |
| QF Level 1 Foundational | 6 | 27% | 22 | 24% | 53 | 22% |
| QF Level 2 Developmental | 4 | 18% | 9 | 10% | 20 | 8% |
| QF Level 3 Progressive | 12 | 55% | 62 | 67% | 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 South West Oakville

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 Oakville | Excess | + 26 to 50 spaces | Excess | + 101 to 150 spaces | Excess | + Over 200 spaces | Excess | + 101 to 150 spaces |
| Oakville | Excess | + 151 to 200 spaces | Excess | + Over 200 spaces | Excess | + Over 200 spaces | Excess | + Over 200 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 |

Oakville

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. Oakville Parent-Child Centre (OPCC) operates the EarlyON programs in the Oakville area.

| Site name | Address | Municipality | Postal code |
|---------------------------------|--------------------------------------|--------------|-------------|
| Main | 461 North Service Road West, Unit 17 | Oakville | L6M 2V5 |
| Satellite | 481 North Service Road West, Unit 25 | Oakville | L6M 2V6 |
| Sixth Line - satellite location | 1500 Sixth Line | Oakville | L6H 2P2 |
| Oakwood - satellite location | 357 Bartos Drive | Oakville | L6K 3E5 |

Community and recreation centres

| Building name | Address | Municipality | Postal code |
|--|-------------------------|--------------|-------------|
| Glen Abbey Community Centre | 1415 Third Line | Oakville | L6M 3G2 |
| Halton Islamic Community Centre | 4269 Regional Road 25 | Oakville | L6M 4E9 |
| Iroquois Ridge Community Centre | 1051 Glenashton Drive | Oakville | L6H 6Z4 |
| Queen Elizabeth Park Community and Cultural Centre | 2302 Bridge Road | Oakville | L6L 2G6 |
| River Oaks Community Centre | 2400 Sixth Line | Oakville | L6H 3N8 |
| St. Volodymyr Cultural Centre | 1280 Dundas Street West | Oakville | L6M 4H9 |

South West Oakville

Social housing: Family and all-ages communities

| Building | Address | Municipality | Postal code | Number of units |
|----------------------|-------------------------------|--------------|-------------|-----------------|
| Margaret Drive | Margaret Drive | Oakville | L6K 3P2 | 48 |
| Maurice Drive | 284-318 and 320 Maurice Drive | Oakville | L6K 2X3 | 60 |
| Prince Charles Place | 111 Prince Charles Drive | Oakville | L6K 3X3 | 52 |
| Roedean Co-op | 350 Kerr Street | Oakville | L6K 3X4 | 100 |
| Rotary Gardens | 1285 Sedgewick Drive | Oakville | L6L 1X7 | 28 |

Nursery schools

| Site name | Address | Municipality | Postal code | Licensed capacity |
|-------------------------------|--------------------------|--------------|-------------|-------------------|
| Bronte Harbour Nursery School | 2489 Lakeshore Road West | Oakville | L6L 1H9 | 34 |

Places of worship

| Name | Address | Municipality | Postal code | Child care program available on-site | | |
|---|---------------------------|--------------|-------------|--------------------------------------|----------------|-------------------------------|
| | | | | Full-day program | Nursery school | Child care program name |
| Central Baptist Church | 340 Rebecca Street | Oakville | L6K 1K3 | No | No | |
| Church of the Epiphany | 141 Bronte Road | Oakville | L6L 3C3 | No | No | |
| Evangel Pentecostal Church | 1450 Rebecca Street | Oakville | L6L 1Z7 | No | No | |
| First Church of Christ Scientist | 2522 Rebecca Street | Oakville | L6L 6N8 | No | No | |
| Halton Mosque | 4310 Fairview Street | Oakville | L6L 4Y8 | No | No | |
| Harvest Bible Chapel | 500 Great Lakes Boulevard | Oakville | L6L 6X9 | No | No | |
| Hopedale Presbyterian Church | 156 Third Line | Oakville | L6L 3Z8 | No | No | |
| Jehovahs Witnesses - Kingdom Hall | 1287 Lakeshore Road West | Oakville | L6L 1G2 | No | No | |
| Oakville Church of the Nazarene Protestant Evangelical Church | 320 Bronte Road | Oakville | L6L 3C8 | Yes | No | Seedlings Children's Centre |
| Oakville Community Church | 1225 Rebecca Street | Oakville | L6L 1Z1 | No | No | |
| St. Aidan's Anglican Church | 318 Queen Mary Drive | Oakville | L6K 3L6 | No | Yes | |
| St. Anthony's Roman Catholic Church | 40 John Street | Oakville | L6K 1G8 | No | No | |
| St. Dominic Roman Catholic Church | 2415 Rebecca Street | Oakville | L6L 2B1 | No | No | |
| St. Hilda's Anglican Church | 1258 Rebecca Street | Oakville | L6L 1Z2 | No | No | |
| St. James Roman Catholic Church | 231 Morden Road | Oakville | L6K 2S2 | No | No | |
| St. Paul's United Church | 454 Rebecca Street | Oakville | L6K 1K7 | No | No | |
| Walton Memorial United Church | 2489 Lakeshore Road West | Oakville | L6L 1H9 | No | Yes | Bronte Harbour Nursery School |

Schools

| Elementary schools | Address | Municipality | Postal code | School board |
|--------------------|-------------------------|--------------|-------------|-----------------|
| Brookdale | 1195 Bridge Road | Oakville | L6L 2C3 | Halton District |
| Eastview | 2266 Hixon Street | Oakville | L6L 4T4 | Halton District |
| Gladys Speers | 2150 Samway Road | Oakville | L6L 2P6 | Halton District |
| Oakwood | 357 Bartos Drive | Oakville | L6K 3E5 | Halton District |
| Patricia-Picknell | 1257 Sedgewick Crescent | Oakville | L6L 1X5 | French Public |
| Pine Grove | 529 Fourth Line | Oakville | L6L 5A8 | Halton District |
| St. Dominic | 2405 Rebecca Street | Oakville | L6L 2B1 | Halton Catholic |
| St. James | 255 Morden Road | Oakville | L6K 2S2 | Halton Catholic |
| St. Joseph | 477 Warminster Drive | Oakville | L6L 4N4 | Halton Catholic |
| Thomas Merton | 171 Speers Road | Oakville | L6K 3W8 | Halton Catholic |
| W.H. Morden | 180 Morden Road | Oakville | L6K 2S3 | Halton District |
| Secondary schools | Address | Municipality | Postal code | School board |
| St. Thomas Aquinas | 124 Margaret Drive | Oakville | L6K 2W1 | Halton Catholic |
| T.A. Blakelock | 1160 Rebecca Street | Oakville | L6L 1Y9 | Halton District |

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