

Game Changer

Will provinces and territories meet
the new federal child care fee targets?
Canadian child care fees 2021

David Macdonald and Martha Friendly





CCPA

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Executive summary

IN WHAT PROMISES to be a historic transformation of child care provision in Canada, the federal government is funding a new Canada-wide universal child care plan that commits to reducing child care fees by 50% by the end of 2022 and to bring them down to an average of \$10 a day in all regulated child care by 2025.

This report assesses which provinces and territories are on track to meet these ambitious targets and which ones might fall behind. In order to do that, we produce three critical data points for the coming transformation. First, what were fees for full-time care in 2021, before any reforms were made? Second, based on the federal commitment to reducing parent fees an average of 50%, what are the city and age group federal fee targets for 2022? Third, based on provincial and territorial plans for fee reduction, what will the projected 2022 fees be in Canadian cities and will they be low enough to meet the federal targets?

We draw on the Canadian Centre for Policy Alternatives' (CCPA) survey of licensed child care centres and regulated home-based child care in 37 cities across Canada—the only database of its kind in the country.

While an average 50% reduction in fees by the end of 2022 may seem like a straightforward goal, the provinces plan to get there in very different ways. The four main ways are: (1) Reducing existing provincially or territorially set fees, (2) Providing a flat-rate rebate but retaining the existing market fee, (3) Changing the fee subsidy system, and (4) Having providers reduce their individual fees by 50%, with some limits. Provinces and territories are

mixing and matching these approaches to get to the average 50% reduction goal. Among the various approaches, reducing the set fees that are already in use in four provinces can most transparently meet the 2022 federal targets, although not all provinces with set-fee regimes are projected to achieve their target fees.

Infant fees in 2021 and projected 2022 fees

Highly labour-intensive infant child care is usually the most expensive child care age group in most of Canada.

The Quebec cities of Gatineau, Quebec City, Longueuil, Montreal and Laval—which have the lowest median infant fees in Canada—already exceed the second federal target of an average of \$10 a day by 2025–26. As a result of Yukon’s territorial child care initiative in 2021, which predated the federal program, infant fees in Whitehorse, at \$240 a month, also exceed its federal target.

At the other end of the spectrum, Toronto topped the charts with the highest infant fees in Canada in 2021, at \$1,948 a month. Similarly, most of the Greater Toronto Area (GTA) suburbs charged infant fees that were more than \$1,500 a month, before any changes came into effect.

Based on the provincial/territorial published plans with sufficient information, nine of 26 cities with data are projected to achieve their federal target for infant fees by the end of 2022. These include Whitehorse, St. John’s, Yellowknife, Lethbridge and several Ontario cities. Another twelve cities will come close to their federal targets, missing them by between \$20 a month and \$100 a month.

Five cities will miss the federal infant fee targets by more than \$100 a month: Winnipeg, Brampton, Hamilton, Calgary and Saskatoon. Manitoba isn’t reducing its provincially set fees but it is changing the fee subsidy system, which is not included in these calculations. Some Ontario cities had fee reduction programs in place in 2019. These set the common 2019 base year at a lower rate but were subsequently cancelled. In Alberta, there is a flat fee reduction program, but part of its plan also involves altering its subsidy system.

Once provincial fee reduction programs are implemented, Toronto is projected to remain the most expensive city in the country for infant care, at \$974 a month in 2022, although this is far less than the \$1,948 median fee in 2021.

Toddler fees in 2021 and projected 2022 fees

Quebec cities already have the lowest toddler fees in Canada and are already below the 50% reduction target for 2022 and the \$10 a day 2025 federal target. Whitehorse's toddler fees, at \$200 a month, are also already below both federal targets.

At the high end, in 2021 Toronto median toddler fees were \$1,615 a month. Richmond, B.C., was close behind, at \$1,450 a month, as were most GTA suburbs, at \$1,300 a month.

Once provincial and territorial fee reduction plans are in place by the end of 2022, five of the 26 cities included in this analysis will achieve their federal fee reduction targets: Whitehorse, St. John's, Regina, Kitchener and Markham.

Thirteen of the 26 cities will come close to their federal targets, missing them only by between \$20 a month and \$100 a month. Saint John, Richmond Hill, Vaughan and London, Ontario are projected to be at the bottom of this range, getting to about \$20 a month more than the federal target in 2022.

Eight cities will miss their 2022 federal toddler targets by at least \$100 a month. Calgary and Winnipeg will miss their federal targets by more than \$200 a month for toddlers.

After the planned reductions, Toronto will continue to have the most expensive toddler care in the country in 2022, at \$807 a month. Calgary will be a close second, at \$785 a month. Toddler fees in the GTA suburbs are projected to be in the \$600 a month range by the end of 2022.

Preschool-age fees in 2021 and projected 2022 fees

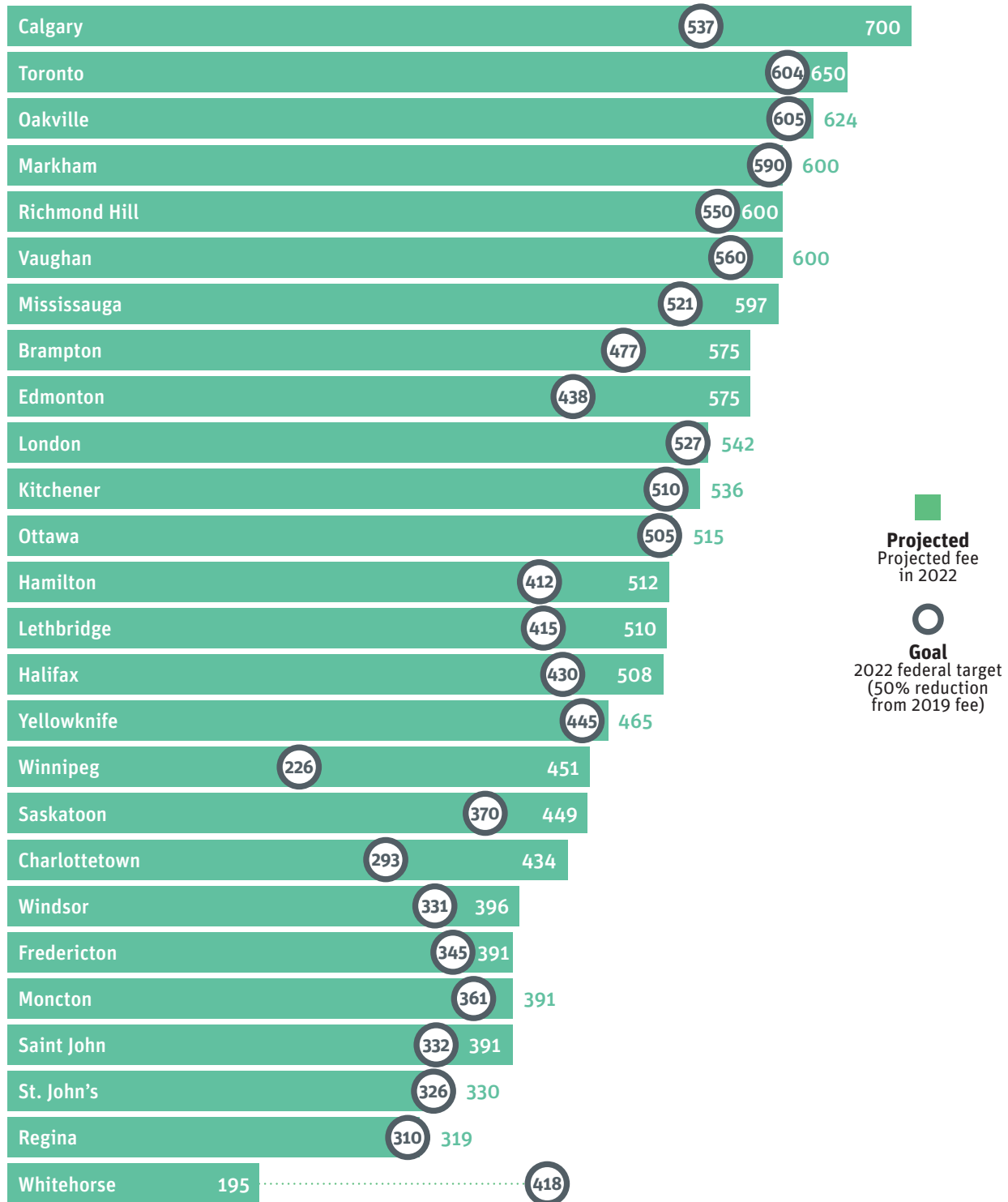
Like the other age groups, neither the cities in Quebec nor Whitehorse will need any additional reductions to reach their federal targets in 2022. All of these cities already had preschool-age fees below \$200 a month in 2021.

Like the other age groups, Toronto had the highest preschool-age fees in the country in 2021, at \$1,300 a month.

Seven cities are projected to achieve their federal target in 2022 for preschool-age fees. Fifteen cities are projected to come close, missing their target by between \$20 a month and \$100 a month at the end of 2022.

Four cities are projected to miss their preschool-age fee targets by at least \$100 a month: Winnipeg, Calgary and Edmonton for the reasons discussed above, but also Charlottetown. P.E.I. has a set-fee system and is reducing all age-based fees to a single set fee in 2022, providing a larger reduction

FIGURE A Projected preschool-aged fees in 2022 (monthly median)



Notes Median fees includes both centres and family child care fees.
Source CCPA 2021 and 2019 child care fee survey and authors' calculations.

for infant fees, which were higher compared to preschool-age fees in the base year. Following the planned reduction in 2022, Calgary is projected to tie Toronto with the highest preschool-age fees, at \$700 a month. The GTA suburbs and Richmond, B.C., will follow close behind, in the \$600 a month range.

Canada is finally on its way to achieving universal, affordable child care; how quickly and how well this can be achieved for all families Canada-wide will be determined by how each jurisdiction goes about meeting its federal targets. As always, the devil is in the details.

A watershed year

THIS HAS BEEN a watershed year for Canadian child care, with federal-provincial and territorial agreements to move toward \$10 a day child care now in place. Child care in Canada has long been characterized as “patchwork”, with no Canada-wide approach, national policy, nor a significant federal role. Child care services have been provided in a primarily market model without sustained operational public funding and with heavy reliance on parent fees to cover basic delivery costs. As a result, the supply of services has been limited in relation to demand, the child care workforce is underpaid, and parent fees have been too high for many families. Canada has been taken to task by feminist organizations, the child care sector, the United Nations and the Organization for Economic Co-operation and Development (OECD) for its lack of a national vision for child care that is supported by public policy and adequate funding arrangements.

Last year, in a development widely hailed as historic, the federal government announced its intention to work with provinces, territories and Indigenous governance organizations to build a Canada-wide system of early learning and child care based on the principles of affordability, accessibility, quality and inclusion. There is no doubt that the substantial funding and policy commitments announced in the April 2021 federal budget have the capacity to dramatically transform Canadian early learning and child care.

Responsibility for the provision of child care, like most other social programs in Canada, primarily falls within the provinces’ and territories’ jurisdiction. Thus, in the past year, the federal government followed its

2021 budget commitments by negotiating bilateral agreements (referred to as Canada-wide Early Learning and Child Care Agreements) with each province and territory,¹ setting out an action plan, targets and timetables for moving toward the goal of a universal child care system in every part of Canada. The federal government earmarked more than \$27 billion over five years to fund and incentivize the 2021 Canada-wide agreements and it committed to ongoing annual spending of at least \$9.2 billion after the initial five-year period. Each province and territory will receive a share of the total funding based on a base funding allocation of \$2 million, which will be supplemented by a per-capita funding formula based on the number of children under the age of 12.

Tracking progress

THE DATA AND analysis in this report can play a key role in assessing progress made toward meeting the agreed-upon targets and long-term goals with respect to building a system that is affordable for parents. The Canadian Centre for Policy Alternatives (CCPA) child care fee survey is the sole Canada-wide data project that has consistently and regularly collected and analyzed data on parent fees for regulated child care services. Beginning with the first survey in 2014, the CCPA has annually surveyed child care centres and regulated family child care providers operating in Canada's large cities to gather these data, allowing parent fees to be tracked across Canada and over time.

In the 2021 federal budget, the federal government recognized low parent fees as a main feature of a new Canada-wide system of early learning and child care. Beginning with “affordability” as the first stated principle, it earmarked substantial federal funds to replace parent fees as the main source of funding for the day-to-day operation of child care services and it set a short-term, specific fee reduction target for provinces and territories to put in place by 2025–26. Specifically, the budget said federal funds would be used to achieve a 50% reduction in average fees² (compared to fees in 2019) for all regulated early learning and child care by the end of 2022 Canada-wide (outside Quebec). It further specified that parent fees outside Quebec would be brought down to an average of \$10 a day per child for all regulated child care spaces by 2025–26.

