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# Insights into the accessibility, affordability, inclusivity, flexibility and quality of child care centres in Canada, 2024



by Thomas J. Charters and Leanne C. Findlay

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# Insights into the accessibility, affordability, inclusivity, flexibility and quality of child care centres in Canada, 2024

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## Abstract

In 2021, the Canadian federal government committed over \$27.2 billion in funding through bilateral agreements with the provinces and territories toward building the Canada-wide Early Learning and Child Care system. Integral to these agreements were investments allocated by provinces and territories toward five foundational pillars of the Multilateral Early Learning and Child Care Framework: provision of accessible, affordable, inclusive, flexible and high-quality care. This study uses data from the 2024 Canadian Survey on the Provision of Child Care Services to examine the characteristics of child care centres in Canada during this period of policy reform, with an emphasis on elements of care reflective of the five pillars of the multilateral framework. Results suggest that the proportion of centres offering flexible or non-standard care options was limited, that 15% of centres had expanded their maximum capacity in the previous year to improve accessibility, that nearly three-quarters of centres had accommodations in place to improve inclusivity for children with long-term conditions or disabilities, and that the affordability of child care as indicated by child care fees varied considerably across child age category and jurisdiction. Further analysis contrasted centres that had received specific funding with those that had not. About 7 in 10 centres outside of Quebec reported that they had received funding from Federal-provincial/territorial agreements. These centres were more likely to be larger in terms of staffing and enrolment and were more likely to be not-for-profit.

**Keywords:** Early learning and child care, Child care centres, Child care supply, Child care quality, Child care service delivery

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## Introduction

Child care use has increased over time in Canada. In particular, the enrolment of children in child care centres increased dramatically from 6% of children aged 0 to 5 years with employed mothers in 1973 (Cleveland, 2022) to over one-third of children aged 0 to 5 years in 2023 (Statistics Canada, 2023). As of 2023, there were about 678,000 full-day or part-day regulated centre spaces across Canada, sufficient to accommodate 31% of children aged 0 to 5 years (Friendly et al., 2024). Child care increasingly constitutes an important part of the social and early learning environments of young children, and the provision of high-quality child care services in Canada is a significant topic for parents, caregivers and policy makers.

Families' access to high-quality child care in Canada may be limited. Barriers to access include unaffordable fees, an inadequate supply of child care, a lack of appropriate child care hours and mediocre child care quality (Japel & Friendly, 2018; Lavergne, 2025; Macdonald, 2018; Macdonald & Friendly, 2023b; Prentice, 2007). Additionally, specific groups in Canada have lower access to child care, such as rural families (Crane, 2008; Friendly et al., 2016) and recent immigrant families (Massing et al., 2023). Unequal access to child care has been characterized as a source of developmental and economic disadvantage (Employment and Social Development Canada, 2017; Prentice, 2007). Further, the COVID-19 pandemic adversely affected the child care sector in Canada, leading to disruptions in care (Hacioglu et al., 2024) and prolonged employment losses among child care workers (Statistics Canada, 2021; Uppal & Savage, 2021). The pandemic reinforced the importance of child care services as essential social and economic infrastructure and motivated calls for reform of the child care landscape in Canada (Beach et al., 2023).

## Canada-wide Early Learning and Child Care agreements

The 2017 Multilateral Framework on Early Learning and Child Care provides guiding principles for federal, provincial and territorial governments to develop an early learning and child care system that includes the provision of accessible, affordable, inclusive, flexible and high-quality child care for all families (Employment and Social Development Canada, 2017; Pasolli & Child Care Now, 2019). In 2021, the federal government committed \$27.2 billion over five years to build the Canada-wide Early Learning and Child Care (CWELCC) system through bilateral agreements with the provinces and territories (Department of Finance Canada, 2021; Employment and Social Development Canada, 2022a). These agreements specify objectives and investment areas for licensed or regulated early learning and child care. Quebec was not a signatory to the bilateral agreements but has received funds as part of an asymmetric agreement to further improve its already established reduced-contribution program of child care (Department of Finance Canada, 2022). The Indigenous Early Learning and Child Care Framework was co-developed separately following consultations between the Government of Canada and Indigenous partners in 2017, reflecting a vision for high-quality child care with foundations respecting Indigenous culture and aspirations (Employment and Social Development Canada, 2022b).

# Child care in Canada and the Multilateral Early Learning and Child Care Framework

## Affordability

Affordability relates to a family's financial ability to pay for child care services and has been identified as one of the principal barriers to child care for Canadian families (Cleveland, 2018; Japel & Friendly, 2018; Prentice, 2007). Child care fees may be paid directly by parents out of pocket, and they may be supplemented through subsidies directly received by parents and may be reduced through government contributions to child care providers. Fees paid by parents may vary depending on the age of the child, the region, the jurisdiction, the availability of subsidies or operational funding, and other factors. Fisher and Thomas (2022) found that federal and provincial fee reduction measures had successfully reduced net child care costs paid by parents although identified coverage gaps. For instance, subsidy amounts were inadequate for some families, and tax credit-based supports, which were accessible only after filing taxes, often resulted in cash flow issues for families.

In 2022, a national analysis found that full-time daily fees outside Quebec were the highest for infants (\$52.10 on average), while daily fees for school-aged children were the lowest, at \$30.80 (Charters & Findlay, 2023). The Canadian Centre for Policy Alternatives' child care fee survey had similar findings (Macdonald & Friendly, 2023a). Evidence suggests that many parents experienced reductions in fees following the CWELCC agreements (Macdonald & Friendly, 2023a; Macdonald & Friendly, 2025). This was the result of several mechanisms, including the implementation of set fee rates, the expansion of \$10-a-day spaces, the proportionate reduction in market fees, modifications to fee subsidy systems or combinations of these approaches.

## Accessibility

Accessibility of child care pertains to the availability of child care spaces to meet the demand for child care (Friendly et al., 2024). That is, it implies that child care spaces are available for the families who wish to participate (Bennett & Tayler, 2006; Laverne, 2025). The reduction in child care fees under the bilateral agreements was expected to increase demand for child care spaces, necessitating the creation of additional regulated spaces (Cleveland, 2018). That about one-quarter of children aged 1 to 3 years in Canada who were not in child care were on a waitlist reflects recent difficulties in finding care (Statistics Canada, 2023). Child care deserts—regions determined to have insufficient numbers of regulated child care spaces relative to child populations—have been used in Canada to examine regional variations in child care access. In 2022, nearly half of children under the age of kindergarten eligibility resided in child care deserts in Canada (Macdonald & Friendly, 2023b).

Provincial and territorial commitments to improving child care accessibility include increasing the availability and supply of regulated child care spaces, typically for children less than 6 years of age, with the general target of 59% coverage of the child population (Government of Canada, 2024). The *Early Childhood Education and Care in Canada 2023* report found that there were about 678,000 full- and part-day regulated centre spaces for children aged 0 to 5 years across Canada, sufficient to accommodate 31% of children of these ages in Canada. Regulated spaces for children aged 0 to 5 years increased by 50,691 (8%) from 2021 to 2023, although growth remained lower for some groups, such as infants (Friendly et al., 2024).

## Flexibility

Flexible child care offers various options, such as non-standard hours (i.e., outside 7 a.m. to 6 p.m. on weekdays), varying hours or care at short notice (Employment and Social Development Canada, 2017). This may reflect care offered during early morning hours, in evenings, on weekends or overnight and would accommodate parents working rotating shifts or casual or on-call jobs, or offer emergency or on-call care options (Halfon & Friendly, 2015; Lero et al., 2021). In 2016/2017, 38% of all families with a child less than 6 years of age had at least one parent working a non-standard schedule (Lero et al., 2021). In such situations, many families combined formal and informal child care arrangements with parental care (Breitkreuz, Colen & Horne, 2021). Overall, mothers working irregular or part-time schedules were less likely to use child care (Zhang et al., 2021).

Recent research has found that non-standard or flexible child care options are uncommon in Canada. In 2022, 2% of centres providing care to children aged 0 to 5 years offered evening, weekend or overnight care options. Drop-in or flexible care was more common, with 16% of centres offering this option (Charters & Findlay, 2023). As part of their commitments outlined in the bilateral agreements, provinces and territories have allocated funds to increase the number of licensed child care spaces offering flexible arrangements (Employment and Social Development Canada, 2024).

