

TWIG

TORONTO WORKFORCE
INNOVATION GROUP

A Work in Progress: Towards \$10 a day Child Care in Toronto.

Mahjabeen Mamoon



2024

Table of Content

	Page
I. Executive Summary	3
II. Acknowledgement	5
III. Introduction	6
IV. Canada-Wide Early Learning and Child Care (CWELCC) System: A Roadmap to Accessible and Affordable Child Care in Ontario	8
V. Understanding the Structure of the Child Care Industry in Ontario	12
VI. Child Care Industry Statistics: Toronto & Ontario	14
a. Trend in the Number of Licensed Child Care Centres in Toronto	14
b. Number of Licensed Child Care Spaces are Increasing in Toronto	15
c. Availability of Licensed Child Care Centres in Toronto: Are Communities Served Well Enough?	16
d. Home Child Care Agencies in Toronto	20
e. Child Care Industry Trends in Ontario: Licensed Child Care Centres and Home Child Care Agencies	22
f. Unlicensed Child Care in Ontario	24
VII. The Child Care Industry Workforce: Discussing the Key Occupations	26
VIII. Employment Requirements and Levels of Education for Early Childhood Educators and Assistants and Home Child Care Providers	28
IX. The Labour Market Characteristics of the Child Care Workforce: Statistical Overview	30
X. Earnings in the Child Care Industry in Toronto	33
XI. The impact of Wage Enhancement Programs on Child Care Workers in	35
XII. Moving Forward	37
XIII. Appendix	39
XIV. End Notes	43

Executive Summary

For over a half-century, working parents in Toronto have struggled with access to child care. From an absence of child care spaces located in their neighbourhood to the lack of affordable fees, parents have often had to make stressful and difficult decisions that negatively affect their ability to work and income. Educators, advocates, and civic leaders have long called for a coherent child care system at the Federal, Provincial and Municipal level.

The signing of the Canada-Wide Early Learning and Child Care (CWELCC) agreement between the Province of Ontario and Federal Government in March 2022 provided a significant opportunity to make child care more accessible and affordable to families. The five-year plan, being rolled out in stages, will reduce fees every year until 2026 with the objective of reaching an average fee of \$10 a day.

We are now two years into the transformation of Ontario's child care system. Not unexpectedly, the implementation of the CWELCC has not been without its challenges. As predicted by Policy Options in 2021, we are learning that affordability and accessibility are not synonymous. Indeed, the substantial lowering of fees has made child care within reach of more low- and middle-income families, has in turn increased the demand for child care space. Although this report finds that the number and availability of child care spaces in Toronto has grown over the last two years, this growth is being constrained by the difficulties in finding qualified child care staff.

The implementation of the CWELCC has caused upheaval and interim stress for both parents and the system itself – it is critically important to get it right. An accessible and affordable child care system in Toronto creates positive long-term economic and social outcomes for parents, children, and communities. Evidence indicates that quality child care leads to:

Higher labour force participation rates, particularly among women. Given current and forecasted future labour market shortages; unlocking of worker availability is critical.

Positive effects on child cognitive and social development, improves school-readiness, and creates a foundation for lifelong learning.

The potential for higher fertility rates. Our low fertility rates are causing a rapid population aging and increased stress on the labour market and public health care. Accessibility to child care and barriers caused by the cost, is often cited by potential parents as why they will delay or not have children.

As Canada's largest city, Toronto presents unique opportunities and challenges with respect to child care. Workers with unpredictable schedules looking for non-

standard hours of child care services face nearly insurmountable barriers. Low-income families looking for subsidized child care or families who rely on Toronto's transit system to drop off/pick up their child(ren) to and from the centre may face more impediments to accessing services. As, per the Global Transport Report 2022, Toronto had the longest distance per commute in North America, based on trips taken via the Toronto Transit Commission (TTC), GO Transit and other regional transportation providers.

Drawing on a variety of quantitative and qualitative information this report focuses on the current state of the child care industry and its workforce in the context of Toronto. Although numbers show that there has been an increase in the number of child care spots over the years, the fact that parents are facing difficulties in securing a spot is an indicator that there are still ongoing challenges related to the availability of spaces. The major roadblock is the current staffing shortages faced by the child care industry, particularly the shortage of qualified Early Childhood Educators (ECEs). There is evidence suggesting that centres are struggling to run programs at their optimal capacity due to recruitment and retention challenges of child care workers.

Key findings from the report:

- The Canada-Wide Early Learning and Child Care (CWELCC) agreement between the Province of Ontario and Federal Government to lower fees is having its intended effect: it has created more affordable licensed child care services for families in Toronto.
- Over the past decade, there has been a notable increase in the number of licensed child care centres in Toronto for all types of programs (infant, toddler, preschool, kindergarten, and school age). However, most of the increase in child care space has occurred in before and after school program. Increase in spaces for infants and toddlers has been far more modest.
- Current efforts made by the Province of Ontario and stakeholders to increase the number of child care spaces is being undermined by the lack of Registered Early Childhood Educators (RECEs). While the Province of Ontario has moved to increase wages of RECE's, it remains unclear if this alone is sufficient to attract and retain frontline staff.
- Many parents still rely on unlicensed child care because of cost or proximity to where they live. Unlicensed child care operates in a policy grey area. While technically illegal, governments have been reluctant to enforce licensing because of the strain it would cause to families using it. The City of Toronto and Province of Ontario should consider approaches or initiative to support unregulated child care providers to transition to becoming licensed.
- Toronto has a numerous day care "deserts" and these deserts appear to correlate with neighbourhood's that have high rates of working poor, low-income families, and transit poverty.

Acknowledgement

I would like to extend my sincere appreciation to the individuals who contributed to the development of the report, “A Work in Progress: Towards \$10 a day Child Care in Toronto”. Within our own organization, I am grateful for the guidance and support provided by John MacLaughlin, Kevin Stolarick, Megha Parhar and Dominic Chan. Their expertise and commitment have been invaluable in shaping the trajectory of this report. I would also like to express my gratitude to the external stakeholders who generously dedicated their time and resources to this study. Cynthia Abel, Deputy Registrar and Director of Registration at the College of Early Childhood Educators; Alana Powell, Director of the Association of Early Childhood Educators Ontario; Sandra Santedicola RECE, from the Yonge and Churchill Licensed Child Care Centre; Diane Daley, CEO of Family Day Care Services; and Shanley McNamee, General Manager of Children’s Services at the City of Toronto, played pivotal roles in enriching our research through interviews and engaging conversations via email or phone. It is important to emphasize that any mistakes or inconsistencies found in the report are solely the fault of the author and are not a reflection of the excellent insights provided by these esteemed individuals. Their collective efforts have significantly contributed to the depth and quality of our findings.

Introduction

Statistics Canada's survey on Early Learning and Child Care Arrangements 2022 found that 42% of Canadian parents postponed returning to work in 2022 due to difficulties in finding child care. According to the latest Statistics Canada report, the proportion of children aged 0-5 years participating in child care in Ontario was lower in 2023 (48%) than in 2019 (54%), but higher than in 2022 (41%). The proportion of parents who used child care and who reported having difficulty finding it in Ontario increased from 50% in 2019 to 64% in 2023. Finding affordable care also remained a common concern among parents, but the percentage of those reporting this concern declined from 54% in 2019 to 39.5% in 2023. The challenge of securing a child care spot in Toronto is no less than the province. Although numbers indicate that there has been an increase in the number of child care spots over the years, parents are facing difficulties to find a spot. The one of the primary reasons behind this is the shortage of child care workers in the industry. In short, given that child care is now more affordable, the growth in the demand for child care has outpaced the growth in child care spaces.

Staffing shortages in child care is not a new issue. However, with the influx of new child care spaces caused by the \$10 a day child care, the child care industry needs more workers. The current shortage of qualified ECEs is limiting the positive impacts of the reduced child care fee. Ontario forecast a shortage of 8,500 RECEs by 2026 and although the new legislation aims to bring more equity into the system, the number of RECEs in Toronto has not kept pace with the increase in child care spots.

The accessibility of child care is more than just a family issue. The Financial Accountability Office of Ontario estimated that reduced child care fees in Ontario could increase the core-age female labour force participation rate to between 85.6% and 87.1% by 2027. This would add 50,900 to 98,600 more women to Ontario's labour force. Improved labour supply is of direct relevance to employers and the business community as this would mean employers are not left grappling with scarcity of skilled workers. As indicated in a recent Statistics Canada report, the non-employment of some parents with children under the age of 6, may be influenced by the costs of child care outweighing the benefits of working. Access to lower-cost child care services may help non-working parents in these circumstances take part in the labour market.

In 2022, the labour participation rate of Ontario mothers with young children aged 0-5 years old was 17.5 percentage points lower than fathers^[1]. This gap in the labour market participation of mothers reflects child care responsibilities which tend to be greater at the earlier stages of the child's life. The child care industry is an important economic driver for a country as the labour force attachment of individuals with children is linked to the availability of child care support. TD Economics has pointed to a range of studies that have shown that for every dollar

A Work in Progress: Towards \$10 a day Child Care in Toronto.

spent on early childhood education, the broader economy receives between \$1.50 and \$2.80 in return.

Given the relevance of the child care industry^[ii] and its key occupations- Early Childhood Educators and Assistants (ECEA) and Home Child Care Providers (HCCP), this report builds on child care industry literature and provides a snapshot of the current child care landscape in Toronto and Ontario. Drawing on a variety of data sets, the work in this report focuses on what can be done to improve the capacity of the child care industry and its workforce. The report provides an overview of the Home-Child Care Agencies and uses the Canadian Survey on the Provision of Child Care Services to analyse the role of the unlicensed child care sector in Ontario. The report takes a deeper dive into the topic by analyzing the labour market characteristics of the child care industry and its key occupations. Through one-on-one interviews and consultations with advocates and experts in the industry (that included the College of Early Child Childhood Educators, Licensed Child Care Centre, Home Child Care Agency, Association of Early Childhood Educators Ontario, and Toronto Children's Services) the report outlines some key insights on the child care industry. Finally, the appendix reports on the findings of job posting statistics for the child care industry as well as the occupations-Early Childhood Educators and Assistants (ECEAs) and Home Child Care Providers (HCCP) in Toronto.

Canada-Wide Early Learning and Child Care (CWELCC) System: A Roadmap to Accessible and Affordable Child Care in Ontario

A national child care program was first recommended in 1970 by the Royal Commission on the Status of Women, but there had not yet been a Canada-wide child care policy until recently. The April 2021 federal budget's \$30 billion investment over five years and permanent funding of approximately \$9.2 billion annually in child care, marked an important policy advancement for the Canadian economy especially for women and children. The CWELCC plan was announced by the Province of Ontario in March 2022 to support families by providing funding for licensed child care services. The goal was to make child care more affordable, accessible, and inclusive for families with children under the age of five.

For the many Toronto families, child care usage is often dependent on the cost of child care services. In 2022, child care usage among families with children below the age of six was 41% in Ontario compared to 71% in Quebec. From 2021 to 2022, the first year the reduced child care fees started taking effect, it was reported by the Financial Accountability Office of Ontario that the labour force participation rates for mothers with young children rose 2.4 percentage points.

Every licensed child care provider (centre-based or home-based child care) serving children under the age of six (or turning six before June 30) is eligible to apply for enrolment in the CWELCC system, provided they meet program requirements. In Toronto, 1,054 licenced child care operators are eligible to opt-in or opt-out of CWELCC and this includes commercial, not-for-profit, public child care centres and licenced home child care. As of December 2022, 92% of the licensed child care operators in Ontario opted into the program and effective December 31, 2022, child care fees were brought down to 50% of the 2020 fees. By September 2025, licensed child care centres are expected to lower their fees to an average of \$10 per day.

Table 1: Participation of Licensed Child Care Centres in \$10 a day Child Care Agreement, City of Toronto

Types of Operators	No of Participants in the \$10 a day Child Care Agreement	Total Number of Licensed Child Care Centres	Percentage of Operators Participating in the \$10 a day Child Care Agreement
City	37	37	100%
Non-Profit	632	688	92%
Commercial	217	321	68%
Total	889	1,046	85%

Source: Children's Services, City of Toronto

Table 1 shows the percentage of licensed child care centres who participated in the \$10 a day child care agreement in Toronto⁽ⁱⁱⁱ⁾. As of November 2023, approximately 85% of the total child care centres and 88% of Home Child Care Agencies opted into the agreement. While recent headlines might suggest that some child care providers in Toronto are opting out of the initiative, the number of licensed child care spaces (centre based) increased and were more affordable. Using City of Toronto's Children's Services data, we found that compared to Jan 2022, there were 5.5% more child care spaces in Toronto in December 2023.

