

The state of early childhood education and care in Canada 2012

Carolyn Ferns & Martha Friendly, June 2014

This report provides a snapshot of the “state of” Canadian ECEC in 2012, the year for which the most recent reliable data are available. Using data consistently collected by the Childcare Resource and Research Unit since 1992 as a base and integrating other pertinent data, this document outlines key trends, patterns and policy shifts in Canadian ECEC’s organization and governance: the demographic context, child care spaces, public funding, parent fees, integration of care and early education, ownership or auspice, Aboriginal child care, human resources and unionization.



The *Moving Child Care Forward* project, funded by the Social Sciences and Humanities Research Council of Canada's Connections program, is designed to broaden and deepen debate and understanding of early childhood education and child care (ECEC) policy issues. The project's goals: knowledge mobilization to promote research, inform public and policy dialogue and to develop effective responses to complex policy issues to better serve young children and their families.

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Moving Childcare Forward Project (a joint initiative of the Childcare Resource and Research Unit, Centre for Work, Families and Well-Being at the University of Guelph, and the Department of Sociology at the University of Manitoba)

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INTRODUCTION

This document is the first in a series intended to synthesize and disseminate timely, policy-relevant data and research about early childhood education and care (ECEC). The series is part of a Connections project supported by the Social Sciences and Humanities Research Council (SSHRC).

This report provides a snapshot of the “state of” Canadian ECEC in 2012, the year for which the most recent reliable data are available. Using data consistently collected by CRRU over time and integrating other relevant data, this report outlines key trends, patterns and policy shifts in Canadian ECEC’s organization and governance: the demographic context, child care spaces, public funding, parent fees, integration of care and early education, ownership or auspice, Aboriginal child care and human resources.

The document presents significant points from analyses of available data about regulated child care to provide information for researchers, policymakers, advocates, and service providers, some of whom will further interpret what it means for families, children, society, the economy and the ECEC field. This information is vitally important as it can help inform policy and actions to address the long-standing and current challenges facing Canadian ECEC—weak policy, shortage of spaces, high fees, low wages of educators and other issues that have an impact on quality and access to services.

This document synthesizes data from all editions of *Early childhood education and care in Canada* (1992, 1995, 1998, 2001, 2004, 2006, 2008 and 2012) and the interim report *Child care space statistics 2007* (Childcare Resource and Research Unit); *Public investments in early childhood education and care in Canada 2010* (published by the Government of Canada); data collected and analyzed by the *You bet we still care!* project (Flanagan, Beach and Varmuza, 2012); Statistics Canada, the Canadian Council on Learning and other relevant sources. Notes about the methodology of successive editions of *ECEC in Canada* can be found in *ECEC in Canada 2012*. For the reader seeking more detailed information, please consult *ECEC in Canada*’s provincial/territorial sections and summary tables. Links to these and other information and sources in this report can be found at the end of the document.¹

The 2014 version of *ECEC in Canada* is expected to be available early in 2015.

SUMMARY: TOP TRENDS 2012

Demographic trends

- The number of children 0-5 years has increased, rising from 2,093,000 children 0-5 years in 2009 to 2,230,000 in 2012.
- The 0-4 age group has been growing at the highest rate in 50 years (11% since 2006).
- The labour force participation rate of mothers with young children continues to increase.
 - In 2012, the labour force participation rate was 69.7% for mothers whose youngest child was 0-2 years, 76.6% for mothers with a youngest child 3-5 years, and 84.0% for those whose youngest child was 6-15 years.
 - In comparison, in 1995, the figures were 61% for mothers whose youngest child was 0-2 years, 68% for those with a youngest child 3-5 years, and 76% for those whose youngest child was 6-15 years.

Space and coverage trends

- Growth in regulated child care spaces has slowed to a low point.
 - In 2012, there were full- or part-time centre-based child care spaces for only 22.5% of Canadian children 0-5 years. This was a small increase from 21.8% coverage in 2010. Although the coverage rate has been creeping up steadily, there is still a very sizeable gap between need and provision.
 - The supply of regulated child care centre spaces for 0-5 year olds grew only 0.7% between 2010 and 2012 while regulated spaces (including family child care) for 0-12 year olds grew by only 0.6%. Even during the limited growth years after 2006, space increases had never dropped below 1%.
- There are substantial differences in the prevalence of different kinds of regulated child care (full-day centres, part-time preschool, family child care, and school-age child care) by province/territory.

- The proportion of regulated child care that is in regulated family child care has been dropping quite steadily—from 27% of total spaces for 0-12 year olds in 2001 to 14% in 2012. Although some of this can be accounted for by growth in centre-based spaces rather than decrease in family child care, recently, the absolute number of family child care spaces has also been dropping in many provinces/territories.

Public funding trends

- Public spending for ECEC in Canada continues to be very low when compared to need/demand and to international benchmarks.
- There were modest increases in budget allocations in actual dollars for regulated child care in every province/territory except British Columbia between 2009/10 and 2011/12 (BC's allocation decreased by \$363,000 in actual dollars).
- After adjusting for inflation, allocations went down in three jurisdictions between 2009/10 and 2011/12: Newfoundland and Labrador, Yukon, and British Columbia.
- A calculation of public funding per regulated space (a very rough quality indicator) shows a Canada-wide average of \$4,070 in 2011/12 with a considerable range – from \$1,613 - \$5,958. However, when a Canada-without-Quebec average is considered, the average across jurisdictions is only \$2,775, a decrease from the 1992 Canada-wide average (in adjusted) dollars of \$2,985. (Quebec's public allocations began to grow dramatically only after 1992).
- Quebec continues to contribute disproportionately to Canada-wide public spending allocations in comparison with other provinces. Quebec's spending has been more than 50% of total provincial/territorial budget allocations for child care for more than a decade; it jumped from 29% of Canada-wide public spending allocations in 1998 to 58% in 2001. In 2012, Quebec's share was 60% of total public spending allocations for regulated child care.

Parent fee trends

- Parent fees for child care continue to be higher than university costs both for Canada as a whole (average) and in almost all provinces/territories.
- The range of parent fees by jurisdiction was enormous, ranging (for an infant) from \$1,824/year in Quebec to more than \$12,000/year in Ontario – almost seven times as much.
- Median monthly parent fees across Canada were \$761 for infant care, \$701 for toddlers and \$674 for preschoolers in 2012 (Quebec is included in the calculations).
- Even after adjusting for inflation, fees were higher in 2012 than in 1998 (the last year comparable Canada-wide fee data were collected) in all jurisdictions except Quebec and Manitoba, two of the three provinces where fees are regulated (the other is PEI).
- Quebec had the lowest fees in Canada, set at \$7-a-day, or \$152/month across all age groups. In Manitoba (the second lowest), median monthly parent fees were \$431 for toddlers and preschoolers and \$631 for infants.

Trends in integration of care and education

- Responsibility for child care has continued to shift from community/social services to education ministries across Canada. Saskatchewan was the first province to take this step in 2006.
- By 2012, six provinces/territories had moved responsibility for child care into their ministries of education, with Nova Scotia becoming the seventh jurisdiction to do so in 2013/14.
- Six provinces now offer kindergarten for a full school-day for five year olds: PEI, Nova Scotia, New Brunswick, Quebec, Ontario (which will complete its transition to a full-day in the fall of 2014) and British Columbia. Ontario also provides full-day kindergarten for all four year olds. Newfoundland and Labrador has announced that it too will soon move to full-day five year old kindergarten.

Auspice (ownership) trends

- For-profit child care is continuing to increase at a rapid rate across Canada.
- Between 2010 and 2012, 58% of space expansion was in the for-profit sector, bringing the proportion of spaces in the for-profit sector to nearly 30% of total Canada-wide centre spaces, the highest level since CRRU started collecting these data in 1992.
- In seven of the provinces/territories, more than 50% of space expansion was in the for-profit sector between 2010 and 2012.
- There has been some limited development of publicly delivered (municipal or school board) child care in several jurisdictions (Alberta, Saskatchewan, Newfoundland and Labrador). Ontario's municipally operated child care sector has decreased substantially – down from 11% of total spaces in 1998 to 2.6% of total spaces in 2012.

Trends in Aboriginal child care

- Twenty-six percent of off-reserve Aboriginal children (2006) and 13.8% of on-reserve First Nations children (2002) 0-5 years were in centre-based child care.

Human resource trends

- Wages for program staff rose between 1998 and 2012 (after adjusting for inflation) in all jurisdictions except Ontario, where they dropped slightly.
- Wages, however, continue to be low; in 2012 the median wage for child care program staff was only 69% of the average wage in Canada.
- Canadian regulated child care is still not a highly unionized profession. The 2012 *You bet we still care!* survey found that only 21.5% of child care staff surveyed reported that they were union members.

