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serving children aged 0 to 5 years in
Canada, 2021 to 2022**



by Thomas J. Charters and Leanne C. Findlay

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Characteristics of child care centres serving children aged 0 to 5 years in Canada, 2021 to 2022

by Thomas J. Charters and Leanne C. Findlay

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Abstract

A significant increase in the use of child care for children aged 0 to 5 years has occurred over the past several decades, particularly the use of centre-based care. In 2021, the federal government committed over \$27.2 billion in funding through bilateral agreements with the provinces and territories to build a Canada-wide early learning and child care system. The current study describes findings from the 2022 Canadian Survey on the Provision of Child Care Services (CSPCCS), which is the first national survey to provide a snapshot of child care services in Canada. Nationally comparable data are critical as a benchmark of the state of child care in Canada to measure change over time and to inform future policy development. Results suggest that there were 12,664 child care centres across Canada providing care to children aged 0 to 5 years in April 2022. About 9 in 10 centres offered full-time care, two-thirds offered part-time care, and one-third offered before- or after-school care. Less common options included drop-in or flexible care (16%) and care during evenings, on weekends or overnight (2%), suggesting that there are few centre-based care options for parents who work non-standard hours. Around half of the centres were not for profit or government operated and had made accommodations for at least one child with a disability, and more than two-thirds of their staff had an early childhood education diploma or certificate, or higher. In terms of the impact of COVID-19, 95% of centres had experienced at least one negative impact in the year prior to the survey, 42% reported one to three impacts and 53% reported four or more negative impacts. Although the CSPCCS provides recent national information on the provision of child care services (as of April 2022), several limitations with respect to the sampling frame and the questionnaire were noted to inform future data collection activities.

Keywords: early learning and child care, centre-based child care, licensed care, services

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Introduction

An increase in women's participation in the Canadian workforce, particularly that of mothers, as well as an increase in lone parents (Friendly et al., 2020; Statistics Canada, 2022a) has contributed to an increased demand for child care in Canada. In addition to providing care while working, child care is used by many families for other reasons, such as socialization and skill development for children. Among children younger than 6 years, use of non-parental child care increased from 42% in 1994 and 1995 (Bushnik, 2006) to 52% in 2022 (Statistics Canada, 2022b). In particular, the use of centre-based child care for children aged 0 to 5 years has become more common, increasing from 6% in 1973 to nearly half of all children using child care in 2019 (Cleveland, 2022; Findlay, 2019). The number of centre-based child care spaces has also grown substantially to about 600,000 full- or part-day spaces across the country in 2019, enough for 27% of children aged 0 to 5 years in Canada (Friendly et al., 2020).

In 2021, the federal government committed over \$27.2 billion in funding through bilateral agreements with the provinces and territories to build a Canada-wide early learning and child care system (Department of Finance, 2021; Employment and Social Development Canada, 2022). These investments will support the Multilateral Early Learning and Child Care Framework vision for accessible, affordable, inclusive, flexible and high-quality care (Employment and Social Development Canada, 2017). A seminal series of reports produced by the Childcare Resource and Research Unit, *Early Childhood Education and Care in Canada*, has reported on licensed child care approximately every two years since 1991, including information on spaces, funding, regulations and staffing, as well as a snapshot of policies and care provision within jurisdictions. Information is largely based on administrative provincial and territorial data, which prove difficult to compare across jurisdictions because of differences in how key child care concepts and categories are defined. Nationally comparable data are critical as a benchmark of the state of child care in Canada to measure change over time and to inform future policy development.

In Canada, child care is often described in three categories: centre-based, licensed (or regulated)¹ home-based and unlicensed home-based care. Centre-based care includes daycare centres, preschools and *centres de la petite enfance* (CPE) centres in Quebec. Centres are typically located in a non-residential building; are generally larger than home-based care in terms of the number of children served and the number of employees; and follow centre-specific regulatory standards for service delivery, such as child-to-staff ratios and health and safety standards. Licensed and unlicensed child care homes are differentiated in terms of provincial and territorial regulations for service delivery; eligibility for operational funding; monitoring and oversight by an agency, province or municipality; and investigation of complaints (Friendly et al., 2020). The remainder of this report will focus on child care centres that serve children aged 0 to 5 (and possibly older children), although future analyses of the current dataset will be conducted to explore child care that occurs in home-based settings.

Centre characteristics

Not-for-profit status

Child care centres can be privately or publicly owned and operated (see Friendly, Vickerson, Mohamed, Rothman, and Nguyen (2021)). "Public" child care centres include those operated by a government body, such as a municipality or school board, while "private" child care comprises all not-for-profit (e.g., non-profit, charitable or cooperative types of organizations) and for-profit service providers. Not-for-profit centres tend to hire more qualified staff (Cleveland, Forer, Hyatt, Japel, & Krashinsky, 2007), have less staff turnover and offer higher wages (Huntsman, 2008; Kershaw, Forer, & Goelman, 2004). These factors likely contribute to the overall higher quality ratings found in not-for-profit centres (Doherty, Friendly, & Forer, 2002). Higher child care quality has previously been shown to have beneficial

1. The literature uses the terms "regulated" and "licensed" care to describe child care environments that follow jurisdictional requirements for care; a license is thus issued to the provider or their regulating body (e.g., a child care agency). However, the term "licensed" was used on the survey and thus is used in this report.

associations with socialization, cognitive, developmental and academic outcomes (Peisner-Feinberg et al., 2001; van Huizen & Plantenga, 2018).