Under the CWELCC agreement, the province is also committed to create approximately 86,000 new licensed child care spaces by the end of 2026 for children five years and under. The expansion plan is based on five pillars: improved affordability, improved access, sustaining high-quality services, inclusion, and enhanced data and reporting. In January 2023, child care providers' CWELCC enrolment shifted to targeted growth and focused on creating affordable child care spaces in underprivileged communities.

The agreement also focuses on enhancing the quality of child care programs by improving the wages, benefits, professional development, and career pathways of the RECEs working in a licensed child care setup with children below the age of 12 years.

Table 2: Median Daily Fees (Full-Time) Prior to the \$10 a day Child Care Agreement, Licensed Child Care Centres, City of Toronto

	Infant	Toddler	Preschool	Before and After Full-Day Kindergarten	Before and After School
Jun-15	\$82.11	\$64.00	\$47.60	\$31.73	\$24.78
Jun-16	\$85.00	\$65.30	\$49.00	\$32.00	\$23.57
Jun-17	\$85.00	\$65.00	\$50.00	\$32.07	\$25.00
Jun-18	\$85.50	\$65.34	\$50.25	\$31.72	\$25.93
Jun-19	\$86.00	\$65.17	\$50.00	\$31.40	\$25.92
Jun-21	\$89.70	\$65.71	\$51.00	\$31.24	\$26.21
Jun-22	\$89.70	\$66.00	\$51.00	\$30.80	\$27.16

Source: Budget Notes Children's Services, City of Toronto

Table 2 shows the daily fees paid by families for using licensed child care centre services in Toronto between 2015 and 2022. While most centres fall within these ranges, there are still some that may charge above or below. These fees were prior to the implementation of the \$10 a day child care agreement signed by the government of Ontario.

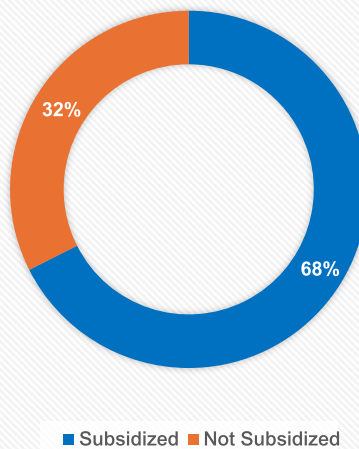
Table 3: Average Daily Fees (Full-Time) after the Introduction of the \$10 a day Child Care Agreement, Licensed Child Care Centres, City of Toronto

	Infant	Toddler	Preschool	Before and After Full-Day Kindergarten
Jun-23	\$32.19	\$29.21	\$24.29	\$14.68

Source: 2023 Budget Notes Children's Services, City of Toronto

Table 3 highlights the impact of the CWELCC agreement on the fees for distinct types of programs offered by licensed child care centres in Toronto. With average regulated child care fees reduced by 50%, Ontario families could save up to \$8500^[iv] annually on licensed child care per child, as of April 2023. Unlicensed programs are not eligible to participate in the CWELCC system and this includes unlicensed Home Child Care Providers, authorized recreation programs and school board-operated extended day programs.


Figure 1: Share of Licenced Child Care Centres that are Subsidized, Toronto, July 2023



Source: Children's Services, City of Toronto

A child care subsidy is available for families who need help with the cost of licensed child care programs. An additional fee reduction may be applied to the fee subsidy if the parent chooses a program (licensed center or licensed home-based child care) that is participating in the \$10 a day child care agreement. According to Figure 1, in July 2023, 68% of the child care centers in the City of Toronto were subsidized. The number of children on waitlist for a child care fee subsidy was 14,938 on December 2023. This was an 8.43% decline from previous period.

Understanding the Structure of the Child Care Industry in Ontario



The child care industry is comprised of establishments primarily engaged in providing day-care services for infants or children. These establishments may also care for older children when they are not in school and may also offer pre-kindergarten educational programs. Each province, territory and even municipality have their own licensing and regulation processes and standards to adhere to in providing child care. Child care centres in Toronto can either be city operated, non-profit in nature or commercial.

The regulated child care services commonly known as “licensed child care,” is governed by a regulating body (i.e., the province). The unregulated child care service commonly known as “unlicensed child care” is where child care is likely to take place in a home environment and is not required to meet most provincial standards.

There are four types of child care services in Ontario:

- **Licensed Child Care Centres:** Are governed by a regulating body, the Province of Ontario, that sets the child-to-staff ratios, curriculum framework, minimum required educational training of providers (etc.). The Ministry of Education issues child care licences under the Child Care and Early Years Act (CCEYA) and is responsible for the enforcement of that legislation.
- **Licensed Home Child Care:** Home child care is also regulated. In Canada, there are two models of regulating home child care: a direct licensing model and an agency model. Ontario uses an agency model, whereby Home Child Care Agencies are directly licensed by the province, then agencies approve and manage individual homes. Home Child Care Agencies monitor to ensure that approved homes are following both the government’s rules and regulations and agency’s policies and procedures. Homes contracted with a Home Child Care Agency can display decals to identify them as licensed by the Government of Ontario. They provide professional development, support, and monitoring for Home Child Care Providers (HCCPs). One of the benefits of using licensed home child care is that they may be able to accommodate more flexible hours of care which may be required by shift workers.
- **Before-School and After-School Care:** Public School Boards that offer kindergarten to grade six must also offer before-and-after-school programs based on demand. These programs complement the regular school day with a mix of exploration, guided independent activities, quiet times, and outdoor play. School boards that operate before and after-school programs either enter directly into a third-party agreement with a licensed child care centre or with an authorized recreational and skill building program to operate the program.

- **Unlicensed Child Care:** There is little information on unregulated child care since it is difficult to locate or track. It is in a grey policy area, with government acknowledging that they exist without necessarily approving of the practice. In Ontario, an unlicensed child care provider can care for a maximum of five children under the age of 13 and no more than three children younger than two years old. The provider is required to count their own children if they are younger than four years old. Unlicensed child care providers must not operate in multiple locations and are required to inform their customers in writing that this child care program is not licensed by the Government of Ontario. There are no required health and safety standards, and no regular monitoring occurs in unlicensed child care programs in Ontario. Government inspection may occur but only following citizen complaints.

Differences in the type of care arrangement used by parents can be largely determined by the child's age. For example, the 2022 Survey on Before and After School Care in Canada reported that parents of older children were less likely to use before and after-school care because their child could stay home alone or with a sibling. On the other hand, parents of younger children were more likely to use formal care arrangements when compared to parents of older children.

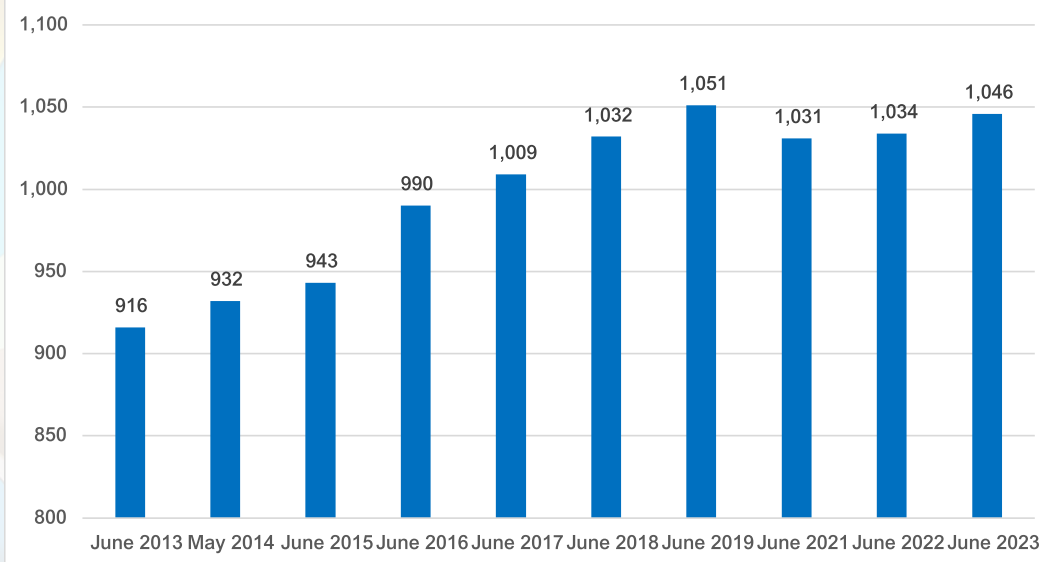
Child Care Industry Statistics: Toronto & Ontario

Services offered by licensed child care providers in Ontario and Toronto are a combination of licensed child care centres and licensed home child care. In addition, there is also a market for unregulated home child care services commonly known as informal or unlicensed child care.

Trend in the Number of Licensed Child Care Centres in Toronto

The number of licensed child care centres, licensed Home Child Care Agencies, and the different types of child care programs available is critically important information for families, service providers and policy makers.

Figure 2: Trend in the Number of Licensed Child Care Centres, City of Toronto



Source: Toronto Children's Services, Factsheets

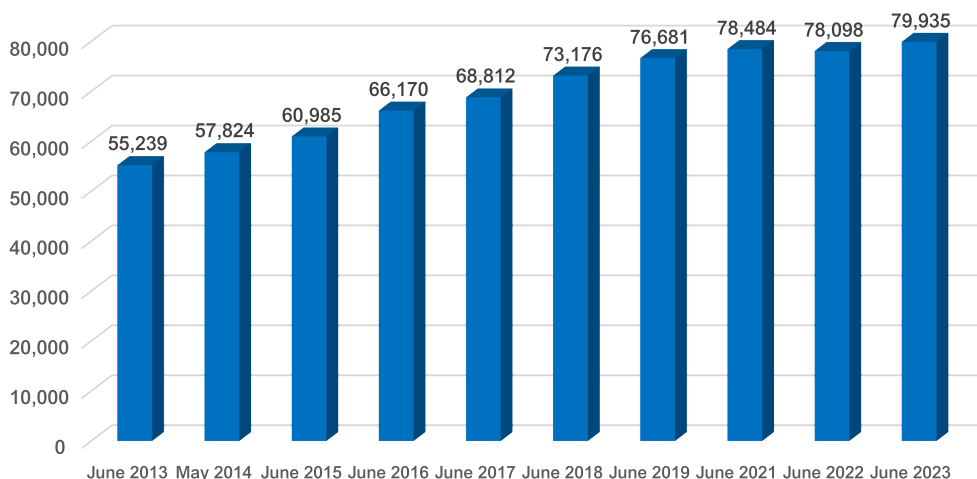
As of June 2023, Toronto's licensed child care system had approximately 1,046 centers (See Figure 2) providing early learning and care for children up to 12 years of age. Figure 2^[v] shows that the number of licensed child care centres in Toronto have grown substantially over the past ten years. In June 2023 there were 14% more child care centres in Toronto compared to the same period in 2013.

As of July 2023, 66% of child care providers (686 centres) in Toronto were operated by a Non-Profit Agency, 30% were operated by a Commercial Agency (320 centres) and the rest 4% (39 centres) were City of Toronto Operated Agencies. Between 2022-2023, 25 new licensed child care centres were added into the child care system and 68% of this expansion came from commercial agencies.

Number of Licensed Child Care Spaces in Toronto is Increasing

In December 2023, a total number of 82,119 licensed spaces (centre based) were available in Toronto.

Figure 3: Trend in the Total Number of Spaces at Licensed Child Care Centres, City of Toronto



Source: Toronto Children's Services, Factsheets

Figure 3 shows that the number of spaces in the licensed child care system has grown over the years where the total number of licensed child care spaces in June 2023 in Toronto saw a 44.7% increase when compared to the same period in 2013.

Child care services and programs are typically designed and offered based on age categories: Infants (0m-18m), Toddlers (18m-2.5years), Preschool-aged children (2.5+ years until the child goes to school), and School-aged children. Child care services can also be offered based on other options like full-time versus part-time care, irregular care, or care during non-standard hours (i.e., evenings, weekends, and overnight services).