POLICY CONTEXT

Canada has no national program or overall approach to early childhood education and care (ECEC). Fourteen jurisdictions — 10 provinces, three territories and the federal government — are involved in regulating, funding and shaping ECEC programs in their respective areas of responsibility.² Federalism underpins the division of roles and responsibilities for Canadian ECEC. Like other social services, education and health care, ECEC falls mainly under provincial/territorial jurisdiction. It should be noted that, despite this division of powers, the federal government had, and continues to have, a pivotal role in developing and sustaining Medicare.

Each province and territory has developed legislation and regulations that set out requirements for the operation of its child care services and each has a variety of funding arrangements and policies. These had traditionally been under social/community services ministries but seven provinces/territories have now moved responsibility for child care to their ministries of education. Generally, regulated child care includes full-day centre-based programs, often nursery schools/preschools (part-time centre-based programs), school-age child care and regulated family child care. These are generally covered by the same provincial/territorial legislation. Several jurisdictions do not require part-time centre programs to be regulated.

Provincial/territorial funding comes in the form of fee subsidies to parents (except in Quebec), operational funds, and some capital funding. All jurisdictions except Quebec subsidize some of the costs of regulated child care for some low/modest income, usually employed, parents. However, being eligible to be subsidized does not necessarily mean that child care fees are covered. In Ontario, there are many fewer available subsidies than there are eligible parents. In other provinces/territories, the fee subsidy provided often does not cover the fee charged by the centre/provider, so fully subsidized parents may still be required to pay out-of-pocket.

Almost all provinces also provide some funds to support the overall operation of child care services. Called “base funding” or “operational funding” this may be in the form of wage grants to increase staff pay or general operational funding. In Quebec, almost all the public funding is in this form while it is more limited in other jurisdictions. Capital funding is sometimes provided by provincial/territorial governments, occasionally to help cover costs of building new facilities but more often in the form of grants to help centres or family child care homes repair or refurbish existing facilities.

Provincial/territorial governments also have responsibility for kindergarten. All the provinces/territories provide public kindergarten through their public education systems; several offer dual religious or language-based education systems. Kindergarten is almost always considered to be an entitlement with no parent fees. In some jurisdictions, kindergartens operate part-time (usually 2.5 hours a day or alternate days of the week), but six provinces/territories have now moved to full-school-day kindergarten provision and Newfoundland and Labrador has announced that it will soon do the same. All jurisdictions offer kindergarten for all five year olds; only Ontario provides kindergarten for all four year olds too, while Saskatchewan is the sole province to include three year olds in its targeted pre-kindergarten program (Alberta may also include some children with special needs from the age of 2.5 years).

In addition to these provincial/territorial programs, a variety of care and education programs for specific populations (such as Aboriginal Head Start and Military Family Resource Programs) operate under the aegis of the federal government. The federal government also provides cash payments to parents through the Universal Child Care Benefit (UCCB) and a tax deduction under The Income Tax Act (the Child Care Expense Deduction – CCED), as well as having responsibility for maternity and parental leave benefits. Except in Quebec, these

benefits fall under federal jurisdiction through Employment Insurance. Provinces/territories determine characteristics of family leaves such as duration and eligibility.

As well, the federal government transfers funds to the provinces/territories via the Canada Social Transfer (CST), a “federal block transfer to provinces and territories in support of post-secondary education, social assistance and social services, and early childhood development and early learning and childcare”.³ As a block transfer, CST funds are not earmarked for specific programs. The CST is on a 3% escalator (increasing) until 2013/14.

In the past, the federal government had taken on a larger (but still modest) role in financing and shaping child care. The Canada Assistance Plan (CAP), in place between 1966 and 1995, provided shared-cost funds for child care under a set of specific conditions spelled out by the federal government. CAP was ended in 1995 to be replaced by the Canada Health and Social Transfer (CHST) block fund. Throughout the 2000s, there were federal transfers to the provinces/ territories considered to be earmarked for child care through the Early Childhood Development Initiative (ECDI), the Multilateral Framework Agreement on Early Learning and Child Care (MFA), the 2005 Foundations program’s bilateral agreements (briefly) and the Child Care Spaces Initiative.

In 2005, a new national child care program—Foundations—was initiated by the then-federal government. Funding agreements and action plans were negotiated with all provinces/territories but when the Liberal government lost the January 2006 election to the Conservatives, the agreements were abrogated and the nascent program was abruptly terminated.

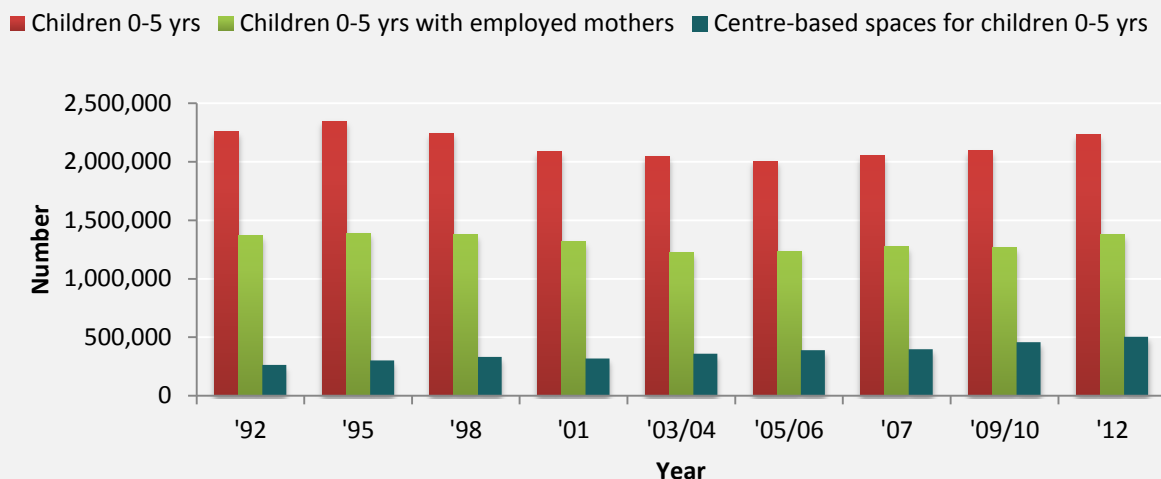
In 2008/09 the \$250 million allocated to the Child Care Spaces Initiative was rolled into the CST block transfer.⁴ Information about the federal funds transferred to each province and territory for child care under these funds is no longer available. The most recent available information providing these details can be found in the 2008 edition of *ECEC in Canada*.⁵

TOPICS

Demographic context

- After shrinking for some years, the number of children 0-5 years increased between 2007, 2009 and 2012, rising from 2,093,000 children 0-5 years in 2009 to 2,230,000 in 2012.
- According to 2011 census data, the 0-4 age group has been growing at the highest rate in 50 years (11% since 2006).
- The number of children 0-5 years with employed mothers rose between 2009/10 and 2012, from 1,268,000 to 1,376,000. (See Figure 1.)
- The labour force participation rate of mothers with young children continues to increase.
 - In 2012, it was 69.7% for mothers whose youngest child was 0-2 years,
 - 76.6% for those with a youngest child 3-5 years, and
 - 84.0% for those whose youngest child was 6-15 years.

FIGURE 1. Number of children, number of children with employed mothers, and centre-based spaces for children 0-5 years, 1992-2012



Regulated child care spaces and coverage

- In 2012, there were 503,229 regulated centre-based spaces for children 0-5 years, including both full-day and part-time spaces. (See Figure 1.)
- In 2012, there were 986,842 regulated child care spaces for 0-12 year olds. (This includes full-day and part-time centres, school-age programs and regulated family child care.)
 - This represents an average increase of 32,501 spaces in each of 2011 and 2012, up very slightly from the previous period but considerably lower than it had been earlier in the 2000 decade (growth in spaces was almost 51,000 additional spaces a year between 2001 and 2004).
- As Figure 2 shows, there were full- or part-time centre-based child care spaces for only 22.5% of Canadian children 0-5 years. Figure 3 shows that 20.5% of children 0-12 years were covered by a regulated space (including regulated family child care and school-age child care).

- As Figures 2 and 3 show, there is a very considerable range of coverage across the provinces/territories.
 - Coverage for children 0-5 years in centres (full- and part-time) ranged from 46.5% in Prince Edward Island to 11.5% in Saskatchewan.
 - Coverage for children 0-12 years in centres (full- and part-time) and regulated family child care ranged from 37.4% in Quebec to 7.6% in Saskatchewan.