Services provided

Child care services can also be described in terms of the flexibility and number of hours care is provided for, including full-time or part-time care, irregular care, or care during non-standard hours (i.e., evenings, weekends and overnight services). According to Lero and colleagues (2021), 38% of preschool-aged children in Canada had at least one parent who worked non-standard hours in 2016 and 2017 (e.g., regular evening or night shifts, or irregular or rotating shifts), representing more than 625,000 families. This has significant implications for child care needs and use patterns. Mothers who work non-standard hours are less likely to use child care overall and, when they do use care, are less likely to use it on a regular basis (Lero et al., 2021; Zhang, Garner, Heidinger, & Findlay, 2021). Lero and colleagues (2021) estimated that in 2019, 2% of child care centres offered non-standard-hour care. Current national data to describe the availability of non-standard care options are lacking.

Child care spaces

The number of child care spaces available to meet the needs of Canadian children is critically important information for families, service providers and policy makers. The report *Early Childhood Education and Care in Canada, 2019* (Friendly et al., 2020) estimated that there were 1.5 million licensed child care spaces for children aged 0 to 12 years in 2019, an increase of approximately 156,000 spaces since 2016. Centre-based care accounted for 91% of these spaces, although it is yet unclear how many spaces are available or used for full-time versus part-time child care in a consistent manner across the country.

Very little information is available to describe the characteristics of children using licensed child care, such as their socioeconomic status, Indigenous or immigrant identity, and disability status. One pillar of the Multilateral Early Learning and Child Care Framework is the provision of inclusive care for children of all backgrounds and abilities. Budget 2022 announced \$625 million over four years to enable provinces and territories to invest in child care specifically for children with disabilities (Department of Finance, 2022). Very little information is available to describe child care use among children with disabilities, although a forthcoming Statistics Canada pilot survey will capture parent-reported information on child care use and barriers for this population. At the service provision level, some provinces and territories capture administrative information related to the provision of support services within child care (see Friendly et al. (2020)), although comparability of information across the country presents challenges. It is important to consider not only the number of children with disabilities who are enrolled, but also the extent to which centres have policies, practices and supports to ensure quality and inclusion (Irwin & Lero, 2021).

Child care fees

A family's ability to afford and use child care is largely determined by the amount charged by the child care provider for the service. This includes both the amount paid by the parent (i.e., parent "out of pocket" fees) and any subsidy² received by the parent or child care provider, and often varies by child age. Fees are largely market driven, with median fees for infants ranging from \$189 per month across the province of Quebec to \$1,948 in Toronto in 2021 (Macdonald & Friendly, 2022).

Unlike other Canadian jurisdictions, the Quebec government offers a reduced contribution program for children aged 0 to 5 years enrolled in CPEs and for-profit centres (*garderies*). In 2022, the rate was \$8.70 per day (Ministère des Finances, 2022). Approximately one-third of licensed spaces are not offered at

2. All provinces and territories outside Quebec (which offers a reduced contribution program) provide support to eligible families by subsidizing fees for licensed child care. The subsidy may cover the entire fee or may be a partial subsidy. Different provinces, territories and municipalities may define and distribute subsidies in different ways, and in most Canadian jurisdictions, parental eligibility is income- or means-tested.

the reduced rate because of the limited number of subsidized spaces to meet demand, although parents who pay market fees are eligible for a tax credit that pays up to 90% of their fees (Macdonald & Friendly, 2020; Mathieu, 2021).

Staff, qualifications, and pay

A clear gap in the existing literature is the lack of recent, national information on the child care workforce, including the number of child care staff employed at child care centres, training and educational qualifications, and compensation. Staff with higher early childhood education (ECE) qualifications tend to provide more personalized, interactive and developmentally appropriate care (Bigras et al., 2010; Fukkink & Lont, 2007), and settings staffed by employees with higher levels of ECE education and professional training have been associated with higher-quality care (Huntsman, 2008; Slot, 2018). Furthermore, higher wages are important to attract and retain qualified staff and to reduce staff turnover (Flanagan, Beach, & Varmuza, 2013; Friendly, 2019). Up-to-date information on staffing levels, qualifications and wages is crucial for informing child care workforce strategies that aim to increase recruitment and retention of trained early childhood educators.

The impact of COVID-19 on child care services

The COVID-19 pandemic led to substantial declines in overall labour force activity in Canada (Lemieux, Milligan, Schirle, & Skuterud, 2020). In the first few months of the pandemic, most jurisdictions mandated a temporary closure of child care centres and schools and—in some provinces and territories—family child care homes. Approximately 72% of centres had closed as of April or May 2020, with most other centres remaining open only to provide care to the children of essential workers (Friendly, Forer, Vickerson, & Mohamed, 2021). Following considerable drops in child enrolment and potential losses in revenue (Macdonald & Friendly, 2021), most centres reported laying off staff (Friendly, Forer, et al., 2021), demonstrated by sharp declines in employment and payroll in the child care sector (Statistics Canada, 2021; Uppal & Savage, 2021). Even into 2021, 73% of centres reported that enrolment was somewhat or much lower than pre-pandemic levels (Vickerson, Friendly, Forer, Mohamed, & Nguyen, 2022).

