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## Holiday Childcare Survey 2023

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# Acknowledgments



## About this report

This report is the 18th annual Holiday Childcare Survey. It is based on surveys from local authorities in England, Scotland and Wales, which were returned to Coram Family and Childcare between April and June 2023. This report provides detail on the cost (Section 1) and availability (Section 2) of childcare in Britain for children aged 4 to 14 years during the 13 weeks of school holiday per year. It compares data across the nations of Britain, England, Scotland and Wales; across regions in England; across the two main types of holiday childcare provider, 'private, voluntary and independent' (PVI) and the public sector; and compares data changes since last year (2022). Section 3 of this year's survey explores local authority perceptions of the accessibility of holiday childcare for families of children with SEND, and the barriers and facilitators to delivering sufficient provision. Section 4 reports on the feedback received from local authorities in England about the benefits of the Holiday Activities and Food (HAF) programme for children and families.

The provision of childcare covered in this report includes holiday clubs registered with an official regulator (Ofsted in England, Care Inspectorate in Scotland, and Care Inspectorate Wales), clubs managed by the PVI sector and those run by local authorities. The use of childminders, informal childcare (such as that provided by other parents or grandparents), or holiday camps (such as for football or drama) are excluded from this report.

## About Coram Family and Childcare

Coram Family and Childcare works to make the UK a better place for families by bringing together what we learn from our on-the-ground parent-led programmes and our research to campaign for solutions that parents want and need. We focus on childcare and early years to make a difference to families' lives now and in the long term.

In addition to the Holiday Childcare Survey, we also produce the Childcare Survey, which is published annually in the spring and covers early years and after-school childcare. Previous reports are available from our website [www.familyandchildcaretrust.org](http://www.familyandchildcaretrust.org)

## Choices about holiday childcare

Most working parents do not have enough annual leave to cover the 13 weeks of school holidays so they will need to make alternative childcare arrangements. Many families will use a combination of these approaches across the summer break and the shorter holidays throughout the year:

- Formal holiday childcare provided by the local authority or a PVI provider.
- 'Holiday camp' type activities such as football or drama – these typically do not run for the whole holiday but may cover a few weeks. In England, if they are not registered with Ofsted, parents cannot use childcare subsidies to help meet the cost of holiday provision (see box 2).
- Annual leave to spend time with their children, either at home or going on holiday. Some parents may do 'shift parenting', where each uses their annual leave at different times. In couple families, this can mean that families do not have time off together.
- Informal care from grandparents, other relatives or friends.
- Term-time only working arrangements – these can be requested as a flexible working option, but in practice are rare outside the education sector.

# Summary

Children and families across Britain need access to good quality, affordable holiday childcare for school-age children. This provides the basis for parents to work or study and gives children the opportunity to socialise and have fun with other children. Most working parents do not have enough annual leave to cover the 13 weeks of school holidays across the year so they will need to make alternative childcare arrangements during these periods.

The financial burden of holiday childcare is challenging for many families but particularly those who are on low incomes. In the context of record levels of inflation and cost of living pressures, it is more vital than ever that the importance of holiday childcare is recognised. It is a social and economic resource for the country, providing employers with a reliable workforce and making sure that children are safe, well-fed and taking part in positive and fun activities during the break from school.

In the Spring Budget, the Chancellor announced £289m in funding to support the development and extension of wraparound childcare. This is a welcome recognition of the need to focus on improving the availability of school-age childcare. However, this will only focus on term-time childcare, rather than the year-round childcare that most working parents need. Parents tell us that holiday childcare is a particular struggle, and this survey once again highlights the significant shortages in provision. Only addressing shortages in term-time provision is a missed opportunity to make a real difference for families.

This year's Holiday Childcare Survey highlights variations in price rises and availability of holiday childcare both between nations and between the regions of England.

## Holiday childcare prices

- The average price of holiday childcare is £157 per week in Britain. This is a 3 per cent rise since 2022.
- Price increases are highest in Wales (9 per cent) followed by Scotland (7 per cent) and then in England (3 per cent).
- There is significant variation in holiday childcare prices across the English regions, ranging from £142 in the East of England to £177 in Inner London; a price difference of £35 per week.
- Parents pay more for childcare during the holidays than during term time. In Britain, holiday childcare costs are 2.3 times more per week than an after-school club, that is £157 per week compared to £67.
- A family will pay £943 for six weeks of holiday childcare for a school-age child, which is £538 more than they would be paying for six weeks of term-time childcare after school (£405).