The fee data for 2021 provided in this report was collected in the fall of 2021 before implementation of the federal fee reductions began. This report

provides three kinds of information. First, it provides 2021 fee data to serve as a baseline for tracking fee reduction progress over the next five years. Second, based on the federal target of a 50% reduction of average fees³, it calculates the median 50% parent fee promised by the end of 2022 for each of the cities surveyed and the fee reduction needed to meet this target. Third, based on those provincial and territorial action plans that have been made publicly available and provide sufficient detail, it projects how close the cities covered in the fee survey will come to achieving the 50% fee reduction target in 2022.

The annual fee survey

THIS REPORT IS the eighth in the Canadian Centre for Policy Alternatives' (CCPA) series that tracks Canadian child care fees. The series was initiated to provide and analyze comparable, consistent data on the fees that parents are required to pay for licensed child care across Canada. Beginning in 2014, the CCPA has annually surveyed centres and regulated family child care providers in Canada's large cities to gather these data.

The annual fee survey considers child care from the perspective of service providers and the fees they charge; it does not collect data on what parents pay out-of-pocket for child care. That is, it asks service providers what fees they charge rather than asking parents what they pay for child care out-of-pocket. Thus, it does not take into account parent fee subsidies, tax credits or deductions that offset fees for parents.⁴

A strength of these surveys has been that the data have been collected using a consistent method, so year-to-year and province-to-province comparisons are possible. At the same time, additional questions and analyses have been added to several annual surveys. For example, we've asked questions about centre wait lists and wait list fees, as well as questions about non-profit and for-profit ownership. For the growing number of provinces and territories that are using fees set by government together with operational funding, the cities' market fee child care services (that is, those not covered by the set provincial fee) have been surveyed and analyzed separately. In

2015, a separate analysis was included to examine out-of-pocket fees that lower-income families eligible for fee subsidies are asked to pay on top of government subsidies.⁵ In 2017, child care providers in rural communities in Ontario and Alberta were surveyed to answer the question: “Are child care fees in rural communities lower than in larger cities?”⁶

The number of cities that we include has increased since the first survey, which covered licensed child care in Canada’s 20 largest cities in 2014. New cities were added, with the total number of cities rising to 37 since 2019. With the addition of Whitehorse, Yellowknife and Iqaluit, cities in every province and territory are now included. The survey collects data on licensed child care fees for three age groups: infants, toddler and preschool-aged children in centres and regulated family child care. Provinces and territories use different definitions of age categories and, in some jurisdictions, age groups are combined. Broadly, infants are children under 18 months or two years, toddlers are 18–36 months and preschoolers are children aged three-, four- and sometimes five-years-old but are not yet in school. The survey collects fee data only for full-day, full-time spaces.

The survey for this report was conducted by phone from October 12, 2021 through December 10, 2021 and involved over 11,000 phone calls. The survey and the figures used throughout the report include licensed spaces for both centres and regulated family child care. Median fees per city are weighted by the licensed capacity (spaces) of service providers, that is, the fees of a larger centre will count more than the fees of a smaller centre or family child care home.

How this report is organized

THE DATA AND analysis in this report are presented in three sections. The first section shows 2021 parent fees for centres and regulated family child care by city for the three age groups. The second section shows each city's federal target fees for 2022, which are calculated to be 50% of the average (median) fees for 2019⁷ (using CCPA's 2019 data) and the fee reductions needed to reach these targets. The third section projects whether the various approaches to reducing parent fees outlined in provincial and territorial action plans⁸ are likely to meet the federal targets. Discussion and conclusion sections complete this report. As we noted earlier, since federal data and indicators are not yet in place, this report and its consistent multi-year approach can play a significant and critical role in monitoring and assessing policy and funding changes.

Infant fees in 2021

THE INFANT CATEGORY comprises children under the age of 18 months or two years, although this varies somewhat by province. British Columbia does not use a separate infant category but, rather, a group combining infants and toddlers aged 0–3 years in a single age category, usually with a common fee. This likely makes the fee for infants in B.C. cities slightly lower and the fee for toddlers slightly more expensive compared to other cities with disaggregated age categories.

Infant care is usually the most expensive age group because it requires the highest staff-to-child ratios, so it is very labour intensive. Infant child care also accounts for the smallest number of full-time child care spaces, in part because the high cost is a disincentive to its development and in part because many parents are at home on parental leave for some portion of a child's first year.⁹

As in previous years, the cities in Quebec (Gatineau, Quebec City, Longueuil, Montreal and Laval) had the lowest median infant fees in the country at \$8.70 a day, or \$189 a month, at the end of 2021. The set fees in Quebec, which are indexed annually, were \$8.50 a day, or \$181 a month, in 2021.

As a result of new funding through Yukon's universal child care program in 2021, which predated the new federal initiative, infant fees in Whitehorse dropped dramatically from 2020, approaching Quebec cities' set fees of \$240 a month.

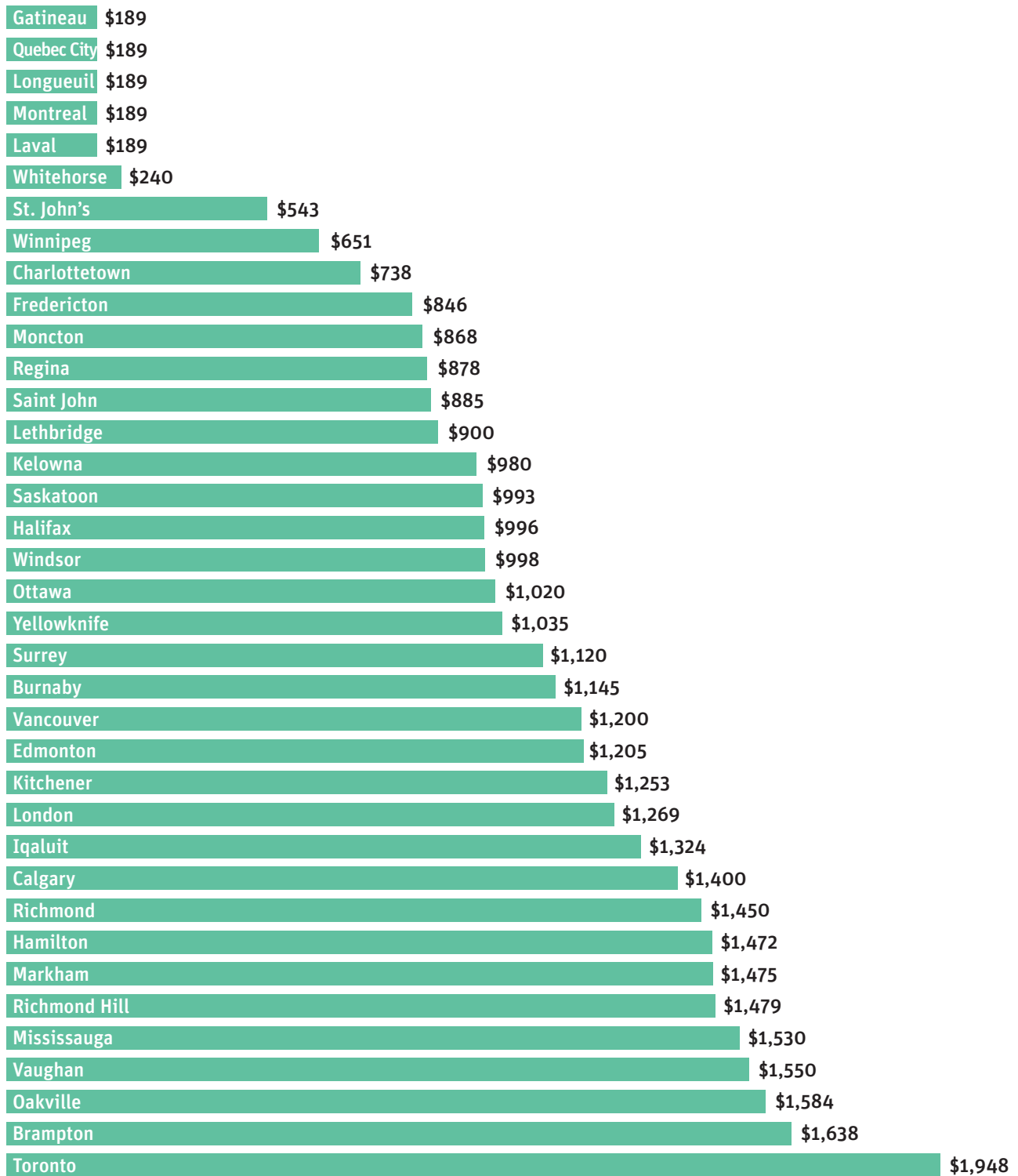
St. John's, Winnipeg and Charlottetown—also cities in set-fee provinces—continue to have lower fees in 2021 than other Canadian cities, with median infant fees of \$543, \$651 and \$738, respectively. St. John's 2021 infant fees have dropped considerably since 2020 due to provincial policy changes; the median infant fee in 2020 was \$955.

All the set fee provinces (Quebec, Manitoba, P.E.I., Newfoundland and Labrador¹⁰) have a sector of licensed service providers that are outside the set fee system and charge much higher market rates. However, in all of the cities in our survey, at least half the total spaces are part of the provincial set-fee scheme. As a result, the median equals the set fee. A weighted average of fees would be slightly higher than provincial set fees due to the existence of the non-set fee market priced spaces.

In 2021, Toronto's media infant fees remain the highest in the country at an eye-watering \$1,948 a month. These fees have gone up since 2020, when the median infant fee was \$1,866.

The rest of the cities in the Greater Toronto Area (Brampton, Oakville, Vaughan, Mississauga, Richmond Hill, Markham) had infant fees in the \$1,500 to \$1,600 range in 2021 (high, but not quite as high as the City of Toronto).

FIGURE 1 2021 median infant fees (monthly)



Source CCPA annual child care fee survey, 2021.

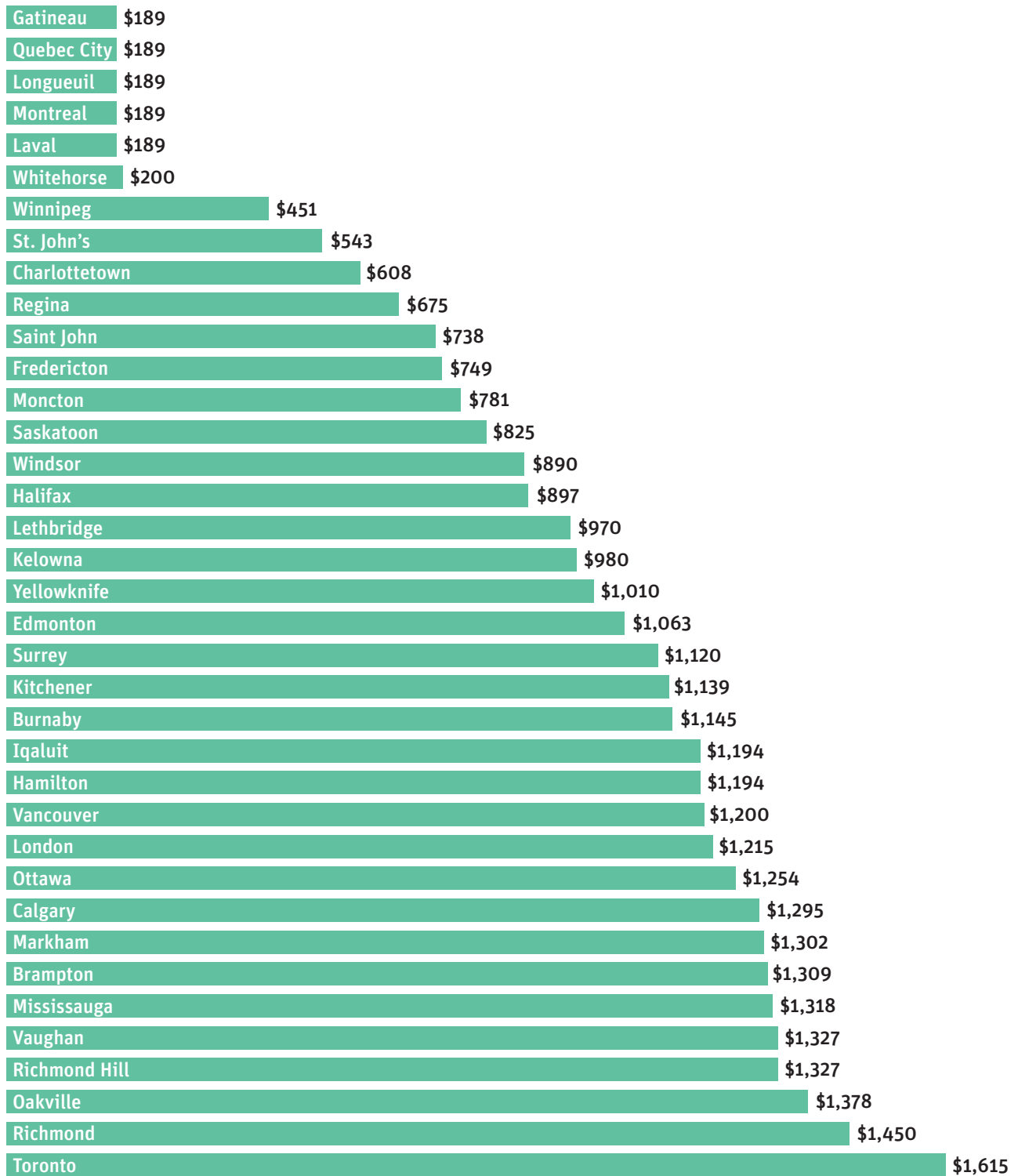
Toddler fees in 2021

THE TODDLER AGE group makes up the second largest group of spaces. It usually comprises children aged 18–24 months to two-and-a-half to three-years-old. Like infant fees, Quebec cities had the lowest median toddler fees in 2021, at \$189 a month. Note that Quebec’s set fees are the same for all age groups.

