

Ontario Child Care: Why Multisite Operators Matter

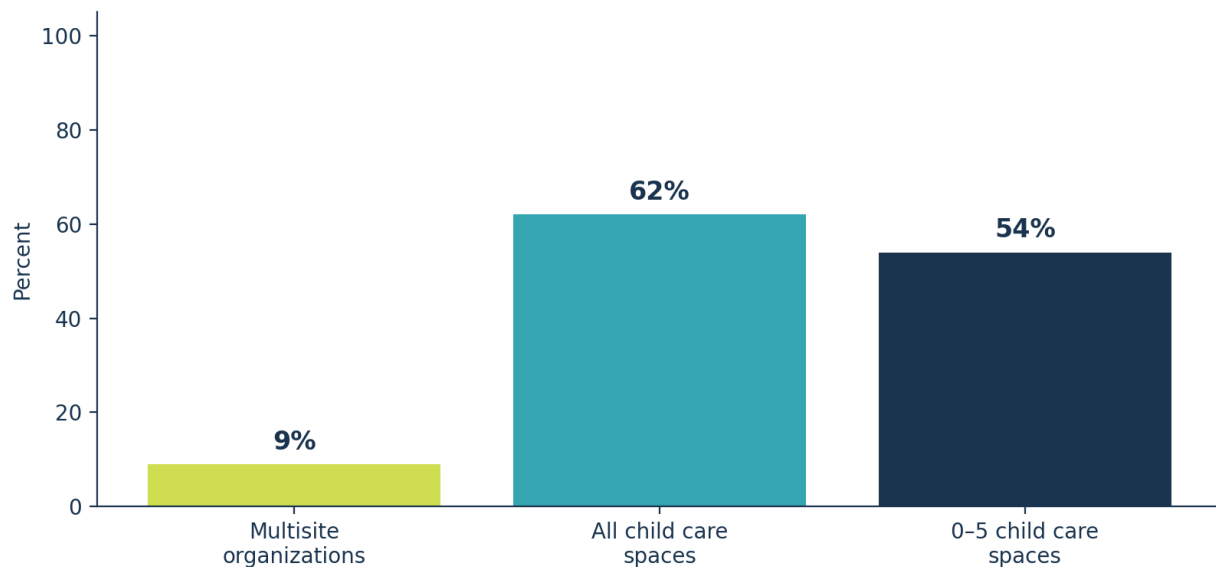
Visual summary of Ontario-wide child care centre data and the 2026 B2C2 Operators' Survey sample



1. Multisite operators have disproportionate reach

Ontario has 6,034 child care centres organized into 2,167 child care groups or organizations. Seventy percent are single-site organizations and another 21% operate two to four centres. Only about 9% — 194 organizations — operate five or more centres and are classified here as multisite groups.

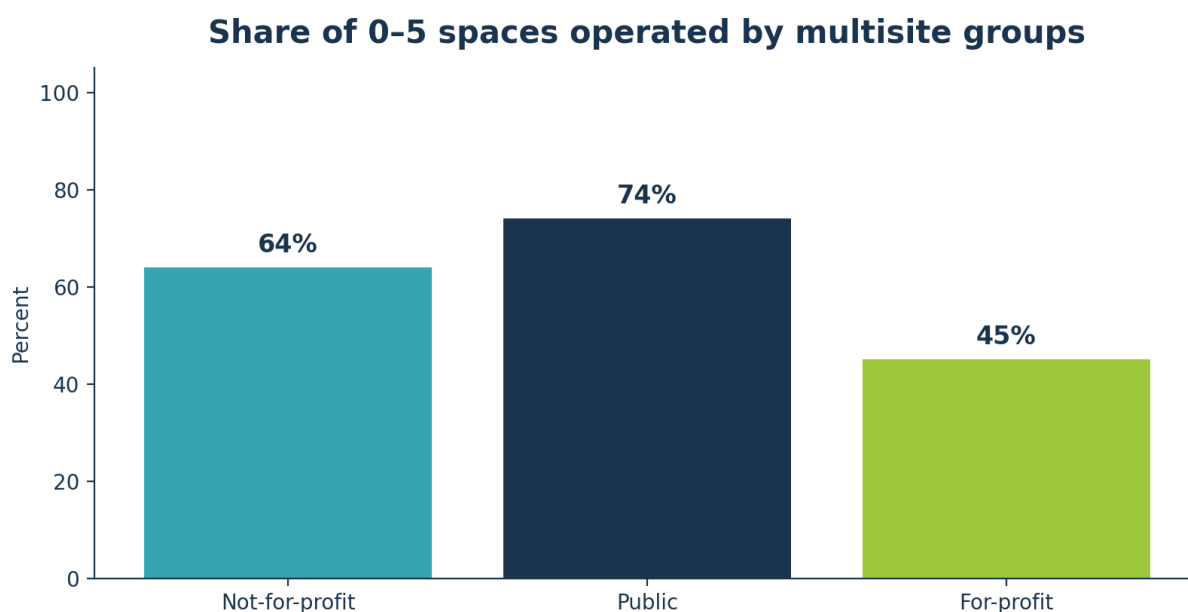
A small share of organizations provides most child care capacity



Key message: Just 9% of child care organizations provide 62% of all child care spaces and 54% of spaces for children aged 0-5.