FIGURE 2. Percent of children 0-5 years for whom there is a regulated centre-based child care space by province/territory - 2012

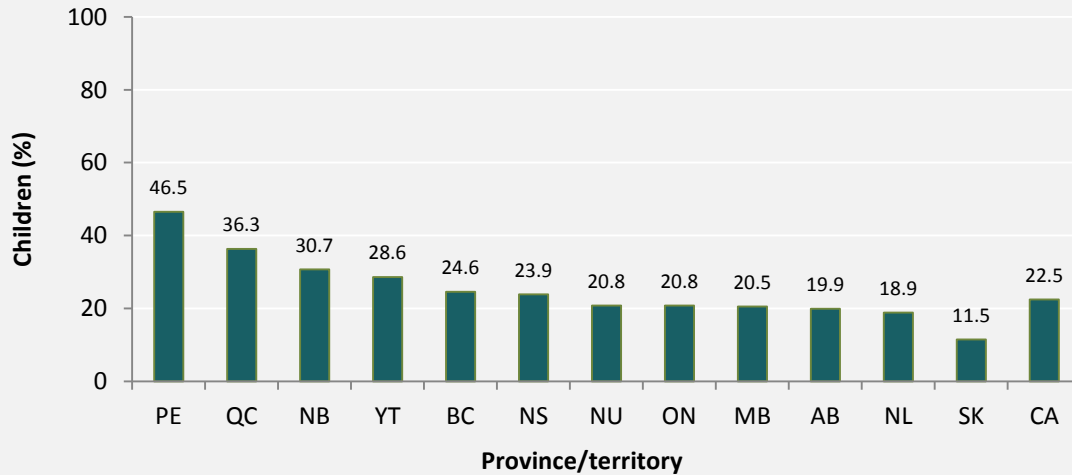
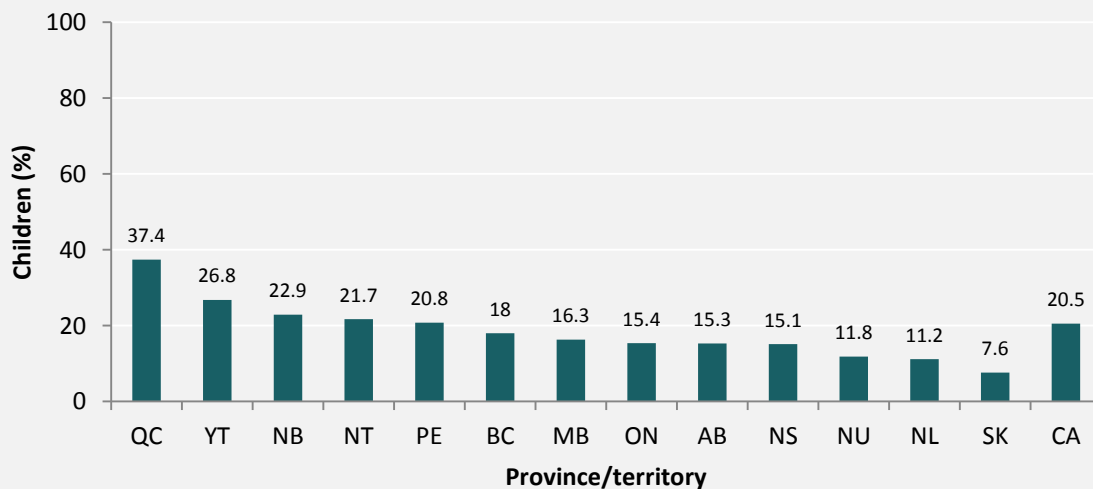
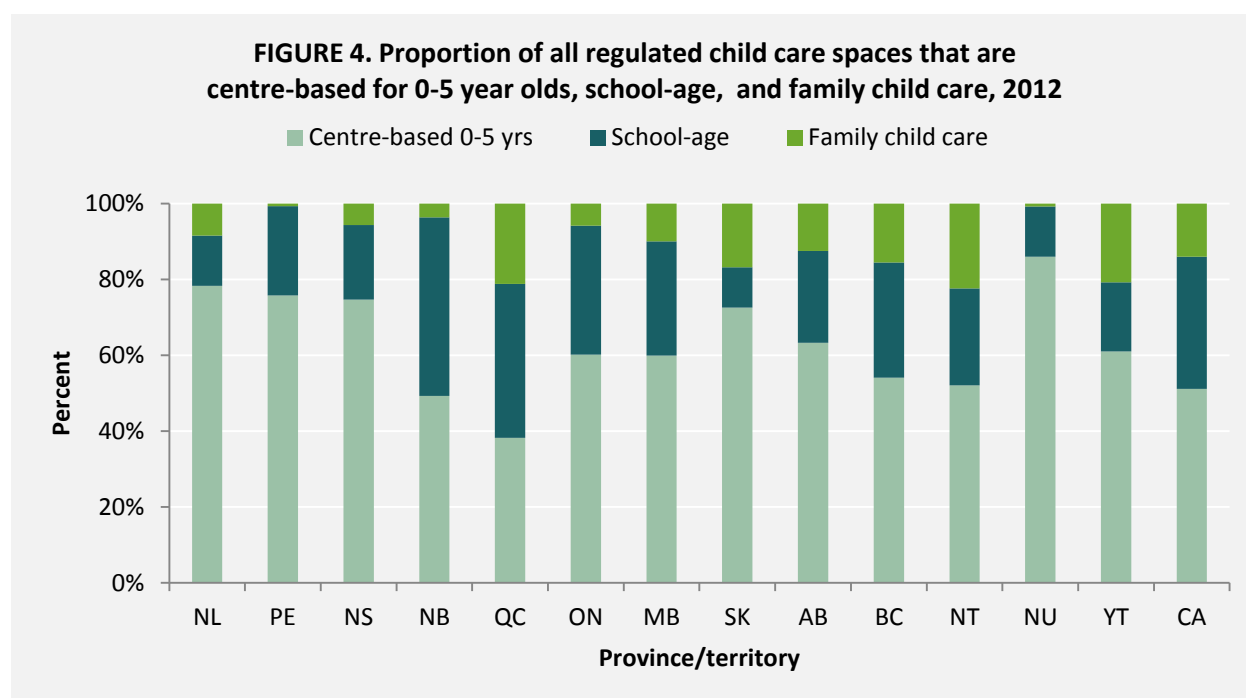


FIGURE 3. Percent of children 0-12 years for whom there is a regulated child care space by province/territory - 2012

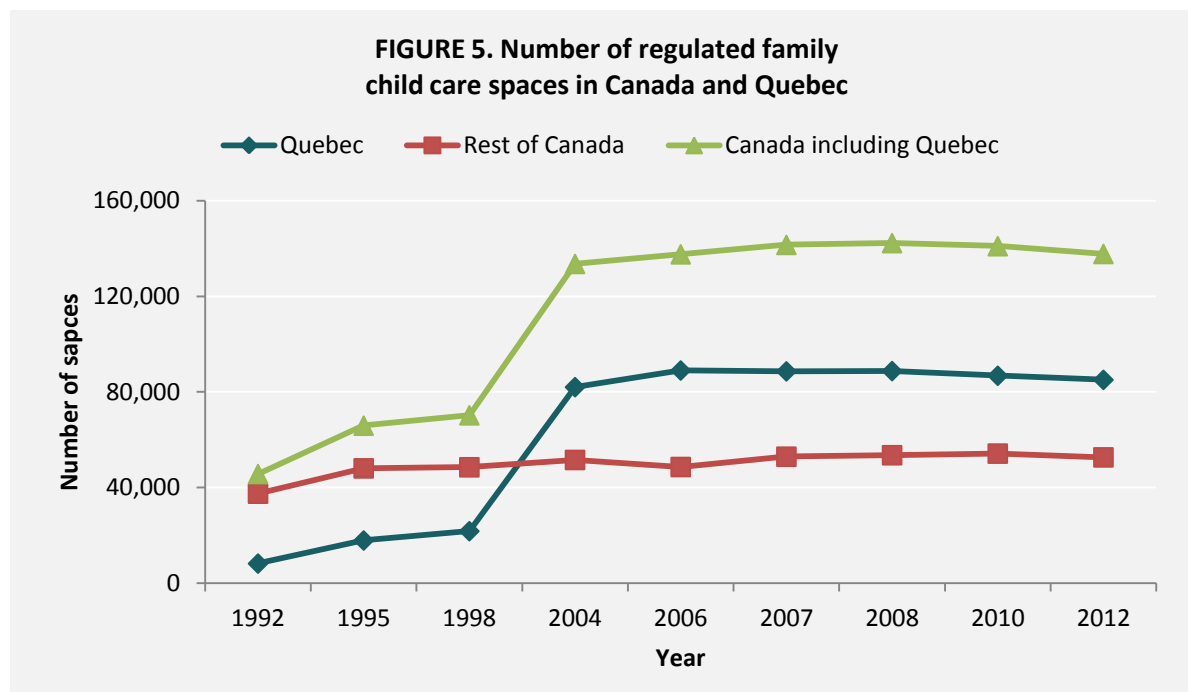


Types of child care

- Canada-wide in 2012, there were 503,229 centre-based full- and part-time centre-based spaces for children 0-5 years; 343,156 school-age child care spaces⁶; and 137,746 family child care spaces.⁷ Figure 4 shows that as a proportion of the total spaces,
 - 51% were centre-based for children 0-5 years (full- and part-time);
 - 35% were school-age spaces;
 - 14% of total spaces were in regulated family child care.
- As Figure 4 shows, the percent of total spaces that were in regulated family child care ranged from 0.7% in Prince Edward Island and Nunavut to 22.4% in the Northwest Territories. Quebec was the next highest: 21% of Quebec's total spaces were in family child care.



