



SW BURLINGTON

Child Care Market Analysis

JANUARY 2021



Census data Demographics



This section of the report 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 predictors 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 to 1,472 fewer females in the labour force and unlikely to need child care.

Another key factor in Halton is newcomer status. Using child care differs greatly depending on the length of time a person has lived in Canada. According to 2018 Kindergarten Parent Survey results, families who have always lived in Canada are more likely to use child care (84 per cent of respondents) than those who have lived in Canada for 10 years or less (53 per cent).

Child care use differs by income level. Families who earn a higher income are more likely to use licensed child care. According to 2018 Kindergarten Parent Survey results, families that earn above \$150,000 annually are 40 per cent more likely to use child care than families with an annual income of less than \$50,000. Considering these and other variables (alone or together) can better describe child care demand 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 (moved to Canada between 2011 and 2016)	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%
Income	#	%	#	%
Total households in after-tax income groups	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%
Households with low income 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 after-tax family income, where "adjusted" indicates that family needs are taken into account. For the 2016 Census, the reference period is the calendar year 2015 for all income variables.

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

Child care Market Analysis

The tables below give 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 licensed home child care providers. Average market rates by type and municipality are included to provide comparative data for prices across Halton. A market rate is the full cost of child care for one day charged by child care providers.

Description	SW Burlington		Burlington		Halton	
	#	%	#	%	#	%
Total number of licensed full-day child care centres and before and after-school programs	11	...	86	...	285	...
Total licensed capacity	841	...	8,360	...	29,343	...
Infant spaces	0	0%	254	3%	794	3%
Toddler spaces	40	5%	883	11%	2,985	10%
Preschool spaces	84	10%	1,812	22%	6,057	21%
Kindergarten spaces	286	34%	2,245	27%	7,563	26%
School-age spaces (before and after-school)	431	51%	3,151	38%	11,929	41%
Family age group spaces	0	0%	15	0.2%	15	0.1%
Centres with a Child Care Service Management Agreement ¹	11	100%	75	87%	240	84%
Centres with a Memorandum of Understanding ²	2	18%	35	41%	128	45%
Sites participating in Quality First ³	9	82%	74	86%	242	85%

Note: Percentages may not total 100% due to rounding.

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

³ Quality First is an early learning initiative focused on quality improvement. Consultants provide training and support to participating licensed child care programs in Halton. The program uses two models, the Centre Model and School Age Model, which are divided into three levels of achievement.

Average Market Rate ¹	Burlington	Halton Hills	Milton	Oakville	Halton
Infant full-day	\$73.15	\$67.91	\$76.67	\$74.43	\$73.55
Toddler full-day	\$60.54	\$54.89	\$60.55	\$62.69	\$60.88
Preschool full-day	\$52.68	\$49.83	\$54.69	\$58.33	\$54.71
School age before and after-school (JK-12 years)	\$26.67	\$22.79	\$23.87	\$25.74	\$25.28

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 licensed home child 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 SW Burlington

Comparing demand with the current supply of licensed spaces allows us to estimate met/unmet need. Need is calculated by taking the number of children aged 0-12 and subtracting female labour force participation and child care utilization rates. Whether an area is operating in excess or shortage of licensed child care space is shown in the table below. The number of children is based on population projections released by Ontario's Ministry of Finance (MOF) in the summer of 2020. The base population for the projections is taken from Statistics Canada's Census 2016.

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	- 0 to 25 spaces	Shortage	- 51 to 75 spaces	Shortage	- 51 to 75 spaces	Excess	+ Over 200 spaces
Burlington	Excess	+ 101 to 150 spaces	Excess	+ Over 200 spaces	Excess	+ Over 200 spaces	Excess	+ Over 200 spaces
Halton	Excess	+ Over 200 spaces	Excess	+ Over 200 spaces	Excess	+ Over 200 spaces	Excess	+ Over 200 spaces