**Table 1 - 2023 holiday childcare prices for England, Scotland and Wales, with percentage change from 2022.**

Nation	Price of holiday childcare per week 2023	% change from 2022 <sup>1</sup>
Great Britain	£157.13	3%
England	£156.43	3%
Scotland	£157.22	7%
Wales	£168.20	9%

<sup>1</sup> The calculation of price changes from year to year excludes price data from local authorities where the change is greater than 50% as this suggests an error in the data for the current or previous year. This is a more accurate calculation than if it was based simply on the difference between the overall figures for both years.

## Is there enough holiday childcare?

### England

- Only 24 per cent of local authorities have enough holiday childcare for parents working full time.
- Only 5 per cent of local authorities report having enough holiday childcare for disabled children.
- England has seen an overall decrease in sufficiency of holiday childcare across all categories of childcare. The most prominent drop is for 8 to 11 year olds with 7 per cent fewer local authorities reporting enough childcare 'in all areas'.

### Scotland

- Scotland has also seen a decrease in the proportion of local authorities reporting sufficient childcare 'in all areas' across almost all categories of holiday childcare. This is most marked for 12 to 14 year olds (-15 per cent), children living in rural areas (-14 per cent), parents working full time (-12 per cent) and 8 to 11 year olds (-11 per cent).
- No local authorities report having enough holiday childcare 'in all areas' for disabled children, working parents, parents working atypical hours or children in rural areas.

### Wales

- Conversely, Wales has seen an increase in the proportion of local authorities reporting sufficient childcare 'in all areas' across all categories of holiday childcare except 'parents working atypical hours' and 'children in rural areas' where no local authorities reported sufficiency this year or last.
- Local authorities in Wales report the highest level of sufficiency of holiday childcare 'in all areas' for parents working full time (18 per cent), followed by 4 to 7 year olds and 8 to 11 year olds at 14 per cent.
- There are low levels of sufficiency for disabled children (5 per cent) and 12 to 14 year olds (5 per cent).

## Holiday childcare for children with special educational needs and/ or disabilities (SEND)

- Fifty-two per cent of local authorities report that their local '**holiday activities and food programme (HAF)**<sup>2</sup> improves access to holiday childcare for children with SEND at least 'a little' (consisting of 14 per cent reporting 'improves access a lot' and 39 per cent reporting 'improves access a little').

- Local authorities identified a number of barriers to access to holiday childcare for children with SEND including funding, cost of childcare, staff skills, costs of providing specialist support, information, and travel-distance to suitable settings.
- Comments made by local authorities in relation to factors which improve access to holiday childcare for children with SEND include: tax-free childcare which is available up to age 16 for children with SEND, funding/training to settings to develop inclusive practices and provide specialist support, and expansion of Holiday Activities and Food programme to children with SEND.

## Holiday childcare for disadvantaged children

- Thirty-four per cent of local authorities in England 'agree' or 'strongly agree' that the HAF<sup>3</sup> programme helps to provide sufficient childcare for working parents (consisting of 30 per cent saying they 'agree' and 4 per cent saying they 'strongly agree').
- The majority of local authorities 'agree' or 'strongly agree' that the HAF programme meets its aims to give children opportunities to be active and engaged during the school holidays, learn about nutrition and eat healthily, be safe and not isolated, and be more engaged in school and other services.

## Areas for action

Coram Family and Childcare is calling on the UK, Scottish and Welsh Governments to:

- Increase and extend the funding announced in the Spring Budget to encourage the development of wraparound childcare to support childcare during school holidays as well as during term time.
- Increase support for Family Information Services to provide good quality holiday childcare information and broker access to local provision that meets families' needs.
- Expand provision of school holiday activity and food programmes running in each nation to improve access to affordable, high-quality childcare for all children who need it, prioritising children with SEND.
- Improve the accessibility of holiday childcare for children with SEND through providing funding, training and support to holiday childcare providers, trialling different approaches through the school holiday activity and food programmes running in each nation.

<sup>2</sup> In England the Holiday Activities and Food programme (HAF) provides a range of Easter, summer and Christmas holiday childcare activities and food for children from reception to Year 11 who are eligible for free school meals. In Wales a similar scheme – Food and Fun – is delivered by participating schools during the summer holiday. In Scotland the summer holiday food, activities and childcare programme ran nationally in 2022, and will be delivered in some areas in 2023.

<sup>3</sup> As above re: England.