- The proportion of total spaces that are in regulated family child care has been dropping quite steadily – from 27% of total spaces in 2001 to 14% in 2012.
 - As Figure 5 shows, for Canada as a whole, the number of regulated child care spaces – after increasing up to 2004 – levelled off. However, as the figure shows, this trend appears to have been associated with the steep increase in regulated family child care in Quebec between 1998 and 2004.
 - As the Canada-without-Quebec (rest of Canada) data show, the supply of regulated family child care has been pretty much flat-lined since 1992.



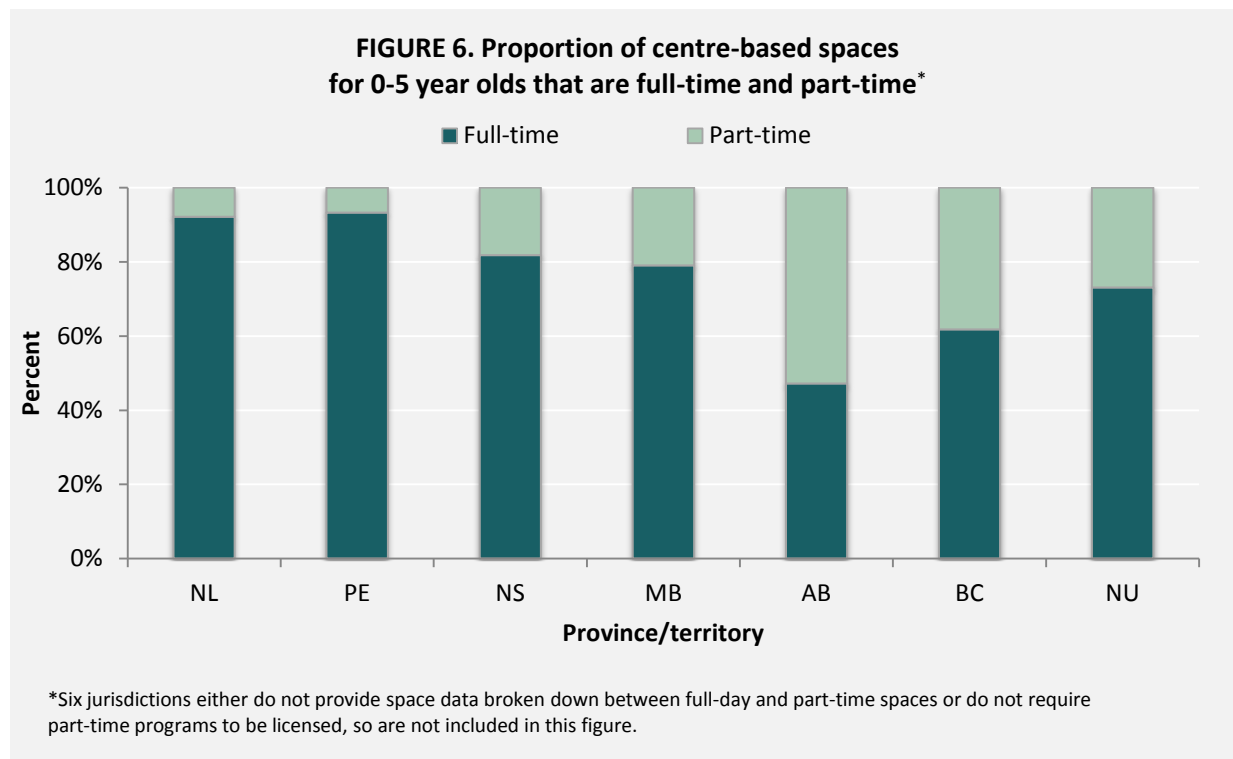
- As Table 1 shows, in some jurisdictions, regulated family child care has been dropping in absolute numbers, dropping in most provinces/territories between 2010 and 2012 but increasing in Newfoundland and Labrador, Nova Scotia and New Brunswick.

TABLE 1. Regulated family child care spaces in Canada, by province/territory, 2008, 2010, 2012

P/T	2008	2010	2012
NL	397	404	605
PE	35	28	28
NS	110	427	984
NB	345	535	782
QC	88,771	86,809	85,095
ON	19,760	18,953	17,097
MB	3,645	3,337	3,046
SK	2,330	2,239	2,065
AB	11,667	11,588	11,465
BC	14,635	16,047	15,975
NT	400	400	400
NU	0	0	8
YT	232	280	236
CA	142,327	141,047	137,786

Full-day or part-time centre-based spaces

- For those provinces/territories that regulate part-time programs and provide a breakdown between full- and part-time spaces, the proportion of full-time to part-time centre-based spaces varies considerably. As Figure 6 shows, the proportion of total centre-based spaces for 0-5 year olds that are part-time (nursery school/preschool) ranges from 52.7% of centre spaces in Alberta to PEI, where part-time spaces make up only 7.2% of centre spaces.



Public funding

- As Table 2 shows, in 2011/12, provincial/territorial allocations to regulated child care totalled \$4,016,815,891. Quebec accounted for 60% of this total (\$2,392,649,000).
- In actual dollars, total provincial/territorial budget allocations to child care increased in almost every jurisdiction between 2009/10 and 2011/12.
 - At a Canada-wide, aggregated level, provincial/territorial allocations increased from \$3.5 billion in 2009/10 to more than \$4.0 billion in 2011/12 in actual dollars.
 - BC was the only jurisdiction where the allocation to child care went down in actual dollars between 2009/10 and 2011/12 – by \$363,000. (BC funding had dropped once before between 2001 and 2003/04.)
- After adjusting for inflation (Table 2), we can see that there has generally been growth in public funding for child care over the years.
 - At a Canada-wide aggregated level, provincial/territorial allocations increased in adjusted dollars from \$2.37 billion in 2001, to \$3.73 billion in 2009/10 and \$4.0 billion in 2011/12.
 - After removing Quebec's substantial funding, we can see that adjusted allocations in the rest of the country increased from \$1.0 billion in 2001, to \$1.59 billion in 2009/10, to \$1.62 billion in 2011/12.

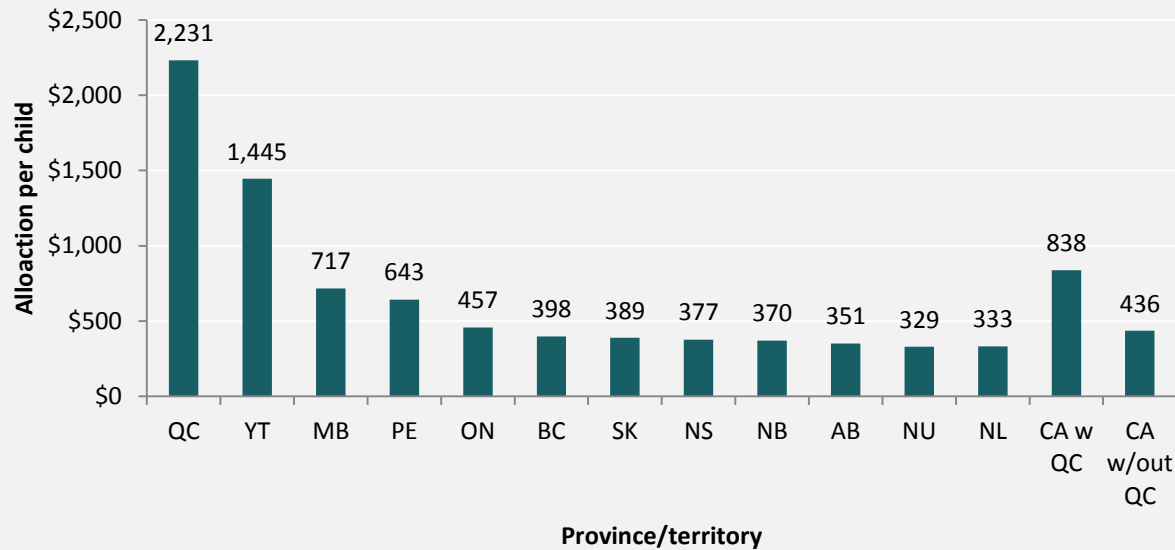
- We can also see that adjusted allocations went down in three jurisdictions between 2009/10 and 2011/12: Newfoundland and Labrador, British Columbia, and the Yukon Territories.
- Overall, public funding has increased but slightly since 2009/2010.
- Although different jurisdictions show jumps and plateaus in funding at different times, public expenditure on ECEC has been and continues to be considerably low by international benchmarks.⁸
- Public funding increases for regulated child care are generally too small and too unpredictable to allow for more than modest growth of services while parent fees remain too high to be affordable in most of Canada.