Table 4: Child Care Availability by Types of Programs, City of Toronto

	Infant	Toddler	Preschool	Kindergarten	School Age
2013	2,816	7,416	25,406	3,718	15,883
2022	3,958	11,161	24,753	14,903	23,323

Source: Toronto Children's Services, Factsheets

Table 4 compares the availability of child care by types of programs in Toronto for the years 2013 and 2022. Between 2013 and 2022, there was a 12% increase in the number of licensed child care centre spaces for the following programs- infant, toddler, and preschool. However, in June 2013, the proportion of licensed child care spaces that belonged to the categories (infant, toddler, preschool) were

A Work in Progress: Towards \$10 a day Child Care in Toronto.

64.5% of the total spaces. In June 2022, this share declined to 51.4%. In other words, between 2013 and 2022, the proportion of spaces for infant, toddlers and preschool children declined from nearly two-thirds of licensed spaces to just over half.

During this period, the number of children^[vi] in the age group 0-4 years declined by 10.7%. Given a reduction of 10.7% in the number of children in the 0-4 age group, the 12% increase in spaces for this age group means that the ratio of children to spaces declined marginally (from 3.2 per space to 2.6). According to a CBC News report, the goal of Ontario is to have a ratio of one affordable child care space for every 2.7 children under the age of five.

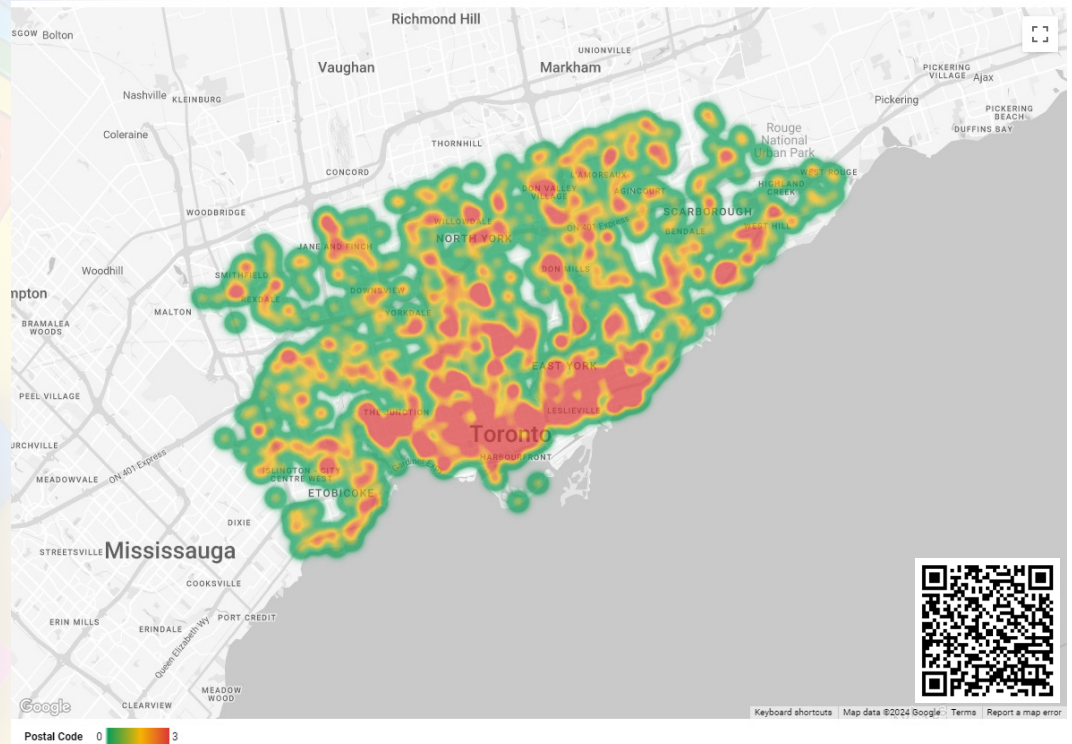
On the other hand, in Toronto, from 2013-2022, there has been a 4.6% decline in the population estimates of the age category 5-9 years old but a 95% increase in the number of licensed child care spaces (before and after school program) that belong to that same category (kindergarten and school age). The proportion of child care space in this category increased from 35.4% in 2013 to 49% in 2022. The near doubling in the number of spaces means that the ratio of children to spaces has been halved (from 8.3 children per space to just 4).

Between 2016 to 2021, most neighbourhoods in Toronto on average saw a decrease^[vii] in the child population by 2.2%. Over the 10-year period between 2011 and 2021, the number of children 4 and under has continuously dropped from 140,510 in 2011 to 136,000 in 2016, and to 123,505 in 2021.

Availability of Licensed Child Care Centres in Toronto: Are Communities Served Well Enough?

The City of Toronto's licensed child care growth strategy adopted in 2017 with a 10-year vision, sets out to create 30,000 additional licensed spaces (for a total of 70,000 spaces) to serve 50 percent of children aged 0-4 in Toronto by 2026. As per the latest report by the City of Toronto, by 2026, the city is expected to fall short of its target by more than 7,000 spaces due to funding challenges. According to the same report, the areas with the greatest need for new child care spaces are also among the poorest led by Scarborough—Rouge Park and Humber River—Black Creek. Both of those wards' licenced child care spaces can serve less than 20 per cent of the children in the area, compared to Toronto—St. Paul's and University-Rosedale, which have space for more than half the children in those areas.

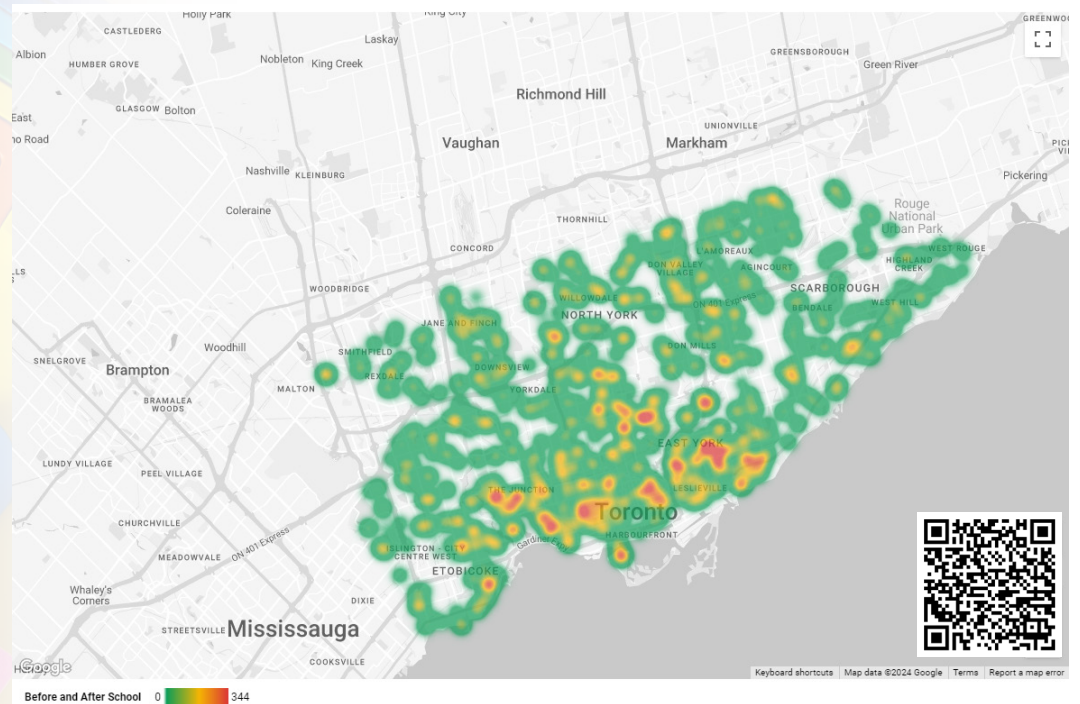
Toronto Child Care Density: Comprehensive Map



Using a heat map, the report provides a visual representation of the distribution of licensed child care centres in Toronto neighbourhoods. The heat map was generated using the City of Toronto's licensed child care and a before-and after school program locator for Toronto. The map has built in filters that allow the viewer to explore the presence of licensed centres based on the different types of programs offered. It appears that the availability of licensed child care centre spaces roughly correlates to low-income neighbourhoods.

In a nutshell, licensed child care centre spaces in Toronto have increased for all types of programs (infant, toddler, preschool, kindergarten, and school age). However, this increase has been disproportionately seen in the before and after school programs (kindergarten and school age) than in the infant, toddler and preschool categories. It is an observation that the system is responding more to the need for the before and after school care programs compared to the infant, toddler, and preschool program. These findings are consistent with the latest report on child care coverage titled "Not Done Yet". The coverage rate for infants in Toronto was 16%.

Toronto Before & After School Child Care Density Map

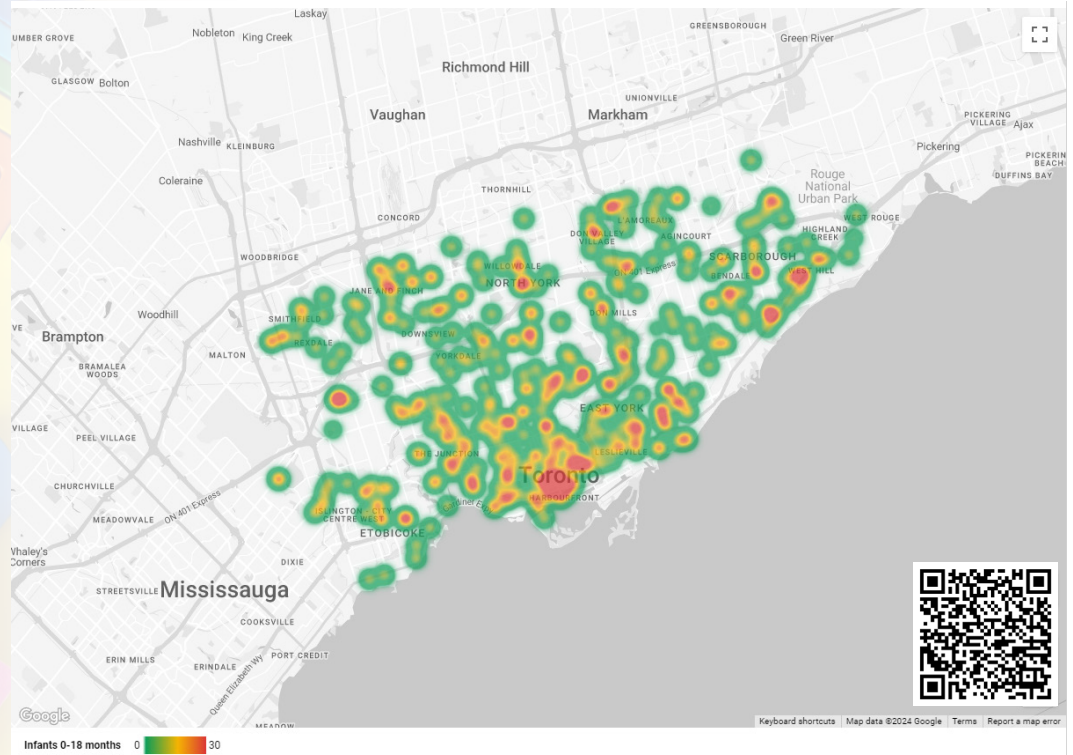


Heat Map URL (or scan QR Code for access)

<https://lookerstudio.google.com/u/0/reporting/b873494c-52bd-48b0-a1f8-1dfaceab95e3/page/MpnnD>

When compared to other regions and municipalities in Ontario, Toronto at face value, would appear to be performing reasonably well in terms of child care availability. However, access to child care can be described as uneven at best. An informal examination of the distribution of the licensed child care centres against Toronto's Neighbourhood Improvement Areas (NIA), indicates that Toronto has a number of day care "deserts", and these deserts appear to correlate with NIA. These areas have structural inequity, including high rates of working poor, low-income families, and transit poverty. This is particularly noticeable in the Rexdale, Morningside, and Scarborough Town Centre areas of the city.