Clearly, the COVID-19 pandemic has disrupted the provision of child care services in Canada. Results from the Canadian Survey on the Provision of Child Care Services (CSPCCS) provide a means to examine the state of child care in early 2022. The survey also explored the negative impacts of the COVID-19 pandemic as they relate to characteristics of centre-based child care services.

Materials and methods

Data source

The 2022 CSPCCS is a cross-sectional survey conducted by Statistics Canada in partnership with Employment and Social Development Canada (Statistics Canada, 2022c). The CSPCCS provides a snapshot of child care services in Canada for children aged 12 and younger at the national, provincial and territorial levels. Data were collected using an electronic questionnaire, with telephone follow-up to complete full or partial non-response cases. Collection took place from April to July 2022.

The target population was centre-based child care providers and licensed and unlicensed home-based child care providers.³ The survey frame was built based on (1) businesses identified as child day-care services (North American Industry Classification System [NAICS] code 62441) on Statistics Canada's Business Register as of February 2022 that reported at least \$2,500 in annual revenue and (2) publicly

3. Licensed and unlicensed home-based child cares are excluded from the current study.

available provincial and territorial lists of licensed child care providers. More information on the frame is available elsewhere (Statistics Canada, 2022c). A sample of 20,000 child care centres was selected, with a response rate of 42%. Sampling was stratified by the probability of being in one of the three types of child care (centre, licensed home-based and unlicensed home-based) and by province or territorial region. Auxiliary information related to employment and revenue was used to predict child care type. Further stratifications were made according to for-profit or not-for-profit status and urban or rural location where possible. For the purpose of this report, only child care centres that provided care to children aged 5 years and younger⁴ and that did not solely provide care to school-aged children⁵ were considered ($n = 3,306$).

Measures

Child care operators or directors provided information on services provided, child enrolment, staff, qualifications and pay on April 6, 2022. Several response options were specific to nominal child age categories (i.e., infants, toddlers, and preschool-aged and school-aged children). As regulations related to age groups differ across jurisdictions (Friendly et al., 2020), respondents were asked to respond in accordance with how these categories were defined within their jurisdiction. Thus, comparisons across provinces or territories are challenging to interpret because the same nominal categories may correspond to different age ranges. Note that the toddler age category is not defined in certain jurisdictions;⁶ therefore, “toddler” was not a valid response.

Characteristics of child care centres included whether they served children of a given category, whether they were licensed by child care authorities, and auspice (private not-for-profit legal status or government-operated,⁷ private for-profit). Information was also collected on five types of care options, including (1) full-time;⁸ (2) part-time; (3) before or after school; (4) during evenings, on weekends or overnight; and (5) on a drop-in or flexible basis. Respondents also indicated whether they served one or more children (of any age) with a disability for whom accommodations were provided⁹ or whether they were receiving a fee subsidy. Further, the survey captured the full-time daily fee per child (including subsidies) charged by centres, by category. National fee estimates were restricted to centres offering full-time care options and operating outside the province of Quebec. Estimates on the enrolment of children with subsidies were likewise restricted to regions outside Quebec.¹⁰

Characteristics of centre staff included counts of those providing direct care to children, their qualifications, and pay on April 6, 2022. Supervisors were included in staff counts because they may also have care responsibilities. Unpaid students and volunteers, support staff, or employees on leave¹¹ were excluded. To characterize the education and training profile of centre staff, the ratio of total (full- and part-time) staff with an ECE qualification at the diploma or certificate level (one to three years of postsecondary training) or higher (four-year degree or graduate training) to total staff was derived. Centres were characterized as having less than one-third, between one-third and two-thirds, or more than two-thirds of total staff providing direct care to children with an ECE certificate or diploma or higher. Centre directors

4. Centres that provided care to children aged older than 5 were included if these centres also cared for children aged younger than 6.
5. The sampling frame of the CSPCCS did not include centres offering before- and after-school programs operated by school boards and, as a result, may have undercounted these centres in certain jurisdictions.
6. Including Alberta, Manitoba, New Brunswick, the Northwest Territories, Nunavut and Yukon.
7. Centres were grouped into this category based on having not-for-profit legal status or being operated by a government agency, such as a school board or district, municipality, regional district, or public health authority.
8. “Full-time” referred to six hours per day or more for the whole week, and “part-time” referred to six hours or more per day for part of the week or less than six hours per day for up to the full week.
9. “Accommodation” referred to any part of the child care environment, curriculum or equipment that was designed, built or altered to encourage or facilitate full participation in daily activities by a child with disabilities.
10. In Quebec, some centres offer spaces at the reduced contribution rate, while other centres are not eligible, though child tax credits are used to offset fees (Revenu Quebec, 2022). Thus, it is difficult to interpret a mean across centres either within the province or as part of a national total.
11. These exclusions also apply to all characteristics in the study pertaining to centre staff (qualifications, salaries).

and operators further reported whether they met provincial and territorial requirements for staff qualifications. Responses included whether the centre (a) exceeded provincial and territorial requirements for the number of ECE staff, (b) met the requirements, (c) had permission to operate with fewer ECE-qualified staff than required or (d) had reduced the number of spaces operated because of an inability to meet requirements.¹² The most frequently paid hourly rates for supervisors and employees with and without ECE qualifications were also reported.