At \$200 a month, Whitehorse’s toddler fees in 2021 were only marginally higher than those in Quebec cities due to Yukon’s universal child care program, which was introduced in 2020. Median toddler fees are \$451 a month in Winnipeg, \$543 in St. John’s, and \$608 in Charlottetown. These cities are in provinces that have set fees. As with infant fees, toddler fees in St. John’s dropped substantially from \$716 a month in 2020. Regina, in a province without set fees, was next among the lower-fee cities in 2021, with fees of \$675 a month.

At \$1,615 a month, Toronto had the highest median toddler fees in the country in 2021. It was followed by Richmond, B.C., with fees of \$1,450 a month despite the fact that centres received provincial funds as part of the B.C. fee reduction initiative, which has been in place since the fall of 2018. Richmond experienced a large increase in its median fee, apparently driven by the presence of several expensive new for-profit centres in the past year. Of the eight cities with the highest fees, seven were in Ontario, with fees in Toronto suburbs Brampton, Oakville, Vaughan, Mississauga, Richmond Hill, Markham ranging from \$1,300 to \$1,380.

FIGURE 2 2021 Median toddler fees (monthly)



Source CCPA annual child care fee survey, 2021.

Preschool-age fees in 2021

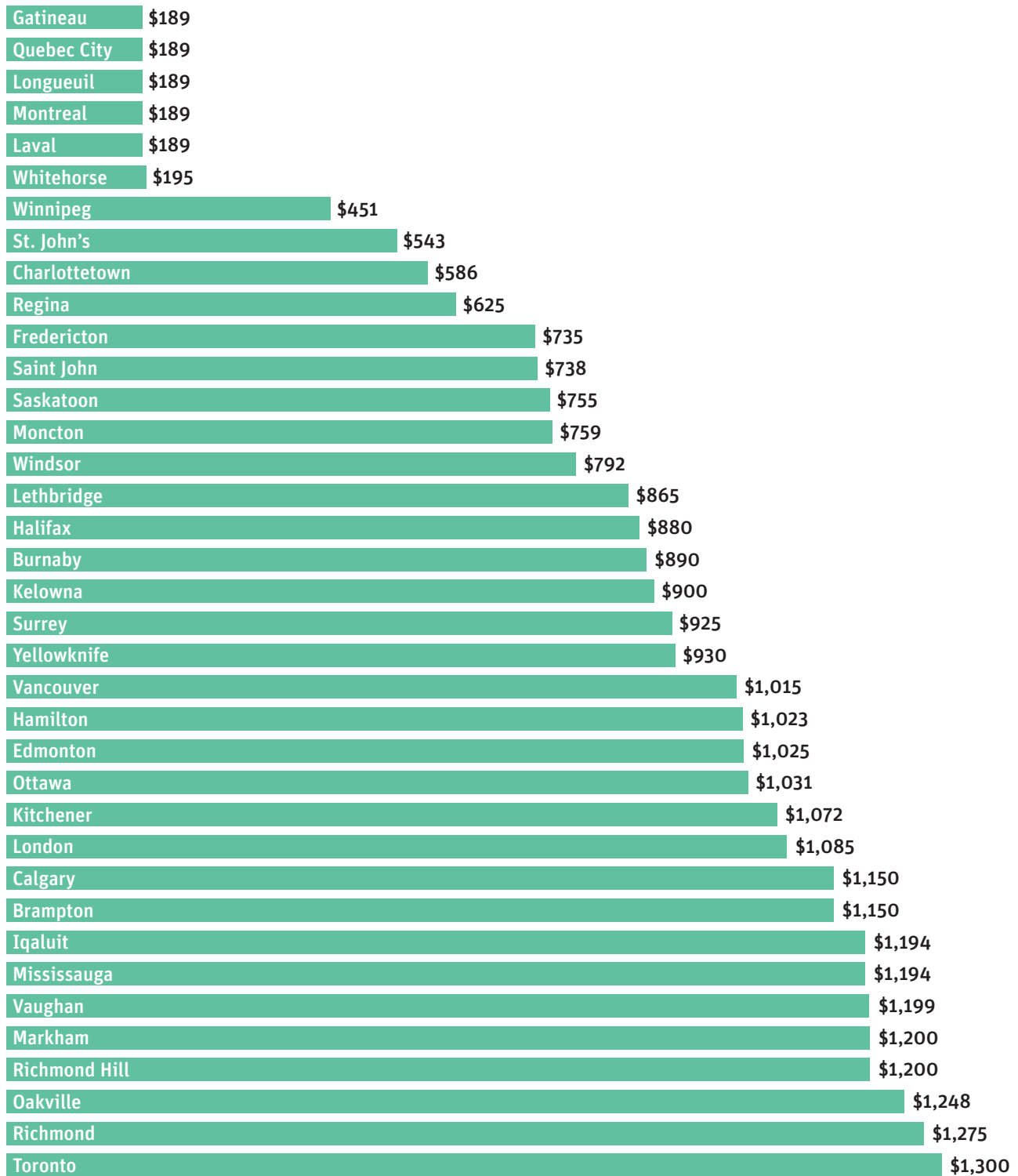
PRESCHOOL-AGED CHILDREN MAKE up the largest child care age group, with the most spaces. It usually comprises children from age two to school entry age.

At \$189 a month, the cities in Quebec (Gatineau, Quebec City, Longueuil, Montreal and Laval) had the lowest preschool-age fees in the country in 2021, reflecting Quebec's across-the-board set fees. Median preschool-age fees in Whitehorse are now on par with those in Quebec, at \$195 a month, due to the territorial funding changes in 2021.

Winnipeg, St. John's and Charlottetown—all cities in set-fee provinces—had the next lowest preschooler fees, as was the case for infant and toddler fees. Winnipeg's preschool-age fee was \$451 a month, St. John's was \$543 a month, and Charlottetown's was \$586 a month. Again, these cities were followed by Regina, with preschool-age fees of \$625 a month.

At \$1,300 a month, Toronto was once again the most expensive city in the country in 2021 for preschool-aged child care. At \$1,275, Richmond, B.C.'s median preschool-aged fees were just behind Toronto. The same Greater Toronto Area suburban cities, Iqaluit and Calgary—all of which had median preschool-aged child care fees in the \$1,100 to \$1,250 a month range.

FIGURE 3 2021 Median preschool-age fees (monthly)



Source CCPA annual child care fee survey, 2021.

Federal targets for 2022 and fee reductions needed to reach them¹¹

THE CROSS-CANADA FEDERAL child care plan announced in the 2021 federal budget set out two fee-related targets. The first is a 50% reduction in average fees by the end of 2022, while the second is a reduction to an average of \$10 a day by 2025–26. Specifically, the federal target for the end of 2022 is a 50% reduction in fees, on average, based on 2019 fees.^{12,13} Figures 4, 5 and 6 show these targets by age group and city, calculated by taking half of the fee from the CCPA survey of 2019 fee data¹⁴ and how much each city’s 2021 fees need to be reduced to meet the targets. This section reviews only the data for the 2022 fee reduction target.

Federal fee targets and reductions needed for infant fees

Table 1 shows the 2019 infant fees and the 2022 federal targets that are based on them. It also shows the 2021 infant fees for comparison and then shows the reduction in fees needed in each city to reach the 2022 federal government target in that city. Infant fees are generally the highest of the

age groups, so the reduction needed to reach the federal targets will also be higher than the other age groups.

The Quebec cities of Gatineau, Quebec City, Longueuil, Montreal and Laval, which have the lowest median infant fees in Canada, already exceed the second federal target of an average of \$10 a day by 2025–26.

As a result of Yukon’s territorial child care initiative in 2021, which predated the federal program, infant fees in Whitehorse had already dropped dramatically compared to 2019; at \$240 a month, they approach the Quebec cities. No additional reductions are needed to reach the federal target in 2022 in Whitehorse.

The 50% federal fee reduction target applied to St. John’s, Winnipeg and Charlottetown—cities with low fees in set-fee provinces—would result in median infant fees of \$477 a month, \$326 a month and \$369 a month, respectively. Thus, St. John’s needs an infant fee reduction of only \$65 a month to meet its target, while Winnipeg’s median infant fees need to be reduced by \$326 a month, and Charlottetown’s need to be reduced by \$369 a month to meet the 2022 federal targets.

The other cities in Atlantic Canada, Regina and Saskatoon in Saskatchewan, and Lethbridge, Alberta, will need to reduce their fees by between \$429 and \$526 a month to reach the federal target. These cities all started with lower median infant fees, so a smaller reduction is needed compared to some of the cities with higher median fees.

The fees in the B.C. cities of Vancouver, Burnaby, and Surrey are closely clustered. Infant fees will need to fall by between \$620 and \$645 a month to reach their federal target, with Richmond, B.C., requiring a larger reduction in infant fees, at \$850 a month. As noted earlier, several new large high-fee for-profit centres appear to be having an impact on median fees in Richmond, B.C. For an analysis of fee differential between for-profit and not-for-profit child care, see Appendix D in this report.

The cities with the highest fees will need to see the biggest fee reductions in order to hit their federal target. Brampton and Toronto will require a fee reduction of more than \$1,000 a month to reach their target. Toronto has very high infant fees, while Brampton, with somewhat lower fees, had a fee reduction program in place in 2019 that set the baseline fee lower, though it has since been cancelled.

Oakville, Vaughan, Mississauga, Richmond Hill and Markham, which are the other cities in the GTA, will need fee reductions in the \$700 to \$900 a month range to reach their federal target. There is significant variation in the fee reduction needed among GTA cities, since several had provincially

TABLE 1 Infant fee targets and reductions needed to reach them in 2022 (monthly)

	A: Median fees in 2019	B: Federal target in 2022 (A×50%)	C: Median fees in 2021	D: Reduction needed in 2022 to hit federal target (C-B)
Toronto	\$1,774	\$887	\$1,948	\$1,061
Brampton	\$1,259	\$629	\$1,638	\$1,009
Oakville	\$1,503	\$751	\$1,584	\$833
Vaughan	\$1,545	\$773	\$1,550	\$778
Mississauga	\$1,424	\$712	\$1,530	\$818
Richmond Hill	\$1,350	\$675	\$1,479	\$804
Markham	\$1,541	\$770	\$1,475	\$705
Hamilton	\$1,148	\$574	\$1,472	\$898
Richmond	\$1,200	\$600	\$1,450	\$850
Calgary	\$1,300	\$650	\$1,400	\$750
Iqaluit	\$1,300	\$650	\$1,324	\$674
London	\$1,250	\$625	\$1,269	\$644
Kitchener	\$1,389	\$694	\$1,253	\$559
Edmonton	\$1,075	\$537	\$1,205	\$667
Vancouver	\$1,112	\$556	\$1,200	\$644
Burnaby	\$1,000	\$500	\$1,145	\$645
Surrey	\$1,000	\$500	\$1,120	\$620
Yellowknife	\$1,093	\$546	\$1,035	\$489
Ottawa	\$1,020	\$510	\$1,020	\$510
Windsor	\$868	\$434	\$998	\$564
Halifax	\$939	\$469	\$996	\$526
Saskatoon	\$995	\$498	\$993	\$495
Kelowna	\$825	\$412	\$980	\$567
Lethbridge	\$900	\$450	\$900	\$450
Saint John	\$868	\$434	\$885	\$451
Regina	\$850	\$425	\$878	\$453
Moncton	\$856	\$428	\$868	\$440
Fredericton	\$835	\$418	\$846	\$429
Charlottetown	\$738	\$369	\$738	\$369
Winnipeg	\$651	\$326	\$651	\$326
St. John's	\$955	\$477	\$543	\$65
Whitehorse	\$900	\$450	\$240	
Laval	\$179	\$189	\$189	
Montreal	\$179	\$189	\$189	
Longueuil	\$179	\$189	\$189	
Quebec City	\$179	\$189	\$189	
Gatineau	\$179	\$189	\$189	

Notes Median fees in 2021 include both centres and family child care.