Toronto Infant Child Care Density Map



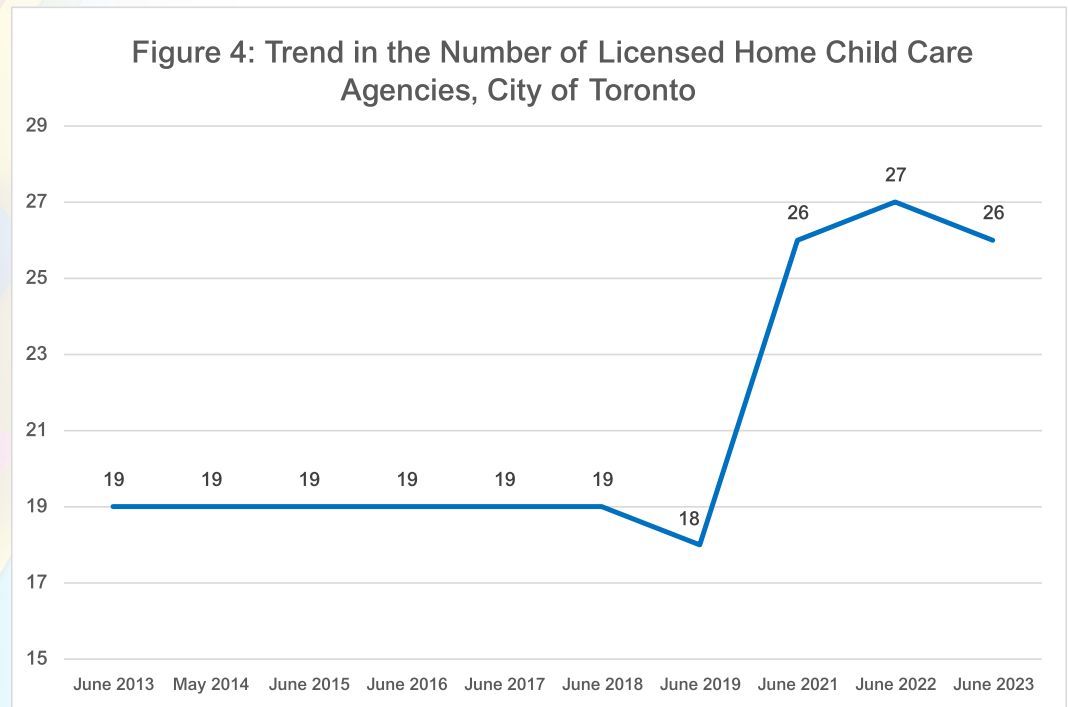
Heat Map URL (or scan QR Code for access)

<https://lookerstudio.google.com/u/0/reporting/20b67b09-0d08-4443-954e-fd4f5bca699d/page/xqnD>

Children’s Services in the City of Toronto noted that in accordance with Ontario regulation, school boards are required to ensure the provision of before and after school programs for every elementary school serving students in primary and or/ junior division where there is sufficient demand and or viability. Each year school boards assess demand and determine where new programs are needed. These programs also operate in shared spaces in schools and do not require capital funding to open. Certainly, in cooperation with the government of Ontario, non-profit agencies, school boards and the private sector in Toronto have come a long way in terms of child care availability but more work needs to be done as their efforts have been constrained by the shortage of child care workers.

Home Child Care Agencies in Toronto

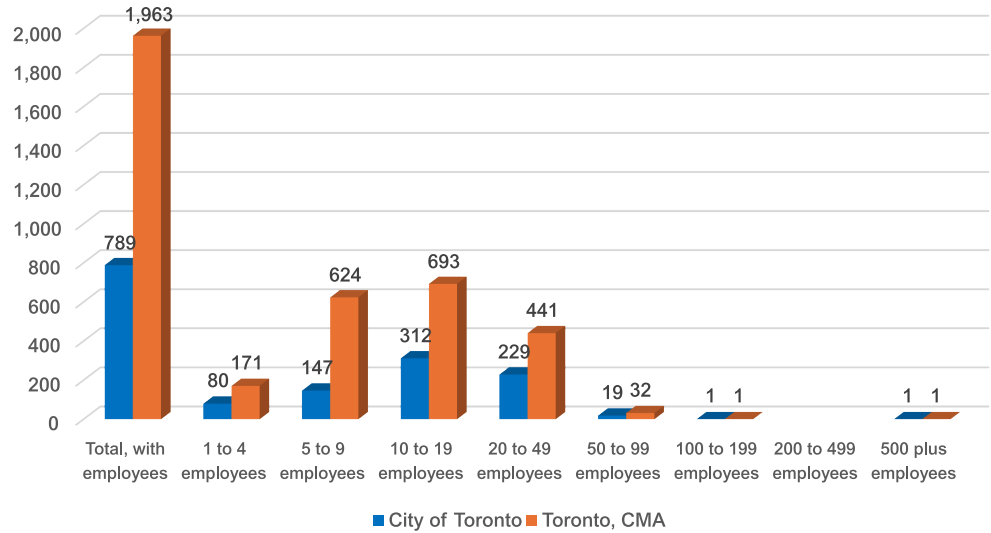
Currently there are a total of 26 licensed Home Child Care Agencies operated by the City of Toronto that have contracts with independent providers who offer early learning and child care in their private homes.



Source: Toronto Children's Services, Factsheets

Figure 4 highlights that post-pandemic, there has been a jump in the number of licensed Home Child Care Agencies^[viii]. During a one-on-one interview with a Home Child Care Agency, we were told that recently some unregulated Home Child Care Providers have been making inquiries to enter the licensed home child care service as independent contractors. This is good news for the child care industry as that can lead to an increased supply of licensed spots. It was suggested by the interviewee that more unlicensed child care providers need to be encouraged to join the licensed system.

Figure 5: Child Day-Care Services by Size, June 2023



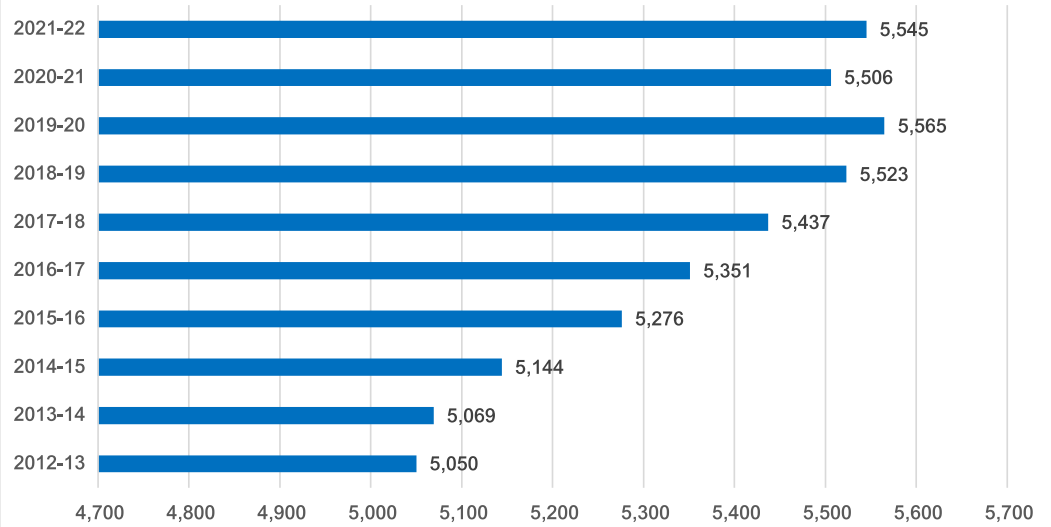
Source: Statistics Canada. Table 33-10-0719-01 Canadian Business Counts, with employees, census metropolitan areas and census subdivisions, June 2023

Figure 5 indicates the child day-care service establishments in Toronto, CMA, and the City of Toronto by employee size in June 2023. According to Canadian Business Counts (Statistics Canada), as of June 2023 there were a total of 1,963 child day-care service establishments in Toronto CMA with employees. Of these, 40% (789 businesses) were in the City of Toronto. Child Day-Care Services in both Toronto, CMA (35%) and the City of Toronto (39.5%) were mostly medium sized business establishments that operated with an employee size ranging between 10-19 staff.

Child Care Industry Trends in Ontario: Licensed Child Care Centres and Home Child Care Agencies

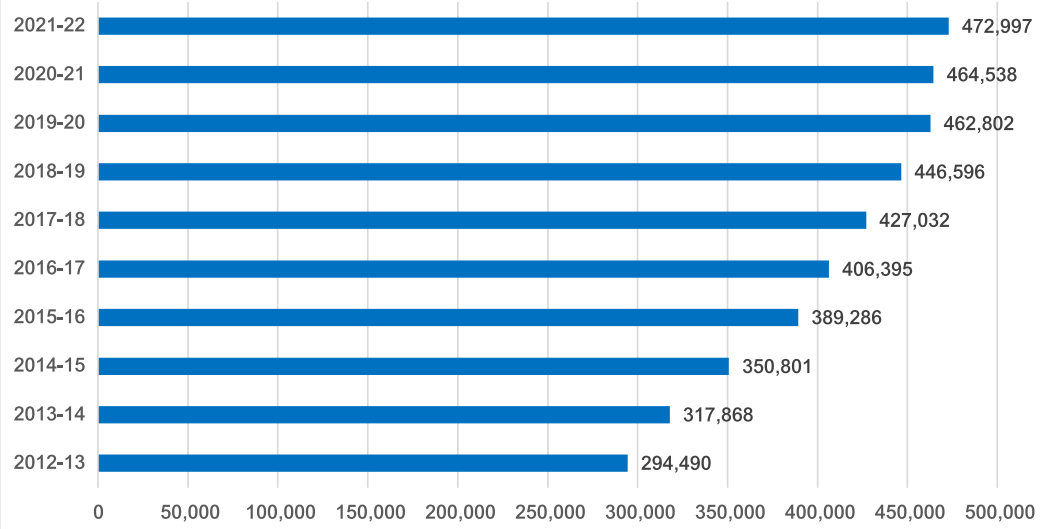
Ontario saw a sustained increase in the number of licensed child care centres every year except during the pandemic when government mandated safety regulations forced many centres to close their doors.

Figure 6: Number of Licensed Child Care Centres, Ontario



Source: Ontario's Early Years and Child Care Annual Report 2022

Figure 7: Number of Spaces in Licensed Child Care Centres, Ontario



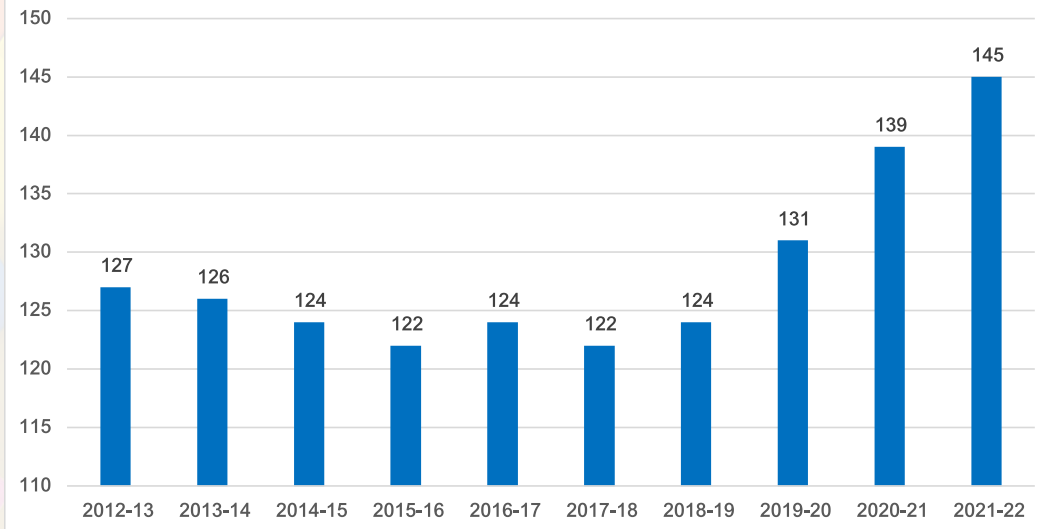
Source: Ontario's Early Years and Child Care Annual Report 2022

Both Figure 6 and Figure 7 reports the annual trend in the number of licensed child care centres and spaces in Ontario over the last decade. According to Figure 7, the number of spaces in these centres increased by 61% over the last ten years.

A Work in Progress: Towards \$10 a day Child Care in Toronto.