## Inclusivity

The concept of inclusivity refers to child care that is available and responsive to children and families in diverse and/or vulnerable populations, such as Indigenous families living off reserve, recent immigrants, refugees, official language minorities, low-income families and children with additional support needs (Employment and Social Development Canada, 2017). Previous Canadian research has found inequalities in child care use across many of these populations, including Indigenous children (Statistics Canada, 2024a), immigrant children (Kingsbury et al., 2021; Massing et al., 2023) and children living in lower socioeconomic conditions (Findlay, Wei & Arim, 2021). Inclusivity also relates to accommodating children's different needs. For instance, children with disabilities often experience barriers to inclusion, such as being denied care because of additional needs (Kerr, Findlay & Arim, 2024; Killoran, Tymon & Frempong, 2007), inadequate training of staff and available resources (Irwin, Lero & Brophy, 2004; Mejia-Cardenas, Rivard & Mestari, 2024), and limited content on caring for children with disabilities in early childhood education (ECE) curricula (Taylor et al., 2023).

In 2022, 43% of child care centres serving children aged 0 to 5 years reported providing accommodations for one or more children with disabilities, according to the Canadian Survey on the Provision of Child Care Services (CSPCCS) (Charters & Findlay, 2023). Over half of child care centres in Canada had one or more employees with professional development training pertaining to working with children with disabilities in the previous year (Statistics Canada, 2024b). Commitments made in the bilateral agreements toward inclusive child care for diverse groups of children and vulnerable children and families included several initiatives related to developing, converting, tracking and funding plans to ensure new space creation, structural renovations and inclusive programming (Government of Canada, 2024). Yet, there is also evidence of shortfalls in available resources to support inclusion, causing some centres not to enroll children with disabilities (Irwin, Lero & Mayer, 2024).

## Quality

In the bilateral agreements, high-quality early learning and child care is characterized by rich early learning environments; responsive and respectful relationships and interactions with children, caregivers and families; and the qualifications and training of the child care workforce (Employment and Social

Development Canada, 2017). These criteria generally correspond to process quality, a multidimensional concept where quality is determined by positive and developmentally appropriate interactions between children and caregivers, the social environment meeting the developmental needs of children, and the overall character and abilities of caregivers (Bigras et al., 2010; Employment and Social Development Canada, 2019; Slot, 2018). Process quality is supported and facilitated by structural quality (Huntsman, 2008; NICHD Early Child Care Research Network, 2002), which reflects organizational characteristics of the environment, such as the children-to-staff ratio, group sizes, staff education and training, and staff turnover (Bigras et al., 2010; Varmuza, Perlman & Falenchuk, 2021). Structural indicators are often regulated by government agencies and are typically easier to measure compared with process quality, which generally requires observation (Bigras et al., 2010).

National analyses of structural measures of child care quality in Canada are challenging given the jurisdictional differences in regulations concerning age groupings of children, staff training, group sizes and children-to-staff ratios. Previous analyses have focused on centre auspice, since non-profit centres have repeatedly been shown to provide higher-quality care (Cleveland & Krashinsky, 2009; Doherty, Friendly & Forer, 2002; Flanagan, Beach & Varmuza, 2013; Varmuza, Perlman & Falenchuk, 2021). In 2022, half of centres providing care to children aged 0 to 5 years had not-for-profit legal status or were run by government agencies (Charters & Findlay, 2023). Most early quality-related initiatives in the implementation of CWELCC (Government of Canada, 2024) have focused on the importance of building qualifications in the child care workforce (such as incentivizing enrolment in ECE programs), addressing educators' compensation through wage grants and the implementation of wage grids, and expanding spaces preferentially in not-for-profit settings (Friendly et al., 2024). It has been argued that upholding child care quality is central to ensuring that the expansion of the early learning and child care system in Canada confers benefits to children and families (Dhuey, 2024).

## Objectives of the current study

Data from the 2024 CSPCCS provide a means to examine the characteristics of child care centres in Canada during a period of policy reform associated with the development of the CWELCC system. Descriptive profiles of centre-based child care in Canada provide a snapshot of the current state of the child care system, and comparisons reveal some changes since the 2022 CSPCCS (Charters & Findlay, 2023). This report provides insights on progress related to the Multilateral Early Learning and Child Care Framework pillars (accessibility, affordability, inclusivity, flexibility and quality). Additionally, the report explores the characteristics of centres that reported receiving funding through the Canada-wide agreements as of April 2024. Continued research in this area is crucial to gain insights into the child care sector; measure change over time; and understand how ongoing reforms may affect children, parents and child care service providers. This report is primarily descriptive and should not be considered an evaluation of reforms associated with CWELCC and the bilateral agreements. The focus is on child care centres providing care to children aged 0 to 5 years.

## Materials and methods

### Data source

The 2024 CSPCCS is a cross-sectional survey conducted by Statistics Canada in partnership with Employment and Social Development Canada (Statistics Canada, 2025). The survey provides a snapshot of child care services in Canada in 2024 for children aged 12 or less at the national, provincial

and territorial levels. Survey collection took place from April to July 2024. The target population consisted of centre-based child care services, as well as licensed and unlicensed home-based child care providers. The survey frame was constructed from (1) businesses identified as child day-care services (North American Industry Classification System code 62441) on Statistics Canada's Business Register as of February 2024 that reported at least \$2,500 in annual revenue and (2) publicly available provincial and territorial lists of licensed child care services. A sample of 21,045 homes and centres was contacted, with a 76% response rate for child care centres. More information on the frame is available elsewhere (Statistics Canada, 2025).

In this report, only child care centres that provided care to children aged 5 years or less (potentially in addition to children aged 6 to 12) were included. Centres that only enrolled children attending school were assumed to be dedicated before- and after-school programs and were excluded. Records with implausibly high counts of employees (exceeding the 95th percentile) were also excluded as potentially representing multiple centres. The resulting sample size was 3,403 child care centres, representative of child care centres in Canada serving children aged 0 to 5 years that were not dedicated before- and after-school programs.

## Measures

Representatives of child care centres (e.g., the centre's director) responded to questions on (1) the characteristics of the child care centre; (2) centre capacity; (3) resources and funding; and (4) enrolment, fees and structural measures of child care quality by provincial and territorial-defined age categories as of April 8, 2024.

Centre characteristics included centre licensing, auspice, Indigenous operation, care options provided and urban location. The total number of staff employed at the centre was collected, including all full- and part-time supervisors, non-supervisory staff providing direct care to children, and support staff (e.g., cooks, cleaners and accountants). Respondents reported whether the centre was licensed by child care authorities from the province or territory or local government; the year in which it was licensed (2023 or 2024, 2020 to 2022, 2010 to 2019, or before 2010); and whether the centre was operated by a First Nations, Métis or Inuit organization or association. Centre auspice included three categories of non-governmental centres: those with not-for-profit legal status, those identifying as for-profit organizations, and those with neither not-for-profit legal status nor for-profit identification. A fourth category included centres operated directly by government agencies (school boards or districts, municipalities, regional districts, and public health authorities). Non-governmental centres with not-for-profit legal status (henceforth, not-for-profit centres) indicated whether their centre had previously operated as a private or for-profit organization.

Care options offered at centres included full-time care (six hours or more daily and at least five days per week), part-time care (either six hours or more daily less than five days a week or less than six hours daily any number of days), before- or after-school care, evening (after 6 p.m.) or weekend care, and drop-in or flexible care. Centres further indicated whether they accepted infants (as defined in their jurisdiction) for enrolment. Centres were classified as being in urban regions if they were located in a census metropolitan area or a census agglomeration with or without census tracts; otherwise, they were considered to be in non-urban regions. Finally, centres were also classified by building type, including in an independent commercial building, in a private residence (house, condominium or apartment), in a school or university, or within another building (e.g., community centres, hospitals or libraries, places of worship, shopping malls or strip malls, office buildings, and social housing complexes).

Statistics related to centre capacity were reported at the centre level. Total children enrolled included all children aged 12 or less in the centre, whether they were enrolled full time, part time, or in before- or

after-school programming. Next, total enrolment was disaggregated into children aged 0 to 5 years not attending school and children attending school. Respondents indicated whether the centre was operating at maximum capacity on April 8, 2024, as indicated on the child care licence or permit (i.e., based on provincial or territorial regulations on the number of caregivers and composition of children by age). Among centres not at maximum capacity, an estimate of additional capacity was derived from the difference between the stated maximum capacity and current total enrolment. Respondents further indicated whether there had been an increase, a decrease or no change in the centre's maximum capacity in the previous year, and whether the centre had a list of children waiting to be enrolled. Respondents indicated whether the centre had any accommodations or supports in place to serve the needs of children with long-term conditions or disabilities (including any characteristics of the child care environment, curriculum or equipment designed to remove potential barriers to full participation among children with disabilities).