## Section 1 – Holiday childcare prices

This section describes the typical prices paid by parents for holiday childcare, and discusses how these have changed in the last year and how they vary across Britain. Where local authorities have quoted their average or lowest weekly holiday childcare costs as zero or very low, these figures have been excluded. Low-cost provision is predominantly for a small cohort of children who meet eligibility criteria. Including this data would prevent us from achieving our aim to present a calculation and analysis of holiday childcare prices for the majority of families who are not eligible for these subsidies.

### A: Prices for holiday childcare

Overall, parents in Britain now pay an average of £157 per week for holiday childcare. Wales has the highest weekly price at £168, followed by Scotland (£157) and then England (£156).

### English regional differences:

- There is significant variation in holiday childcare prices across the English regions, ranging from £142 in the East of England to £177 in Inner London; a price difference of £35 per week.

- The average cost for childcare in London (Inner and Outer) (£169) is 7.6 per cent higher than the average cost in Britain (£157).
- These variations highlight the continued difference in affordability of holiday childcare depending on where families live.



**Table 2 - Average weekly price of holiday childcare, by nation and region, weighted**

Nation/region	Price of holiday childcare per week
<b>Great Britain</b>	£157.13
<b>England</b>	£156.43
<b>Scotland</b>	£157.22
<b>Wales</b>	£168.20
East of England	£142.31
East Midlands	£163.49
London, Inner	£177.13
London, Outer	£160.19
North East	£152.01
North West	£145.86
South East	£165.46
South West	£154.44
West Midlands	£155.78
Yorkshire and Humberside	£159.17

**Table 3 - Price changes in holiday childcare from 2022, by nation and region, weighted**

Nation/region	% difference in price from 2022
<b>Great Britain</b>	+3%
<b>England</b>	+3%
<b>Scotland</b>	+7%
<b>Wales</b>	+9%
East of England	+1%
East Midlands	+5%
London, Inner	+2%
London, Outer	-4%
North East	+3%
North West	+9%
South East	-1%
South West	-3%
West Midlands	+6%
Yorkshire and Humberside	+6%



## B. Price changes for holiday childcare

In Britain, prices for holiday childcare have risen by 3 per cent since 2022<sup>4</sup>. While this is lower than inflation, it still represents further increases to family expenditure at a time when budgets are already squeezed by cost-of-living pressures.

Holiday childcare price increases are higher in Wales (9 per cent rise) and Scotland (7 per cent rise) than in England (3 per cent rise). Similar to last year, the highest increase in holiday childcare in Wales could be the result of the nation having the highest proportion of PVI provision in Britain (97 per cent). For more detail on this, see section D 'difference in holiday childcare prices between public and PVI sector provision.'

There is some notable variation in price changes for holiday childcare across the English regions, with the highest price rise in the North West (+9 per cent) and in the West Midlands and Yorkshire and Humberside (both +6 per cent). There is stability of prices in the East of England (+1 per cent) and the South East (-1 per cent) and the highest decreases are in Outer London (-4 per cent) and the South West (-3 per cent).

This variation reflects the volatility in the holiday childcare market. In general, there are fewer holiday childcare providers in any given area than early years providers. This means that if one large provider changes their prices, or if a large provider opens or closes, it can have a significant impact on local prices. This volatility makes it difficult for families to make plans based on the price and availability of holiday childcare in their local area. This puts into sharp focus the role of local authorities in providing good quality holiday childcare information and brokering access to provision that meets the needs of their families.

<sup>4</sup> The calculation of price changes from year to year excludes price data from local authorities where the change is greater than 50%, as this suggests an error in the data for the current or previous year. This is a more accurate calculation than if it was based simply on the difference between the overall figures for both years.

## C. Local variations in holiday childcare prices

Prices for holiday childcare can vary significantly both within and between local areas. The majority of holiday childcare providers are private businesses who can set their own prices to parents according to local market conditions. As such, average regional price figures often mask considerable variation within regions.

These figures are based on the best data that local authorities have available. Providers are not obliged to share their rates with local authorities and, in particular, holiday clubs with the highest fees may decide not to share their prices with their local authority.

If anything, it is likely that the figures presented here underestimate the extent of local variations in holiday childcare prices.

In the average local authority in Britain, the most expensive holiday childcare is 61 per cent above the national average and the least expensive is 40 per cent below. This is mostly accounted for by the wide variation in England where the most expensive provision is 65 per cent above the average and least expensive is 40 per cent below.

### English regional differences:

- The highest price variations are found in Inner and Outer London and the East and West Midlands.
- For all regions, the most expensive prices are between 37 per cent and 104 per cent above the national average, while the least expensive are between 20 per cent and 58 per cent lower than the national average.