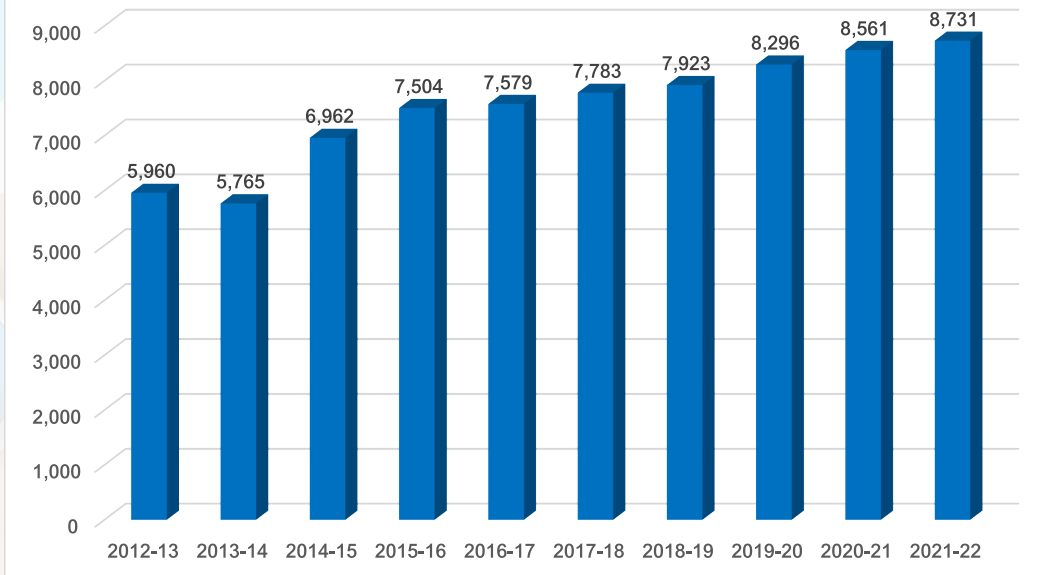
In other words, between 2012-13 and 2021-22, the province of Ontario added 178,507 spots in licensed child care centres. These numbers are very much unlike what anecdotal evidence suggest about centres closing and operators reducing capacity.

Figure 8: Number of Licensed Home Child Care Agencies, Ontario



Source: Ontario's Early Years and Child Care Annual Report 2022

Figure 9: Number of Approved Homes, Ontario



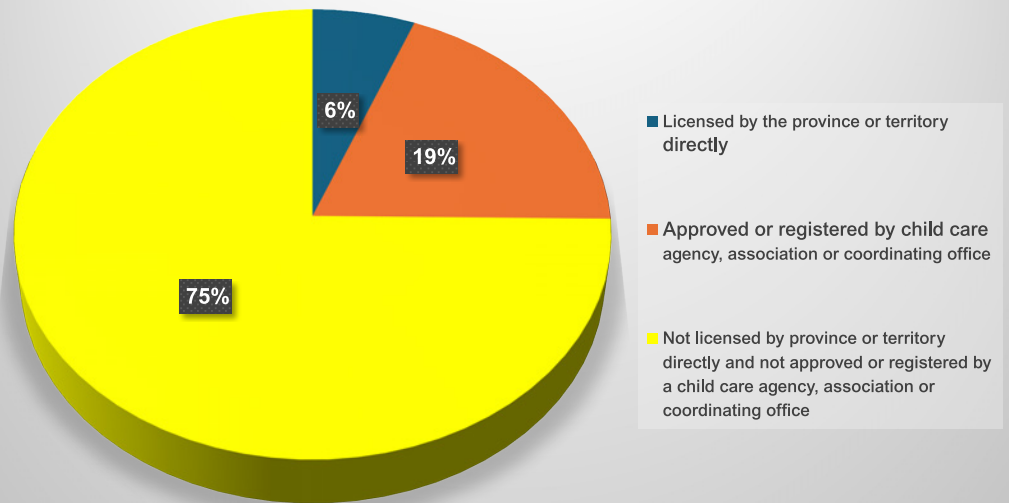
Source: Ontario's Early Years and Child Care Annual Report 2022

Figure 8 and Figure 9 illustrate that over the past five years, the number of licensed Home Child Care agencies as well as the number of homes approved by these agencies have shown an upward trend in Ontario. While an increase in the supply of licensed child care providers is good news for all families interested in using the service, it can be even more beneficial to families employed in occupations that demand non-standard work hours. This is because Home Child Care Providers are more likely to offer flexible hours of service compared to licensed child care centres.

Unlicensed Child Care in Ontario

According to the Canadian Survey on the Provision of Child Care Services in 2022, Ontario had the following type of child care services available: Center based child care services (4,384); Licensed home-based child care (2,282) and unlicensed child care (6,763). The government of Ontario uses the term “unlicensed child care” to define informal or unregulated child care in the province.

Figure 10: Composition of Home-Based Child Care Businesses in Ontario, 2022



Source: Statistics Canada. Table 42-10-0047-01 Child care businesses by service type, Ontario, 2022

Figure 10 shows that in 2022, 75% of all home-based child care services in Ontario were unregulated. The Canadian Survey on the Provision of Child Care surveyed providers in this informal sector asking why they remained unregulated. Several reasons were given, and respondents were asked to select all that applied.

Table 5: Reasons Why Some Child Care Services Decided to Remain Unlicensed

Want control over own business	49%
Do not see any benefit in getting licensed	36%
Feels there are too many requirements	21%
Don't plan on providing care long enough to make it worthwhile	24%
Unaware of the licensing system	5%
Finds the cost associated with licensing requirements too high	15%
Do not consider licensing necessary	39%
Other reasons	17%

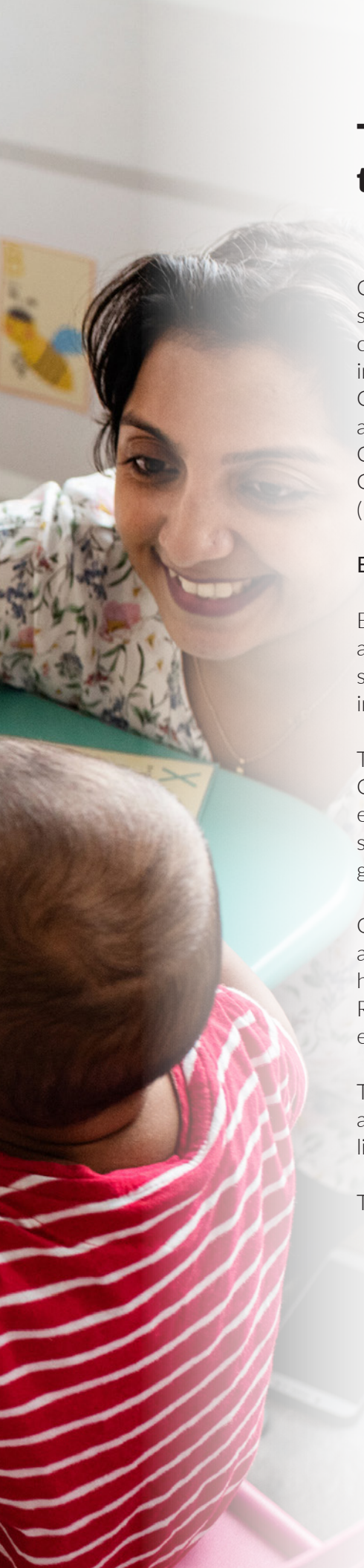
Source: Statistics Canada. Table 42-10-0047-01 Child care businesses by service type, Ontario, 2022

Table 5 summarizes the reasons why some child care providers in Ontario decided to stay unlicensed. Note that respondents were allowed to choose multiple reasons. The top three reasons given were: wanting full control over their own business (49%), not considering licensing a necessity (39%) and not seeing any or enough benefits to getting licensed (36%).

The authors of the report spoke to the College of Early Childhood Educators, and they underscored the importance of parental awareness of the dualism of licensed and unlicensed centers and the similarities/differences between them. Daycare centres are licensed, while home-based daycares can either be licensed or unlicensed. Although licensed providers are subject to oversight, it does not necessarily guarantee better care than in an unlicensed daycare. The demand for unlicensed child care persists partly because for some families, it can be culturally comforting to send their child(ren) to a care provider sharing common cultural and religious beliefs or a model of community care. In any community, parents should be given that choice. Several research studies also highlight the following factors influencing some families' demand for unlicensed child care: variable work hours (e.g., night shifts, shift work), cost and convenience (e.g., in the same apartment, building or street) and familiarity.

However, when considering an unlicensed home daycare, parents are encouraged to inquire about the provider's credentials, certifications, and the standards the provider maintains. There must also be some shared goals between the government and unlicensed child care providers of wanting to improve the quality of service or care. The College of Early Childhood Educators suggested that the child care system can consider some transition mechanism to merge the unregulated child care services into licensed home child care. Until then, the government can continue to communicate with caregivers in the unregulated sector and support them with information to enhance program quality, health, and safety.

The Child Care Industry Workforce: Discussing the Key Occupations



Child care workers are an integral part of the child care ecosystem. This section summarizes the key occupations that make up the child care workforce in the country. In regulated child care settings, workers who have the most direct role in child care provision are the frontline Early Childhood Educators and Assistants, Centre Directors and licensed Home Child Care Providers. They work with children and families on a daily basis. This paper used the 2021 National Occupational Classification (NOC) to look at two broad groups of child care workers: Early Childhood Educators and Assistants (ECEAs) and Home Child Care Providers (HCCPs).

Early Childhood Educators and Assistants

Early Childhood Educators (ECEs) or Registered Early Childhood Educators (RECEs) and Early Childhood Educator Assistants (ECEAs) are trained professionals who specialize in the early development and learning of children between the ages of infancy and 12 years. ECEAs provide care for children under the guidance of ECEs.

To become a RECE, an individual must be registered with the College of Early Childhood Educators that regulates Ontario's profession of early childhood education in the public's interest. The College helps protect children and families by setting registration requirements, ethical and professional standards for ECEs, and governing member conduct through a complaints and discipline process.

Only members of the College can use the title "Early Childhood Educator" (ECE) and "Registered Early Childhood Educator" (RECE) and only individuals who have met the registration requirements of the College and hold a Certificate of Registration in good standing may practise the profession of early childhood education.

The majority of Early Childhood Educators are employed in child day-care services and elementary schools. According to Job Bank Canada, they mainly work in sectors like the Social assistance (78%) and Elementary and secondary schools (16%).

The category of RECEs also includes the following roles:

- **Child Care Supervisors:** In addition to having the role and duties of a RECE, supervisors play a leadership role in licensed child care centres, overseeing the different child care programs in the centre and the staff employed.
- **Resource Consultants:** They are typically RECEs, who have specialized training and/or qualifications in providing individualized supports for children with special needs. They support staff and parents in working with children with special needs who attend licensed child care.

- **Home Child Care Providers:** Home Child Care Providers supervise and care for children primarily in their own homes or in the children's homes, where they may also reside. They are employed by private households, child-care agencies, or they may be self-employed.
- **Home Visitors:** Home Visitors work for licensed Home Child Care Agencies to screen and monitor licensed Home Child Care Providers. They must be either a member in good standing of the College of Early Childhood Educators, with at least two years of experience working with children or approved by a director, who is an employee of the Ministry of Education. They also help families find a Home Child Care Provider who meets their needs. They support the Home Child Care Provider in designing programs, planning nutritious meals, and ensuring health, safety and development standards are met.
- **Other program staff working directly with children:** This category includes individuals who work with children and families in licensed child care but are not registered members of the College of Early Childhood Educators. Titles in this role can include child care worker, daycare worker, family support worker, and child care assistant. In addition, program staff can include program assistants or enhanced staff who work with children with special needs.

Using Jobs TO data, the report found that between December 2022 and November 2023, there were a total of 1,646 active job postings (See Appendix A, Table A1) made by the Child Day-care Services industry in Toronto. Based on these job posting numbers, apart from the ECEAs, employers in the child care industry also advertises job postings for other occupations like Cooks, Food Counter Attendants, Kitchen Helpers, and Related Support Occupations and, Social and Community Service Workers. There was a total of 1,276 active job postings for the ECEAs position and 400 for the role of HCCP during the same period. While the average posting duration for ECEAs was 25 days, it was significantly higher at 71 days for the Home Child Care Providers. Appendix A (Figure A1, A2 and A3) represents the 12-month trend in active job postings and trend in the number of companies hiring for the two occupations ECEAs, Home Child Care Providers and the overall industry Child Day-Care Services in Toronto.

Employment Requirements and Levels of Education for Early Childhood Educators and Assistants and Home Child Care Providers

The quality of the early childhood programs is largely dependent on the staff who implement the programs and the most crucial factors affecting this quality is the caregiver's education, qualifications and training and experience.

To be hired as an ECE or ECEA in Ontario, a professional license from the College of Early Childhood Educators is required. They are employed in child-care centres, daycare centres, kindergartens, agencies for exceptional children and other settings where early childhood education services are provided. Using the December 2022 to November 2023 Job Posting Data (See Appendix A, Table A1), the top five sectors that had high demand for ECEAs in Toronto were Child Day-Care Services, Employment Placement Agencies and Executive Search Services, Civic and Social Organizations, Human Resources Consulting Services and All Other Schools and Instruction.