Negative impacts related to COVID-19 experienced in the year prior to the interview were reported, including lower enrolment or fewer children, difficulty recruiting and retaining skilled child care employees, loss of employees because of COVID-19-related health concerns, lost or reduced government funding, deferred rent on business space, costs associated specifically with COVID-19 health and safety requirements,¹³ difficulty maintaining government regulations associated with COVID-19 health and safety requirements, temporary shutdown of business, previous or ongoing loss of revenue, and other impacts. Respondents were able to select as many of the impacts as applied to them.

Analytical strategy

Descriptive analyses examined general centre characteristics, services provided, enrolment, staff, qualifications and pay at the national level. To reduce bias in mean estimates related to implausibly high values (outliers), counts relating to enrolment, staffing and fees at or above the 99th percentile were excluded. Mean counts were calculated only in eligible centres that offered the respective forms of care. Caution should be given to the interpretation of national tabulations across nominal categories, as these were aggregated across provincial and territorial jurisdictions that use different age-range definitions.

Cross-tabulations between descriptive characteristics of child care centres and selected impact indicators were made, and between-group differences were examined using unpaired t-tests. Differences between the characteristics of child care centres that experienced greater versus lesser impacts because of COVID-19 may provide insight into the potential effects of the COVID-19 pandemic on the provision of child care services. These results should not be interpreted as causal effects of the pandemic, because any differences in cross-sectional data cannot necessarily be attributed to the pandemic without observing pre-pandemic levels and accounting for other factors. Analyses were performed in SAS Enterprise Guide 8.3 using G-estimation macros (G-Est 2.03.004) for domain and variance estimation (Statistics Canada, 2022d).

Results

There were an estimated 12,664 child care centres across Canada providing care to children aged 0 to 5 years in April 2022 (see Chart 1 for provincial and territorial estimates). These centres enrolled approximately 565,000 children full time and 152,200 part time across Canada. About half of centres enrolled infants (54%), nearly three-quarters had toddlers (73%)¹⁴ and about 9 in 10 enrolled preschool-aged children (91%; see Table 1). Of the CSPCCS subpopulation that provided care to children aged 0 to 5, 4 in 10 also enrolled school-aged children (39%). About 9 in 10 centres were licensed by child care authorities, 2% were unlicensed and 8% uncertain. Half of centres reported private not-for-profit legal status or were government operated (50%). About 9 in 10 centres offered full-time care (88%), two-thirds offered part-time care (66%), and one-third offered before- or after-school care (37%). Less common options included drop-in or flexible care (16%) and care during evenings, on weekends or overnight (2%).

12. Provincial and territorial requirements stipulate the proportion of staff required to have ECE credentials and may be specific to child age (see Friendly et al. (2020)).

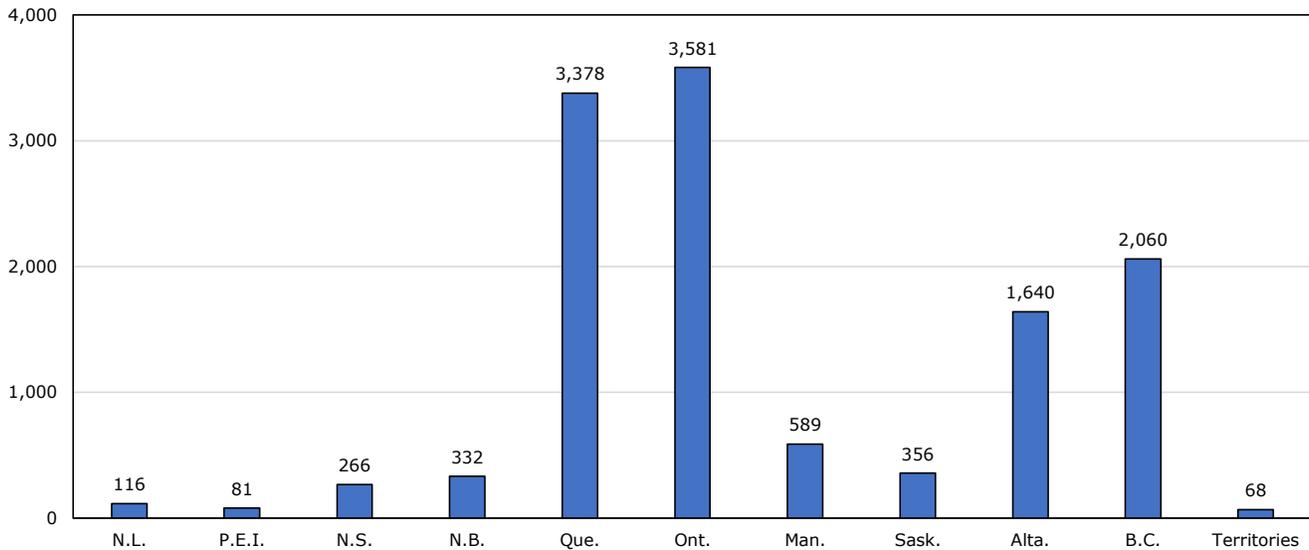
13. Such as those related to using personal protective equipment, doing additional cleaning and establishing distancing practices.

