



# SE 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	SE Burlington		Burlington	
	#	%	#	%
Population, 2016	42,583	...	183,314	...
Population change, 2011 to 2016	364	1%	7,535	4%
Total number of children 13 months to 12 years of age	5,232	12%	24,645	13%
Infant (13 to 18 months)	193	4%	915	4%
Toddler (19 to 30 months)	378	7%	1,830	7%
Preschool (31 to 3.8 years)	485	9%	2,310	9%
Kindergarten (3.8 to 5.8 years)	833	16%	3,995	16%
School-age (5.8 to 12 years)	3,343	64%	15,595	63%
Mother tongue not English	7,195	17%	35,170	19%
Recent immigrants	775	2%	4,125	2%
Total population aged 25 to 64 years with no certificate, diploma or degree	910	2%	4,925	3%
Total population aged 25 to 64 years with a postsecondary certificate, diploma or degree	15,615	37%	70,495	38%
Labour Force Participation Rate (Males and females)	22,440	64%	101,635	68%
Labour Force Participation Rate (Females)	10,990	60%	49,925	64%
<b>Income</b>	<b>#</b>	<b>%</b>	<b>#</b>	<b>%</b>
Total number of households in after-tax income of households	16,620	...	71,355	...
\$0 to \$29,999	1,900	11%	7,785	11%
\$30,000 to \$59,999	3,870	23%	16,955	24%
\$60,000 to \$99,999	4,890	29%	20,700	29%
\$100,000 to \$124,999	2,010	12%	8,840	12%
\$125,000 and over	3,995	24%	17,085	24%
In low income in 2015 based on after-tax low-income measure (LIM-AT)	2,865	17%	13,240	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.

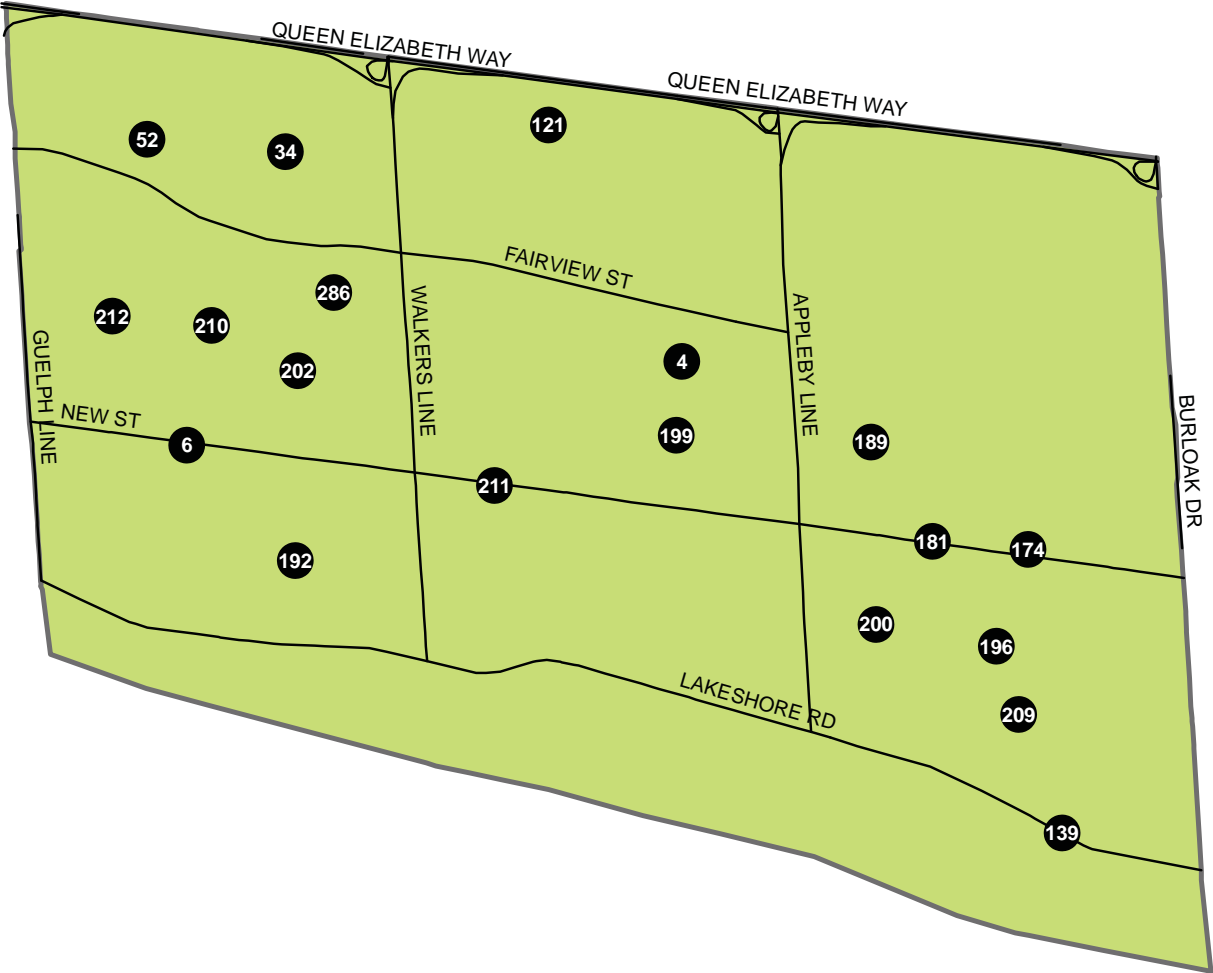
Statistics Canada randomly rounds each individual value either up or down to a multiple of '5' or '10'. As a result, when these data are summed or grouped, the total value may not match the individual values since totals and sub-totals are independently rounded. Similarly, percentages, which are calculated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