TABLE 2. Total allocations for regulated child care for children 0-12 years, in 2012 adjusted dollars⁹, provinces/territories/Canada total 1992, 2001, 2009/10, 2011/12

P/T	1992 (Adjusted to 2012 dollars) \$	2001 (Adjusted to 2012 dollars) \$	2009/10 (Adjusted to 2012 dollars) \$	2011/12 Actual \$
NL	2,401,000	9,723,000	21,909,203	21,224,505
PE	3,981,000	5,301,000	6,866,442	12,471,400
NS	16,437,000	16,168,000	41,669,439	43,221,873
NB	5,247,000	14,827,000	30,890,449	35,000,000
QC	202,532,000	1,370,031,000	2,133,721,263	2,392,649,000
ON	604,664,000	566,233,000	855,956,667	865,100,000
MB	60,665,000	78,854,000	124,423,304	134,345,200
SK	17,712,000	20,552,000	57,344,186	62,653,151
AB	95,869,000	72,112,000	203,502,683	209,769,762
BC	80,304,000	206,381,000	242,881,174	227,151,000
NT	3,290,000	2,009,000	2,713,696	Not available
NU	n/a	2,339,000	2,962,434	3,027,000
YT	3,509,000	5,568,000	7,856,055	7,661,000
CA ¹⁰	\$1,096,609,000	\$2,370,032,000	\$3,732,696,996	\$4,016,815,891
CA w/out QC	\$894,077,000	\$1,000,001,000	\$1,598,975,733	\$1,624,166,891

- As Figure 7 shows, the Canada-wide average annual allocation per capita (per child aged 0-12) was \$838/year in 2011/12 but only \$436/year when Quebec is excluded from the calculation.
 - Provincial/territorial annual allocations by child (per capita 0-12 years) range from \$333 in Newfoundland and Labrador to \$2,231 in Quebec.

FIGURE 7. Allocation to regulated child care per child 0-12 years, 2011/12, by province/territory



- As Table 3 shows, the total Canada-wide adjusted allocation per child rose from \$225 in 1992 to \$838 or to \$436 excluding Quebec from the calculation in 2011/12.

TABLE 3. Allocation per child (0-12) by all provinces/territories, in 2012 adjusted dollars

Yr	1992	1995	1998	2001	2003/04	2005/06	2007/08	2009/10	2011/12
	\$	\$	\$	\$	\$	\$	\$	\$	\$
CA	225	274	276	484	589	714	726	802	838
CA w/out QC	239	285	256	265	266	393	409	440	436

- As Table 4 shows, the Canada-wide average allocation per regulated space for children aged 0-12 was \$4,070 in 2011/12 but only \$2,775 in Canada-without-Quebec, less than the 1992 figure for Canada as a whole.
- Per regulated space allocations in 2011/12 range from \$1,613 in New Brunswick to \$5,958 next door in Quebec.
- As a rough comparison, the Canada-wide average education spending per primary school student was \$8,715 in 2008/09 (most recent available figure)¹¹.

TABLE 4. Allocation for each regulated child care space for 0-12 year olds by all provinces/territories, in 2012 adjusted dollars

Yr	1992	1995	1998	2001	2003/04	2005/06	2007/08	2009/10	2011/12
	\$	\$	\$	\$	\$	\$	\$	\$	\$
CA	2,985	3,266	2,711	3,991	3,772	4,061	3,848	3,992	4,070
CA w/out QC	3,085	3,520	2,927	2,787	2,324	3,143	2,943	2,907	2,775

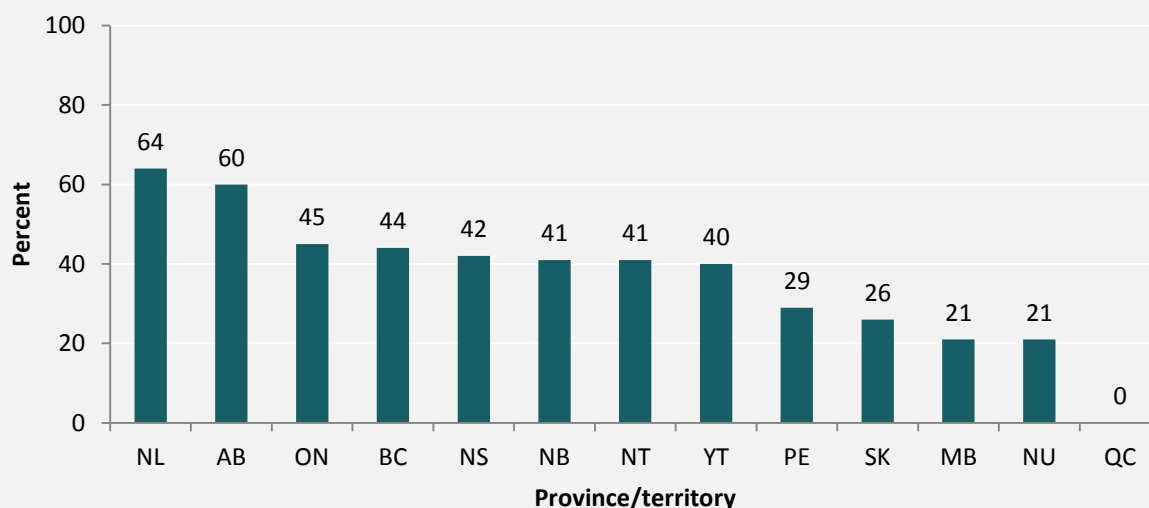
- Other than Quebec, all jurisdictions spend some of their allocation on fee subsidy programs (Table 5).

TABLE 5. Total allocation for regulated child care for children 0-12 years, allocation to parent fee subsidies, and percent of total allocated to parent fee subsidies, 2011/2012

P/T	Total allocation for regulated child care \$	Allocation to fee subsidies \$	Percent of total allocated to parent fee subsidies %
NL	21,224,505	13,541,230	64
PE	12,471,400	3,660,500	29
NS	43,221,873	17,954,221	42
NB	35,000,000	14,200,000	41
QC	2,392,649,000	0	0
ON	865,100,000	386,800,000	45
MB	134,345,200	28,107,600	21
SK	62,653,151	16,309,339	26
AB	209,769,762	126,906,140	60
BC	227,151,000	99,585,000	44
NT	2,542,000	1,042,000	41
NU	3,027,000	642,000	21
YT	7,661,000	3,077,000	40

- Among jurisdictions with fee subsidy programs (all except Quebec), the percent of total allocation for fee subsidies relative to operational/base and capital funding to services ranged in 2012 from 21% in Manitoba and Nunavut to 64% in Newfoundland and Labrador (Figure 8).

FIGURE 8. Percent of total allocation to regulated child care that is allocated to parent fee subsidies, by province/territory, 2011/12



Parent fees

- The Canada-wide median monthly fee was \$761 for infant care, \$696 for toddler care and \$674 for preschool-age care in 2012.
- The lowest 2012 median infant fee was \$152 a month in Quebec (\$7/day); the highest median infant fee was \$1,152 a month in Ontario.
- Fees vary considerably both within and across provinces/territories. The difference between the lowest annual infant fee (\$1,824) and the highest (\$12,516/year in Ontario) in 2012 was more than \$10,000 annually per child. Putting it another way, Ontario's median fee was almost seven times the Quebec fee.
- As Table 6 shows, even after adjusting for inflation, fees were higher in 2012 than in 1998 (some were considerably higher) in all jurisdictions except Quebec and Manitoba.
- Province-wide maximum parent fees are now set by provincial governments in PEI, Quebec and Manitoba.