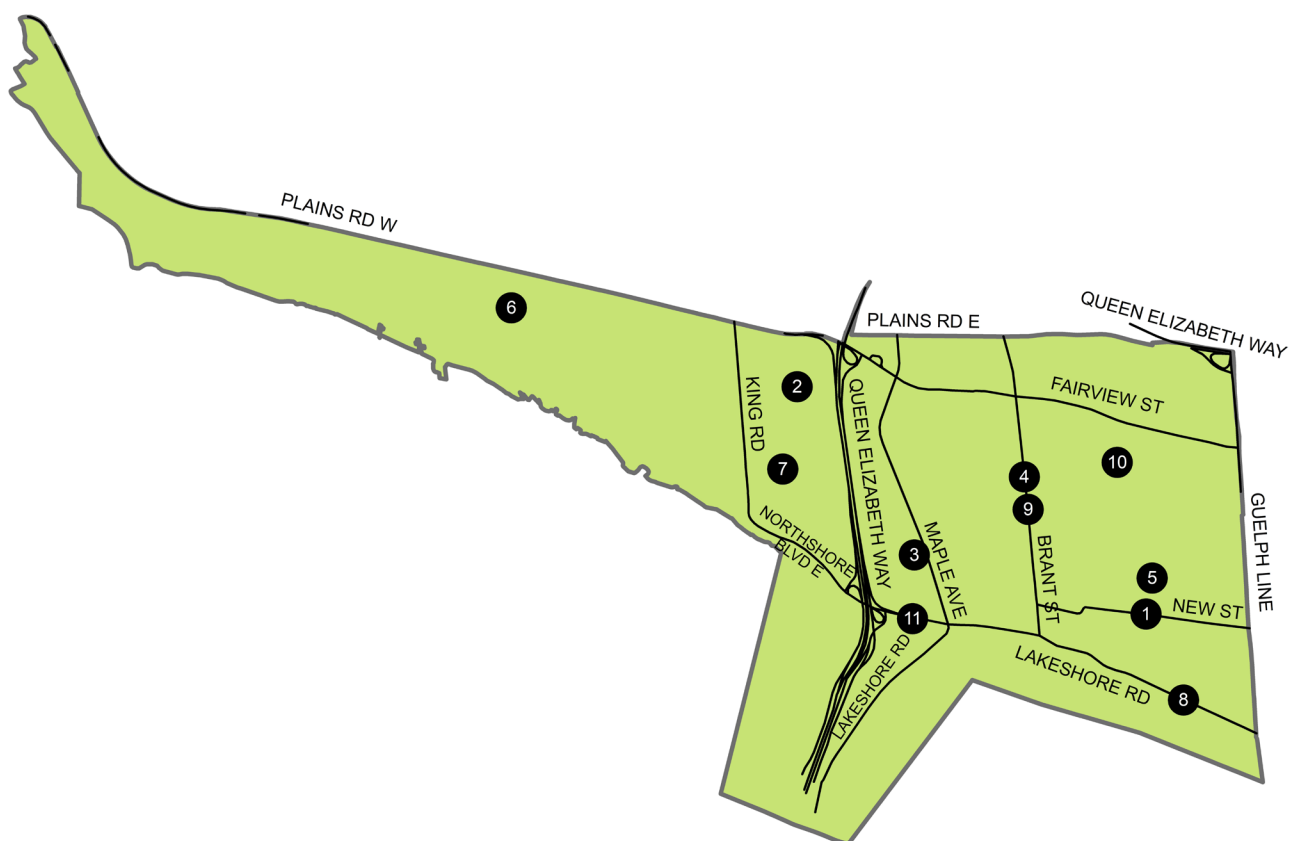
Supply of child care services



South West Burlington

This map shows the location of licensed child care centres within the market area, excluding nursery school programs and licensed home child care providers, and full-day child care programs or before and after school programs licensed after January 15, 2021.

Information about licensed capacity and market rate specific to each program are included with the legend on the following page.