Resources and funding of child care centres were assessed through questions on centre budgets and funding sources. The breakdown of the centre's operating budget (excluding capital and start-up funding) included percentages paid by parents, the government and other sources (e.g., an employer or organization). Respondents also noted whether the centre charged for goods and services in addition to the daily fee (e.g., for transportation, late pick up, supplies, food, diapers, activity fees and field trips). Centres outside Quebec noted whether they had received any funding from the CWELCC agreements, and centres in Quebec were asked whether they were subsidized by the Quebec reduced contribution program. Centres also specified whether at least one child enrolled received a subsidy to cover all or part of the usual parent fee (excluding the Canada child benefit, the child care expense deduction and other tax credits). Centres were asked whether they had expanded their physical space in the past year and, if so, whether they had received any capital funding from the provincial or territorial government for the expansion.

Enrolment counts by age were reported according to provincial and territorial regulations with respect to maximum group sizes and child-to-staff ratios. Each province or territory had between four and seven age groupings, sometimes including overlapping ages (**Table 1**). Full-time daily fees paid by parents were similarly tabulated. Structural measures associated with child care quality were derived from the data. Group size was estimated through the ratio of total children enrolled by age category and the number of rooms allocated in the centre to the age group. Rooms that had mixed age groups were assigned to the majority age group or, if the groups were equal in number, to the youngest group. Child-to-staff ratios were derived by taking the ratio of the total number of children enrolled in an age group to the number of employees providing direct care to that group. Group sizes and child-to-staff ratios are presented for different age groups as median values to account for the presence of outliers.

## Analytical strategy

Descriptive analyses gave a snapshot of child care centres providing care to children aged 0 to 5 years in Canada in April 2024. Analysis was at the centre level, with percentages reflecting the proportion of centres with a given characteristic or the proportion of centres with one or more children of a given description (e.g., one or more children attending school). Mean counts reflect counts within centres and conditionally apply only to centres with that characteristic (i.e., mean counts of infants only among centres enrolling infants).

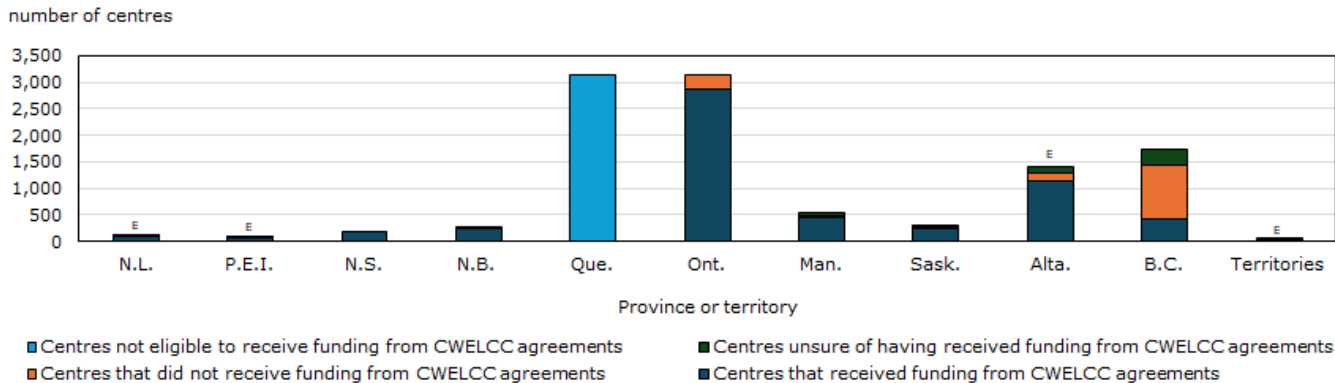
The characteristics of centres that reported having received CWELCC funding and those of centres that did not were compared using unpaired t-tests. Differences in centre characteristics between these groups may provide insights into the types of centres most likely to have participated in the CWELCC system. 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, 2022a).

# Results

There were an estimated 11,092 child care centres providing care to children aged 0 to 5 years in Canada in 2024 that met this report’s criteria. These centres enrolled approximately 627,500 children on a full- or part-time basis—about 520,750 children aged 0 to 5 years who were not attending school and 106,750 children who were currently attending school. Of note, age categories were defined at the provincial or territorial level and do not represent consistently defined groups across Canada.

**Chart 1** demonstrates that across Canada, 5,711 centres reported that they had received CWELCC funding, 1,635 had not received funding, and 3,149 were in Quebec and not eligible. Ontario had the highest number and proportion of centres that reported having received CWELCC funding (2,871; about 90% of centres in Ontario). By contrast, British Columbia had the lowest number and proportion of centres that reported having received funding (1,034; 59% of centres in British Columbia). Respondents in British Columbia and the territories were more likely to be uncertain whether the centre had received any CWELCC funding.

**Chart 1**  
Centres caring for children aged 0 to 5 years by participation in Canada-wide Early Learning and Child Care agreements, Canada, April 2024



<sup>E</sup> use with caution  
**Note:** CWELCC = Canada-wide Early Learning and Child Care. The territories include Yukon, Nunavut and the Northwest Territories. Use caution in interpreting counts for centres that did not received funding in Newfoundland and Labrador and Prince Edward Island and for centres unsure of having received funding in Newfoundland and Labrador, Prince Edward Island, Alberta, and the territories. Counts are too unreliable to be published for centres that did not receive funding in Nova Scotia and the territories and for centres unsure of having received funding in Nova Scotia, New Brunswick and Ontario.  
**Source:** Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2024.

**Table 1** provides an overview of centre characteristics. On average, a total of 12 staff (full- and part-time supervisors, non-supervisory staff providing direct care to children and support staff) worked in child care centres in 2024. Nearly all centres were licensed by provincial, territorial or local government child care authorities; over half had been licensed before 2010, one-third from 2010 to 2019, and the remainder in 2020 or later. Just under half of centres (47%) were not-for-profit and 44% identified as for-profit. The remaining centres were either operated by government agencies (7%) or did not have not-for-profit legal status and did not identify as for-profit (3%). Among not-for-profit centres, about one-fifth had previously operated as a for-profit organization. Of all centres, 1.5% were operated by a First Nations, Métis or Inuit association or organization. Full-time care was the most common care option offered, with the least common options including care on weekends, in evenings or overnight (2%) and drop-in or flexible care (14%). Nearly two-thirds of centres (65%) accepted infants, and nearly 9 in 10 centres (86%) were located in urban regions. Two in five centres (41%) were located in independent commercial buildings, while one-quarter were in schools or universities.

**Table 1**  
**Characteristics of child care centres providing care to children aged 0 to 5 years, Canada, April 2024**

| Characteristics                                                                                                                                          | Centre-based estimate |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
|                                                                                                                                                          | mean in centres       |
| <b>Total staffing</b>                                                                                                                                    |                       |
| All                                                                                                                                                      | 11.5                  |
|                                                                                                                                                          | percentage of centres |
| <b>Centre is licensed by child care authorities from the provincial, territorial or local government</b>                                                 |                       |
| Yes                                                                                                                                                      | 98.1                  |
| <b>Year centre was licensed (if licensed at the time of survey collection)</b>                                                                           |                       |
| 2023 to 2024                                                                                                                                             | 2.1 E                 |
| 2020 to 2022                                                                                                                                             | 8.1                   |
| 2010 to 2019                                                                                                                                             | 33.0                  |
| Before 2010                                                                                                                                              | 56.8                  |
| <b>Centre auspice</b>                                                                                                                                    | 46.9                  |
| Non-governmental centre, not-for-profit legal status                                                                                                     | 46.9                  |
| Non-governmental centre, for-profit identification                                                                                                       | 44.0                  |
| Non-governmental centre, neither not-for-profit legal status nor for-profit identification                                                               | 2.5                   |
| Centre operated by a government agency                                                                                                                   | 6.6                   |
| <b>Centre had previously been operated as a private or for-profit organization (if it is a non-governmental centre with not-for-profit legal status)</b> |                       |
| Yes                                                                                                                                                      | 21.9                  |
| <b>Operated by First Nations, Métis or Inuit organization or association</b>                                                                             |                       |
| Yes                                                                                                                                                      | 1.5                   |
| <b>Care options offered at centre</b>                                                                                                                    | 90.7                  |
| Full time                                                                                                                                                | 90.7                  |
| Part time                                                                                                                                                | 56.0                  |
| Before- or after-school program                                                                                                                          | 38.3                  |
| Weekends, evenings or overnight                                                                                                                          | 2.3 E                 |
| Drop-in or flexible                                                                                                                                      | 13.7                  |
| <b>Offers part-time care only</b>                                                                                                                        |                       |
| Yes                                                                                                                                                      | 8.0                   |
| <b>Accepts infants for enrolment</b>                                                                                                                     |                       |
| Yes                                                                                                                                                      | 65.2                  |
| <b>Located in urban region</b>                                                                                                                           |                       |
| Yes                                                                                                                                                      | 85.5                  |
| <b>Building type</b>                                                                                                                                     |                       |
| Independent commercial building                                                                                                                          | 41.4                  |
| Private residence                                                                                                                                        | 7.2                   |
| School or university                                                                                                                                     | 25.0                  |
| Located in other building                                                                                                                                | 26.4                  |

E use with caution

Source: Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2024.