This high level of price variation highlights the complexity of local holiday childcare markets. For this reason, it is important that parents can access high quality information about what is available in their area. Without this, parents may struggle to find holiday childcare that is affordable and that meets the needs of their family.

**Table 4 - Highest and lowest prices of holiday childcare per week as a percentage above or below average prices, weighted**

Nation/region	Most expensive	Least expensive
<b>Great Britain</b>	61%	-40%
<b>England</b>	65%	-41%
<b>Scotland</b>	7%	-33%
<b>Wales</b>	31%	-37%
East of England	69%	-20%
East Midlands	104%	-58%
London, Inner	95%	-40%
London, Outer	75%	-38%
North East	37%	-41%
North West	56%	-35%
South East	56%	-45%
South West	55%	-37%
West Midlands	71%	-47%
Yorkshire and Humberside	58%	-36%

**Table 5 - Holiday childcare price difference between average prices in public and PVI sector, by nation**

Nation	Public sector	Private, voluntary and independent sector (PVI)	% difference	% of provision which is provided by the public sector
Great Britain	£122.53	£162.24	32%	11%
England	£121.64	£161.85	33%	11%
Scotland	£128.68	£154.84	20%	14%
Wales	£156.89	£177.09	13%	3%

### D. Difference in holiday childcare prices between public and 'private, voluntary and independent' (PVI) sector provision

This section considers the different prices and availability of holiday clubs managed by the PVI sector compared with those managed by the public sector. Table 5 shows that, across Britain, holiday clubs provided by the PVI sector are an average of 32 per cent more expensive than those in the public sector. These price differences are partly due to subsidies and low-cost access to premises and equipment that holiday clubs in the public sector may have and reflect PVI providers offering, in some cases, a more expensive range of activities. Some PVI providers will also make a profit.

PVI providers in England are 33 per cent more expensive than public sector providers and in Scotland they are 20 per cent more expensive. However, in Wales the price difference between the two sectors is lower with the PVI sector being 13 per cent more expensive than the public sector. Scotland has a lower proportion (86 per cent) of private sector provision than England (89 per cent). Wales has the highest level of PVI providers in the holiday childcare sector at 97 per cent.

The average cost of public sector holiday childcare is lowest in England (£122 per week) and highest in Wales (£157 per week). The average cost of PVI holiday childcare is lowest in Scotland (£155 per week) and highest in Wales (£177 per week). While holiday childcare is cheaper in the public sector, in many areas families will struggle to find available places.

### E. Holiday childcare prices compared to term time prices

Parents who use holiday childcare are likely to use after-school clubs during school terms. Whereas during term time they are only buying childcare for before and after the school day, during the holidays they need to buy childcare for the full day, meaning prices are considerably more expensive. **Table 6** shows that parents across Britain pay more than twice as much (2.3) during the school holidays as they do during term time. The greatest increase in childcare costs in the holidays can be found in Wales where it is 2.54 times more expensive than term-time care.



It should be noted that this increase in payments for childcare during the school holidays impacts families the most during the summer. Our calculations show that in Britain a family will pay £943 for six weeks of holiday childcare for a school age child, which is £538 more than they would

be paying for six weeks of term-time childcare before and after school (£405).

For many families, the jump in prices from term-time to holiday childcare is difficult to manage. Parents using Tax Free Childcare accounts can 'even out' their spend across the year by paying

into their account every month and then spending more in the summer, but parents on Universal Credit must absorb the higher costs upfront, waiting for them to be repaid in subsequent benefits payments.

**Table 6 - Holiday childcare prices compared to after school club prices**

Nation	Holiday club per week	After school club per week	Holiday club price as a multiple of after school club price
Great Britain	£157.13	£67.42	2.33
England	£156.43	£67.68	2.31
Scotland	£157.22	£63.92	2.46
Wales	£168.20	£66.20	2.54



## Box 2: Support with childcare costs

Support to help parents pay for childcare costs, including holiday childcare, is available to parents in some circumstances. This support is only available to parents who use childcare registered with an official regulator (Ofsted in England, Care Inspectorate in Scotland, and Care Inspectorate Wales). Many activity-based providers, such as sports or drama clubs that run for a few weeks in the summer, as well as childcare providers caring only for older children, are not required to register. Parents who use government support for childcare costs may have a smaller choice of providers or miss out on financial help.