14. This age category was not defined in New Brunswick, Manitoba, Alberta or the territories; this estimate reflects all other regions in Canada.

Part-time, but not full-time, care was offered by 1 in 10 centres. Centres that offered full-time care enrolled, on average, 51 children on a full-time basis and centres offering part-time services enrolled 21 children on a part-time basis. Slightly less than half of centres accommodated at least one child with a disability (43%), and 85% had at least one child receiving a fee subsidy. Among centres offering full-time care outside Quebec, daily fees (including subsidies) were highest for infants (\$52.10) and lowest for school-aged children (\$30.80).

Chart 1
Child care centres by province and territory, Canada, April 2022

Number of centres



Source: Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2022.

Table 1
Characteristics of centre-based child care services, Canada, April 2022

	Canada
Weighted Count	12,466 percent
Centre characteristics	
Provides care to groups in age categories¹ (proportion)	
Infants (alt: no infants enrolled)	54.1
Toddlers (alt: no toddlers enrolled)	72.5
Preschool-aged children (alt: no preschool-aged children enrolled)	91.4
School-aged children (alt: no school-aged children enrolled)	39.3
Licensed by child care authorities (proportion)	
Licensed	90.6
Not licensed	1.8 ^E
Not sure	7.6
Auspice (proportion)	
Private not for profit or government operated	49.8
Private for profit	46.6
Don't know	3.6
Services provided	
Options offered at centre (proportion)	
Full time (alt: does not offer this option)	87.8
Part time (alt: does not offer this option)	66.2
Before or after school (alt: does not offer this option)	36.8
Evenings, weekends or overnight (alt: does not offer this option)	1.7
Drop in or flexible (alt: does not offer this option)	15.8
Centre offers part-time care only (proportion)	
Part-time only	10.0
Other options offered ⁵	90.0
Enrolment	
Number of children enrolled in centre full time² (mean)	
All age groups	51.4
Number of children enrolled in centre part time² (mean)	
All age groups	20.6
Children enrolled with disability (proportion)	
Any enrolment	43.4
No enrolment	56.6
Children enrolled with fee subsidy⁶ (proportion)	
Any enrolment	85.2
No enrolment	12.9
Don't know	1.9 ^E
Average full-time daily fee (\$) charged per child^{3,6} (mean)	
Infants	52.1
Toddlers	51.0
Preschool-aged children	43.7
School-aged children	30.8
Staff, qualifications and pay	
Number of employees providing direct care to children⁴ full time (mean)	
All age groups	9.7
Number of employees providing direct care to children⁴ part time (mean)	
All age groups	3.1
Education and training profile of full-time staff (proportion)	
Fewer than one-third of staff with ECE certificate, diploma or degree	15.8
One-third to two-thirds of staff with ECE certificate, diploma or degree	32.1
Over two-thirds of staff with ECE certificate, diploma or degree	52.0
Current staffing situation (proportion)	
Exceeds provincial or territorial requirements for ECE staff	40.0
Meets provincial or territorial requirements for ECE staff	47.8
Has permission to operate with fewer than required ECE staff	6.2
Reduced enrolment because of inability to hire ECE staff	6.0
Hourly rate (\$) most frequently paid (mean)	
Supervisory staff	27.8
Employees with ECE training	21.9
Employees with no ECE training	18.0

^E use with caution

1. Indicated by enrolment of any child within the given category (categories differ by province and territory).
2. Represents means in centres with non-zero counts for children enrolled on a given full- or part-time basis.
3. Average daily fees calculated only in centres offering the full-time child care option. Excluding Quebec.
4. Represents means in centres with non-zero counts for staff working on a given full- or part-time basis.
5. All other care options may include full-time care only, full- and part-time care, and other care options not including part- or full-time care.
6. Excludes Quebec from the sample.

Notes: alt=alternative response option to item not displayed in tables for brevity; ECE=early childhood education.

Source: Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2022.

On average, centres with full-time staff employed about 10 staff (including supervisors) providing direct care to children on a full-time basis. Centres employing part-time staff had three part-time staff or supervisors providing direct care to children. About half of centres had more than two-thirds of staff with an ECE qualification at the certificate or diploma level or higher, while 16% of centres had less than one-third of staff with these qualifications. Nearly 9 in 10 centres either met (48%) or exceeded (40%) provincial or territorial requirements for ECE staff. Other centres had permission to operate with fewer ECE staff (6%) or reduced enrolment when unable to meet requirements (6%). Mean hourly rates of pay (including wage enhancements) were highest among supervisory staff (\$27.80), and higher for employees with ECE qualifications (\$21.90) than for those without (\$18.00).

Table 2 shows the proportion of child care centres that did or did not experience negative impacts in the previous year because of COVID-19. The median number of negative impacts was three, with about 5% of centres not reporting any negative impacts, 42% reporting one to three and 53% reporting four or more. The most common impacts were costs associated specifically with COVID-19 health and safety requirements (68%), difficulty recruiting and retaining skilled child care employees (62%), and lower enrolment or fewer children (61%). Least often reported were impacts related to deferred rent on business space (6%). Several impacts were correlated with one another. For example, impacts related to difficulty recruiting and retaining skilled child care employees were significantly associated with loss of employees because of COVID-19-related health concerns (ϕ correlation coefficient=0.37) and impacts from lower enrolment or fewer children associated with previous or ongoing loss of revenue (ϕ =0.34).