Legend	Site name	CCSMA ¹	Licensed capacity ²						(\$) Market rate ³			
			Total capacity	INF	TOD	PRE	JK/SK	SA	INF	TOD	PRE	SA/BAS
1	Brant Children's Centre - Burlington Baptist	Yes	80	0	0	24	26	30	*	\$63.00	\$53.80	\$53.80
2	Centre Copains-Copines	Yes	117	0	15	20	52	30	*	\$42.00	\$38.60	\$17.07
3	Les Coccinelles D'Oakville - Renaissance	Yes	87	0	15	16	26	30	*	\$63.75	\$56.25	\$19.00
4	YMCA of Hamilton/Burlington/Brantford SACC-Central	Yes	81	0	0	0	26	55	*	\$58.75	\$49.50	\$25.25
5	YMCA of Hamilton/Burlington/Brantford SACC-Drury Lane	Yes	85	0	0	0	26	59	*	\$58.75	\$49.50	\$25.25
6	YMCA of Hamilton/Burlington/Brantford SACC-Glenview	Yes	56	0	0	0	26	30	*	\$58.75	\$49.50	\$25.25
7	YMCA of Hamilton/Burlington/Brantford SACC-King's Road	Yes	56	0	0	0	26	30	*	\$58.75	\$49.50	\$25.25
8	YMCA of Hamilton/Burlington/Brantford SACC-Lakeshore	Yes	86	0	0	0	26	60	*	\$58.75	\$49.50	\$25.25
9	YMCA of Hamilton/Burlington/Brantford SACC-St. John	Yes	73	0	0	0	26	47	*	\$58.75	\$49.50	\$25.25
10	YMCA of Hamilton/Burlington/Brantford SACC-Tom Thomson	Yes	86	0	0	0	26	60	*	\$58.75	\$49.50	\$25.25
11	YMCA of Hamilton/Burlington/Brantford -Brant Child Care	Yes	34	0	10	24	0	0	*	\$58.75	\$49.50	*

* 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 (INF), toddler (TOD), preschool (PRE), junior and senior kindergarten (JK/SK), and school age (SA/BAS) spaces from the Ontario Child Care Management System (OCCMS) on January 15, 2021.

³ The market rate is the full cost of child care for one day charged by a child care provider. 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 effective January 15, 2021.

Community assets

Burlington

Licensed home child care agencies

Agency name	Head office address	Postal code	Service area
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)	5144 Cherryhill Crescent, Burlington	L7L 4C2	Burlington

EarlyON Child and Family Centres

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. Halton Region provides oversight of EarlyON Child and Family Centres. Reach Out Centre For Kids (ROCK) provides EarlyON programs in the Burlington area.

Name of location	Address	Site type	Postal code
Reach Out Centre For Kids (ROCK) - St. Marks Catholic Elementary School	2145 Upper Middle Road, Burlington	Centre	L7P 4G1
Reach Out Centre for Kids (ROCK) - Burloak	356 Burloak Drive, Burlington	Mobile	L7L 4W5
Reach Out Centre for Kids (ROCK) - Cumberland	710 Cumberland Avenue, Burlington	Centre	L7N 3M9
Reach Out Centre for Kids (ROCK) - Pearl Street	471 Pearl Street, Burlington	Head office/ Virtual program	L7R 4M4
Reach Out Centre for Kids (ROCK) - Warwick/Surrey Lane	702 Surrey Lane, Burlington	Mobile	L7T 3S6

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 Court	708 and 710 Brant Street	Burlington	L7R 2H5	16
Carey House	1401 Ontario Street	Burlington	L7S 1G3	10
Don Quixote Co-op	1315 Maple Crossing Boulevard	Burlington	L7S 2K8	41
Maple Crossing	1300 Maple Crossing	Burlington	L7S 2K7	60
Stoa Co-op	456 Brock Avenue	Burlington	L7S 1M9	49

Nursery schools

Site name	Address	Municipality	Postal code	Licensed capacity
Burlington Montessori Preschool - St. Lukes	1382 Ontario Street	Burlington	L7S 1G1	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	CS Viamond
Saint-Philippe	901 Francis Road	Burlington	L7T 3Y3	CSC MonAvenir
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, December 2020.