TABLE 6. Median full-time monthly parent fees in full-day centres by age group, provinces/Canada total, 1998 (adjusted to 2012 dollars) and 2012¹²

P/T	Infants		Toddlers		Preschoolers	
	1998 (adjusted \$)	2012 (\$)	1998 (adjusted \$)	2012 (\$)	1998 (adjusted \$)	2012 (\$)
NL	n/a	n/a	507	773	480	783
PE	587	696	507	566	480	544
NS	627	825	550	694	550	685
NB	507	740	480	653	480	620
QC	636	152	607	152	587	152
ON	1,043	1,152	804	925	722	835
MB	764	631	511	431	491	431
SK	n/a	650	540	561	507	535
AB	700	900	600	825	567	790
BC	867	1,047	730	907	614	761
CA	708	761	636	701	607	674

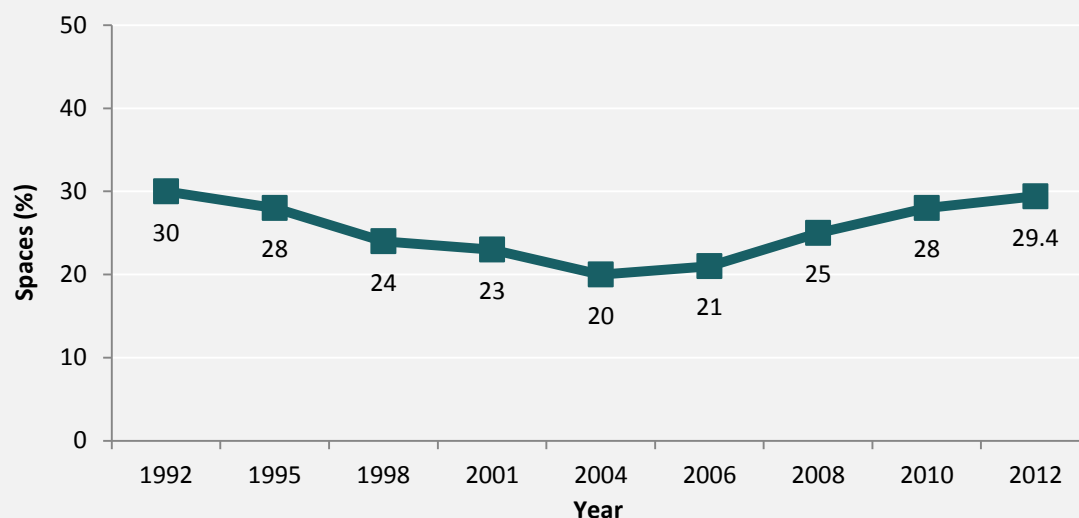
Integration of care and education

- Seven jurisdictions have now moved responsibility for child care into their Ministries of Education: Prince Edward Island, Nova Scotia (in 2013/14), New Brunswick, Ontario, Saskatchewan, Northwest Territories and Nunavut.
- In other provinces/territories, responsibilities for kindergarten and child care are split between at least two ministries, with kindergarten the responsibility of Ministries of Education and child care usually falling under Social/Community Services ministries. In BC, responsibility is split between three ministries: Education is responsible for kindergarten, Child and Family Development is responsible for child care policy and funding including subsidies, and the Ministry of Health is responsible for child care licensing.
- There is some, usually targeted, kindergarten provision for four-year-olds in Nova Scotia, Quebec, Manitoba, Saskatchewan, Alberta, and Yukon. Ontario, which is the only province with kindergarten for all four year olds, will have moved to full-day kindergarten for all four and five year olds in the fall of 2014.
- Six provinces now offer kindergarten for a full school-day: Prince Edward Island, Nova Scotia, New Brunswick, Quebec, Ontario (fall of 2014), and British Columbia. Northwest Territories and Yukon have some full-day provision. Newfoundland and Labrador has announced that it too will soon move to full-day kindergarten.

Auspice (ownership)

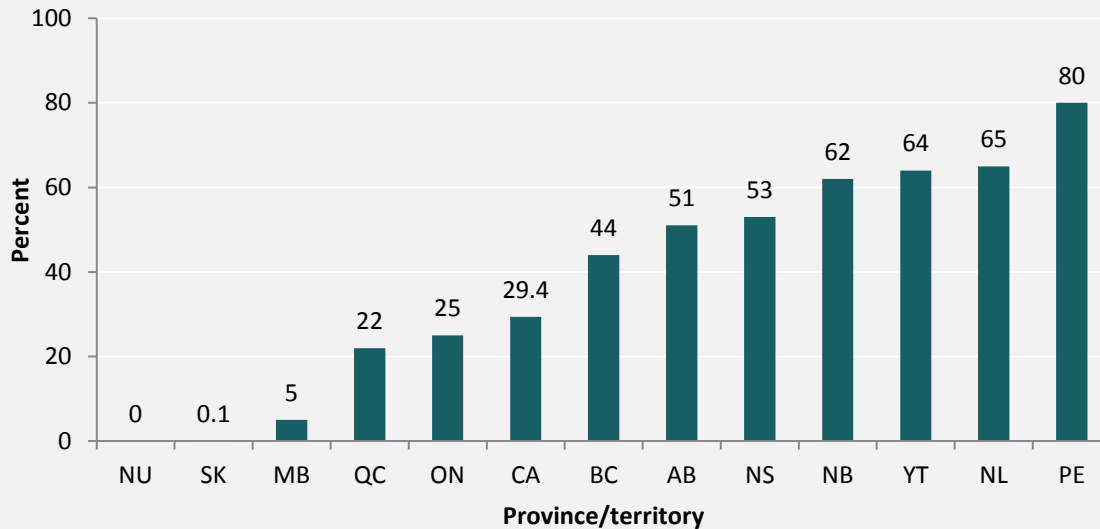
- As Figure 9 shows, in 2012, the proportion of spaces in the for-profit sector was at its highest level since 1992.
- The size of the for-profit sector has grown steadily since 2004 when it accounted for 20% of regulated spaces; now 29.4% of spaces are for-profit – up nearly 10% in eight years.

FIGURE 9. Percent of regulated centre-based spaces that are for-profit , 1992-2012



- As Figure 10 shows, the proportion of child care spaces that are for-profit ranges from 0% of spaces in Nunavut to 80% of total centre spaces in Prince Edward Island.

FIGURE 10. Percent of regulated centre-based child care spaces that are for-profit, by province/territory, 2012