Source CCPA annual child care fee survey, 2021.

funded, municipally implemented fee reduction programs in 2019.¹⁵ These programs had all ended by the time of the 2021 data collection but they resulted in lower fees in 2019, which was the base year used in this report for calculating all jurisdictions' 50% federal fee reduction target.¹⁶

Federal fee targets and reductions needed for toddler fees

Table 2 shows 2019 toddler fees from our fee survey that year. The federal target is based on cutting 2019 fees in half (column B). With 2021 fees and the federal target, we calculate column D, the reduction amount needed in 2022 to reach the federal target.

The cities in Quebec already have the lowest fees in Canada for toddlers and they are already below the \$10 a day federal target for 2022. Whitehorse has already seen a substantial reduction in its toddler fees due to its provincial fee reduction initiative. Its toddler fees are already below the federal target.

Winnipeg, Charlottetown, and St. John's, which are in set-fee provinces, already have among the lowest toddler fees in the country. Fee reductions of between \$200 and \$300 a month for toddler care will be required to reach the federal target. Both P.E.I. and Newfoundland and Labrador have now moved from differential set fees by age group to one set fee across all age groups, similar to Quebec's set-fee system.

In the remaining Atlantic cities, along with Saskatoon, Regina, and the smaller Ontario city of Windsor, toddler fees will need to fall by \$300 to \$500 a month to reach their federal target.

At the high end of the range, Toronto would need the largest drop in toddler fees—\$886 a month—to reach its federal target. The surrounding suburbs of Oakville, Richmond Hill, Vaughan, Mississauga and Brampton would need toddler fees to fall by between \$700 and \$850 a month by the end of 2022. As noted above, one of several reasons for the substantial variation in the reduction needed among Ontario cities is that a number of cities had municipally delivered, provincially funded fee reduction programs in 2019 that have since been terminated. This reduced the value in column A (2019 fees), thus requiring a larger reduction in 2022 to reach the target.

TABLE 2 Toddler fee targets and reductions needed to reach them in 2022 (monthly)

	A: Median fees in 2019	B: Federal target in 2022 (A×50%)	C: Median fees in 2021	D: Reduction needed in 2022 to hit federal target (C-B)
Toronto	\$1,457	\$729	\$1,615	\$886
Richmond	\$1,200	\$600	\$1,450	\$850
Oakville	\$1,264	\$632	\$1,378	\$746
Richmond Hill	\$1,280	\$640	\$1,327	\$687
Vaughan	\$1,285	\$643	\$1,327	\$684
Mississauga	\$1,090	\$545	\$1,318	\$773
Brampton	\$1,025	\$513	\$1,309	\$797
Markham	\$1,327	\$663	\$1,302	\$639
Calgary	\$1,100	\$550	\$1,295	\$745
Ottawa	\$1,040	\$520	\$1,254	\$734
London	\$1,172	\$586	\$1,215	\$629
Vancouver	\$1,112	\$556	\$1,200	\$644
Hamilton	\$977	\$488	\$1,194	\$705
Iqaluit	\$1,213	\$606	\$1,194	\$587
Burnaby	\$1,000	\$500	\$1,145	\$645
Kitchener	\$1,149	\$575	\$1,139	\$565
Surrey	\$1,000	\$500	\$1,120	\$620
Edmonton	\$917	\$458	\$1,063	\$605
Yellowknife	\$990	\$495	\$1,010	\$515
Kelowna	\$825	\$412	\$980	\$567
Lethbridge	\$850	\$425	\$970	\$545
Halifax	\$829	\$414	\$897	\$482
Windsor	\$760	\$380	\$890	\$510
Saskatoon	\$800	\$400	\$825	\$425
Moncton	\$716	\$358	\$781	\$423
Fredericton	\$727	\$363	\$749	\$385
Saint John	\$738	\$369	\$738	\$369
Regina	\$680	\$340	\$675	\$335
Charlottetown	\$608	\$304	\$608	\$304
St. John's	\$726	\$363	\$543	\$179
Winnipeg	\$451	\$226	\$451	\$226
Whitehorse	\$850	\$425	\$200	
Laval	\$179	\$189	\$189	
Montreal	\$179	\$189	\$189	
Longueuil	\$179	\$189	\$189	
Quebec City	\$179	\$189	\$189	
Gatineau	\$179	\$189	\$189	

Source: CCPA annual child care fee survey, 2021.

Federal fee targets and reductions needed for preschool-age fees

Table 3 shows the 2019 median preschooler fees from our 2019 fee survey. The federal targets are based on cutting those 2019 fees in half, presented in column B. The 2021 preschool-age fees are shown in column C. From these, we calculate column D, the reduction amount needed to reach the federal target for each city.

As with other age groups, neither the cities in Quebec nor Whitehorse will need any additional reductions in 2022 to reach the federal target in column B.

The cities in set-fee provinces—Charlottetown, Winnipeg and St. John’s—will require less than a \$300 a month reduction of their preschool-age fees to reach their federal targets. In P.E.I., the provincial government has recently begun requiring all centres to use the provincially set fee, not only designated Early Years Centres.

Other Atlantic Canada cities and smaller cities in Ontario, Saskatchewan, and Alberta would need to reduce their preschool-age fees by \$300 to \$450 a month to reach the federal target.

While Toronto has the highest preschool-age fees, reaching the federal target will not require as large a reduction as Richmond, B.C. Toronto fees will require a reduction of almost \$700 a month, whereas fees in Richmond will need to be reduced by almost \$800 a month. As we noted earlier, several large, for-profit centres with high fees have opened in Richmond since 2019. This has substantially driven up median fees, thereby requiring a larger reduction in 2022 to cut 2019 fees in half.

The other cities in the Greater Toronto Area will need to reduce preschool-age fees by about \$600 to \$700 a month to meet the federal target.

TABLE 3 Preschool-age fee targets and reductions needed to reach them in 2022 (monthly)

	A: Median fees in 2019	B: Federal target in 2022 (A×50%)	C: Median fees in 2021	D: Reduction needed in 2022 to hit federal target (C-B)
Toronto	\$1,207	\$604	\$1,300	\$696
Richmond	\$955	\$477	\$1,275	\$797
Oakville	\$1,210	\$605	\$1,248	\$643
Richmond Hill	\$1,100	\$550	\$1,200	\$650
Markham	\$1,180	\$590	\$1,200	\$610
Vaughan	\$1,120	\$560	\$1,199	\$639
Mississauga	\$1,042	\$521	\$1,194	\$673
Iqaluit	\$1,213	\$606	\$1,194	\$587
Brampton	\$955	\$477	\$1,150	\$673
Calgary	\$1,075	\$537	\$1,150	\$613
London	\$1,055	\$527	\$1,085	\$558
Kitchener	\$1,020	\$510	\$1,072	\$562
Ottawa	\$1,010	\$505	\$1,031	\$526
Edmonton	\$875	\$438	\$1,025	\$587
Hamilton	\$825	\$412	\$1,023	\$611
Vancouver	\$954	\$477	\$1,015	\$538
Yellowknife	\$890	\$445	\$930	\$485
Surrey	\$850	\$425	\$925	\$500
Kelowna	\$810	\$405	\$900	\$495
Burnaby	\$850	\$425	\$890	\$465
Halifax	\$861	\$430	\$880	\$449
Lethbridge	\$830	\$415	\$865	\$450
Windsor	\$662	\$331	\$792	\$461
Moncton	\$722	\$361	\$759	\$398
Saskatoon	\$740	\$370	\$755	\$385
Saint John	\$664	\$332	\$738	\$406
Fredericton	\$690	\$345	\$735	\$390
Regina	\$620	\$310	\$625	\$315
Charlottetown	\$586	\$293	\$586	\$293
St. John's	\$660	\$330	\$543	\$212
Winnipeg	\$451	\$226	\$451	\$226
Whitehorse	\$835	\$418	\$195	
Laval	\$179	\$189	\$189	
Montreal	\$179	\$189	\$189	
Longueuil	\$179	\$189	\$189	
Quebec City	\$179	\$189	\$189	
Gatineau	\$179	\$189	\$189	

Source: CCPA annual child care fee survey, 2021.

Provincial/territorial policy choices

Will they meet federal fee reduction targets?

AFTER REVIEWING WHAT will be needed to reach the federal target outlined in Tables 1, 2 and 3, the next question is whether provincial plans will provide adequate fee reduction.

While the federal target of a 50% reduction in average fees, which is stated in the April 2021 budget, seems specific, provinces and territories have different starting points, as well as interpreting the target and the baseline in different ways. Table 4 provides a broad overview of the approaches used by the provinces and territories.¹⁷

This section examines whether those jurisdictions that have published their plans and have adequate information for the calculations are likely to meet the 2022 target. It first discusses the four approaches being taken and then discusses what the plan means for the projected 2022 fees in each city.

As Table 4 shows, the 10 provinces and territories are included, using four different routes to fee reduction, with some using more than one means to its end.

TABLE 4 Provincial/territorial approaches to reaching federal fee reduction targets

Province/territory	Reducing provincially/territorially set fees	Introducing a flat-rate fee reduction to previous market fees	Each service provider reduces fees by 50%	Change in fee subsidy eligibility or value
Newfoundland and Labrador	Yes			
Prince Edward Island	Yes			Yes
Nova Scotia		Yes		
New Brunswick	Yes			
Ontario			Yes	
Manitoba				Yes
Saskatchewan		Yes		
Alberta*		Yes		Yes
British Columbia [†]	Yes	Yes		
Yukon		Yes		
Northwest Territories			Yes	

Note This table includes only provinces/territories with sufficiently detailed public information. New Brunswick did not previously use a set fee approach but it moving to one with lowered fees. The Alberta fee subsidy rate has been reduced, not increased, and the income eligibility criterion has been raised substantially. British Columbia will increase the number of \$10 a day spaces from 2,500 to 12,500 by December 2022, although the set fee of \$10 a day will not change. The details of its fee reductions aren't yet available. A more detailed description of the plans is available in Appendix C.

Source Bilateral agreements between the federal government and each province/territory.

Reducing provincial and territorial set fees

Both Newfoundland and Labrador and P.E.I. are planning to reduce their provincially set fees to achieve, or exceed, their 50% federal target. This means that parents of all children in regulated child care will pay the new lower fee set by the provincial government—a predictable and transparent approach to lowering fees. P.E.I. previously had different set fees for children of different ages; these will be collapsed to a single \$20 a day fee in October 2022. According to the P.E.I. action plan, the province will reduce fees to an average of \$15 a day by December 2022 (based on an average fee that includes changes to fee subsidies and the introduction of kindergarten/ preschool for three-year-olds, although the set fees will remain at \$20 a day.)¹⁸

New Brunswick is moving from a system of market rate fees to one of set fees in its “designated facilities”. Almost all centres and most homes are now part of this system. In June 2022, the new set fee will be \$21 a day for infants or \$18 a day for toddlers and preschoolers in the larger cities in that province that we’ve surveyed.¹⁹

Before the Canada-wide program, B.C.'s prototype sites provided 2,500 \$10 a day spaces, which will be expanded to 12,500 spaces by the end of 2022. Thus, the fees have not changed, but their availability is being expanded.

At \$8.70 a day in 2022, Quebec's set-fee system, Canada's best-known set-fee system, is already below the longer-term federal target of \$10 a day. As a result, Quebec has not planned any fee reductions for 2022. Manitoba has also used a provincially set-fee system for many years, but it is not planning to reduce the set fees. Instead, Manitoba will expand its parent fee subsidy system to reduce eligible parents' out-of-pocket child care costs.

Flat-rate reduction on previously established fees

The most common approach, adopted by five of the 13 provinces and territories, is to provide a flat-rate fee reduction per space. Under this approach, service providers charge market-determined parent fees as they always have, but the province covers a specified, flat-rate portion of the fee. For example, Saskatchewan will now give child care centres \$395 a month to cover part of the parent fee for an infant in a centre. The net fee will be whatever fee that the centre has been charging, minus \$395 a month. It is essentially a flow-through fee subsidy from the province to cover all parents via the centre.

This approach reduces parent fees but is a somewhat less predictable and less transparent way to achieve the federal target, especially when compared with a straightforward set fee for all parents. It is also harder to monitor for accountability purposes. Additionally, this approach will result in parents paying widely varying fees. The province could reach the target of an average 50% fee reduction all while continuing to see fees at some centres or family child care homes which are much higher than others.

Finally, although provinces and territories may set a cap on fee increases (Alberta and British Columbia have done this), in practice, this is difficult to monitor. Also, unless a mechanism to limit this is put in place in the absence of a set fee, new centres could open up and charge exorbitant fees. This has driven up fees in Richmond, B.C., but appears to have been explicitly capped in Ontario. Overall, this approach to fee reduction maintains a market-fee approach, with less public management than the provincially set-fee systems.