Educational requirements to work in regulated daycares vary by province. For example, in Ontario child care centres, one-third of the staff responsible for an infant group or a toddler group must have a two-year early childhood education (ECE) diploma and two-thirds of staff with a preschool-age group must have a two-year ECE diploma. According to the Government of Canada website and based on the 2021 National Occupational Classification (NOC) an employer typically demands the completion of a two- to four-year college program in early childhood education or a bachelor's degree in child development. ECEAs can be required to have some experience in child care, complete secondary school or have attained a childhood education assistant certificate program or post-secondary courses in early childhood education.

Typically, a Home Child Care Provider must have completed high school or its equivalency and training programs in child care or a related field. Child care or household management experience may be required. Home Agencies may also require Home Child Care Providers to have first aid certifications and cardiopulmonary resuscitation (CPR) training.

Table 6: Highest Levels of Education of Child Care Workers Compared to All Other Workers, Toronto CMA, Census 2021

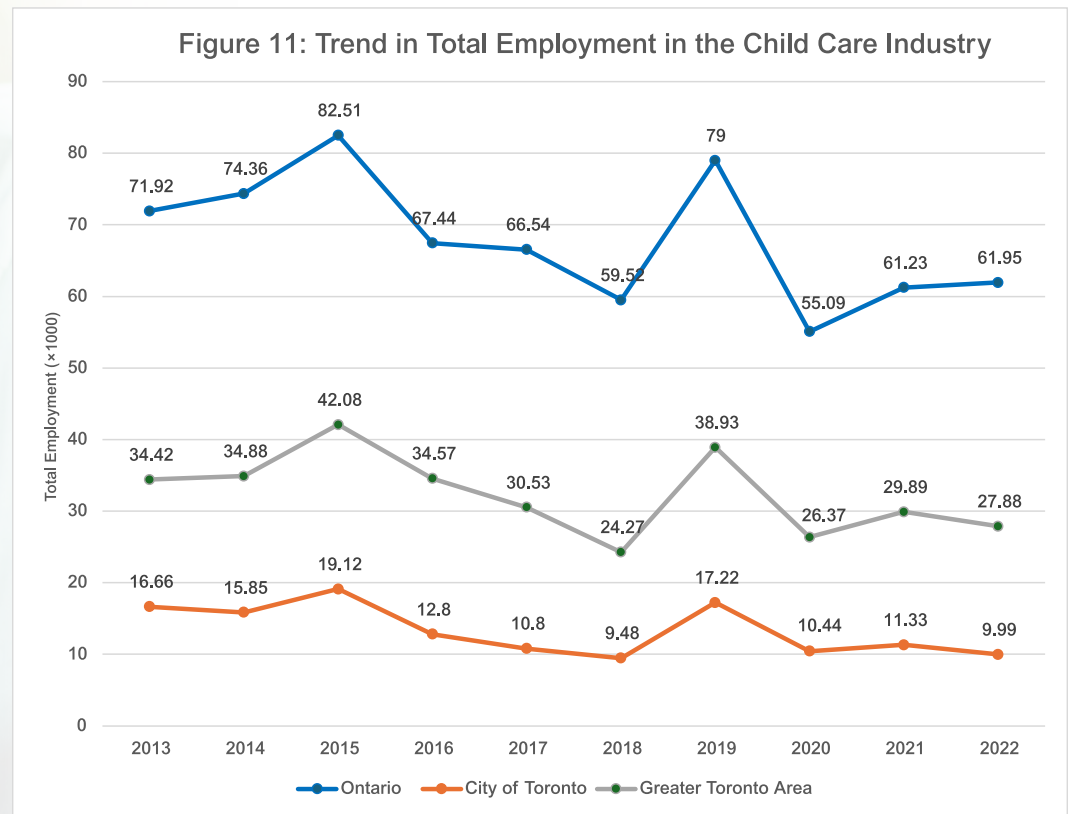
	Early Childhood Educators & Assistants	Home Child Care Providers	Total, Child Care Workers	All Other Workers
No certificate, diploma, or degree	2%	5%	3%	4%
Secondary (high) school diploma and equivalency certificate	10%	28%	15%	16%
Apprenticeship or trades certificate or diploma	2%	4%	2%	3%
College or other non-university certificate or diploma	52%	22%	43%	18%
University certificate or diploma below bachelor level	4%	8%	5%	3%
University certificate, diploma or degree at bachelor level or above	30%	33%	31%	55%

Source: Census 2021

Table 6 above reports the Census 2021 statistics for the highest level of education attained by child care workers and all other workers in Toronto CMA. According to Census 2021, 51% of child care workers in Toronto CMA had a postsecondary education^[ix]. However, there were differences among the two groups of child care workers. ECEAs (58%) were more likely to have an education level above a high school diploma compared with HCCPs (34%). During the Census 2021 period in Toronto, CMA, the highest level of educational attainment for all other workers appeared to be Bachelor's degree or higher (55%). Since most landed immigrants are likely to reside in Toronto CMA, a good share of ECEs and ECAs (30%) and HCCPs (33%) happen to have a Bachelor's degree or higher making them overqualified for this role.

The Labour Market Characteristics of the Child Care Workforce: Statistical Overview

This section provides a statistical overview of the child care workforce in Toronto with a focus on trends in the levels of employment, rates of unemployment, hours worked (full-time versus part-time), job tenure, income and share of employment (Immigrant or Canadian born). The child care industry and its labour market characteristics are essential because any changes will likely have implications on the well-being of the children and families using child care services.

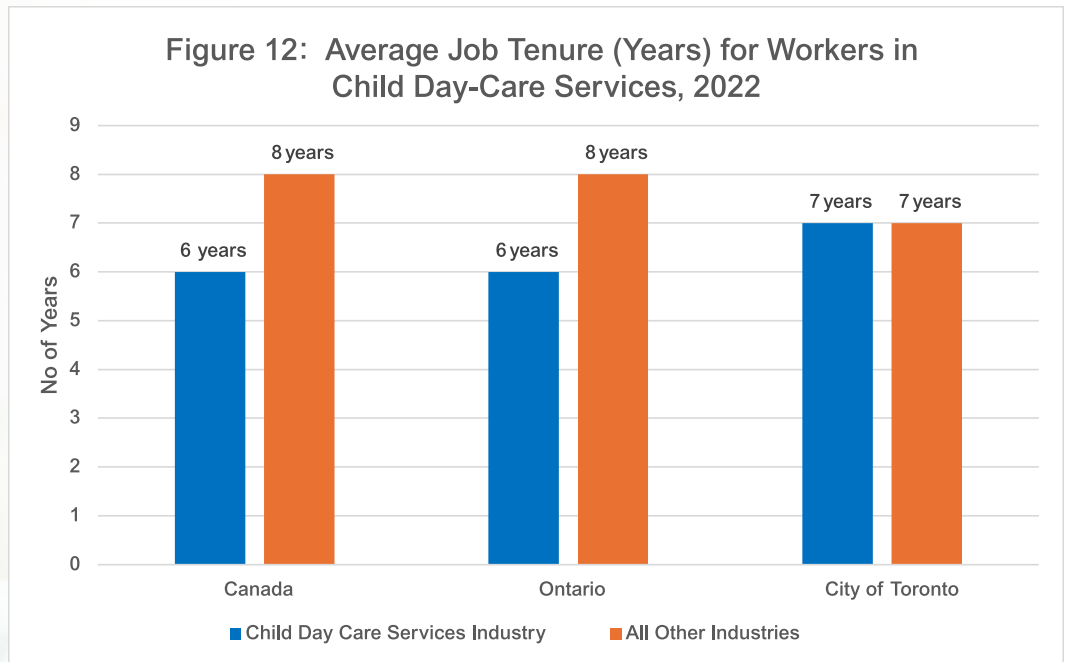


Source: Labour Force Survey

Figure 11 shows how total employment in Child Day-Care Services has trended over the last decade, comparatively, in the City of Toronto, Greater Toronto Area and Ontario from 2013 to 2022. In all three geographies, the level of employment has been on a downward arc, following a pattern of decline over the last decade with exceptions in the years 2015 and 2019.

In 2022, 13% of employment in the child care industry in Toronto CMA comprised of 13% of newcomer immigrants (immigrants landed 5 years or earlier). This was two times more than the newcomer immigrants employed at all other industry at 6% in Toronto, CMA for the year 2022.

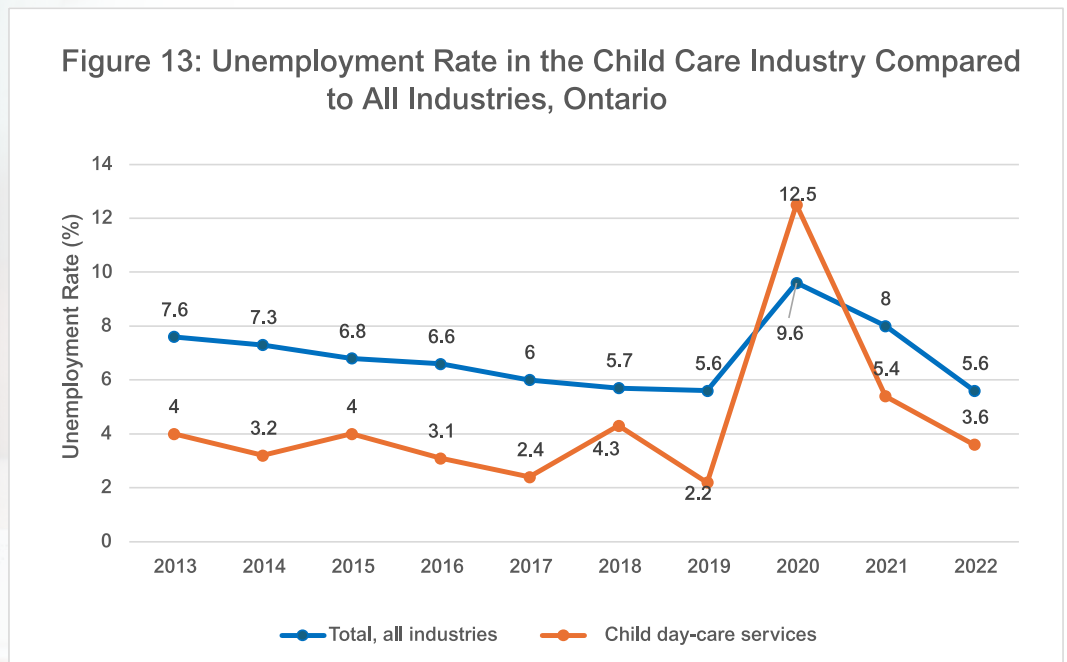
Figure 12: Average Job Tenure (Years) for Workers in Child Day-Care Services, 2022



Source: Labour Force Survey

Figure 12 above compares the average Job Tenure (in years), for workers in child care services in Toronto, Ontario and Canada, for the year 2022. It appears that the average job tenure of worker in the child care industry in Toronto was 7 years compared to an average tenure of 6 years in Canada and Ontario during the same period. However, when compared to the average job tenure in all other industries, workers in the Child Day-Care Services in Ontario and Canada spend two fewer years in a job. In the case of Toronto, the average job tenure is the same 7 years for workers in all other industries as well as the Child Day-care Services industry.

Figure 13: Unemployment Rate in the Child Care Industry Compared to All Industries, Ontario



Source: Labour Force Survey

A Work in Progress: Towards \$10 a day Child Care in Toronto.