Table 2**Negative impacts to centre-based child care services due to COVID-19 in the previous year, Canada, April 2022**

Negative impact	Response	
	Yes	No
	percent	
Lower enrolment or fewer children	61.3	38.7
Difficulty recruiting and retaining skilled child care employees	62.0	38.0
Loss of employees because of COVID-19-related health concerns	45.1	54.9
Lost or reduced government funding	18.1	81.9
Deferred rent on business space	6.4	93.6
Costs associated specifically with COVID-19 health and safety requirements ¹	67.7	32.3
Difficulty maintaining government regulations associated with COVID-19 health and safety requirement	32.9	67.1
Temporary shutdown of business	42.3	57.7
Previous or ongoing loss of revenue	37.4	62.6
Other	4.6	95.4

1. Costs relate, for example, to ratios, distancing, use of personal protective equipment and additional cleaning.

Source: Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2022.

Table 3 demonstrates the characteristics of child care centres by the three most common impacts: (a) lower enrolment or fewer children, (b) difficulty recruiting and retaining skilled child care employees, and (c) costs associated specifically with COVID-19 health and safety requirements. Centres impacted in the past year by lower enrolment or fewer children and difficulty recruiting and retaining skilled child care employees were more likely to have offered care to school-aged children at the time of the survey, tended to charge higher daily fees and tended to enrol children receiving fee subsidies. Further, centres impacted in the past year by lower enrolment or fewer children had proportionately fewer staff with higher levels of ECE qualifications. Centres that experienced difficulty recruiting and retaining skilled child care employees had higher mean full-time enrolment at the time of the survey, had slightly more staff, and were more likely to have either reduced enrolment or obtained permission to operate with fewer ECE staff than mandated. Centres impacted by costs associated specifically with COVID-19 health and safety requirements were somewhat more likely to be licensed, to be private not for profit or government operated, and to provide accommodations for a child with a disability.

Table 3
Characteristics of centre-based child care services by select negative impacts of the COVID-19 pandemic in the previous year, Canada, April 2022

	Lower enrolment or fewer children			Difficulty recruiting and retaining skilled child care employees			Costs associated specifically with COVID-19 health and safety requirements		
	Yes	No	Difference	Yes	No	Difference	Yes	No	Difference
Weighted Count	7,644	4,822	2,821	7,733	4,733	3,000	8,436	4,030	4,406
					percent				
Centre characteristics									
Provides care to groups in age categories¹ (proportion)									
Infants (alt: no infants enrolled)	47.9	64.0	-16.1 §	60.4	43.9	16.5 §	54.4	53.5	0.9
Toddlers (alt: no toddlers enrolled)	74.4	70.0	4.4	75.8	66.4	9.4 §	72.8	71.9	1.0
Preschool-aged children (alt: no preschool-aged children enrolled)	93.0	88.9	4.2 §	92.6	89.4	3.2 §	91.4	91.5	-0.1
School-aged children (alt: no school-aged children enrolled)	47.3	26.6	20.7 §	44.0	31.6	12.5 §	39.5	38.9	0.6
Licensed by child care authorities (proportion)									
Licensed	89.9	91.6	-1.6	91.2	89.6	1.6	91.7	88.3	3.4 §
Not licensed	2.0 ^E	1.4 ^E	0.6	F	3.2 ^E	F	1.6 ^E	2.2 ^E	-0.5
Not sure	8.0	7.0	1.0	F	7.2	F	6.7	9.6	-2.9 §
Auspice (proportion)									
Private not for profit or government operated	49.3	50.6	-1.4	50.2	49.2	0.9	52.4	44.4	7.9 §
Private for profit	46.6	46.6	0.0	46.2	47.3	-1.1	45.0	50.1	-5.1 §
Don't know	4.1	2.8 ^E	1.3	3.7 ^E	3.5	0.2	2.7	5.5 ^E	-2.8 §
Services provided									
Options offered at centre (proportion)									
Full time (alt: does not offer this option)	84.4	93.3	-8.9 §	93.0	79.3	13.7 §	89.1	85.0	4.2 §
Part time (alt: does not offer this option)	69.4	61.1	8.4 §	66.6	65.5	1.1	68.6	61.2	7.3 §
Before or after school (alt: does not offer this option)	45.4	23.1	22.3 §	41.4	29.1	12.3 §	36.7	36.8	-0.1
Evenings, weekends or overnight (alt: does not offer this option)	1.8 ^E	1.5 ^E	0.3	1.5 ^E	2.1 ^E	-0.6	1.8 ^E	1.5 ^E	0.3
Drop in or flexible (alt: does not offer this option)	16.6	14.5	2.1	17.6	12.9	4.7 §	16.1	15.3	0.8
Centre offers part-time care only (proportion)									
Part-time only	12.4	6.2	6.2 §	5.1	18.1	-13.0 §	8.9	12.4	-3.5 §
Other options offered ⁵	87.6	93.8	-6.2 §	94.9	81.9	13.0 §	91.1	87.6	3.5 §
Enrolment									
Number of children enrolled in centre full time² (mean)									
All age groups	47.4	57.4	-10.0 §	54.1	46.1	8.0 §	51.7	50.8	0.9
Number of children enrolled in centre part time² (mean)									
All age groups	22.4	17.0	5.3 §	19.8	21.8	-1.9	21.3	18.8	2.5
Children enrolled with disability (proportion)									
Any enrolment	41.0	47.2	-6.2 §	46.6	38.1	8.5 §	45.9	38.1	7.7 §
No enrolment	59.0	52.8	6.2 §	53.4	61.9	-8.5 §	54.1	61.9	-7.7 §
Children enrolled with fee subsidy⁶ (proportion)									
Any enrolment	86.7	81.1	5.6 §	87.7	81.0	6.8 §	85.7	84.0	1.7
No enrolment	12.0	F	F	11.7	14.9	-3.2	12.2	14.3	-2.1
Don't know	1.2 ^E	F	F	0.6 ^E	4.1 ^E	-3.6 §	2.1 ^E	1.6 ^E	0.4
Average full-time daily fee (\$) charged per child^{3,6} (mean)									
Infants	53.6	48.8	4.7 §	54.1	47.4	6.7 §	52.8	50.8	2.1
Toddlers	52.3	47.6	4.7 §	52.0	48.1	3.9 §	51.7	49.5	2.2
Preschool-aged children	44.7	41.1	3.6 §	44.8	41.2	3.6 §	44.6	41.5	3.1 §
School-aged children	31.2	29.8	1.4	31.6	28.7	2.9 §	31.1	30.3	0.8