**Table 2** describes the capacities of child care centres in 2024. On average, centres enrolled 57 children overall, of whom 47 were aged 0 to 5 years and were not attending school. About two in five centres additionally enrolled children attending school (24 children, on average). Three in five centres were operating at maximum capacity. Among the 40% of centres not at maximum capacity, an additional 16 children could have been enrolled per centre, on average. Compared with April 2023, four in five centres (81%) had not changed their maximum capacity, while 15% had increased it. Most centres (84%) had a waitlist of children waiting to be enrolled. Nearly three-quarters of centres had accommodations in place for children with long-term conditions or disabilities.

**Table 2****Capacity of child care centres providing care to children aged 0 to 5 years, Canada, April 2024**

| Characteristics                                                                                           | Percentage of centres | Mean in centres |
|-----------------------------------------------------------------------------------------------------------|-----------------------|-----------------|
| <b>Children enrolled</b>                                                                                  |                       |                 |
| All                                                                                                       | 100.0                 | 56.6            |
| <b>Enrolment of children aged 0 to 5 years not attending school</b>                                       |                       |                 |
| All                                                                                                       | 100.0                 | 46.9            |
| Full time                                                                                                 | 91.0                  | 43.8            |
| Part time                                                                                                 | 45.4                  | 15.5            |
| <b>Enrolment of children attending school</b>                                                             |                       |                 |
| All                                                                                                       | 40.6                  | 23.7            |
| Full time                                                                                                 | 28.0                  | 22.0            |
| Part time                                                                                                 | 22.5                  | 15.3            |
| <b>Centre operating at maximum capacity</b>                                                               |                       |                 |
| Yes                                                                                                       | 60.2                  | ...             |
| <b>How many more children would be allowed to be cared for (if the centre is not at maximum capacity)</b> | 100.0                 | 15.7            |
| <b>Change in maximum capacity compared with April 2023</b>                                                |                       |                 |
| Yes, an increase                                                                                          | 14.9                  | ...             |
| Yes, a decrease                                                                                           | 4.0                   | ...             |
| No change                                                                                                 | 81.1                  | ...             |
| <b>Has a waitlist of children waiting to be enrolled</b>                                                  |                       |                 |
| Yes                                                                                                       | 83.8                  | ...             |
| <b>Accommodations in place for children with long-term conditions or disabilities</b>                     |                       |                 |
| Yes                                                                                                       | 73.6                  | ...             |
| ... not applicable                                                                                        |                       |                 |

**Source:** Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2024.

**Table 3** provides information on centre resources and funding. In 2024, the average centre derived about three-fifths of its operating budget from government sources, two-fifths from parents and about 4% from other sources. About 7 in 10 centres outside Quebec (72%) reported that they had received some funding from the CWELCC agreements, 2 in 10 had not (21%) and 8% did not know. In Quebec, about 7 in 10 centres (71%) reported that they were subsidized by the Quebec reduced contribution program. Most centres outside Quebec (86%) had one or more children enrolled who received a fee subsidy. In the past year, 6% of centres had expanded their physical space, and 41% of these had received capital funding from the province or territory for the expansion.

**Table 3****Resources and funding of child care centres providing care to children aged 0 to 5 years, Canada,  
April 2024**

| Characteristics                                                                                                                                  | Centre-based estimate |
|--------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
|                                                                                                                                                  | mean in centres       |
| <b>Sources of centre operating budget</b>                                                                                                        |                       |
| Parents                                                                                                                                          | 39.5                  |
| Government                                                                                                                                       | 57.0                  |
| Other sources                                                                                                                                    | 3.5                   |
|                                                                                                                                                  | percentage of centres |
| <b>Centre charges parents for other goods or services in addition to those covered by the daily fee</b>                                          |                       |
| Yes                                                                                                                                              | 29.7                  |
| <b>Centre receives any funding from the Canada-wide Early Learning and Child Care agreements<sup>1</sup></b>                                     |                       |
| Yes                                                                                                                                              | 71.9                  |
| No                                                                                                                                               | 20.6                  |
| Don't know                                                                                                                                       | 7.5                   |
| <b>Any children enrolled receive subsidy to cover all or part of the usual parent fee<sup>1</sup></b>                                            |                       |
| Yes                                                                                                                                              | 85.9                  |
| No                                                                                                                                               | 14.1                  |
| <b>Centre is subsidized by the Quebec reduced contribution program<sup>2</sup></b>                                                               |                       |
| Yes                                                                                                                                              | 70.8                  |
| <b>Centre expanded physical space in the past year</b>                                                                                           |                       |
| Yes                                                                                                                                              | 5.7                   |
| <b>Centre received any capital funding from the province or territory for expansion (if the centre expanded physical space in the past year)</b> |                       |
| Yes                                                                                                                                              | 41.2                  |

1. Provinces and territories outside Quebec.

2. Quebec only.

**Source:** Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2024.

**Table 4** demonstrates enrolment, daily fees, group sizes and children-to-staff ratios by child age group. The first column shows the percentage of centres within a given province or territory with one or more children of the given age enrolled. The second column presents the mean age-specific enrolment of children in centres with one or more children of the respective group. A third column describes the mean full-time daily fee collected from parents specific to the age groups. To illustrate, 82% of centres in Saskatchewan enrolled toddlers (defined in Saskatchewan as children aged 18 months to less than 30 months). Among these centres, on average 15 toddlers were enrolled, and daily fees were on average \$40.00.

Group size was derived for each centre by taking the ratio of total enrolled children of a given age per number of rooms assigned to that age. The age-specific child-to-staff ratio likewise represents the ratio of enrolled children of a given age per employee assigned to this age in the centre. For example, in Nova Scotia, the median group size of preschool-aged children aged 3 or more and not attending school was 13 children per classroom, with about 7 children per staff member providing care to preschool-aged children.

Table 4

Enrolment, fees and structural measures of child care quality in centres providing care to children aged 0 to 5 years, by age group, Canada, April 2024 (part 1)