Each service provider reduces fees by 50%

Using this approach, which is currently planned by the Northwest Territories and Ontario,²⁰ each service provider would cut its fees in half by the end of 2022. In Ontario, the municipal-level entities that act as local service managers will play a role in determining the amount of funding that service providers will receive to support this. In the Northwest Territories, a maximum dollar value will be applied. In Ontario, there is no maximum value that the province will cover (fees cannot fall below \$12 a day with the 50% reduction). Without such a maximum cap in Ontario, service providers with the highest fees will receive the largest government contribution. This approach would be expected to provide a more predictable result than the flat-rate fee reduction approach, since reducing fees on a provider-by-provider basis will obviously be more predictable for parents—although fee variances will continue.

Changing fee subsidy eligibility or value

The fourth funding route that provinces and territories have chosen to meet the federal fee reduction target is to make changes to the fee subsidy systems that have been used by almost all Canadian jurisdictions since the 1960s. While all provinces are expected to continue their fee subsidy systems, Alberta, Ontario, Manitoba, and P.E.I. are counting their low-income subsidy system as part, or all, of their 50% fee reduction plan. According to Manitoba's action plan, the province is exclusively relying on low-income subsidies to reach its 2022 fee reduction target. Alberta will combine changes to the fee subsidy system with one of the fee reduction routes described above. Ontario will include the residual fees paid by partly subsidized parents in the calculation of the average fee it but does not appear to be intending to change the fee subsidy system. In P.E.I., the action plan identifies including fee subsidies in calculations to arrive at an average \$15 a day fee for all children in regulated child care.

We note that an individual parent fee subsidy is not actually a fee reduction. Rather than reducing the fee charged for child care by a service provider, a fee subsidy is a demand-side payment that pays part, or all, of the fee on behalf of an eligible parent—essentially, a voucher that reduces parents' out-of-pocket costs. All provinces and territories except Quebec currently use individual parent fee subsidy systems, which have varying income eligibility criteria and usually have social criteria as well, such as parental employment, a child's special need, or a child in need of protection.

For the provinces proposing to use their fee subsidy system as all, or part, of their plan to reduce out-of-pocket costs for some parents, the result will be that those parents who are subsidized will have potentially substantially lower out-of-pocket costs. But, overall, parent fees generally will not be reduced. This would have the effect of driving down the average for all parents to meet the 50% federal target but this fee reduction will not extend to parents who aren't eligible for subsidies.

Alberta, for example, will combine a flat-rate fee reduction and changes to the subsidy system. Alberta's income eligibility for fee subsidy has increased dramatically while the subsidy rate that the province pays to the child care service on behalf of the eligible parent has been reduced. Thus, for some families, net out-of-pocket fees will decline but will increase for others. Middle-income families will benefit through much higher subsidy eligibility, but eligible low-income families will have less of their fee paid for by the province.²¹

The 2022 fee projections in the next section fully incorporate the provincially planned fee reductions (these are outlined in more detail in Appendix C). The projections in the next section are based on our understanding of current federal/provincial/territorial action plans and publicly available information provided by officials. While some of the mechanisms in B.C.'s plan are known, as discussed above, several of the critical values are not available right now, so projections for British Columbia are not possible. Projections in Nunavut are also not possible because their publicly available plans are not yet sufficiently detailed. According to current information, fee reductions in Ontario are based on fees as they stood on March 27, 2022, but the Ontario action plan is not yet publicly available. For consistency, we use 2019 parent fees as a baseline in the federal fee target, including all Ontario cities, since 2019 is the baseline for all action plans made public to date.

The projections in the next section include all planned fee reductions by the end of 2022 since provinces and territories have varying implementation schedules throughout 2022.

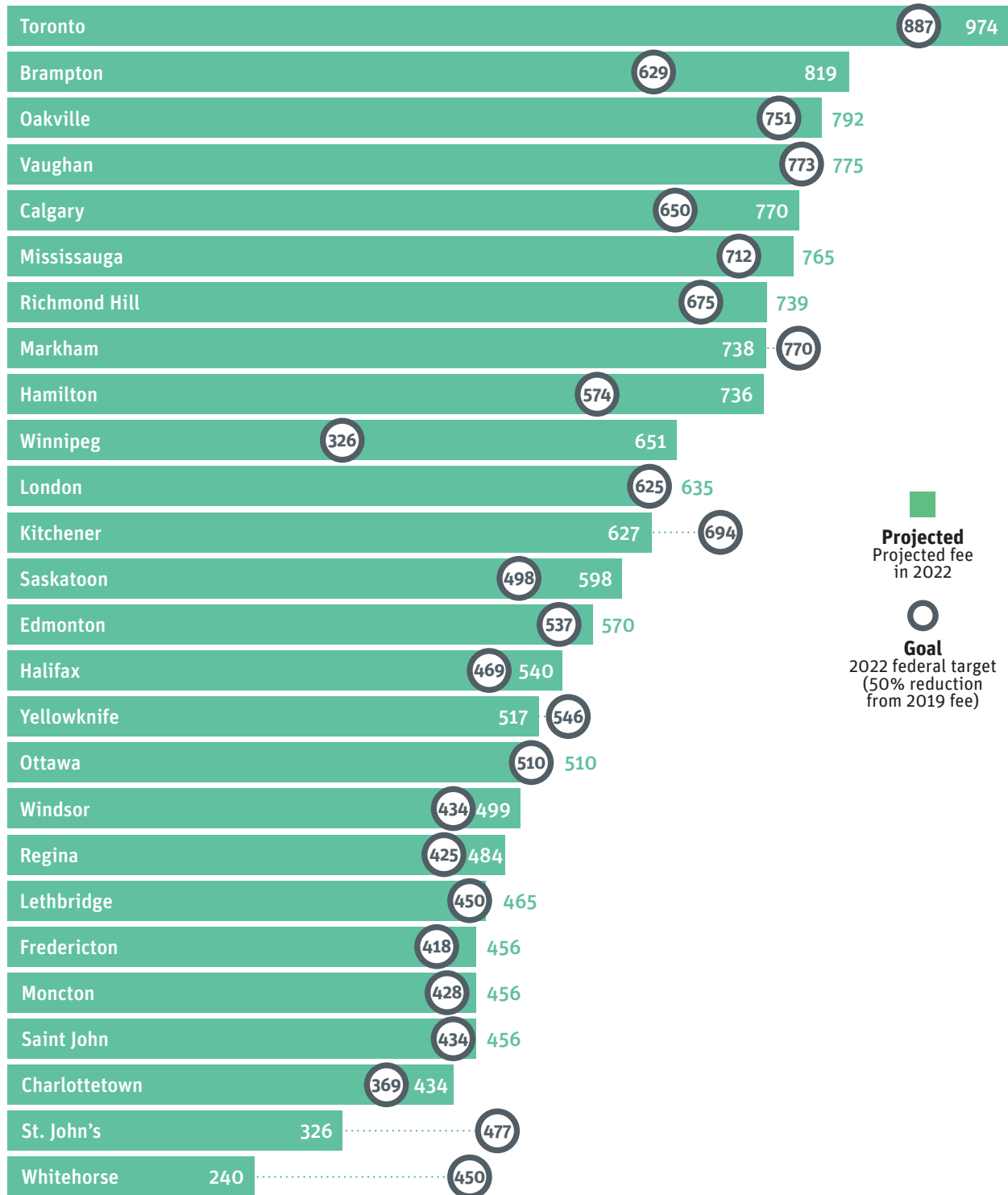
Projected 2022 infant fees

OF THE 26 cities with available data included in this analysis, nine are projected to meet to exceed their federal infant fee target in 2022.²² Another twelve cities will be close to their infant fee target, getting to between \$20 a month and \$100 a month of their targets. Five cities will miss their federal infant fee target by more than \$100 a month.

Whitehorse and St. John's will exceed their target by more than \$100 a month. Whitehorse, which is implementing a flat-rate reduction of \$700 a month, will exceed the federal target infant fee, with a predicted median fee of only \$240 a month in 2022. This will put Yukon infant fees almost on par with Quebec cities—a major accomplishment. In St. John's, projected infant fees of \$326 a month in 2022 will exceed the federal target of \$477, particularly since that city uses a set-fee program

Ottawa, Kitchener, London, Markham, Vaughan, and Yellowknife will also meet or exceed their federal infant fee targets. Saskatoon, Winnipeg, Calgary, Hamilton and Brampton will exceed their federal infant target by more than \$100 a month. Winnipeg will miss its federal target by \$326 a month since Manitoba is not reducing its set fees in 2022. Brampton and Hamilton will miss their federal targets by more than \$150 a month. While both cities will see a 50% fee reduction compared to March 2021, this will not cut their 2019 fees in half. In both cities, substantial municipal fee reduction

FIGURE 4 Projected infant fees in 2022 (monthly median)



Notes Median fees include both centres and family child care fees.
Source CCPA 2021 and 2019 child care fee survey and authors' calculations.

plans were in place in 2019 but have since been cancelled, creating a lower starting point for the federal target.

Even after the fee reductions planned for 2022 are in place, Toronto's infant fees will still be the highest in the country, at \$974 a month. While this is a far cry from its \$1,948 a month fee in 2021, it is still expensive. Brampton, Oakville and Vaughan have projected infant fees of roughly \$800 a month in 2022.

Projected toddler fees in 2022

OF THE 26 cities with data included in this analysis, five are projected to be meet or exceed their federal toddler fee target in 2022.²³ Thirteen cities will miss their federal target for toddler fees by between \$20 a month to \$100 a month. Eight cities are predicted to miss their federal target by more than \$100 a month.

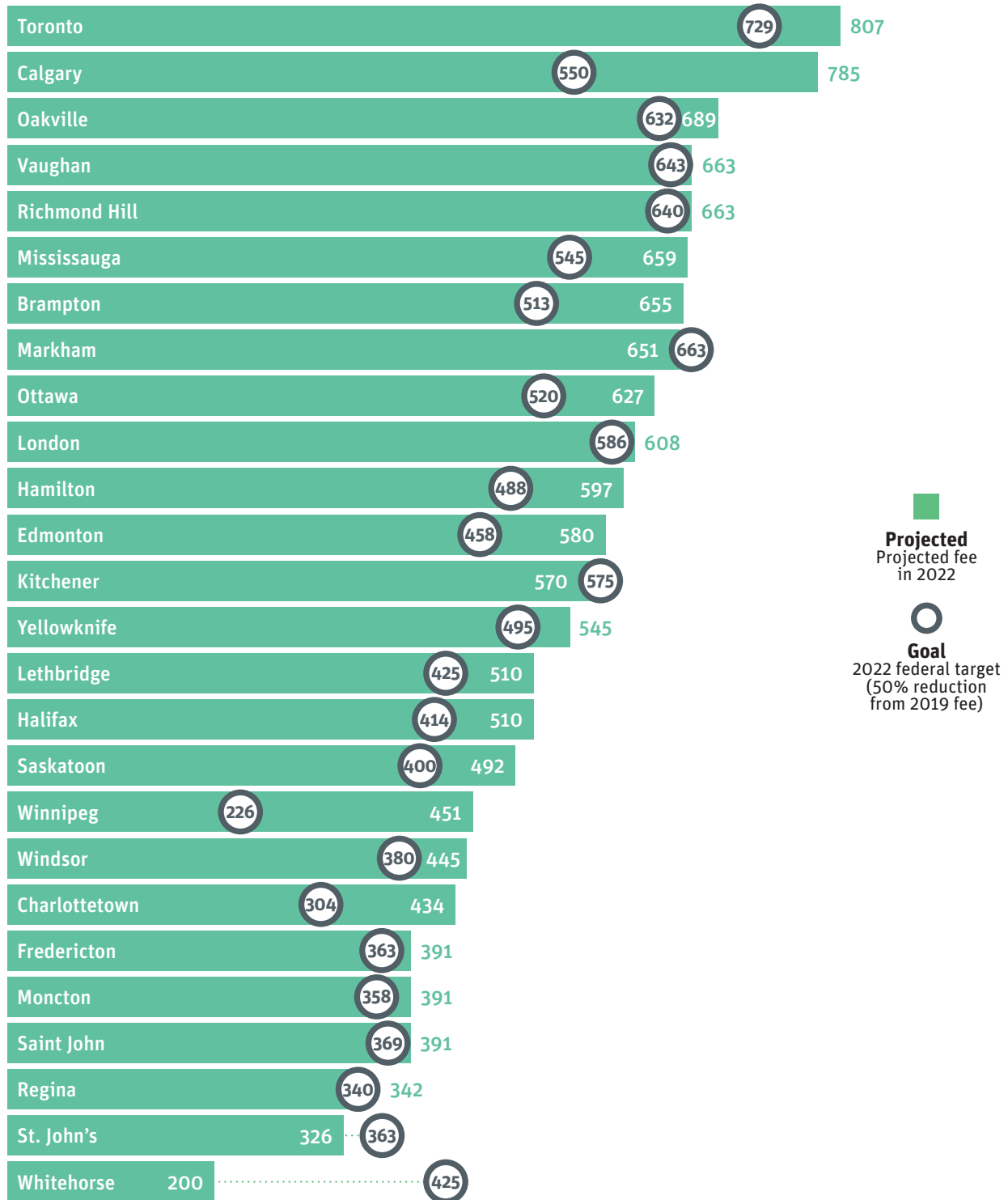
Whitehorse will exceed its target by more than \$200 a month—its 2022 fees will now approach those in Quebec and become among the most affordable in the country.