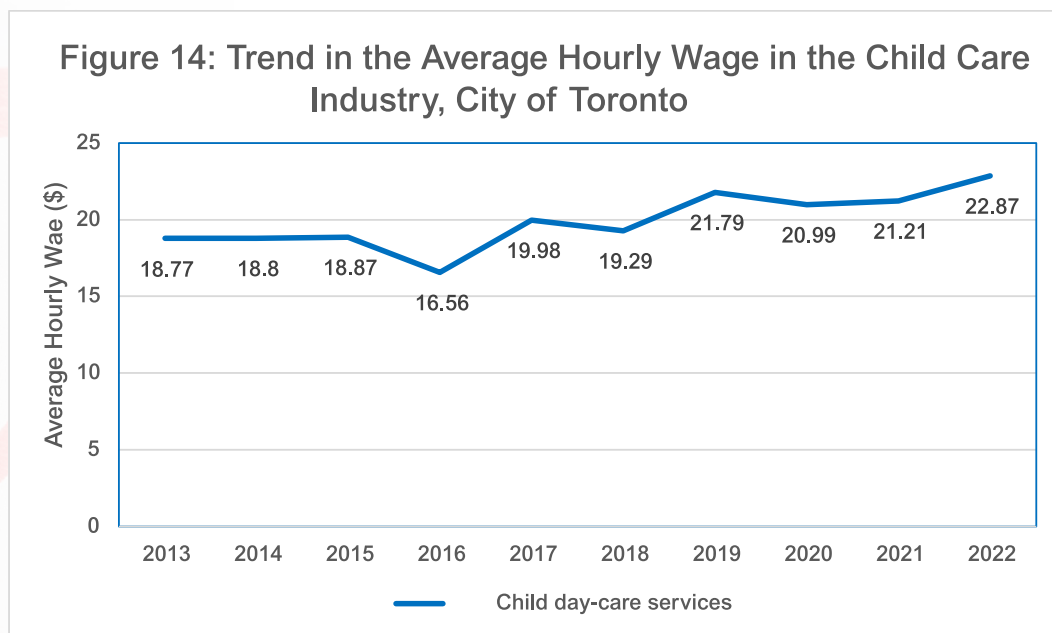
When it comes to unemployment, different industries and occupations are affected in distinct ways by the changes in economic circumstances. Figure 13 compares the trend in the unemployment rate in the child care industry with all other industries in Ontario.

It appears that over the years the unemployment rate in the child care industry has fared better than the unemployment rate in all other industries. Of course, the rate took a significant dip rising to 12.5% compared to 9.6% for all other industries during the pandemic. In 2022, the unemployment rate in the child care industry stood at 3.6% lower compared to the unemployment rate of 5.6% in all other industries but higher than the pre-pandemic level of child care industry unemployment rate at 2.2% in 2019.



Earnings in the Child Care Industry in Toronto

In 2022, the average wage in the child care industry was \$22.87/hour, the highest in the past decade.



Source: Labour Force Survey

Figure 14 shows that there has been an upward trend in the average hourly wage in the child care industry in the past ten years. In 2022, the hourly wage in the child day care industry was 22% more than 2013. During the same period, the rate of inflation was 24.78% indicating that the wage increase has not kept up with inflation. The Province of Ontario's November 2023 announcement of a rise in the wage ceiling and wage floor of the RECEs, means that the average hourly wage in 2024 will be higher than what we see in Figure 14.

Table 7: Median Employment Income (Annual), for Key Occupations in Child Care, Census 2021

Median Employment Income	Early Childhood Educators and Assistants (ECEAs)	Home Child Care Providers (HCCPs)
Toronto, CMA	\$41,600	\$29,000
Ontario	\$39,600	\$24,600
Canada	\$37,600	\$24,400

Source: Census 2021

Table 7 gives additional insight into the annual earnings of child care workers. It highlights the Census 2021 data on the median employment income (annual) for key occupations in the child care industry. According to the 2021 Census data, child care workers, be it ECEAs or HCCPs, earned slightly more in Toronto, CMA compared to Ontario and Canada. However, HCCPs^[x] earned notably less than ECEAs in all three geographic comparisons.

Using Census 2021 data, we checked how the income for ECEs compared to some occupations^[xi] that have less educational requirements and job training in Toronto. The results have been listed in order of ascending salary.

- Receptionists (\$40,000)
- Hotel front desk clerks (\$40,800)
- Security guards and related security service occupations (\$41,200)
- Nursery and greenhouse labourers (\$44,000)
- Service station attendant (45,600)
- Shippers and Receivers (\$46,400)
- Meat cutters and fishmongers – retail and wholesale (\$47,600)
- Couriers and messengers (\$49,600)
- Janitors, caretakers, and heavy-duty cleaners (\$51,600)
- Operators and attendants in amusement, recreation, and sport (\$62,000).

It appears that ECEs, who play an integral role in helping our children build the foundational blocks of learning, social interaction, cognitive development, and emotional regulation may not be receiving competitive wages when compared to occupations requiring lower education and job training in Toronto. Although the Province of Ontario has raised wages, we don't know if this is sufficient.

Several studies on the child care industry and associated occupations have reported that child care workers feel overwhelmed, exhausted, under-appreciated and underpaid. A survey of Early Childhood Educators' well-being conducted by the Association of Early Childhood Educators Ontario (AECEO) found that 60 percent of employees felt their salaries do not accurately reflect the work they do, and 68 per cent said they feel "worn out."

The Association of Early Childhood Educators Ontario (AECEO) have expressed concerns that while the government is supporting the early care workforce through investing in tuition and training grants, existing child care workers continue to leave the profession as they feel their wages and benefits are not a correct reflection of their workload. AECEO also underscored that if the retention issue is not resolved, the industry will struggle to build a long-term qualified and sustainable workforce.

The impact of Wage Enhancement Programs on Child Care Workers in Ontario

Since 2014, the Government of Ontario has supported the recruitment and retention of RECEs in licensed child care centres through the Provincial Wage Enhancement (PWE) Grant. In 2023, the Ontario government made an ongoing funding commitment to support a wage enhancement for eligible child care professionals working in licensed child care settings. The PWE funding aims to close the wage gap between RECE wages in the education and licensed child care sectors; help licensed centres retain RECEs/child care staff; and support greater employment and income security.

In November 2023, Education Minister Stephen Lecce announced Ontario's launching of the most significant and comprehensive Child Care Workforce Strategy to date with a plan that includes increasing the starting wage (minimum wage) and wage ceiling for RECEs employed by child care operators enrolled in the CWELCC system. RECEs working in licensed child care programs that opt into the \$10 a day child care agreement can also be eligible for some new workforce compensation funding. There are two separate streams of the workforce compensation funding: the Wage Floor and the Annual Increase. In 2023, RECE program staff working in licensed child care had a wage floor of \$19/hour, and RECE child care supervisors or RECE Home Child Care Visitors had a wage floor of \$21/hour.

Table 8: Wage Grid of Key Occupations in Child Care, Ontario

	2024 wage floor	2025 wage floor	2026 wage floor
RECE Program Staff	\$23.86	\$24.86	\$25.86
RECE Child Care Supervisors or RECE Home Child Care Visitors	\$24.86	\$25.86	\$26.86

Source: Province of Ontario

Table 8 shows the wage grid of key occupations in the child care industry from 2024-2026. Starting in 2024, the minimum wage of RECEs in most licensed child-care centres is set to rise to \$23.86/hour, up from a planned increase to \$20/hour. The strategy also calls for RECE supervisors and Home Child Care Visitors to see a wage boost from \$22/hour to \$24.86/hour. Starting wages will increase by \$1/hour each year through to 2026. The wage ceiling is also set to rise. Any RECE program staff making less than \$26/hour will be eligible for the existing annual increase of up to \$1/hour. In 2025, eligibility will be expanded to include those earning less than \$27/hour, and in 2026 for those earning less than \$28/hour. Currently, only RECEs earning less than \$25/hour are eligible for this increase. RECE supervisors and Home Child Care Visitors earning less than \$29/hour in

A Work in Progress: Towards \$10 a day Child Care in Toronto.

2024, less than \$30/hour in 2025, and less than \$31/hour in 2026 will also be eligible for the annual increase.

The Province of Ontario expects 75% of RECEs currently working in child care centres that opted in the CWELCC agreement will benefit from the wage bump attracting more individuals into becoming RECEs. This new hourly rate will bring them in line with the starting wages of RECEs working in a public school board, helping to narrow the wage gap and create interest in the profession. The workforce strategy also includes funding to establish a dedicated professional development day, and doubling funding for a program that helps non-ECE child-care staff get an ECE diploma by paying their tuition and other costs.



Moving Forward

- 1** Wages of child care workers should be competitive enough to ensure that child care centres have an adequate supply of employees needed to run the facilities at optimum capacity. In November 2023 the government boosted both the wage ceiling and wage floor of RECEs, but whether this raise is competitive enough to recruit, retain existing child care workers and re-attract those who left the industry is an empirical question. The government and other stakeholders need to monitor whether this increase is sufficient to attract more workers into the field. The child care landscape differs throughout the province of Ontario. For example, it may cost significantly more for an operator to run a licensed centre in Toronto when compared to other parts of Ontario. At the same time, the higher rental prices in the GTA may mean a child care worker living in this region is also likely to pay a larger portion of their income in living expenses. The funding formula for any industry should be able to identify and take into consideration these disparities in operating costs to ensure the fair and equitable creation and distribution of funding policy.
- 2** There is evidence that other occupations with roughly comparable qualifications like that of an ECE offer better wages. In addition, to work in licensed centres as an ECE, title holders must pay an annual fee of \$160 to the College and these conditions may be prompting many members into letting their membership lapse after an average of three years. It is of the utmost importance that child care worker wages are reflective of their importance in the child care system.
- 3** We can also learn from best practices in other jurisdictions. For example, in early 2022, P.E.I. enhanced efforts to encourage trained child care workers who left the field to return. Announcing a \$5,000 grant for certified level three ECEs who had been out of the child care workforce for more than two years. To qualify, candidates must be employed with a licensed early learning centre and must stay in the workforce for two years to avoid repaying the grant.
- 4** It is essential to create positive earning trajectories and occupational progression that recognize the experience and tenure of a child care worker. Child care workers must also have access to career enhancement opportunities like professional development, training, and qualification upgrade programs. Within a child care facility apart from ECEs or ECEAs, positions may also include Special Needs Educator, Pedagogist, Program Administrator, Program Manager, Program Supervisor, Assistant Director, Director, or Owner of a child care facility. Outside child care facilities, career path may include government employment within the Ministry of Education and Child Care, Advanced

Education, or a local municipal government. Community service employment could also lead to positions such as Respite Provider, Child Advocate, Child Care Consultant (CCRR), Recreational Early Childhood Program Coordinator (Cruise ships, resorts, local community centres), Family Support Worker or Consultant, Behavioral Consultant, Strong Start or Head Start Facilitator, ECE Researcher, Post-Secondary ECE Instructor, or Post-Secondary Program Coordinator.

5 We need to find ways to recognize the experience of newcomer immigrants with international experience in child care or create smoother pathways for newcomers to become qualified as ECEs. In June 2019, the Province of Ontario launched a five-year pilot program called “The Home Child Care Provider Pilot and Home Support Worker Pilot”. These economic pilot programs were targeted to support foreign national caregivers with job offers or Canadian work experience in eligible caregiver occupations and who met the minimum education and language proficiency requirements. A similar approach recognizing the international experience of ECEs could be one way to help ease the supply shortage of ECEs in Ontario.

6 For decades many low-income families have been reliant on unlicensed child care providers. Especially those looking for low-cost services, non-standard hours, proximity to where they live and/or providers who share similar cultural backgrounds. However, there is little to no oversight of the unregulated child care in Ontario. To ensure greater public safety and quality of care, the government must explore ways to ensure proper standards for these services are met. More informal child care providers need to be supported so that eventually they can transition into regulated settings.