**SOURCE:** Statistics Canada, Census 2016

# Supply of child care services SE 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
6	Brant Children's Centre	Yes	182	0	15	64	48	55	*	\$59.00	\$49.80	\$17.60
4	Brightpath - Burlington	Yes	80	10	30	40	0	0	\$71.95	\$62.76	\$56.09	*
286	Fairview Glen Montessori	No	109	0	15	16	78	0	*	†	†	*
34	First Steps Learning & Child Care Centre	Yes	72	10	15	47	0	0	\$62.00	\$47.40	\$44.40	*
52	Happy Beginnings Day Care Centre	Yes	54	0	15	24	0	15	*	\$45.00	\$40.00	*
121	Peekaboo - Burlington	Yes	88	10	30	48	0	0	\$70.34	\$61.61	\$55.17	*
139	Small Wunders	Yes	92	18	30	24	20	0	\$64.40	\$54.40	\$50.40	*
174	YMCA Ham/Burl - Lord Elgin Child Care	Yes	24	0	0	24	0	0	\$68.50	\$57.00	\$48.00	*
181	YMCA Ham/Burl - SACC - Ascension	Yes	112	0	0	0	52	60	*	*	*	\$24.50
189	YMCA Ham/Burl - SACC - Frontenac	Yes	86	0	0	0	26	60	*	*	*	\$24.50
192	YMCA Ham/Burl - SACC - John T. Tuck	Yes	105	0	0	0	52	53	*	*	*	\$24.50
196	YMCA Ham/Burl - SACC - Mohawk Gardens	Yes	112	0	0	0	52	60	*	*	*	\$24.50
199	YMCA Ham/Burl - SACC - Pauline Johnson	Yes	112	0	0	0	52	60	*	*	*	\$24.50
200	YMCA Ham/Burl - SACC - Pineland	Yes	120	0	0	0	0	120	*	*	*	\$24.50
202	YMCA Ham/Burl - SACC - Ryerson	Yes	56	0	0	0	26	30	*	*	*	\$24.50
209	YMCA Ham/Burl - SACC - St. Patrick	Yes	86	0	0	0	26	60	*	*	*	\$24.50
210	YMCA Ham/Burl - SACC - St. Paul	Yes	56	0	0	0	26	30	*	*	*	\$24.50
211	YMCA Ham/Burl - SACC - St. Raphael	Yes	55	0	0	0	26	29	*	*	*	\$24.50
212	YMCA Ham/Burl - SACC - Tecumseh	Yes	56	0	0	0	26	30	*	*	*	\$24.50