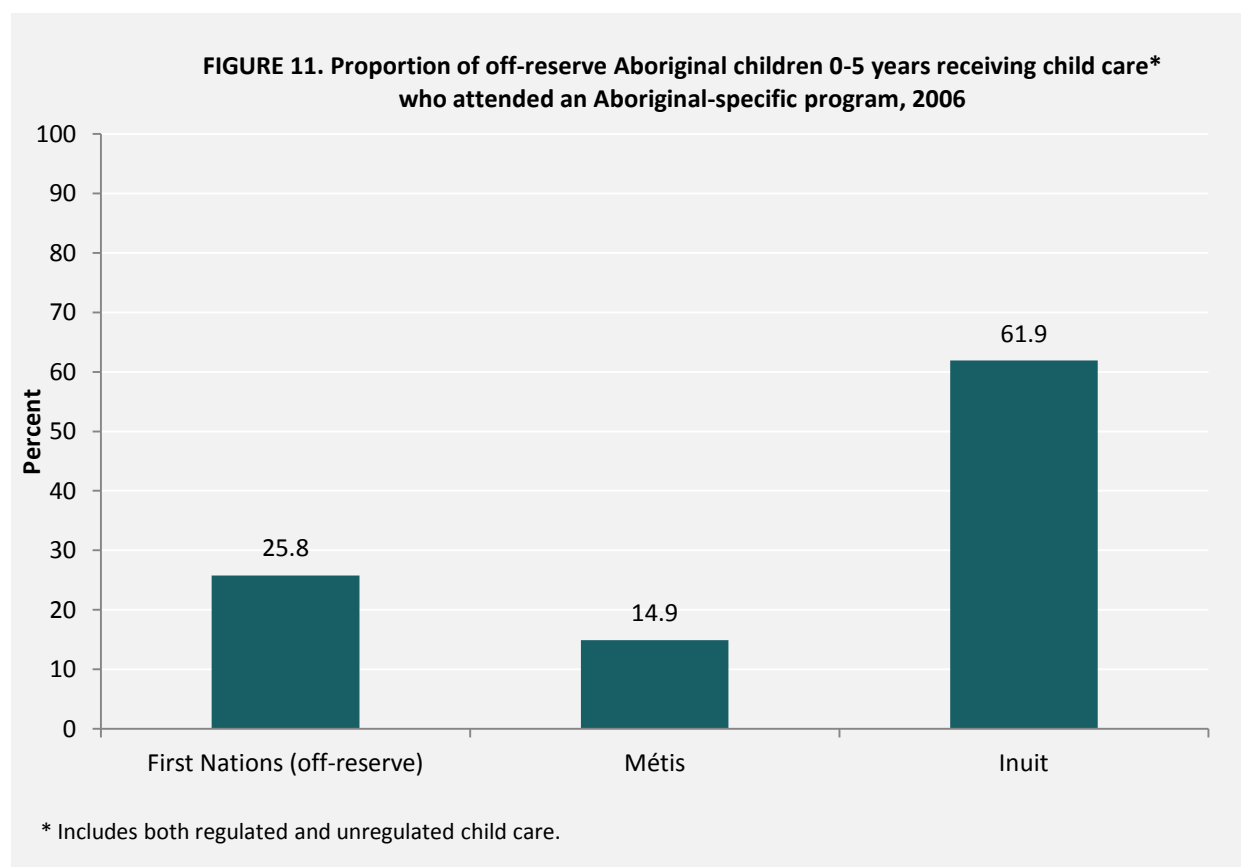
- The for-profit sector accounted for 58% of centre space expansion between 2010 and 2012. As Table 7 shows, in seven of the provinces/territories, more than 50% of space expansion was in the for-profit sector between 2010 and 2012.
- Of the provinces that use an agency model for family child care, Ontario and Alberta had for-profit family child care agencies. In Alberta, 45% of the family child care agencies were for-profit in 2012.
- There is some publicly-delivered child care in a number of provinces.
 - In Quebec, all school-age child care is operated by schools.
 - Ontario has been the sole province with a substantial municipally-operated child care sector in recent years. However, it has been shrinking. Municipal spaces are down from 18,143 spaces or 11% of total centre spaces in 1998 to 7,192 spaces or 2.6% of total centre spaces in 2012.
 - Alberta, Saskatchewan and Newfoundland and Labrador all have several publicly-delivered child care centres.

TABLE 7. Non-profit and for-profit child care spaces and percent of expansion that was in the for-profit sector, 2010 and 2012

P/T	Number of non-profit centre spaces in 2010 and 2012 and the difference between years (growth or reduction)			Number of for-profit centre spaces in 2010 and 2012 and the difference between years (growth or reduction)			% of expansion 2010-2012 that was for-profit
	2010	2012	+/-	2010	2012	+/-	
NL	1,615	2,332	+717	4,181	4,263	+82	10
PE	2,126	804	-1,322	2,958	3,219	+261	100 +
NS	7,194	7,595	+401	7,674	8,742	+1,068	73
NB	7,065	7,916	+851	11,720	12,799	+1,079	56
QC	242,539	247,664	+5,125	50,038	68,809	+18,771	79
ON	192,256	205,791	+13,535	65,201	70,109	+4,908	27
MB	24,871	26,300	+1,429	1,174	1,268	+94	6
SK	8,609	9,008	+399	0	61	+61	13
AB	41,506	39,545	-1,961	40,835	40,914	+79	100 +
BC	45,956	48,346	+2,390	35,267	38,647	+3,380	59
NT	1,385	1,785	+400	0	0	0	0
NU	1,015	1,104	+89	0	0	0	0
YT	639	430	-200	512	774	+262	100+
CA	576,776	598,620	+21,853	219,560	249,605	+30,045	58

Aboriginal child care

- There were 136,095 children 0-4 years identifying with an Aboriginal group (2011).
- In 2009, the Canadian Council on Learning¹³ reported that 50% of all off-reserve Aboriginal children 0-5 years (2006 data) and 44% of on-reserve First Nations children 0-5 years (2002 data) were in some kind of child care (centre-based, regulated and unregulated home child care).
 - Of children 0-5 years in child care, 52% of off-reserve Aboriginal children and 31% of on-reserve First Nations children were in a centre-based program.
 - Thus, among all Aboriginal children 0-5 years, 26% of off-reserve Aboriginal children (2006) and 13.8% of on-reserve First Nations children (2002) were in centre-based child care.
- Among off-reserve Aboriginal children in regulated or unregulated child care in 2006, 18% were in an Aboriginal-specific child care program – one that promoted First Nations, Inuit or Métis customs and cultural values. As Figure 11¹⁴ shows, Inuit children (62%) were more likely to participate in such programs than off-reserve First Nations children (26%) or Métis children (15%).



- A 2012 study of the First Nations ECE sector in British Columbia,¹⁵ found that 23% of First Nations communities in BC had no early childhood education and care services.

Human resources¹⁶

- As Table 8 shows, the median gross hourly wage for child care program staff in 2012 was \$16.50. For program directors the median gross hourly wage was \$22.00. This represents a median gross annual salary of \$30,146 for front-line staff and \$40,194 for directors (assuming full-time, full-year employment).
- In October 2012, the average hourly wage in Canada across all occupations was \$23.92.
 - Program staff earn 69% of the average wage.
 - Centre directors earn 92% of the average wage.
- Between 1998 and 2012, after adjusting for inflation, wages rose for program staff in all jurisdictions except Ontario, where they dropped slightly (Table 8).
- The data show that the hourly increase over that time was highest in Quebec at \$5.42. Several other provinces had hourly adjusted increases in the \$4.00+ an hour range.
- After adjusting for inflation, the Canada-wide mean increase for program staff was \$1.14 an hour over the 14 year period between the 1998 and 2012 data collections (or an average hourly wage increase of \$.08 a year). As low wages are a key issue in Canadian child care, linked to recruitment and retention problems, this is a matter of concern.

TABLE 8. Median gross hourly wages for program staff, provinces/Canada total 1998 (adjusted to 2012 dollars) and 2012

Prov.	1998 (adjusted to 2012 dollar)	2012
	\$	\$
NL	9.39	14.00
PE	10.42	15.00
NS	11.62	12.84
NB	9.42	13.50
QC	13.89	19.13
ON	17.76	17.29
MB	13.28	16.00
SK	14.03	14.92
AB	11.18	15.33
BC	16.20	17.00
CAN	15.36	16.50

- As Table 9 shows, ECE and other training requirements for centre directors are not high. Five provinces require at least a two year ECE diploma, one requires one year. In one province a director may have “equivalent” education, while in five jurisdictions training requirements for a director are either not specified or not required. Only one province, Manitoba, requires more than a two year diploma for a centre director.
- In five provinces/territories, at least 50% of program staff are required to have at least a one year ECE credential, while in eight jurisdictions, the requirements are lower.

TABLE 9. Minimum post-secondary early childhood training requirements for staff in full-time child care centres, 2012

P/T	Centre directors	Other full-time staff
NL	Two year ECE diploma	One year ECE certificate/ one staff member per group. All - 30-60 hour course/others. In infant care/one-year certificate in ECE required - all staff.
PE	One year ECE diploma	One staff per centre - one year ECE diploma.
NS	Training program in ECE or equivalent	Training program in ECE or equivalent – 2/3 of staff.
NB	Director or designate or ¼ of staff – one year ECE certificate or equivalent	See centre directors.
QC	Not specified	2/3 of staff in centres – college/university ECE. The college diploma may be a three-year Diplôme d'études collégiales (DEC) or a one-year Attestation d'études collégiales combined with three years experience.
ON	Two year ECE diploma/approved College of Arts and Technology (CAAT) or equivalent	One staff/ group - two year ECE diploma from approved CAAT or equivalent.
MB	Post-diploma continuing education certificate or degree program from an approved MB post-secondary institution	ECE diploma from recognized MB community college or Manitoba Child Care Program's Competency Based Assessment (CBA) program – 2/3 of staff for 0-6 year olds and ½ of staff for school-age and nursery school. All - 40 hours of approved training within first year of work.
SK	Two year ECE diploma	50% of staff – one year ECE. All - 120 hour child care orientation course.
AB	Two year ECE diploma	25% of staff – one year ECE certificate. All - orientation course or equivalent ECE-related course work - 45 hours.
BC	Not specified.	With infant/toddler groups up to 36 months –basic ECE training at approved training institution/one staff plus infant/toddler educator with specialized post-basic training/one staff. With groups 30 months to school-age – basic ECE training for one staff.
NT	No training required.	No training required.
NU	No training required.	No training required.
YT	Not specified.	20% of staff - two year ECD training or degree/Health and Social Services or Education plus 60 hour course. Additional 30% of staff - one year ECD training. 60 hour course - all others.