Appendix

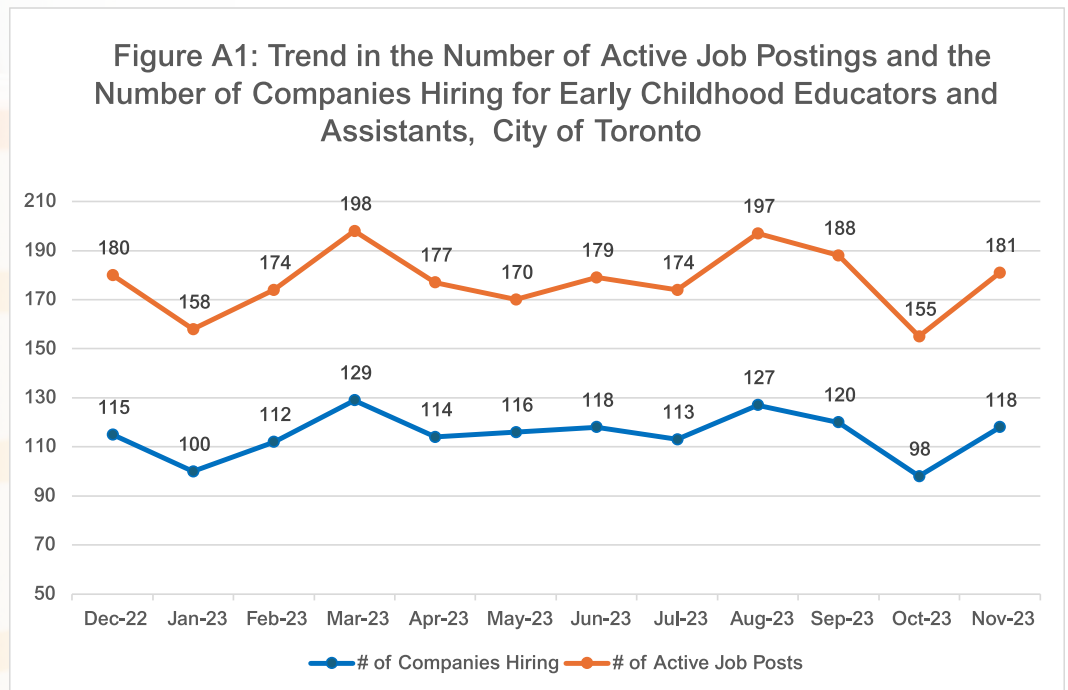
Appendix A: Labour Market Insights Based on Job Postings in the Child Care Eco System

Table A1: Labour Market Insights Based on Job Postings in the Child Care Industry and Key Occupations, City of Toronto, December 2022- November 2023

	NOC: Early Childhood Educators and Assistants (ECEA)	NOC: Home Child Care Providers (HCCP)	NAIC: Child Day-Care Services
Active Job Postings	1,276	400	1,646
Average Posting Duration	25 days	71 days	25 days
Job Type (Full-Time Vs Part-Time)	Full-time (69%) Part-time (31%)	Full-Time (97%) Part-Time (3%)	Full-Time (70%) Part-Time (30%)
Top Five Hiring Employers	<ol style="list-style-type: none"> The Macaulay Child Development Centre (76) Sentient HR Services Inc. (42) BrightPath Kids Canada (39) Viva Kids Academy (24) YMCA of Greater Toronto (24). 	<ol style="list-style-type: none"> Private Household (6) Christian Hamaoka (4) Fowzi Abdullahi (4) Poonam Puri (4) Stefan Lundrigan (4) 	<ol style="list-style-type: none"> Conseil scolaire catholique MonAvenir (246) The Macaulay Child Development Centre (133) BrightPath Kids Canada (91) BGC St. Alban's Club (54) Ideal Child Services Group (48)
Top Five In-Demand Skills	First Aid, Support, Communication, Social, Standing	Social, Hygiene, Social Development, Reliability, Criminal Record Check	First aid, Communication, Social, Support, Planning
Top Three Language Skills	French (83), Mandarin (3), Spanish (3)	French (2), Cantonese (1), Mandarin (1), Vietnamese (1)	French (233), Mandarin (5), Cantonese (2)
Top Five In-Demand Sectors/Occupations	<p>Top Five In-Demand Sectors</p> <ol style="list-style-type: none"> Child day-care services (724) Employment placement agencies and executive search services (77) Civic and social organizations (68) Human resources consulting services (57) All other schools and instruction (56). 	<p>Top Five In-Demand Sectors</p> <ol style="list-style-type: none"> Private households (52) Offices of lawyers (7) Home health care services (6) New car dealers (2) Translation and interpretation services (2) 	<p>Top Five In-Demand Occupations</p> <ol style="list-style-type: none"> Early childhood educators and assistants (724) Hotel front desk clerks (26) Cooks (23) Food counter attendants, kitchen helpers and related support occupations (20) Social and community service workers (12)

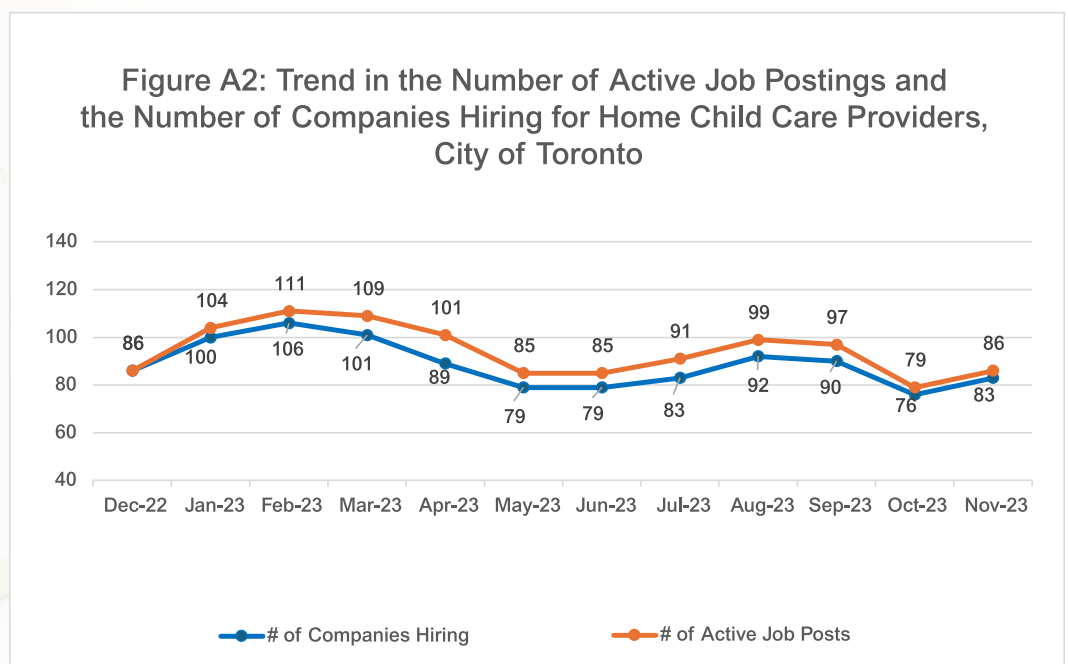
Source: <https://workforceinnovation.ca/JobPostingData>. This report presents information sourced from job ads posted by employers and agencies on over 50 publicly accessible websites.

Appendix A, Figure A1



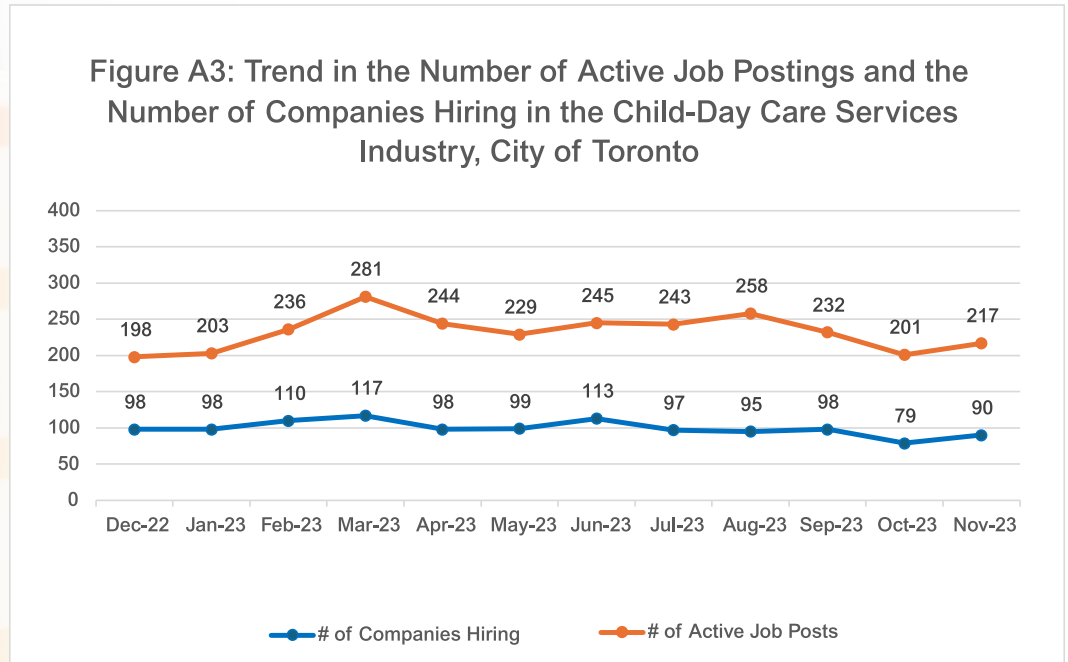
Source: <https://workforceinnovation.ca/JobPostingData>. This report presents information sourced from job ads posted by employers and agencies on over 50 publicly accessible websites.

Appendix A, Figure A2



Source: <https://workforceinnovation.ca/JobPostingData>. This report presents information sourced from job ads posted by employers and agencies on over 50 publicly accessible websites.

Appendix A, Figure A3



Source: [https://workforceinnovation.ca/Job Posting Data](https://workforceinnovation.ca/JobPostingData). This report presents information sourced from job ads posted by employers and agencies on over 50 publicly accessible websites.

End Notes

- i. Financial Accountability Office of Ontario. (2023, May 16). Women in Ontario's Labour Market: Progress, challenges, and potential impacts of \$10 a day child care. <https://www.fao-on.org/en/Blog/Publications/wilma#fig5-2-image>
- ii. To identify child care programs and their employees, the report used the industry code for "Child Day-Care Services" from the North American Industry Classification System (NAICS), code 62441.
- iii. According to some latest news articles, the province does not track how many operators have left the \$10-a-day program, but in Toronto, the city says seven have withdrawn. Jones, A. (2024, January 17). Why a Toronto daycare is exiting the \$10-a-day program over funding uncertainty. The Globe and Mail. <https://www.theglobeandmail.com/canada/toronto/article-why-a-toronto-daycare-is-exiting-the-10-a-day-program-over-funding/>
- iv. Government of Canada. (2023). Toward \$10-a-day: Early Learning and Child Care. Retrieved from <https://www.canada.ca/en/employment-social-development/campaigns/child-care.html>
- v. Please note that numerous figures in this paper omit statistics for the year 2020. This is attributed to the closure of all licensed child care programs between March and June 2020, in compliance with provincial orders amid the pandemic, except for Licensed Home Child Care. Additionally, before-and-after school programs experienced mandatory closures from January 2021 to mid-February and again from April to the end of the 2021 school year. By Fall 2020, 93% of centres had reopened following strict Health & Safety protocols, but families did not return as normal and most centres had low enrolment. The demand for fee subsidy also decreased due to changes in employment and virtual schooling. The following information is based on normal operations and does not take into account reduced operating capacities and temporary closures resulting from the pandemic. Hence 2020 numbers were not recorded.
- vi. Note that the 0-4 population has been adjusted to reflect the fact that, in any given year, one-third of 3-year-olds and two-thirds of 4-year-olds who could be in full-time (pre-school) child care will, as of September, be eligible for Junior Kindergarten. The calculations in the table were made based on the addition of one-fifth of the 0-4 age group added to the 5-9 age group.
- vii. Raising the Village. (n.d.). Child & Family Demographics. Retrieved from <https://raisingthevillage.ca/child-family-demographics-3/>
- viii. Data regarding the precise total number of spaces provided by licensed home child care providers in Toronto at a specific point in time is unavailable. This is

A Work in Progress: Towards \$10 a day Child Care in Toronto.

due to the dynamic nature of these agencies, which can expand (by engaging more home child care providers) or contract at any given time. Additionally, individual home child care providers operate in varied physical spaces, and their capacity to accommodate more children may vary. Some providers may have the flexibility to expand the number of children cared for during specific periods, such as evenings and/or weekends.

- ix. Postsecondary education includes individuals whose highest level of educational attainment encompasses an apprenticeship or trades certificate or diploma, a college, or other non-university certificate or diploma, a university certificate or diploma below the bachelor level, or a university degree.
- x. It should be noted that the occupation of Home Child Care Providers (HCCPs) also includes live-in care givers and babysitter, which will likely pull the median hourly wage downwards because of different working arrangements.
- xi. The occupations are classified according to the National Occupational Classification (NOC) 2021, which serves as the widely recognized taxonomy and organizational framework for occupations in the Canadian labor market. The listed occupations are categorized based on levels of educational requirements determined by the Training, Education, Experience, and Responsibilities (TEER) Category. The TEER Category, represented by the second digit in the NOC, delineates the requisite training, education, experience, and responsibilities associated with each occupation. NOC 2021 Version 1.0 comprises six TEER categories. Each TEER category is characterized by the specific amount and type of training and education necessary to enter and fulfill the duties of a particular occupation. It also factors in the required experience and the complexity of responsibilities inherent in the work.