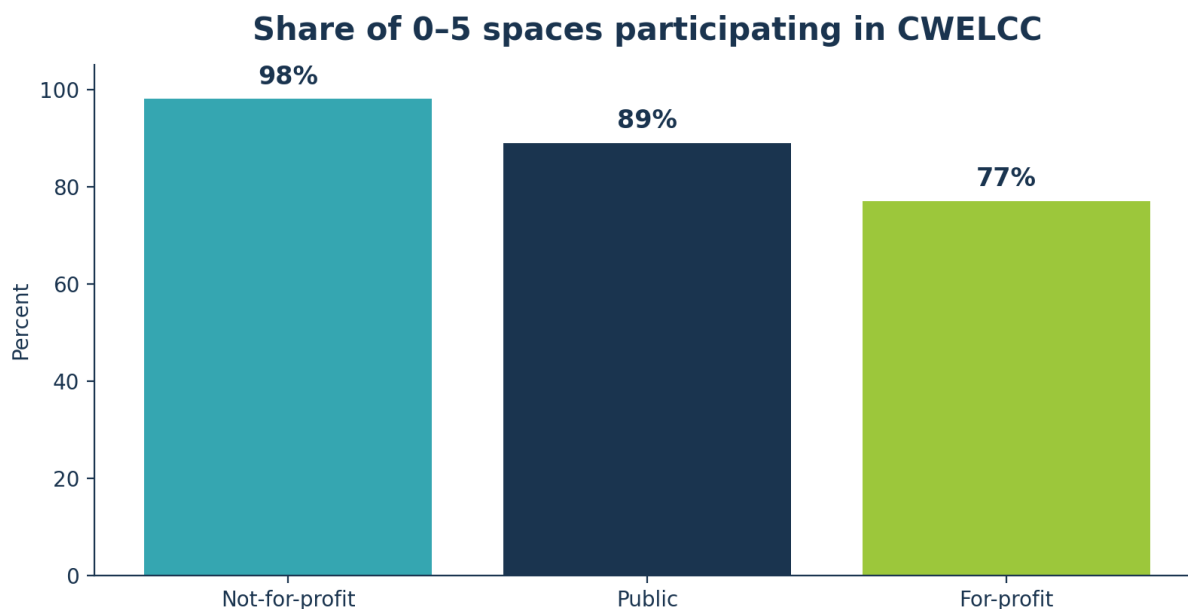
2. Multisite concentration differs by auspice

Of the 194 multisite groups, 139 are not-for-profit, 16 are public sector, and 39 are for-profit. Multisite organizations account for 64% of not-for-profit 0–5 spaces, 74% of public-sector 0–5 spaces, and 45% of for-profit 0–5 spaces.



3. CWELCC participation varies by auspice

Of 199,583 not-for-profit spaces for children aged 0–5, 98% are in CWELCC. Among 28,725 public-sector spaces, 89% are in CWELCC. Among 115,721 for-profit spaces, 77% are in CWELCC.



4. Important limitation of the 2026 B2C2 Operators' Survey

The survey sample includes many responses from multisite not-for-profit and public operators, as well as many small not-for-profit, public, and for-profit operators. However, it does not include responses from Ontario's largest for-profit multisite organizations.

Large for-profit multisite operator absent from survey	Ontario centres reported
BrightPath Kids	46
Kids and Company	37
Early Years Education System Ltd. (EYES)	24*
Lullaboo	18
Tiny Hoppers	16

** EYES lists 42 locations on its website according to the supplied notes; the Ontario-wide dataset counts 24 centres, possibly reflecting a franchise structure.*

Survey representation caution

There are approximately 39 for-profit multisite groups in Ontario, but only four for-profit multisite operators responded to the survey, and each operates only five or six centres. Because none of the largest for-profit chains responded, findings about for-profit operators should be interpreted with this limitation in mind.

Why this matters

Because multisite organizations control such a large share of Ontario's child care capacity, changes in their participation, expansion, contraction, or operating decisions can have disproportionate effects on overall system growth.