- As Table 10 shows, regulated family child care is licensed directly by the province/territory in eight jurisdictions. Four jurisdictions use an agency model, while Newfoundland and Labrador and Alberta use both approaches.
- Three provinces (Quebec, Manitoba, Alberta) allow group family child care (more than one provider in a home).
- Nine provinces/territories require at least one minimum training course for family child care providers.

TABLE 10. Regulated family child care: Required ECE training and administrative model 2012

P/T	Required ECE training	Agency model or individually licensed providers
NL	Minimum course (30 hours every 3 years)	Both agencies and individual licenses
PE	Minimum course (30 hours)	Individual licenses
NS	Minimum course - Level 1/Canadian Child Care Federation family day care training	Agency model
NB	None	Individual licenses
QC	Minimum course (45 hours + 6 hours each year)	Agency model and regulated group family child care
ON	None	Agency model
MB	Minimum course (40 hours/community college)	Individual licenses and licensed group family child care
SK	Minimum course (40 hours)	Individual licenses
AB	Minimum course	Agency model (contracted and approved, not licensed) and licensed group family child care homes. Some individual licenses.
BC	Minimum course (20 hours)	Individual licenses
NT	None	Individual licenses
NU	None	Individual licenses
YT	Minimum course (60 hours, family day home course or equivalent)	Individual licenses

Unionization¹⁷

- Canadian child care is not highly unionized. Analysis of data from the 2012 *You bet we still care!* survey of child care staff and employers shows that, of the 2,365 staff who responded to a question about union membership, 21.5% Canada-wide identified themselves as union members.
- Union membership in this survey ranged from a high of 30% of staff in Quebec and 29.4% in British Columbia to 0% in New Brunswick.
- The survey found a number of key differences between unionized and non-unionized child care employees and their workplaces, and some areas where there were no differences. Key areas of difference included: higher staff retention, higher wages and benefits, some workplace practices and characteristics, and some areas of job satisfaction.
- On average, wages for staff in unionized centres were \$4.61 an hour higher than those in non-unionized centres (\$20.11/hour compared to \$15.50 for non-unionized staff).
- The biggest difference was in Ontario, where unionized staff were paid an average of \$23.06/hour, while non-unionized staff were paid \$15.77/hour.
- Looking at comparative wages in quartiles in each province/territory, 47.1% of unionized staff were in the highest quartile in their province/territory, while 8.0% were in their jurisdiction's lowest quartile.

Data deficits: What's missing and why

In 2003, Canadian researchers reporting on the National Data Project¹⁸ described the state of ECEC data as “incomplete and inconsistent”. It could be argued that Canadian ECEC data have only become more fragile since then and that the availability and collection of data has become more challenging.

While there never has been a national data and research program for child care, since the late 1980s, the Childcare Resource and Research Unit collected administrative data from provinces/territories, a bi-annual project funded by the federal government until 2006. This, together with available research and demographic data from Statistics Canada and data from other key research such as *You Bet I Care!* has made up Canada's main child care data for 20 years. The 2012 edition of *ECEC in Canada* was the first collected and synthesized without any kind of federal government funding and was, by necessity, a “bare-bones” version, providing only the most basic information, and available only online.

Early childhood education and care in Canada 2012 was CRRU's ninth edition of consistently collected information—consistent in format, content and methodology across provinces/territories and longitudinally. This cross-Canada data on ECEC programs (compiled and published about every two years) since 1992 forms a body of information that is both comparative across Canada and longitudinally over a 20 year period. This makes it possible to identify trends and developments over time—information invaluable for research, policymaking, advocacy and service planning.

Some data (for example, federal contributions to provinces/territories for child care and data on children with special needs from Statistics Canada's post-censal Participation and Activity Limitation Survey (PALS) are no longer available and some information (for example, data about Aboriginal child care and detailed information about kindergarten) were not compiled for CRRU's 2012 version of *ECEC in Canada* due to insufficient resources.

Consistent collection of ECEC data is vitally important to ensure the best policy and program design, services planning, accountability of public funds, and evaluation of program effectiveness. The lack of good quality ECEC data means that meeting these objectives is increasingly difficult today.

ENDNOTES

- ¹ The main source of data for this document is: Friendly, M., Halfon, S., Beach, J. & Forer, B. (2013). *Early childhood education and care in Canada 2012*. Toronto: Childcare Resource and Research Unit. Available online at: <http://childcarecanada.org/publications/ecec-canada/13/08/early-childhood-education-and-care-canada-2012>. Notes on the methodology can be found on pg. 4 of that document. Previous editions of *ECEC in Canada* are available at: <http://childcarecanada.org/publications/ecec-in-canada>.
- ² In addition, in Ontario, municipalities play an important mandated role as “local service managers”.
- ³ Source: Department of Finance Canada (2011). What is the Canada Social Transfer (CST)? Online at: <https://www.fin.gc.ca/fedprov/cst-eng.asp>.
- ⁴ See the Federal Government chapter (pp. 13-25) of *Public investments in early childhood education and care in Canada 2010* for a more thorough explanation of federal contributions. Available online at: http://www.ecd-elcc.ca/eng/ecd/ececc/early_childhood_education-eng.pdf.
- ⁵ See Table 31 (pg. 209) in *Early childhood education and care in Canada 2008*. Available online at: http://childcarecanada.org/sites/default/files/ECEC08_LONG_VIEW.pdf.
- ⁶ Note that the age definitions for “school-age” vary across provinces/territories, so it should not be assumed that these are comparable by age.
- ⁷ Note that regulated family child care does not necessarily use the concept of “spaces” in the same way that it is used in centre-based child care; this figure may represent enrolment, not licensed capacity.
- ⁸ UNICEF (2008). *The child care transition, Innocenti Report Card 8, 2008*. Florence: UNICEF Innocenti Research Centre.
- ⁹ Adjustment for inflation was calculated using the Bank of Canada Inflation Calculator, available online at: <http://www.bankofcanada.ca/rates/related/inflation-calculator/>.
- ¹⁰ Note that totals may not add up due to rounding and adjustment. The 2012 total includes the 2010 figure for Northwest Territories, as more recent information was not available.
- ¹¹ Source: Statistics Canada and Council of Education Ministers Canada. (2012). *Education indicators in Canada: An international perspective 2012*. Available online at: <http://www.statcan.gc.ca/pub/81-604-x/81-604-x2012001-eng.pdf>.
- ¹² Source: Flanagan, K., Beach, J. & Varmuza, P. (2013). *You bet we still care. A survey of centre-based early childhood education and care in Canada: Highlights report*. Ottawa: Child Care Human Resources Sector Council. online at: http://www.wstcoast.org/pdf/YouBetSurveyReport_Final.pdf. Territorial specific data was not available due to the small number of responses.
- ¹³ Canadian Council on Learning (2009). *The state of Aboriginal learning in Canada: A holistic approach to measuring success*. Ottawa: Author. Available online at: http://www.ccl-cca.ca/pdfs/StateAboriginalLearning/SAL-FINALReport_EN.PDF.
- ¹⁴ Figure 11 is adapted from Figure 3.2 (pg 34) of Canadian Council on Learning (2009). *The state of Aboriginal learning in Canada: A holistic approach to measuring success*. Ottawa: Author. Available online at: http://www.ccl-cca.ca/pdfs/StateAboriginalLearning/SAL-FINALReport_EN.PDF. Data source: Statistics Canada, Aboriginal Children's Survey 2006. Special tabulation, unpublished data received by CCL in 2009 by special request.
- ¹⁵ BC Aboriginal Child Care Society (2012). *Training, recruitment and retention in the First Nations ECE sector: Background paper*. Available online at: http://www.acc-society.bc.ca/files_2/documents/BackgroundPaper.pdf.
- ¹⁶ The source for this section is: Flanagan, K., Beach, J. & Varmuza, P. (2013). *You bet we still care. A survey of centre-based early childhood education and care in Canada: Highlights report*. Ottawa: Child Care Human Resources Sector Council. Available online at: http://www.wstcoast.org/pdf/YouBetSurveyReport_Final.pdf.
- ¹⁷ The source for this section is: Beach, J., Flanagan, K. & Varmuza, P. (2014). *Unionization and human resources in child care: What did we learn from the You Bet We Still Care Survey?* Ottawa: Canadian Union of Public Employees and the British Columbia Government Employees Union.
- ¹⁸ Cleveland, G., Colley, S., Friendly, M. & Lero, D. (2003). *The state of data on early childhood education and care in Canada. Final report of the National Data Project*. Toronto: Childcare Resource and Research Unit. Available online at: http://childcarecanada.org/sites/default/files/State_data.pdf.