| Province or territory & Age category                                                                                                     | Percentage of centres enrolling children of this age | Mean enrolment in centres | Mean daily fee in centres <sup>1</sup> | Median group size in centres | Median child-to-staff ratio in centres |
|------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|---------------------------|----------------------------------------|------------------------------|----------------------------------------|
| <b>Newfoundland and Labrador</b>                                                                                                         |                                                      |                           |                                        |                              |                                        |
| Infants—children aged less than 24 months                                                                                                | 15.1 E                                               | 6.1                       | 10.0                                   | 6.0                          | 3.0                                    |
| Toddlers—children aged 18 months to less than 3 years                                                                                    | 94.8                                                 | 11.1                      | 14.4 E                                 | 8.8                          | 4.0                                    |
| Preschool-aged children—children aged 2 years and 9 months to less than 5 years and 9 months who do not attend prekindergarten or school | 100.0                                                | 24.8                      | 14.4                                   | 12.6                         | 5.0                                    |
| Prekindergarten-aged children—children aged 3 years and 8 months to less than 5 years and 9 months who attend prekindergarten            | 17.0 E                                               | 13.9                      | 10.0                                   | 12.9                         | 9.4 E                                  |
| School-aged children—children aged 4 years and 8 months to 13 years who attend school                                                    | 47.4                                                 | 17.4                      | 5.5                                    | 12.1                         | 10.0                                   |
| <b>Prince Edward Island</b>                                                                                                              |                                                      |                           |                                        |                              |                                        |
| Children aged less than 22 months                                                                                                        | 95.9                                                 | 10.9                      | 12.7                                   | 7.8                          | 4.9                                    |
| Children aged 22 months to 3 years                                                                                                       | 100.0                                                | 14.9                      | 11.8                                   | 11.4                         | 5.8                                    |
| Children aged 3 years or more who do not attend school                                                                                   | 100.0                                                | 16.9                      | 9.3                                    | 10.3                         | 5.4                                    |
| School-aged children—children aged 3 years or more who attend school                                                                     | 47.9                                                 | 15.0                      | 24.9                                   | 10.8                         | 7.8                                    |
| <b>Nova Scotia</b>                                                                                                                       |                                                      |                           |                                        |                              |                                        |
| Infants—children aged less than 18 months                                                                                                | 45.0                                                 | 12.8                      | 27.8                                   | 9.9                          | 4.9                                    |
| Toddlers—children aged 18 months to less than 36 months                                                                                  | 95.3                                                 | 19.1                      | 26.2                                   | 12.0                         | 5.7                                    |
| Preschoolers—children aged 3 years or more who do not attend school or a pre-primary program                                             | 100.0                                                | 21.9                      | 25.5                                   | 13.4                         | 6.5                                    |
| Pre-primary children—children who attend a pre-primary program                                                                           | 26.1                                                 | 11.3                      | 16.3                                   | 7.7                          | 5.3                                    |
| School-aged children—children aged 12 or less who attend school above the pre-primary level                                              | 45.0                                                 | 19.8                      | 16.0                                   | 14.0                         | 11.0                                   |
| <b>New Brunswick</b>                                                                                                                     |                                                      |                           |                                        |                              |                                        |
| Infants—children aged less than 2 years                                                                                                  | 60.8                                                 | 10.5                      | 29.9                                   | 6.6                          | 3.8                                    |
| Preschool children aged 2 years                                                                                                          | 85.1                                                 | 11.1                      | 21.1                                   | 7.7                          | 5.0                                    |
| Preschool children aged 3 years who do not attend school                                                                                 | 93.2                                                 | 11.6                      | 28.5                                   | 8.5                          | 6.0                                    |
| Preschool children aged 4 years or more who do not attend school                                                                         | 93.1                                                 | 13.9                      | 29.0                                   | 10.2                         | 7.9                                    |
| School-aged children who attend school                                                                                                   | 67.0                                                 | 20.3                      | 21.7                                   | 10.6                         | 8.8                                    |
| <b>Quebec</b>                                                                                                                            |                                                      |                           |                                        |                              |                                        |
| Children aged less than 18 months                                                                                                        | 81.0                                                 | 15.3                      | 23.0                                   | 11.2                         | 6.4                                    |
| Children aged 18 months to less than 4 years who do not attend school                                                                    | 97.3                                                 | 33.1                      | 21.2                                   | 6.9                          | 6.0                                    |
| Children aged 4 years or more who do not attend school                                                                                   | 81.6                                                 | 21.8                      | 21.9                                   | 12.4                         | 10.8                                   |
| Children who attend school                                                                                                               | 2.1 E                                                | 27.6                      | 17.0                                   | 11.3                         | 7.5                                    |
| <b>Ontario</b>                                                                                                                           |                                                      |                           |                                        |                              |                                        |
| Infants—children aged less than 18 months                                                                                                | 29.5                                                 | 14.7                      | 42.4                                   | 12.5                         | 4.0                                    |
| Toddlers—children aged 18 months to less than 30 months                                                                                  | 84.9                                                 | 16.0                      | 36.2                                   | 12.9                         | 4.9                                    |
| Preschool-aged children—children aged 30 months to less than 6 years who do not attend school                                            | 98.0                                                 | 22.0                      | 33.3                                   | 13.6                         | 5.5                                    |
| Kindergarten-aged children—children aged 44 months to less than 7 years who attend                                                       | 33.8                                                 | 19.8                      | 21.9                                   | 16.2                         | 9.8                                    |
| Primary or junior grade school-aged children—children aged 68 months to 12 years who attend                                              | 52.6                                                 | 17.1                      | 25.1                                   | 11.0                         | 8.2                                    |
| <b>Manitoba</b>                                                                                                                          |                                                      |                           |                                        |                              |                                        |
| Infants—children aged 12 weeks to less than 12 months                                                                                    | 21.1                                                 | 5.6                       | 16.4                                   | 3.8                          | 1.9                                    |
| Infants—children aged 12 months to less than 24 months                                                                                   | 51.6                                                 | 8.7                       | 13.0                                   | 6.7                          | 3.4                                    |
| Preschool-aged children aged 2 years                                                                                                     | 68.9                                                 | 10.1                      | 15.0                                   | 7.0                          | 3.5                                    |
| Preschool-aged children aged 3 years who do not attend school                                                                            | 85.4                                                 | 12.7                      | 14.0                                   | 8.7                          | 4.0                                    |
| Preschool-aged children aged 4 years who do not attend school                                                                            | 86.5                                                 | 14.1                      | 14.6                                   | 9.7                          | 4.3                                    |
| Preschool-aged children aged 5 years or more who do not attend school                                                                    | 63.7                                                 | 11.0                      | 14.1                                   | 7.7                          | 4.2                                    |
| School-aged children who attend school                                                                                                   | 55.8                                                 | 22.3                      | 12.9                                   | 14.6                         | 7.5                                    |

... not applicable

E use with caution

F too unreliable to be published

1. Fees represent full-time daily rates among children aged 0 to 5 years not attending school and daily rates among children attending school.

Source: Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2024.

Table 4

Enrolment, fees and structural measures of child care quality in centres providing care to children aged 0 to 5 years, by age group, Canada, April 2024 (part 2)

| Province or territory & Age category                                                           | Percentage of centres enrolling children of this age | Mean enrolment in centres | Mean daily fee in centres <sup>1</sup> | Median group size in centres | Median child-to-staff ratio in centres |
|------------------------------------------------------------------------------------------------|------------------------------------------------------|---------------------------|----------------------------------------|------------------------------|----------------------------------------|
| <b>Saskatchewan</b>                                                                            |                                                      |                           |                                        |                              |                                        |
| Infants—children aged 6 weeks to less than 18 months                                           | 52.3                                                 | 8.1                       | 39.4                                   | 6.8                          | 3.9                                    |
| Toddlers—children aged 18 months to less than 30 months                                        | 81.7                                                 | 14.6                      | 40.0                                   | 10.8                         | 5.9                                    |
| Preschool children aged 30 months or more who do not attend school                             | 98.8                                                 | 23.2                      | 31.4                                   | 12.9                         | 6.0                                    |
| School-aged children who attend school                                                         | 58.6                                                 | 14.0                      | 28.0                                   | 9.8                          | 7.8                                    |
| <b>Alberta</b>                                                                                 |                                                      |                           |                                        |                              |                                        |
| Infants—children aged less than 12 months                                                      | 23.8                                                 | 6.7                       | 49.5                                   | 3.4                          | 2.6                                    |
| Infants—children aged 12 months to less than 19 months                                         | 59.9                                                 | 10.8                      | 47.2                                   | 7.9                          | 4.5                                    |
| Children aged 19 months to less than 3 years who do not attend school                          | 71.0                                                 | 15.5                      | 41.2                                   | 10.8                         | 4.9                                    |
| Preschool children—children aged 3 years to less than 4 years who do not attend school         | 94.9                                                 | 17.1                      | 39.0                                   | 13.5                         | 6.9                                    |
| Preschool children—children aged 4 years or more who do not attend school                      | 94.7                                                 | 17.3                      | 38.8                                   | 12.8                         | 7.0                                    |
| Kindergarten children and school-aged children—children aged 4 years or more who attend school | 69.3                                                 | 18.4                      | 31.7                                   | 13.9                         | 8.5                                    |
| <b>British Columbia</b>                                                                        |                                                      |                           |                                        |                              |                                        |
| Children aged less than 18 months                                                              | 35.5                                                 | 10.0                      | 42.4                                   | 6.3                          | 3.4                                    |
| Children aged 18 months to less than 30 months                                                 | 52.2                                                 | 14.1                      | 41.3                                   | 9.6                          | 4.2                                    |
| Preschool children—children aged 30 months or more who do not attend school                    | 93.9                                                 | 25.5                      | 38.2                                   | 16.0                         | 5.8                                    |
| School-aged children—children who attend school                                                | 42.0                                                 | 25.8                      | 26.4                                   | 17.1                         | 8.9                                    |
| <b>Yukon</b>                                                                                   |                                                      |                           |                                        |                              |                                        |
| Infants—children less than 18 months                                                           | 71.7                                                 | 9.7                       | 39.4                                   | 7.8                          | 5.7                                    |
| Preschool children—children aged 18 months to less than 3 years who do not attend school       | 88.0                                                 | 12.5                      | 24.0                                   | 5.7                          | 4.4                                    |
| Preschool children—children aged 3 years or more who do not attend school                      | 88.3                                                 | 12.4                      | 26.0                                   | 6.0                          | 4.7                                    |
| School-aged children—children who attend school                                                | 62.6                                                 | 11.2                      | 16.1                                   | 7.3                          | 6.7                                    |
| <b>Northwest Territories</b>                                                                   |                                                      |                           |                                        |                              |                                        |
| Infants—children aged less than 13 months                                                      | F                                                    | ...                       | ...                                    | ...                          | ...                                    |
| Infants—children aged 13 months to less than 25 months                                         | 55.6 E                                               | 15.3 E                    | 38.2                                   | 8.1                          | 3.8                                    |
| Preschool children—children aged 25 months to less than 36 months                              | 79.7                                                 | 16.4                      | 16.1                                   | 11.2                         | 4.4                                    |
| Preschool children—children aged 3 years who do not attend school                              | 91.4                                                 | 16.4                      | 20.8                                   | 8.0                          | 3.7                                    |
| Preschool children—children aged 4 years who do not attend school                              | 71.1                                                 | 11.2                      | 19.0                                   | 5.0                          | 2.5                                    |
| Preschool children—children aged 5 years or more who do not attend school                      | F                                                    | ...                       | ...                                    | ...                          | ...                                    |
| School-aged children—children who attend school                                                | 80.5                                                 | 17.5                      | F                                      | 11.6                         | 4.8                                    |
| <b>Nunavut</b>                                                                                 |                                                      |                           |                                        |                              |                                        |
| Children aged 0 to 12 months                                                                   | 44.7 E                                               | F                         | 34.3 E                                 | F                            | F                                      |
| Children aged 13 to 24 months                                                                  | 81.2                                                 | 6.0                       | 30.6                                   | 2.5 E                        | 2.3                                    |
| Children aged 25 to 35 months                                                                  | 59.8 E                                               | 4.1                       | 17.2 E                                 | 2.0                          | 2.7                                    |
| Children aged 3 years                                                                          | 81.2                                                 | 7.0                       | 23.2 E                                 | 3.4                          | 3.6                                    |
| Children aged 4 years who do not attend school                                                 | 71.4                                                 | 6.3 E                     | 24.7 E                                 | 2.8 E                        | 2.1 E                                  |
| Children aged 5 years or more who do not attend school                                         | F                                                    | ...                       | ...                                    | ...                          | ...                                    |
| School-aged children—children who attend school                                                | 45.5 E                                               | 4.8                       | 23.6 E                                 | 4.0 E                        | 2.0 E                                  |