St. John's, Regina, Kitchener and Markham's projected toddler fees will also meet or exceed their federal target, although not by as much as in Whitehorse. Saint John, London, Richmond Hill and Vaughan will be close to hitting their federal target, they'll get to just over \$20 a month.

On the other hand, Winnipeg and Calgary will miss their toddler fee targets by a fair amount, over \$200 a month.²⁴

Despite coming close to reaching its federal target, Toronto toddler fees in 2022 will still be the highest in the country, at \$807 a month, while Calgary's projected 2022 toddler fees will be \$785 a month. Brampton, Mississauga, Richmond Hill, Vaughan, Oakville and Markham have projected 2022 toddler fees in the \$650 to \$700 a month range.

FIGURE 5 Projected toddler fees in 2022 (monthly median)



Notes Median fees include both centre and family child care fees.
Source CCPA 2021 and 2019 child care fee survey and authors' calculations.

Projected preschool-age fees in 2022

OF 26 CITIES, seven will meet or exceed their federal target.²⁵ In 15 cities, the 2022 fees will be close to their federal target, but will still miss them by between \$20 a month to \$100 a month. In four cities, projected 2022 preschool-age fees will miss their target by more than \$100 a month.

Whitehorse's preschool fees in 2022 are projected to be comparable to Quebec cities, at less than \$200 a month. The preschool-age fees in Regina and St. John's will also be low, at roughly \$320 a month in 2022.

Charlottetown, Winnipeg, Edmonton and Calgary will miss their federal fee target by more than \$100 a month. In Manitoba, set fees will remain unchanged, with the province's action plan addressing fee reduction through the fee subsidy system.

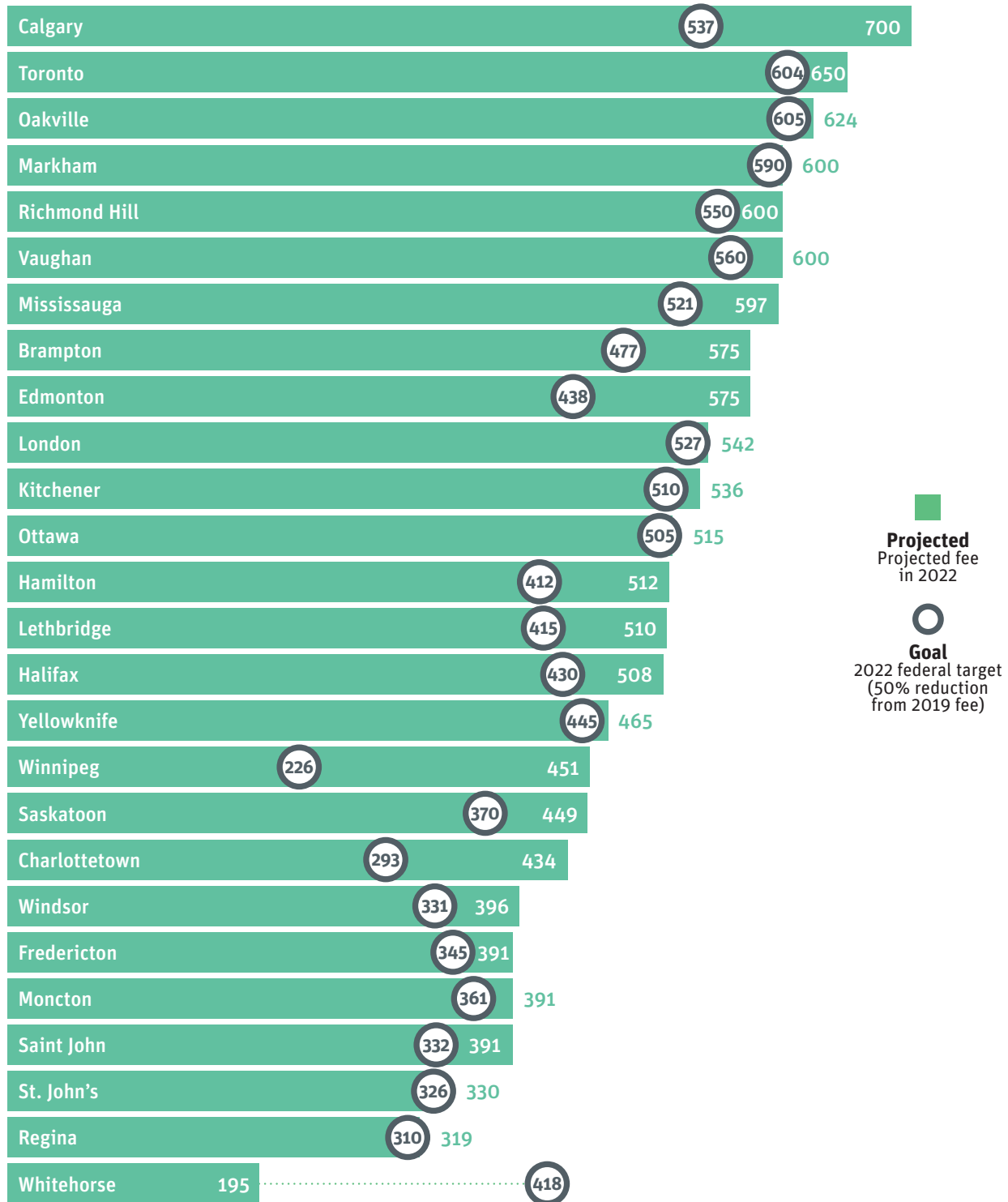
Charlottetown will see a modest reduction in preschool-aged set fees, down to \$434 a month—not enough to meet the federal target. In part, this is linked to P.E.I.'s move from different set fees for the three age groups to a single fee in 2022. This will mean a larger reduction in infant fees than preschool-aged fees because these were lower to begin with.

Edmonton and Calgary preschool-age fees will miss their federal target by at least a \$100 a month. Preschooler fees will decrease by 34% in 2022, but this won't reach the federal target of 50% of 2019 fees. As noted above,

families that are eligible for a full subsidy may also be able to have \$266 a month of their fee paid for by the provincial government, down from \$644 a month. The changes in the Alberta fee subsidy system will benefit middle-income families who will be newly included in eligibility²⁶ but will penalize lower-income families, who will see a smaller benefit from the subsidy system change.²⁷

Following the projected fee reductions in 2022, Calgary will have the highest preschool-age fees, at \$700 a month. The cities of Toronto, Oakville, Markham, Vaughan, and Mississauga will be next highest—between \$600 and \$650 a month. That said, these same Ontario cities will be quite close to reaching their federal fee target.

FIGURE 6 Projected preschool-aged fees in 2022 (monthly median)



Notes Median fees includes both centres and family child care fees.
Source CCPA 2021 and 2019 child care fee survey and authors' calculations.

Discussion

CANADA IS AT the beginning of a national affordable child care plan that has the capacity to transform the inequitable and unaffordable early learning and child care into a system in which parents will be able to find and afford high quality child care. The CCPA's 2021 annual fee survey data serves as a baseline for assessing the policy changes before the first Canada-wide federal funding aimed at reducing parent fees began to come on stream.

The principle of affordability, which was agreed to by all provinces and territories, was articulated as fee reduction in the 2021 federal budget. Subsequent negotiations landed on two specified common targets, a seemingly straightforward idea. Our analysis examines the 2022 reduction of average child care fees by 50%, taking into account the variety of starting points and different interpretations, and it concludes that the different approaches will have varying effects on parent fees.

We have observed that the provincial and territorial action plans to achieve the 50% fee reduction in 2022 fall into four categories:

1. Reduce provincially and territorially set fees;
2. Implement a flat-rate reduction on previously established fees;
3. Rely on each service provider to reduce fees by 50%;
4. Change parent fee subsidies.

This report discusses how each of these approaches relates to the federal fee reduction target. It also provides projections of how closely the provinces and territories will meet federal 50% fee reduction target in 2022.

The infant fee reduction target will be met or exceeded in nine of 26 cities included in this analysis. In another twelve cities, parent fees will come close to the federal target (within \$20 to \$100 a month). In another five of the 26 included cities, the gap will be bigger than \$100 a month. For toddler fees, five of 26 cities are projected to reach or exceed the federal target. 13 are projected to come close and eight will miss the federal target by at least \$100 a month. In the preschool-age group (the least costly parent fees), fees in seven of 26 cities are projected to meet or exceed the federal target; an additional 15 cities would come within \$20 to \$100 a month and four cities will likely fail to reach the federal target by \$100 a month or more.

This report also raises several other issues that need to be considered as the provinces and territories address affordability, both by meeting the first target—average fee reduction of 50%—and then reaching the second target—reduction of parent fees to an average of \$10 a day.

First, let's address the meaning of average fee. It may connote an average fee across the whole province or territory, but an average fee could also be determined regionally. It could also signify different parent fees by the child's age group, so infant fees could still be higher than preschool-age fees. Or it could signify different parent fees by family income, meaning that low-income parents could pay lower fees than high-income parents. These all have various merits and challenges, and all will, of course, have different impacts on fee reduction from the perspective of meeting both federal targets and families' needs.

Another issue that arises is the relationship between fee reduction and affordability—and how affordability will be determined. Research by Cleveland et al. for the City of Toronto and the Ontario government explored the idea of affordability in some detail, considering the effects of child care fees on family financial and employment considerations for families in different financial circumstances.²⁸ As parent fees are reduced across Canada, these changes will need to be more closely considered within the framework of affordability in order to achieve the principle. An average 50% reduction of parent fees across the board will have quite different results in jurisdictions that already have relatively low fees at the baseline point compared to those with much higher fees. It is noteworthy that fees might be reduced by a considerable amount but could still be too high, or unaffordable, for modest-income families.²⁹ In sum, fee reduction with specified targets is demonstrably a

useful tool for achieving the principle of affordability for families, but what is affordable for families with different income levels, different numbers and ages of children, and different circumstances also needs to be taken into account. As Canada moves beyond the first step of an average 50% fee reduction toward an average \$10 a day fee Canada-wide, how affordability is conceptualized and defined will be an important consideration.

A final issue that has been repeatedly noted in reports and analyses on Canadian early learning and child care is the state of Canadian data in this field. While this is not at all a new issue,³⁰ now that \$30 billion is on the table to support a new Canada-wide commitment to build a national child care system, a workable data and research strategy is critical and urgently needed to provide baseline data, indicators of progress, achievement of targets, understanding of successes and failures, and accountability for public funds. Research of various kinds—including evaluation and assessment of initiatives, predictors of successful system elements, and analysis of best practices—will be fundamental to guide the creation of quality, affordable child care in Canada.

Conclusion

State of child care in 2022

CANADIAN EARLY LEARNING and child care is in an exciting and historic place in April 2022. With all provinces and territories having signed on to the federal plan, Canada is on the way to a system of universal, affordable quality child care. While the first phase of system building has been accomplished, with all the broad agreements signed, now it's time to pay attention to the details and ensure that we are meeting the targets and goals as well as implementing the best system possible. The principle of affordability is but one of three key linked elements—affordability, accessibility and quality (workforce)—that must be developed in a coordinated fashion to avoid unforeseen circumstances and achieve the desired results.

This report, which is the eighth annual report of the Canadian Centre for Policy Alternatives' child care fee survey, makes several unique contributions. It establishes a baseline for median child care fees in Canada's big cities in 2021 before new, substantial federal funds aimed at affordability began to flow. It establishes the federal fee reduction target for all cities and for children in all age groups based on the CCPA's tracking of 2019 median fees in order to calculate the gap between the 2021 fees and the federal target. Third, it analyzes the specific plan for parent fee reduction for each jurisdiction (those that are available) in order to project which cities are likely to meet the federal target of a 50% reduction in child care fees by the end of 2022.

We conclude that some cities will meet the federal target, most will fall somewhat short, and some will fall very short. Prior to 2022, no cities outside of Quebec came close to providing affordable child care. But by the end of 2022, several cities will come close to matching Quebec’s affordable child care fees—a remarkable achievement in a short space of time. Based on this analysis and informed by seven years of tracking child care fees across Canada, we observe that by providing operational funding for services, combined with provincial and territorial set fees, offers the most predictable and transparent way of achieving fee reduction and other early learning and child care goals, as well as tracking the impact of public funding.

As child care fees drop substantially this year across the country, increased demand for access to child care will come into focus. This should shift policymakers’ attention to the sufficiency of physical facilities as well as the importance of decent wages in recruiting and retaining educators with early childhood training in order to staff those spaces.