^E use with caution

F too unreliable to be published

§ difference in estimates is statistically significant ($p < 0.05$)

1. Indicated by enrolment of any child within the given category (categories differ by province and territory).

2. Represents means in centres with non-zero counts for children enrolled on a given full- or part-time basis.

3. Average daily fees calculated only in centres offering the full-time child care option.

4. Represents means in centres with non-zero counts for staff working on a given full- or part-time basis.

5. All other care options may include full-time care only, full- and part-time care, and other care options not including part- or full-time care.

6. Excludes Quebec from the sample.

Notes: Some estimates are suppressed to ensure the reliability and confidentiality of estimates. alt=alternative response option to item not displayed in tables for brevity. ECE=early childhood education.

Source: Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2022.

Table 3
Characteristics of centre-based child care services by select negative impacts of the COVID-19 pandemic in the previous year, Canada, April 2022 (continued)

	Lower enrolment or fewer children			Difficulty recruiting and retaining skilled child care employees			Costs associated specifically with COVID-19 health and safety requirements		
	Yes	No	Difference	Yes	No	Difference	Yes	No	Difference
percent									
Staff, qualifications and pay									
Number of employees providing direct care to children⁴ full time (mean)									
All age groups	9.1	10.7	-1.6 §	10.6	8.2	2.4 §	9.9	9.4	0.5
Number of employees providing direct care to children⁴ part time (mean)									
All age groups	3.0	3.1	-0.1	3.2	2.8	0.4 §	3.1	2.9	0.2
Education and training profile of full-time staff (proportion)									
Fewer than one-third of staff with ECE certificate, diploma or degree	17.6	13.0	4.6 §	15.5	16.5	-1.0	15.2	17.2	-2.0
One-third to two-thirds of staff with ECE certificate, diploma or degree	33.4	30.1	3.3	33.6	29.7	3.9	33.5	29.1	4.4
Over two-thirds of staff with ECE certificate, diploma or degree	49.0	56.9	-7.9 §	51.0	53.8	-2.9	51.3	53.7	-2.4
Current staffing situation (proportion)									
Exceeds provincial or territorial requirements for ECE staff	37.3	44.3	-7.0 §	37.7	43.9	-6.2 §	41.1	37.7	3.4
Meets provincial or territorial requirements for ECE staff	50.0	44.4	5.6 §	47.1	49.1	-2.0	46.7	50.2	-3.5
Has permission to operate with fewer than required ECE staff	5.5	7.2	-1.6	7.3	4.3	3.0 §	5.8	6.9	-1.1
Reduced enrolment because of inability to hire ECE staff	7.2	4.1	3.1 §	7.9	2.8 ^E	5.1 §	6.3	5.2 ^E	1.2
Hourly rate (\$) most frequently paid (mean)									
Supervisory staff	27.0	29.2	-2.2 §	28.1	27.3	0.9 §	28.1	27.1	1.0 §
Employees with ECE training	21.4	22.6	-1.2 §	21.9	21.7	0.2	21.9	21.8	0.1
Employees with no ECE training	17.7	18.6	-0.9 §	18.1	18.0	0.1	18.0	18.1	-0.1

^E use with caution

F too unreliable to be published

§ difference in estimates is statistically significant ($p < 0.05$)

1. Indicated by enrolment of any child within the given category (categories differ by province and territory).

2. Represents means in centres with non-zero counts for children enrolled on a given full- or part-time basis.

3. Average daily fees calculated only in centres offering the full-time child care option.

4. Represents means in centres with non-zero counts for staff working on a given full- or part-time basis.

5. All other care options may include full-time care only, full- and part-time care, and other care options not including part- or full-time care.

6. Excludes Quebec from the sample.

Notes: Some estimates are suppressed to ensure the reliability and confidentiality of estimates. alt=alternative response option to item not displayed in tables for brevity.

ECE=early childhood education.

Source: Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2022.