... not applicable

E use with caution

F too unreliable to be published

1. Fees represent full-time daily rates among children aged 0 to 5 years not attending school and daily rates among children attending school.

Source: Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2024.

**Table 5** describes differences in characteristics between centres that reported having received CWELCC funding and those that did not. Centres with CWELCC funding tended to be larger, employed more workers, and enrolled more children on a full- or part-time basis. Funded centres were also 19 percentage points more likely to be not-for-profit and 16 percentage points less likely to be for-profit services. No significant differences were found for centres run by government agencies. Among not-for-profit centres, those that reported having received CWELCC funding were nearly twice as likely to have previously been a for-profit centre. Centres operated by First Nations, Métis or Inuit organizations were less likely to report having received CWELCC funding.

Table 5

Centres providing care to children aged 0 to 5 years by receipt of funding from Canada-wide Early Learning and Child Care agreements, Canada, April 2024

| Characteristics                                                                                                                                          | Centre has received funding<br>through CWELCC<br>agreements | Centre has not received<br>funding through CWELCC<br>agreements | Difference |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|-----------------------------------------------------------------|------------|
| mean in centres                                                                                                                                          |                                                             |                                                                 |            |
| <b>Total staffing</b>                                                                                                                                    |                                                             |                                                                 |            |
| All                                                                                                                                                      | 11.3                                                        | 8.9                                                             | 2.4 *      |
| <b>Total children enrolled</b>                                                                                                                           |                                                             |                                                                 |            |
| All                                                                                                                                                      | 57.2                                                        | 46.2                                                            | 11 *       |
| percentage of centres                                                                                                                                    |                                                             |                                                                 |            |
| <b>Centre auspice</b>                                                                                                                                    |                                                             |                                                                 |            |
| Non-governmental centre, not-for-profit legal status                                                                                                     | 54.0                                                        | 35.1                                                            | 18.9 *     |
| Non-governmental centre, for-profit identification                                                                                                       | 39.6                                                        | 56.0                                                            | -16.4 *    |
| Non-governmental centre, neither not-for-profit legal status nor for-profit identification                                                               | 1.3 E                                                       | 2.4 E                                                           | -1.2       |
| Centre operated by a government agency                                                                                                                   | 5.2                                                         | 6.5 E                                                           | -1.3       |
| <b>Centre had previously been operated as a private or for-profit organization (if it is a non-governmental centre with not-for-profit legal status)</b> |                                                             |                                                                 |            |
| Yes                                                                                                                                                      | 24.1                                                        | 11.2 E                                                          | 12.9 *     |
| <b>Operated by First Nations, Métis or Inuit organization or association</b>                                                                             |                                                             |                                                                 |            |
| Yes                                                                                                                                                      | 0.7                                                         | 3.4 E                                                           | -2.7 *     |
| <b>Year centre was licensed (if licensed at the time of survey collection)</b>                                                                           |                                                             |                                                                 |            |
| 2023 to 2024                                                                                                                                             | 2.2 E                                                       | 3.5 E                                                           | -1.2       |
| 2020 to 2022                                                                                                                                             | 8.8                                                         | 13.8                                                            | -5.0 *     |
| 2010 to 2019                                                                                                                                             | 28.2                                                        | 36.8                                                            | -8.6 *     |
| Before 2010                                                                                                                                              | 60.8                                                        | 46.0                                                            | 14.8 *     |
| <b>Centre operating at maximum capacity</b>                                                                                                              |                                                             |                                                                 |            |
| Yes                                                                                                                                                      | 52.2                                                        | 54.5                                                            | -2.3       |
| <b>Change in maximum capacity compared with April 2023</b>                                                                                               |                                                             |                                                                 |            |
| Yes, an increase                                                                                                                                         | 22.2                                                        | 11.5 E                                                          | 10.8 *     |
| Yes, a decrease                                                                                                                                          | 3.2 E                                                       | 5.2 E                                                           | -2.1       |
| No change                                                                                                                                                | 74.6                                                        | 83.3                                                            | -8.7 *     |
| <b>Located in an urban region</b>                                                                                                                        |                                                             |                                                                 |            |
| Yes                                                                                                                                                      | 84.8                                                        | 86.6                                                            | -1.9       |
| <b>Province or territory</b>                                                                                                                             |                                                             |                                                                 |            |
| Newfoundland and Labrador                                                                                                                                | 1.5                                                         | 1.0 E                                                           | 0.5 *      |
| Prince Edward Island                                                                                                                                     | 1.0                                                         | 0.2 E                                                           | 0.8 *      |
| Nova Scotia                                                                                                                                              | 3.2                                                         | F                                                               | ...        |
| New Brunswick                                                                                                                                            | 4.0                                                         | 3.2                                                             | 0.8 *      |
| Quebec                                                                                                                                                   | ...                                                         | ...                                                             | ...        |
| Ontario                                                                                                                                                  | 50.3                                                        | 17.0                                                            | 33.2 *     |
| Manitoba                                                                                                                                                 | 7.7                                                         | 3.4                                                             | 4.3 *      |
| Saskatchewan                                                                                                                                             | 4.3                                                         | 2.1 E                                                           | 2.2 *      |
| Alberta                                                                                                                                                  | 19.9                                                        | 9.6                                                             | 10.4 *     |
| British Columbia                                                                                                                                         | 7.3                                                         | 63.2                                                            | -55.9 *    |
| Territories combined                                                                                                                                     | 0.8                                                         | F                                                               | ...        |

... not applicable

E use with caution

F too unreliable to be published

\* difference in centres is statistically significant (p&lt;0.05)

**Note:** CWELCC = Canada-wide Early Learning and Child Care.**Source:** Statistics Canada, Canadian Survey on the Provision of Child Care Services, 2024.

Centres licensed before 2010 were more likely to report having received CWELCC funding, while centres licensed from 2010 to 2022 were somewhat less likely. No difference was observed in the proportion of centres operating at maximum capacity by CWELCC funding status, although funded centres were about 11 percentage points more likely to have increased their maximum capacity in the previous year. The

share of centres that increased their maximum capacity and that received funding was about twice that of centres that increased their capacity but had not received funding. No relationship was found between CWELCC funding and urban location. In most provinces and territories, the majority of centres reported that they had received CWELCC funding, except for British Columbia (the proportion of centres not receiving funds could not be estimated in Nova Scotia and the territories).