\* Rate not applicable

† Rate not available

<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	SE Burlington		Burlington		Halton	
	#	%	#	%	#	%
Total number of licensed full-day child care programs and before and after-school programs	19	...	84	...	279	...
Total licensed capacity	1,657	...	7,870	...	27,662	...
Infant spaces	48	3%	261	3%	795	3%
Toddler spaces	150	9%	843	11%	2,742	10%
Preschool spaces	287	17%	1,751	22%	5,821	21%
Kindergarten spaces	510	31%	2,093	27%	7,169	26%
School-age spaces	662	40%	2,922	37%	11,135	40%
Programs with a licensed capacity of >75 spaces or more	12	63%	50	60%	163	58%
Programs with a Child Care Service Management Agreement	19	100%	81	96%	263	94%
Programs with a Memorandum of Understanding <sup>1</sup>	7	37%	38	45%	130	47%
Programs participating in Quality First (QF)	18	95%	76	90%	242	87%
QF Level 1 Foundational	3	17%	20	26%	53	22%
QF Level 2 Developmental	1	6%	7	9%	20	8%
QF Level 3 Progressive	14	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 East 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
SE Burlington	Excess	+ 0 to 25 spaces	Excess	+ 0 to 25 spaces	Excess	+ 0 to 25 spaces	Excess	+ 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 East Burlington

### Nursery schools

Building	Address	Municipality	Postal code	Licensed capacity
Burlington Dance Academy	3584 Commerce Court	Burlington	L7N 3L7	34
Muppets Co-operative Preschool	4407 Spruce Avenue	Burlington	L7L 1L9	24

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

Site name	Address	Municipality	Postal code	Number of units
Applemead Co-op	3000 Driftwood Drive	Burlington	L7L 3L6	54
Burloak Drive	254-360 Burloak Drive	Burlington	L7L 4W5	54
Walkers Landing	515 Walkers Line	Burlington	L7N 3V4	80

## Places of worship

Name	Address	Municipality	Postal code	Child care program available on-site		
				Full-day program	Nursery school	Child care program name
Appleby United Church	4407 Spruce Avenue	Burlington	L7L 1L9	No	Yes	Muppets Co-operative Preschool
Burlington Alliance Church	4457 New Street	Burlington	L7L 1T8	No	No	
Burlington Christian Reformed Church	3422 New Street	Burlington	L7N 1N3	No	No	
Burlington East Presbyterian Church	505 Walkers Line	Burlington	L7N 2E3	No	No	
Ebenezer Canadian Reformed Church	607 Dynes Road	Burlington	L7N 2V4	No	No	
Holy Cross Evangelical Lutheran Church	3455 Lakeshore Road	Burlington	L7N 1B5	No	No	
Pineland Baptist Church	5100 New Street	Burlington	L7L 1V1	No	No	
Port Nelson United Church	3132 South Drive	Burlington	L7N 1H7	No	No	
Shoreacres Bible Chapel	370 Shoreacres Road	Burlington	L7L 2H5	No	No	
St. Elizabeth's Anglican Church	5324 Bromley Road	Burlington	L7L 3G4	No	Yes	
St. Patrick's Roman Catholic Church	196 Kenwood Avenue	Burlington	L7L 4L8	No	No	
St. Raphael's Roman Catholic Church	4072 New Street	Burlington	L7L 1S9	No	No	

## Schools

Elementary schools	Address	Municipality	Postal code	School board
Ascension	5205 New Street	Burlington	L7L 1V3	Halton Catholic
Frontenac	5140 Pinedale Avenue	Burlington	L7L 3V4	Halton District
John T. Tuck	3365 Spruce Avenue	Burlington	L7N 1J7	Halton District
Mohawk Gardens	5280 Spruce Avenue	Burlington	L7L 1N3	Halton District
Pauline Johnson	4350 Longmoor Drive	Burlington	L7L 1X7	Halton District
Pineland	5121 Meadowhill Road	Burlington	L7L 3K7	Halton District
Ryerson	565 Woodview Road	Burlington	L7N 2Z9	Halton District
St. Patrick	200 Kenwood Avenue	Burlington	L7L 4L8	Halton Catholic
St. Paul	530 Cumberland Avenue	Burlington	L7N 2X2	Halton Catholic
St. Raphael	4056 New Street	Burlington	L7L 1S9	Halton Catholic
Tecumseh	3141 Woodward Avenue	Burlington	L7N 2M3	Halton District
Secondary schools	Address	Municipality	Postal code	School board
Assumption	3230 Woodward Avenue	Burlington	L7N 3P1	Halton Catholic
Gary Allen	3250 New Street	Burlington	L7N 1M8	Halton District
Nelson	4181 New Street	Burlington	L7L 1T3	Halton District
Robert Bateman	5151 New Street	Burlington	L7L 1V3	Halton District

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