Canada is finally on its way to achieving universal, affordable child care; how quickly and how well this can be achieved for all families Canada-wide will be determined by how each jurisdiction goes about meeting its federal targets. As always, the devil is in the details.

Appendix A

Methodology

THE CCPA CONDUCTED a phone survey of child care centres across Canada between October 12, 2021 and December 10, 2021. It involved more than 11,000 phone calls. When requested by the respondent, e-mail exchanges were also conducted.

As shown in the table below, different survey approaches were used depending on the number of centres and/or homes in a city. In cities with less than 120 centres, a census was conducted. Otherwise, a randomized sample was drawn. For cities where centres or homes were randomly sampled, the objective was to obtain estimates that were accurate $\pm 10\%$, 9 times out of 10. In cities where a census was conducted, the goal was a 60% response rate, weighted by the number of spaces. To attain these response rates, multiple call backs of the same lists were employed. In all cases, the targets were exceeded.

Response bias is always a concern and, as such, if fee data couldn't be obtained over the phone, it was sought online from official centre websites only and not secondary sources.

TABLE 5 Response rates by city

City name	Province	% of licensed spaces surveyed	Survey methodology
Vancouver	British Columbia		A random sampling of centre spaces and a random sampling of family providers were called
Richmond	British Columbia		A random sampling of centre spaces and all family providers were called
Burnaby	British Columbia		A random sampling of centre spaces and all family providers were called
Surrey	British Columbia		A random sampling of centre spaces and all family providers were called
Kelowna	British Columbia	94%	All centres and family child care providers were called. The precise number of spaces is unknown, survey rate is the proportion of centres and homes successfully contacted.
Calgary	Alberta		A random sampling of centre spaces and all family child care agencies were called
Edmonton	Alberta		A random sampling of centre spaces and all family child care agencies were called
Lethbridge	Alberta	86%	All centres and family child care agencies were called
Saskatoon	Saskatchewan	78%	All centres and family child care providers were called. The precise number of spaces is unknown, survey rate is the proportion of centres successfully contacted.
Regina	Saskatchewan	80%	All centres and family child care providers were called. The precise number of spaces is unknown, survey rate is the proportion of centres successfully contacted.
Winnipeg	Manitoba		Set fees centres (<2 yrs:\$30 a day, 2–5yrs:\$20.80 a day)
Windsor	Ontario	69%	All centres and family child care agencies were called
London	Ontario	78%	All centres and family child care agencies were called
Kitchener	Ontario	90%	All centres and family child care agencies were called
Hamilton	Ontario	78%	All centres and family child care agencies were called
Brampton	Ontario	70%	All centres and family child care agencies were called
Mississauga	Ontario		A random sampling of centre spaces and all family child care agencies were called
Oakville	Ontario	75%	All centres and family child care agencies were called
Richmond Hill	Ontario	72%	All centres and family child care agencies were called
Vaughan	Ontario	73%	All centres and family child care agencies were called
Toronto	Ontario		A random sampling of centre spaces and all family child care agencies were called
Markham	Ontario	63%	All centres and family child care agencies were called
Ottawa	Ontario		A random sampling of centre spaces and all family child care agencies were called
Gatineau	Quebec	65%	Set fees (\$8.70 a day)
Laval	Quebec		Set fees (\$8.70 a day)
Montréal	Quebec		Set fees (\$8.70 a day)
Longueuil	Quebec		Set fees (\$8.70 a day)
Québec City	Quebec		Set fees (\$8.70 a day)
Iqaluit	Nunavut	75%	All centres and family child care providers were called
Yellowknife	NWT	83%	All centres and family child care providers were called
Whitehorse	Yukon	84%	All centres and family child care providers were called
Saint John	New Brunswick	81%	All centres and family child care providers were called
Moncton	New Brunswick	67%	All centres and family child care providers were called
Fredericton	New Brunswick	67%	All centres and family child care providers were called
Halifax	Nova Scotia	65%	All centres and family child care providers were called
Charlottetown	Prince Edward Island		Set fees (<2 yrs:\$34 a day, 2yrs:\$28 a day, 3–4yrs:\$27 a day), Expansion questions methodology: all centres were called
St. John's	Newfoundland and Labrador	92%	Set fees (\$25 a day all ages), Expansion questions methodology: all centres were called

Appendix B

Detailed 2021 median fees by age group and provider type

TABLE 6 Detailed 2021 median monthly fees by age group and provider type

City name	Province	All fees (median)			Centre fees (median)			Home fees (median)		
		Infant	Toddler	Preschool-age	Infant	Toddler	Preschool-age	Infant	Toddler	Preschool-age
Vancouver	British Columbia	\$1,200		\$1,015	\$1,185		\$980	\$1,350		\$1,290
Richmond	British Columbia	\$1,450		\$1,275	\$1,495		\$1,275	\$1,100		\$985
Burnaby	British Columbia	\$1,145		\$890	\$1,145		\$890	\$1,175		\$1,000
Surrey	British Columbia	\$1,120		\$925	\$1,120		\$925	\$950		\$890
Kelowna	British Columbia	\$980		\$900	\$1,000		\$930	\$850		\$868
Calgary	Alberta	\$1,400	\$1,295	\$1,150	\$1,445	\$1,300	\$1,175	\$990	\$970	\$900
Edmonton	Alberta	\$1,205	\$1,063	\$1,025	\$1,295	\$1,100	\$1,030	\$885	\$850	\$820
Lethbridge	Alberta	\$900	\$970	\$865	\$1,075	\$1,000	\$945	\$865	\$865	\$865
Saskatoon	Saskatchewan	\$993	\$825	\$755	\$1,075	\$845	\$770	\$803	\$785	\$700
Regina	Saskatchewan	\$878	\$675	\$625	\$900	\$675	\$625	\$800	\$700	\$650
Winnipeg	Manitoba	\$651		\$451	\$651		\$451	\$482		\$395
Windsor	Ontario	\$998	\$890	\$792	\$998	\$890	\$792	\$868	\$868	\$803
London	Ontario	\$1,269	\$1,215	\$1,085	\$1,285	\$1,215	\$1,095	\$1,042	\$998	\$955
Kitchener	Ontario	\$1,253	\$1,139	\$1,072	\$1,671	\$1,287	\$1,150	\$977	\$933	\$890
Hamilton	Ontario	\$1,472	\$1,194	\$1,023	\$1,476	\$1,215	\$1,023	\$911	\$911	\$868
Brampton	Ontario	\$1,638	\$1,309	\$1,150	\$1,665	\$1,309	\$1,167	\$977	\$977	\$911
Mississauga	Ontario	\$1,530	\$1,318	\$1,194	\$1,638	\$1,318	\$1,210	\$1,042	\$1,042	\$1,085
Oakville	Ontario	\$1,584	\$1,378	\$1,248	\$1,670	\$1,389	\$1,248	\$1,172	\$1,085	\$998
Richmond Hill	Ontario	\$1,479	\$1,327	\$1,200	\$1,575	\$1,350	\$1,200	\$1,411	\$1,248	\$1,085
Vaughan	Ontario	\$1,550	\$1,327	\$1,199	\$1,630	\$1,327	\$1,200	\$1,085	\$1,085	\$933

City name	Province	All fees (median)			Centre fees (median)			Home fees (median)		
		Infant	Toddler	Preschool-age	Infant	Toddler	Preschool-age	Infant	Toddler	Preschool-age
Toronto	Ontario	\$1,948	\$1,615	\$1,300	\$2,029	\$1,690	\$1,367	\$1,102	\$999	\$989
Markham	Ontario	\$1,475	\$1,302	\$1,200	\$1,495	\$1,327	\$1,200	\$1,128	\$1,302	\$1,302
Ottawa	Ontario	\$1,020	\$1,254	\$1,031	\$1,700	\$1,338	\$1,067	\$998	\$998	\$1,015
Gatineau	Quebec		\$189							
Laval	Quebec		\$189							
Montréal	Quebec		\$189							
Longueuil	Quebec		\$189							
Québec City	Quebec		\$189							
Iqaluit	Nunavut	\$1,324	\$1,194		\$1,324	\$1,194		\$1,356	\$1,411	
Yellowknife	NWT	\$1,035	\$1,010	\$930	\$1,035	\$1,010	\$885	\$1,085	\$1,085	\$1,042
Whitehorse	Yukon	\$240	\$200	\$195	\$240	\$200	\$195	\$175	\$150	\$100
Saint John	New Brunswick	\$885	\$738	\$738	\$885	\$748	\$738	\$846	\$716	\$694
Moncton	New Brunswick	\$868	\$781	\$759	\$868	\$796	\$760	\$760	\$690	\$738
Fredericton	New Brunswick	\$846	\$749	\$735	\$846	\$749	\$735	\$825	\$770	\$760
Halifax	Nova Scotia	\$996	\$897	\$880	\$1,007	\$911	\$887	\$868	\$825	\$760
Charlottetown	Prince Edward Island	\$738	\$608	\$586	\$738	\$608	\$586			
St. John's	Newfoundland and Labrador	\$543	\$543	\$543	\$543	\$543	\$543	\$543	\$543	\$543

Appendix C

Details of fee reduction plans in 2022 by province

British Columbia

The number of \$10 a day spaces will expand from 2,500 to 12,500 by the end of 2022. The existing fee reduction initiative amount will be increased, but the values hadn't been announced at the time of publication.

Nunavut

Signed on January 24, 2022, but no implementation details yet.

Newfoundland and Labrador

Already had set fees in 2019, with fees set at \$44/\$33/\$30 a day. All age group fees will drop to \$15 a day in January 2022.³¹

Prince Edward Island

P.E.I. had set fees of \$34/\$28/\$27 in 2019. These will fall to a flat \$25 a day in January 2022 across all age groups. They'll decline further to a flat \$20 a day in October 2022.³² Some provincial government communications cite a \$15 a day average by December 2022, but this last reduction isn't due to change in the flat fee. It is due to an expansion of the low-income subsidy.

Nova Scotia

Fees for home-based child care will be reduced by a flat rate of \$16.50 a day (an \$8.25 a day reduction is already going into place).³³ In April 2022, fees

will be reduced in centres by \$10.50/\$9/\$8.75 a day. In December 2022, the fee reduction in total will be \$21/\$18/\$17.50 a day.³⁴

New Brunswick

The province is moving to a set fee system for its “designated” facilities, which represent the majority of spaces. On June 1, 2022, fees will move to \$21/18/18 a day in larger urban areas (which covers all cities in our fee survey) and \$19/16/16 for small urban and rural areas.³⁵

Quebec

No change in fixed fees in 2022. Fees are already \$8.70 a day in 2022.³⁶

Ontario

Providers reduced their fees by 25% on April 1, 2022, and will reduce them by an additional 25% in December 2022. Each age group fee will be separately reduced by that percentage. Provider net fees cannot drop below \$12 a day but there is no cap on the maximum dollar value that the 50% reduction can amount to.³⁷

Manitoba

No change in fixed fees (\$30/\$20.80 a day) in 2022.³⁸ Families making up to \$35,000 will now receive a full subsidy (reducing fees to \$2 a day). Families making up to \$58,200 will see some reduction.³⁹ Families making over \$58,200 will see no reduction in fees in 2022. The median family income for families with a child aged 5 or younger in Winnipeg is \$63,400 and, therefore, the median family won't see fee reductions in 2022.⁴⁰

Saskatchewan

Monthly fee reduction in centres: \$395/\$333/\$306; in homes: \$393/\$367/\$333. Net fees after the reduction won't be less than \$200 a month. There will be a retroactive refund going back to July 1, 2021. The 50% reduction was incorporated into fees changed at the provider level by February 2022.⁴¹

Alberta

Monthly fee reduction in centres: \$635/\$510/\$450; in homes: \$350/\$325/\$300.⁴² A substantial increase in eligibility for income-based subsidies worth an additional flat fee of \$266 for families with income under \$120,000.⁴³ Median family income for families with children aged five and under in Edmonton is \$83,260 and in Calgary is \$93,530. The \$266 flat fee rate will replace the previous maximum subsidy amounts, which were high for lower-income families. For families making under \$50,000, the previous maximum subsidy

amount for centres was \$741/\$644 for infant/preschool and for homes it was \$614/\$516 for infant/preschool.

Yukon

Yukon universal child care (\$700 a month flat-fee reduction).⁴⁴ The territory implemented this program on April 1, 2021, before the federal child care plan was announced.

Northwest Territories

Fees will be reduced by either the maximum fee subsidy of \$530/\$465/\$465 a month or 50% of the actual child care fee charged to families, whichever is less.⁴⁵ This applies to both licensed centres and homes.