## Discussion

This report gives a snapshot of child care centres providing care to children aged 0 to 5 years in April 2024 and compares characteristics of centres that had received funding from the CWELCC agreements with those of centres that did not. An estimated 11,092 child care centres were operating in Canada in 2024, providing full- or part-time care to approximately 627,500 children. Nearly all centres were licensed by child care authorities, with over half being licensed before 2010. Just under half of the centres were not-for-profit, of which about one in five had previously been for-profit organizations. A typical centre had about 12 employees and enrolled 57 children on a full- or part-time basis. About 7 in 10 centres outside Quebec reported that they had received CWELCC funding, and about 7 in 10 centres in Quebec participated in the Quebec reduced contribution program.

Repeated cycles of the cross-sectional CSPCCS may provide insights into changes in child care centres over time and demonstrate progress toward the commitments made in the bilateral agreements. Comparisons with centres surveyed in April 2022 (Charters & Findlay, 2023; Charters & Findlay, 2024) suggest that the average levels of enrolment, care options and staffing were largely consistent between the two periods. The following sections address findings relevant to specific pillars of the bilateral agreements and draw comparisons over time where appropriate.

## Affordability

Results suggest that 86% of centres outside Quebec had enrolled one or more children receiving a fee subsidy, which is comparable to 2022 (Charters & Findlay, 2023). While only Alberta and Prince Edward Island modified their fee subsidy eligibility or value (in addition to other policy interventions) to help achieve federal fee reduction targets (Macdonald & Friendly, 2023a), preexisting subsidy programs remained active in other jurisdictions (Friendly et al., 2024). As the survey results do not provide information on the number of children receiving a subsidy or changes in subsidy amounts or eligibility rules, these results provide limited insights into how subsidies continue to be used to reduce fees.

Full-time daily fees varied considerably across age categories and jurisdictions, with a minimum of \$10.00 a day to a maximum of \$49.50 a day. Compared with the results of the Canadian Centre for Policy Alternatives child care fee surveys (Macdonald & Friendly, 2023a; Macdonald & Friendly, 2025), the present findings are somewhat similar or moderately higher in most of the provinces and territories. However, differences in survey methods likely account for some differences in the findings (e.g., the child care fee surveys were collected only in major Canadian cities, whereas the current findings reflect provincial- or territorial-level estimates).

## Accessibility

Nearly four in five centres had a list of children waiting to be enrolled, and about three in five centres were operating at their maximum capacity in April 2024. These findings suggest that most centres were

unable to enroll additional children in all or some age groups. Wait lists for enrolment may reflect unmet demand among families for child care spaces that is not being met by the supply and limitations in the accessibility of child care in Canada. Of note, 15% of centres had expanded their maximum capacity in the previous year, suggesting limited expansion of child care spaces among preexisting centres. Lower availability of child care services may lead to increased competition among parents for scarce spaces (Statistics Canada, 2022b). Centres not at maximum capacity were capable of providing care to an additional 16 children per centre on average and a median of 6 children (not shown), although the specifics of additional capacity (e.g., age and full-time versus part-time status) are unknown.

## Flexibility

The proportions of centres offering flexible or non-standard care options were largely consistent in 2022 and 2024. For instance, in 2022 and 2024, about 2% of centres offered care during non-standard hours, such as on weekends, in evenings or overnight, and the proportion of centres offering drop-in or flexible care options remained under 20%. These results suggest that care options for non-standard hours remain limited (Lero et al., 2021).

## Inclusivity

Commitments made in the bilateral agreements targeted new space creation and inclusive programming to accommodate diverse groups of children and vulnerable children and families. In 2022, 43% of centres had enrolled one or more children with disabilities for whom they provided accommodations (Charters & Findlay, 2023), while, in 2024, 74% of centres reported having accommodations in place for children with long-term conditions or disabilities. Although the 2024 figure refers to accommodations and the 2022 figure refers to children (and thus are not directly comparable), the results suggest that the majority of centres in Canada were able to offer at least some accommodations for inclusive care to children with disabilities.

## Quality

Expansion of the not-for-profit child care sector in Canada has been advocated for (Dhuey, 2024; Friendly, 2019) because of its associations with higher quality (Cleveland & Krashinsky, 2009; Varmuza, Perlman & Falenchuk, 2021) and more stable provision of care (Kershaw, Forer & Goelman, 2004). Provinces and territories committed to expanding child care spaces completely or predominantly in not-for-profit centres and regulated family-based settings (Friendly et al., 2024; Government of Canada, 2024). The proportion of not-for-profit or government-operated centres (53.5%) may be roughly comparable to the 2022 proportion of 49.8%, in addition to the 3.6% that did not know their auspice status in that survey. This may corroborate findings from administrative data sources (Friendly et al., 2024), where the expansion of not-for-profit centre-based care from 2022 to 2024 is uncertain.

Results suggest that structural characteristics associated with child care quality at times exceeded the provincially or territorially legislated recommendations, particularly for younger age groups. For example, for toddlers in Saskatchewan, the median group size (11) and median child-to-staff ratio (6:1) exceeded Saskatchewan's age-specific requirements for child care centres of a group size maximum of 10 and a children-to-staff ratio of 5:1 (Beach et al., 2023). However, these findings should be put in context with two possible explanations relating to survey measurement. First, enrolment estimates reflect full- and part-time enrolment and not attendance on a given day. Thus, multiple children who were enrolled part time may have occupied a single full-time equivalent space. Second, in the case of mixed-age groups, rooms were assigned to either the age group with the greatest number of children or, if groups were

equal, to the youngest group. This may distort the allocation of children to rooms or staff. Therefore, caution should be used in interpreting the results of these structural measures. These findings also point to the complexity of the day-to-day operations of child care centres, with continuous reallocation of staff to accommodate daily attendance and the fluidity of child care situations to meet jurisdictional requirements.

## Funding from Canada-wide Early Learning and Child Care agreements

Across Canada, an estimated 5,711 centres serving children aged 0 to 5 years reported that they had received CWELCC funding (72%). Funding was associated with not-for-profit services, consistent with the intent for the CWELCC system to expand primarily among public and not-for-profit services (Government of Canada, 2024). There is some evidence that non-governmental, not-for-profit centres receiving funds were more likely to have previously been for-profit centres. While this may reflect movement from the for-profit to the not-for-profit auspice model, the overall share of for-profit centres remained fairly consistent with previous periods (Charters & Findlay, 2023; Friendly et al., 2024). While there were no significant associations between funding status and a centre operating at maximum capacity, funded centres were more likely to have increased their maximum capacity relative to the previous year. This may possibly relate to CWELCC funding contributing to the expansion of child care spaces (Government of Canada, 2024), although further analysis of other potential determinants is required. Most centres that were operated by a First Nations, Métis or Inuit organization did not receive CWELCC funding, possibly because of separate funding mechanisms available through the Indigenous Early Learning and Child Care Framework. In most provinces and territories, the majority of child care centres reported that they had received funding from the CWELCC agreements by 2024 with the exception of centres in British Columbia. Though provincial reports from British Columbia describe the use of federal funds towards a number of commitments related to the bilateral agreements, some of these funds may have been carried over to provincial initiatives that predated the agreements (Macdonald & Friendly, 2023a; Province of British Columbia, 2023). Uncertainty about funding sources may have led respondents to claim they did not receive CWELCC funding.

## Limitations

This study has several limitations. The CSPCCS sampling frame was drawn from Statistics Canada's Business Register and publicly available lists of licensed and regulated child care centres, which may have excluded some centres administered by schools or school boards that are not part of provincial or territorial child care licensing. Respondents were asked whether their centre had received any funding from the CWELCC agreements. Although clarification was provided that the CWELCC system is the five-year plan to make regulated child care more accessible and affordable and reduce average fees to \$10 a day by 2025/2026, respondents may not have been aware of the centre's participation, as each jurisdiction has its own terminology for the distribution of funding. Future iterations of the survey will attempt to improve the sampling frame, in addition to question wording for this item.

Estimates of structural characteristics associated with child care quality may be biased by reliance on estimates of enrolment by age rather than attendance, as well as by the inability to distinguish or examine the composition of mixed-age classes. It is plausible that many centres would have reached or been close to reaching their maximum group size and child-to-staff ratios, given that most centres reported being at maximum capacity (60%) or had a waitlist (84%). This implies that even modest distortions to these counts may have pushed the median estimates over the maximum limits stipulated by the province or territory. The collection of information on mixed group patterns may improve the derivation of these structural measures, which remain relevant to understanding the important concept of child care quality (Bigras et al., 2010; Slot, 2018). Finally, the CSPCCS is a cross-sectional survey and faces limitations in

describing changes occurring over time. Given that the CSPCCS relies on provider and director perspectives, it was not possible to address many facets relevant to the CWELCC system, such as the characteristics of participating children, fee reductions as experienced by families and other areas of interest. Therefore, while the results of this study may provide insights into characteristics of child care centres associated with the CWELCC pillars, they do not represent evaluations of the program or comprehensive appraisals of the pillars themselves.