Discussion

This report gives a snapshot of centres providing care to children aged 5 years and younger, as of April 2022, including the characteristics of centres that had or had not experienced negative impacts to their operations in the past year because of COVID-19. An estimated 12,664 centres across Canada provided care to children aged 0 to 5 in the spring of 2022, enrolling 717,200 children on either a full- or part-time basis. Most centres provided care to children in the toddler or preschool categories, were licensed, offered full-time care options, enrolled one or more children receiving a fee subsidy, and either met or exceeded provincial or territorial requirements for the number of ECE-qualified staff. Around half of the centres were not for profit or government operated, had made accommodations for an enrolled child with a disability, and had more than two-thirds of their staff with an ECE diploma or certificate or higher.

On average, centres enrolled more full-time than part-time children and hired more full-time than part-time employees. Less common options included drop-in or flexible care (16%) and care offered during evenings, on weekends or overnight (2%). This corresponds with a previous study suggesting that there are few centre-based care options for parents who work non-standard hours (Lero et al., 2021). While 9 out of 10 centres were licensed, there were more centres uncertain of their status than identified as unlicensed. Subsequent analysis suggested that centres offering only part-time care were 11 percentage points less likely to be licensed (81%, not shown) than others (92%). This is consistent with part-day

preschools and nursery schools that are exempt from licensing in a few jurisdictions (Friendly et al., 2020).

Nearly all centres had experienced at least one negative impact to their operations in the past year because of COVID-19, with more common impacts related to costs associated specifically with COVID-19 health and safety requirements, lower enrolment or fewer children, and difficulty recruiting and retaining skilled child care employees. However, COVID-19-related impacts likely vary dramatically from centre to centre and may be related to unobservable characteristics specific to each centre's unique situation, or to provincial, territorial or municipal regulations or supports (e.g., policies or funding programs).

Limitations

The CSPCCS has several limitations. Most centres operate under licensing criteria set by their respective province or territory that specify different definitions for child age categories, requirements for ECE training of centre-based staff, maximum group sizes, child-to-staff ratios and other criteria (Friendly et al., 2020). Although the survey and analyses considered enrolment and staffing by province- or territory-specific age category, aggregation of these categories at the national level should be interpreted with caution because they represent nominal categories, not specific age ranges.

Additional limitations relate to the sampling frame. First, the frame was drawn from the Canadian Business Register and publicly available lists of licensed and regulated child care providers, which may exclude some child care centres.¹⁵ For example, some child care centres are operated by schools or school boards (common in Quebec) that offer before- and after-school care to kindergarteners (aged 4 to 5) and would not be identified on the Business Register under the child care NAICS code, nor be licensed by their province or territory as a child care provider. Future surveys would benefit from using complete, up-to-date lists of child care services (as opposed to relying on publicly available information). The frame also does not include child care providers that were not in operation at the time of data collection (e.g., those that may have closed because of the pandemic); thus, the findings related to the impact of the pandemic may underestimate the experiences of the hardest-hit child care centres.

Limitations should also be noted with some of the survey questions. First, respondents may have had difficulty reporting child care fees "including subsidies" as per the questionnaire. Funding models vary by jurisdiction—fees may be fully paid upfront by parents (who then receive a subsidy), whereas in other jurisdictions, the subsidy is received directly by the child care centre. Some jurisdictions provide operating grants or other types of funding to offset the posted fee, and some have an established cap or limit on fees. Second, the question regarding wages included wage enhancements but excluded provincial top-ups; however, the nomenclature of these supplemental payments varies across jurisdictions. For example, in Newfoundland and Labrador, eligible staff receive a quarterly "educational supplement" in addition to the minimum salary of \$16 to \$18 per hour (Beach et al., in preparation). It is unclear whether respondents incorporated various forms of wage supplements, and this may influence the results. Finally, results on the proportion of centres meeting licensing requirements were generally higher than shown in administrative data (Friendly et al., 2020). This warrants further exploration. It should be noted that the licensing requirements regarding staff educational qualifications, a key component of licensing, vary a great deal across jurisdictions.

15. This is likely to be even more of an issue for home-based child care because many provinces and territories do not publish public records of home-based child care providers. Thus, studies must rely entirely on the Business Register to capture these forms of child care.

Conclusions and future directions

The current study is the first to report national estimates of the provision of child care services in centres that serve children aged 0 to 5 years. These results provide a description of the characteristics of child care centres in April 2022, prior to the implementation of most of the federal and provincial and territorial bilateral agreements, as well as the negative impacts of COVID-19 on the provision of centre-based child care. Future research could explore changes in these characteristics over time, as well as a further analysis of the characteristics of the centres that experienced the most negative impacts of the pandemic. Characteristics that warrant further exploration include the size of the child care centre (i.e., the number of children served), as well as the geographic location (province or territory, rural versus urban centres). While the focus of this report was on centres that provide care to children aged 0 to 5, information on licensed home-based child care, unlicensed home-based child care and centres that primarily provide care for school-aged children could be examined in future reports. This study also highlights the importance of having up-to-date, systematic data collection (e.g., repeated cycles of the CSPCCS) on child care services to monitor the child care landscape. Given the extent of policy changes currently being undertaken to enhance the affordability, availability, inclusiveness, flexibility and quality of child care, further research and continued data collection about the provision of child care services will be essential to gauge the impacts on this sector and on Canadian children and families.

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