Appendix D

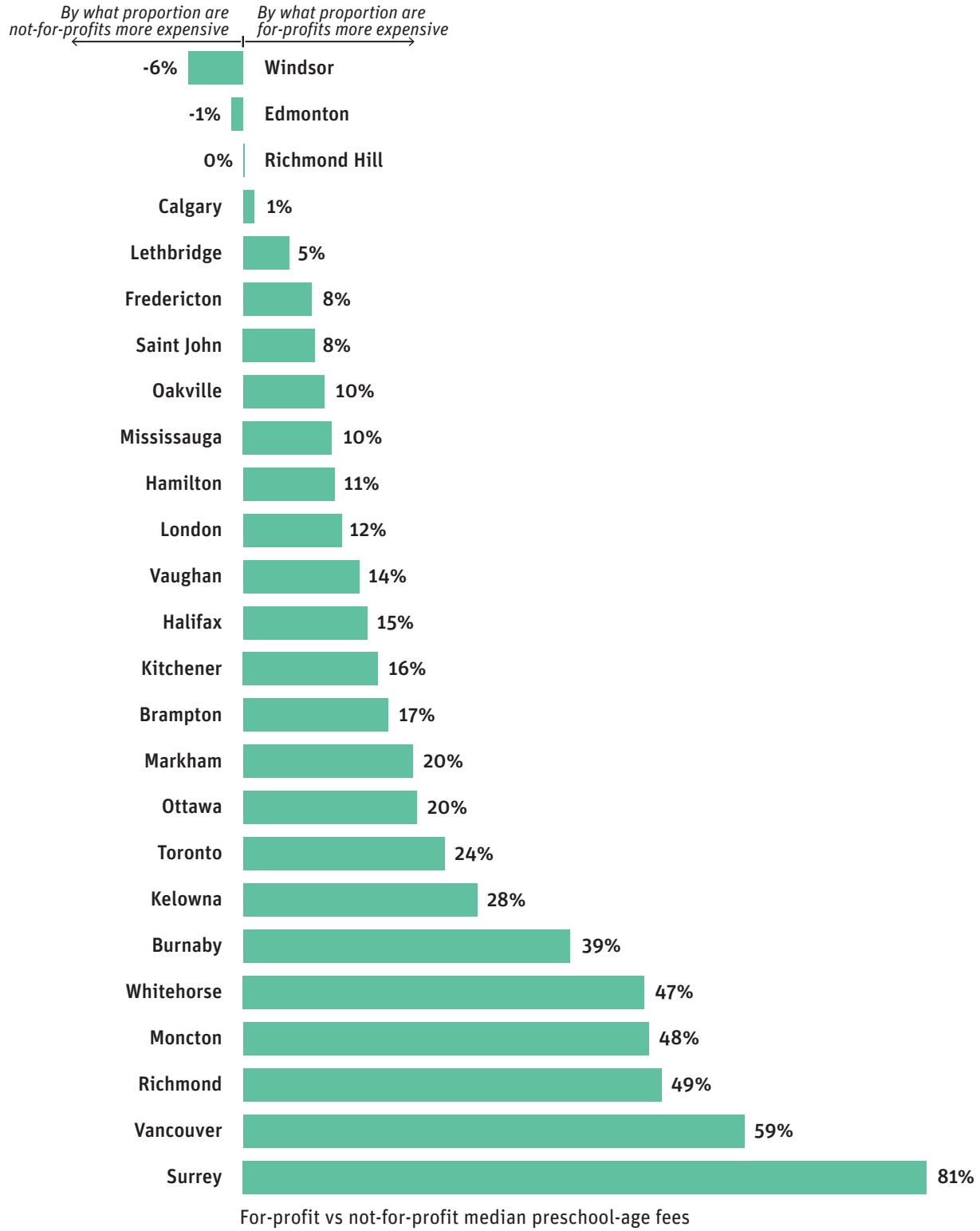
For-profit vs. not-for-profit centre preschool-age fees, 2021

CANADIAN CHILD CARE centres operate under three broad operational umbrellas: they are publicly operated, they are for profit or are operated as a non-profit. If they are for-profit, they do not have a mandate to re-invest additional proceeds from their operations into the service. Instead the owners can draw profits from the operation. On the other hand, neither public child care nor non-profits can produce a profit for owners. Any additional surplus in a not-for-profit goes back into child care operations.

In the development of a national child care plan where substantial transfers will be made to centres in order to reduce fees, it's important to understand if the ownership structure consistently impacts fees and how. As part of the fee survey, we collect the ownership structure of centres. In the figure below we compare the preschool-age fees in 2021 between the two auspices. For example, in Fredericton the average for-profit centre charges 8% more for a full-time preschool-age child than the average non-profit centre does (\$744 a month vs. \$689 a month).

In almost all cities, for-profits charge higher fees than not-for-profits for a preschool-age space.

FIGURE 7 For-profit vs not-for-profit median preschool-age fees



Note Yellowknife, Iqaluit, Regina, and Saskatoon are not represented in this table as neither Nunavut nor the Northwest Territories have any for-profit child care, while Saskatchewan has very little.

Notes

1 The Quebec agreement is an “asymmetrical” one. See Government of Canada, “Canada-Quebec—2021 to 2026 Asymmetrical Agreement on the Canada-Wide Early Learning and Child Care Component”, <https://www.canada.ca/en/early-learning-child-care-agreement/agreements-provinces-territories/quebec-canada-wide-2021.html>

2 The term “50% reduction in average fees” has been most commonly used in the agreements but sometimes it has been stated as an “average 50% reduction”.

3 Macdonald, David and Friendly, Martha. March 2020. *In Progress: Child care fees in Canada 2019*. Canadian Centre for Policy Alternatives.

4 For a discussion of this, Fisher, J. & Thomas, J. (In press). “Net child care costs in Canada.” *Canadian Public Policy*

5 Macdonald, David and Klinger, Thea. December 2015. *They Go Up So Fast: 2015 child care fees in Canadian cities*. Canadian Centre for Policy Alternatives.

6 Macdonald, David and Friendly, Martha. December 2017. *Time Out: Child care fees in Canada 2017*. Canadian Centre for Policy Alternatives.

7 2019 fees are specified as the base for the 50% fee reduction in most of the federal/provincial/territorial agreements.

8 This section includes those provinces and territories whose action plans are publicly available and provide enough information to do the necessary calculations.

9 Two paid parental leave regimes in Canada are normally 12 months long, with possible extension to 18 months. See Friendly, Martha et al. 2020. *Early Childhood Education and Care in Canada 2019*, pg. xv, for detailed information.

10 British Columbia also has a section of \$10 a day set-fee “prototype” centres but the number is too small to count as a province with set fees, although it is increasing. Alberta also had a project of \$25 a day set fee centres for several years, but it has been cancelled.

11 The fee reductions needed to reach the federal 50% targets are based on 2019 median fees, as per most of the Canada-wide agreements.

12 This included the publicly available agreements of P.E.I., Nova Scotia, Manitoba, Saskatchewan, B.C., and Yukon. Quebec's plan is also published but fees are not being reduced. See *Early Learning and Child Care Agreements*, <https://www.canada.ca/en/early-learning-child-care-agreement/agreements-provinces-territories.html>.

13 Note that the fee targets for Ontario, whose action plan is not yet available, may be based not on 2019 fees like the other jurisdictions. To date, reductions there are based on March 27, 2022 fees. However, for consistency with other jurisdictions (and since Ontario information is not yet public), 2019 has been used as the baseline for all fee targets.

14 Macdonald, David and Friendly, Martha. 2020. *In progress: Child care fees in Canada 2019*.

15 See Table 3 of Macdonald, David and Friendly, Martha. March 2020. *In Progress: Child care fees in Canada 2019*. Canadian Centre for Policy Alternatives.

16 So far, Ontario fee reductions are based on fees as they stood on March 27, 2022, unlike other jurisdictions with agreements, which are based on 2019 fees. For the purposes of this report, and in the absence of public information, Ontario targets are calculated using 2019 as the base fee year, for consistency.

17 Nunavut has not yet published its planned fee reduction approach

18 See table 7 of Appendix D, *Canada—Prince Edward Island Canada-wide Early Learning and Child Care Agreement, 2021 to 2026*. (<https://www.canada.ca/en/early-learning-child-care-agreement/agreements-provinces-territories/prince-edward-island-canada-wide-2021.html#3.h3.09>).

19 Other set fees exist for smaller cities and urban areas along with part-time centres. See *Early Learning and Child Care in New Brunswick*, Government of New Brunswick, "Information for operators", (<https://www2.gnb.ca/content/gnb/en/corporate/promo/investing-in-early-learning-and-child-care/information-for-operators.html#1>)

20 Ontario is achieving the 50% fee reduction through two steps of 25% each, one in April 2022 and one in December 2022.

21 Buschmann, Rob. 2021. *Still Unaffordable for Low-income Families. A discussion paper summary*. Edmonton Council for Early Learning and Care.

22 A city whose projected fees are within \$20 a month of the federal target will be said to have met that federal target.

23 A city whose projected fees are within \$20 a month of the federal targets will be said to have met that federal target.

24 Eligibility will be expanded to families making under \$120,000. See the subsidy rates section of Government of Alberta, *Federal-provincial child care agreement*.

25 A city whose projected fees are within \$20 a month of the federal target will be said to have met that federal target.

26 Eligibility will be expanded to families making up to \$120,000. See the subsidy rates section of Government of Alberta, *Federal-provincial child care agreement*.

27 See a detailed analysis of this in Rob Buschmann. 2021. *Still unaffordable for low-income families?* Edmonton Council on Early Learning and Care.

- 28** Cleveland, Gordon. “Affordable for all: Making Licensed Child Care Affordable in Ontario”, 2018 (https://www.oise.utoronto.ca/atkinson/UserFiles/File/Events/20180509_Task_Force_Meeting/Presentation_at_OISE_on_Affordable_for_All_report.pdf).
- 29** Macdonald, David and Friendly, Martha. March 2020. *In progress: Child care fees in Canada 2019*. Canadian Centre for Policy Alternatives.
- 30** Friendly, Martha et al. 2003. HRSDC Data Roundtable. 2010.ESDC 1st and 2nd National Data Roundtables. 2019, 2020. Final report of the Expert Panel On ELCC Data and Research, 2019–2021 (confidential).
- 31** Newfoundland and Labrador. December 15, 2021. *New Affordable Child Care Initiatives Introduced Through the Federal-Provincial Early Learning and Child Care Action Plan*. (<https://www.gov.nl.ca/releases/2021/education/1215n02/>).
- 32** See table 3 of *Canada-Prince Edward Island Canada-wide Early Learning and Child Care Agreement—2021 to 2026*. (<https://www.canada.ca/en/early-learning-child-care-agreement/agreements-provinces-territories/prince-edward-island-canada-wide-2021.html#3.h3.o4>).
- 33** Communication to home care providers from Janet Lynn Huntington, “Parent Fee Reduction” on January 18, 2022 citing a home care fee reduction of 25%, or \$8.25 a day. (<https://www.facebook.com/groups/1015547835975224/permalink/1019094948953846/>).
- 34** Government of Nova Scotia, “Nova Scotia Child Care Transformation: Information for Operators”, (<https://www.ednet.ns.ca/childcare/information-for-operators>).
- 35** Early Learning and Child Care in New Brunswick, Government of New Brunswick, “Information for operators”, (<https://www2.gnb.ca/content/gnb/en/corporate/promo/investing-in-early-learning-and-child-care/information-for-operators.html#1>)
- 36** Ministère des Finances, Gouvernement du Québec. March 28, 2022. *Cost of a Child Care Space for 2022*. (<http://www.budget.finances.gouv.qc.ca/budget/outils/garde-net-en.asp>).
- 37** Government of Ontario. March 28, 2022. O. Reg. 236/22 General. (<https://www.ontario.ca/laws/regulation/r22236>).
- 38** See Section 1: Affordability, in *Canada-Manitoba Canada-Wide Early Learning and Child Care Agreement*. (<https://www.canada.ca/en/early-learning-child-care-agreement/agreements-provinces-territories/manitoba-canada-wide-2021.html#h4.o4>).
- 39** See detailed modelling in Appendix C.
- 40** Statistics Canada. 2019. Custom tabulation from the T1 Family File. *Median Family Income for Families with Children aged 5 or younger in Winnipeg*.
- 41** Government of Saskatchewan. November 19, 2021. *Parent Child Care Affordability Information Sheet for Families—November 2021*. (<https://publications.saskatchewan.ca/api/v1/products/115285/formats/130497/download>).
- 42** See the affordability grants section of Government of Alberta’s *Federal-provincial Child Care Agreement*.
- 43** See the subsidy rates section of Government of Alberta’s *Federal-provincial Child Care Agreement*.
- 44** Government of Yukon. March 8, 2021. *Universal Child Care Program Will Make Life More Affordable for Yukon Families*. (<https://yukon.ca/en/news/universal-child-care-program-will-make-life-more-affordable-yukon-families>).
- 45** Government of the Northwest Territories. March 2022. *Information for Licensed Programs: Helping families with child care costs*. (<https://www.ece.gov.nt.ca/sites/ece/files/resources/information-for-licensed-programs-helping-families-with-child-care-costs.pdf>).



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