## Conclusions

The current study builds on previous work to provide national estimates of child care services in centres providing care to children aged 0 to 5 years in April 2024. The results provide an overview of child care centres, including overall characteristics, centre capacity, resources and funding, and structural features associated with child care quality. This study further provides insights into the CWELCC system by exploring changes in centre characteristics over two cycles of the CSPCCS and differences between centres that reported having received CWELCC funding as of 2024 and those that did not. Continued and systematic data collection and analysis on child care services will provide policy makers and stakeholders with timely insights into the changing child care landscape in Canada. Future work should continue to monitor the status of the early learning and child care system in Canada and progress toward realizing the principles of the bilateral agreements with the provinces and territories.

## Appendix

Table A.1

### Age categories of children by province and territory, Canada, April 2024 (part 1)

| Province or territory                                                                                                                    | School attendance                               |
|------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|
| <b>Newfoundland and Labrador</b>                                                                                                         |                                                 |
| <b>Age category</b>                                                                                                                      |                                                 |
| Infants—children aged less than 24 months                                                                                                | Children aged 0 to 5 years not attending school |
| Toddlers—children aged 18 months to less than 3 years                                                                                    |                                                 |
| Preschool-aged children—children aged 2 years and 9 months to less than 5 years and 9 months who do not attend prekindergarten or school |                                                 |
| Prekindergarten-aged children—children aged 3 years and 8 months to less than 5 years and 9 months who attend prekindergarten            | Children attending school                       |
| School-aged children—children aged 4 years and 8 months to 13 years who attend school                                                    |                                                 |
| <b>Prince Edward Island</b>                                                                                                              |                                                 |
| <b>Age category</b>                                                                                                                      |                                                 |
| Children aged less than 22 months                                                                                                        | Children aged 0 to 5 years not attending school |
| Children aged 22 months to 3 years                                                                                                       |                                                 |
| Children aged 3 years or more who do not attend school                                                                                   |                                                 |
| School-aged children—children aged 3 years or more who attend school                                                                     | Children attending school                       |
| <b>Nova Scotia</b>                                                                                                                       |                                                 |
| <b>Age category</b>                                                                                                                      |                                                 |
| Infants—children aged less than 18 months                                                                                                | Children aged 0 to 5 years not attending school |
| Toddlers—children aged 18 months to less than 36 months                                                                                  |                                                 |
| Preschoolers—children aged 3 years or more who do not attend school or a pre-primary program                                             |                                                 |
| Pre-primary children—children who attend a pre-primary program                                                                           | Children attending school                       |
| School-aged children—children aged 12 or less who attend school above the pre-primary level                                              |                                                 |
| <b>New Brunswick</b>                                                                                                                     |                                                 |
| <b>Age category</b>                                                                                                                      |                                                 |
| Infants—children aged less than 2 years                                                                                                  | Children aged 0 to 5 years not attending school |
| Preschool children aged 2 years                                                                                                          |                                                 |
| Preschool children aged 3 years who do not attend school                                                                                 |                                                 |
| Preschool children aged 4 years or more who do not attend school                                                                         |                                                 |
| School-aged children who attend school                                                                                                   | Children attending school                       |
| <b>Quebec</b>                                                                                                                            |                                                 |
| <b>Age category</b>                                                                                                                      |                                                 |
| Children aged less than 18 months                                                                                                        | Children aged 0 to 5 years not attending school |
| Children aged 18 months to less than 4 years who do not attend school                                                                    |                                                 |
| Children aged 4 years or more who do not attend school                                                                                   |                                                 |
| Children who attend school                                                                                                               | Children attending school                       |

Table A.1

## Age categories of children by province and territory, Canada, April 2024 (part 2)

| Province or territory                                                                              | School attendance                               |
|----------------------------------------------------------------------------------------------------|-------------------------------------------------|
| <b>Ontario</b>                                                                                     |                                                 |
| <b>Age category</b>                                                                                |                                                 |
| Infants—children aged less than 18 months                                                          | Children aged 0 to 5 years not attending school |
| Toddlers—children aged 18 months to less than 30 months                                            |                                                 |
| Preschool-aged children—children aged 30 months to less than 6 years who do not attend school      |                                                 |
| Kindergarten-aged children—children aged 44 months to less than 7 years who attend kindergarten    | Children attending school                       |
| Primary or junior grade school-aged children—children aged 68 months to 12 years who attend school |                                                 |
| <b>Manitoba</b>                                                                                    |                                                 |
| <b>Age category</b>                                                                                |                                                 |
| Infants—children aged 12 weeks to less than 12 months                                              | Children aged 0 to 5 years not attending school |
| Infants—children aged 12 months to less than 24 months                                             |                                                 |
| Preschool-aged children aged 2 years                                                               |                                                 |
| Preschool-aged children aged 3 years who do not attend school                                      |                                                 |
| Preschool-aged children aged 4 years who do not attend school                                      |                                                 |
| Preschool-aged children aged 5 years or more who do not attend school                              |                                                 |
| School-aged children who attend school                                                             | Children attending school                       |
| <b>Saskatchewan</b>                                                                                |                                                 |
| <b>Age category</b>                                                                                |                                                 |
| Infants—children aged 6 weeks to less than 18 months                                               | Children aged 0 to 5 years not attending school |
| Toddlers—children aged 18 months to less than 30 months                                            |                                                 |
| Preschool children aged 30 months or more who do not attend school                                 |                                                 |
| School-aged children who attend school                                                             | Children attending school                       |
| <b>Alberta</b>                                                                                     |                                                 |
| <b>Age category</b>                                                                                |                                                 |
| Infants—children aged less than 12 months                                                          | Children aged 0 to 5 years not attending school |
| Infants—children aged 12 months to less than 19 months                                             |                                                 |
| Children aged 19 months to less than 3 years who do not attend school                              |                                                 |
| Preschool children—children aged 3 years to less than 4 years who do not attend school             |                                                 |
| Preschool children—children aged 4 years or more who do not attend school                          |                                                 |
| Kindergarten children and school-aged children—children aged 4 years or more who attend school     | Children attending school                       |
| <b>British Columbia</b>                                                                            |                                                 |
| <b>Age category</b>                                                                                |                                                 |
| Children aged less than 18 months                                                                  | Children aged 0 to 5 years not attending school |
| Children aged 18 months to less than 30 months                                                     |                                                 |
| Preschool children—children aged 30 months or more who do not attend school                        |                                                 |
| School-aged children—children who attend school                                                    | Children attending school                       |
| <b>Yukon</b>                                                                                       |                                                 |
| <b>Age category</b>                                                                                |                                                 |
| Infants—children less than 18 months                                                               | Children aged 0 to 5 years not attending school |
| Preschool children—children aged 18 months to less than 3 years who do not attend school           |                                                 |
| Preschool children—children aged 3 years or more who do not attend school                          |                                                 |
| School-aged children—children who attend school                                                    | Children attending school                       |

**Table A.1****Age categories of children by province and territory, Canada, April 2024 (end)**

| Province or territory                                                     | School attendance                               |
|---------------------------------------------------------------------------|-------------------------------------------------|
| Northwest Territories                                                     |                                                 |
| Age category                                                              |                                                 |
| Infants—children aged less than 13 months                                 | Children aged 0 to 5 years not attending school |
| Infants—children aged 13 months to less than 25 months                    |                                                 |
| Preschool children—children aged 25 months to less than 36 months         |                                                 |
| Preschool children—children aged 3 years who do not attend school         |                                                 |
| Preschool children—children aged 4 years who do not attend school         |                                                 |
| Preschool children—children aged 5 years or more who do not attend school | Children attending school                       |
| School-aged children—children who attend school                           |                                                 |
| Nunavut                                                                   |                                                 |
| Age category                                                              |                                                 |
| Children aged 0 to 12 months                                              | Children aged 0 to 5 years not attending school |
| Children aged 13 to 24 months                                             |                                                 |
| Children aged 25 to 35 months                                             |                                                 |
| Children aged 3 years                                                     |                                                 |
| Children aged 4 years who do not attend school                            |                                                 |
| Children aged 5 years or more who do not attend school                    | Children attending school                       |
| School-aged children—children who attend school                           |                                                 |

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