There is some childcare support available for parents who are in training or education but this varies with the parent's age, the type of qualification they are undertaking, and the policies of their education provider. There is more information on support for these parents on the Coram Family and Childcare website.

<b>Tax Free Childcare</b>	<b>Aged under 12 or under 17 if child has a disability</b>	<p>Covers 20% of childcare costs up to a maximum of £2,000 per child per year or £4,000 for disabled children. Tax Free Childcare replaces the childcare vouchers scheme that has closed for new applications but can still be used by families who already have an account.</p> <p>Parents and their partner (if they have one) must work at least the equivalent of 16 hours a week at the national minimum wage or national living wage.</p> <p>Can be received alongside the 30 hours extended entitlement for 3 to 4 year olds but not Working Tax Credit or Universal Credit.</p> <p>Take-up of Tax-Free Childcare has been much lower than the Government forecast, meaning that many eligible parents are missing out on support.</p>
<b>Universal Credit</b>	<b>Any age, with providers registered with an official regulator</b>	<p>Pays up to 85% of childcare costs up to £1,118 per month for one child or £1,918 per month for two or more children.</p> <p>Universal Credit can be claimed alongside funded childcare but not with Working Tax Credit or Tax-Free Childcare. Parents must have an income below a certain level – this varies based on families' circumstances.</p> <p>The actual amount families get will tend to be less than 85 per cent of their childcare costs as Universal Credit is reduced as people earn more.</p>



## Section 2 – Is there enough holiday childcare?

This section examines whether there is enough holiday childcare for different groups and discusses how this has changed in the last year – known legally as ‘childcare sufficiency’.

### A. Sufficiency duties for local authorities

Local authorities are required to manage the market for childcare in their local area, which means they need to know whether enough childcare is available for key groups. The precise nature of these duties varies between the nations of Britain.

Because these duties are slightly different in different parts of Britain, we have presented sufficiency data separately for the three nations. The data is based on local authorities’ assessments at the time of the survey, which may differ from their published Childcare Sufficiency Assessments if the local situation has changed since this was last published.

Local authorities were asked to report whether they had sufficient holiday childcare in terms of ‘Yes: all areas’, ‘Yes: in some areas’, ‘No’ or ‘Data not held or cannot tell’. Overall, the provision of childcare ‘in all areas’ was far from universal and varied according to the type and age of childcare required.

### B. Holiday childcare sufficiency in England

In England, local authorities must audit childcare sufficiency annually, including considering the free early education entitlements, childcare for school age children (including holidays), disabled children, and different types of families. However, as shown in **table 7**, in response to our survey local authorities were most likely to report ‘data not held or cannot tell’ in relation to assessing sufficiency for children in rural areas (50 per cent), parents working atypical hours (48 per cent), disabled children (48 per cent) and 12 to 14 year olds (49 per cent).

We asked councils whether they have sufficient holiday childcare ‘in all areas’ of their local authority, across seven categories of holiday childcare (see **table 7**).

The highest proportion of local authorities (26 per cent) reported sufficiency ‘in all areas’ for 4 to 7 year olds, followed by ‘parents working full time’ (24 per cent) and ‘8 to 11 year olds’ (23 per cent).

Low proportions of local authorities reported sufficient holiday childcare ‘in all areas’ for disabled children (5 per cent), parents working atypical hours (9 per cent), 12 to 14 year olds (10 per cent) and children in rural areas (13 per cent). These are also the categories for which local authorities reported having low levels of data.

**Table 7 - Sufficiency of holiday childcare in England, by local authority**

	Yes: in all areas	Yes: in some areas	No	Data not held or cannot tell
4-7 year olds	26%	41%	2%	31%
8-11 year olds	23%	38%	4%	35%
12-14 year olds	10%	32%	9%	49%
Disabled children	5%	29%	18%	48%
Parents working full time	24%	38%	3%	35%
Parents working atypical hours	9%	30%	13%	48%
Children in rural areas	13%	34%	3%	50%

**Table 8 - Sufficiency of holiday childcare in England, by local authority, 2022 and 2023**

	Yes: in all areas (2023)	Yes: in all areas (2022)	Percentage point change, 2022-2023
4-7 year olds	26%	29%	-3%
8-11 year olds	23%	30%	-7%
12-14 year olds	10%	14%	-4%
Disabled children	5%	7%	-2%
Parents working full time	24%	27%	-2%
Parents working atypical hours	9%	10%	-1%
Children in rural areas	13%	15%	-2%

As shown in **table 8**, over the past year there has been significant decreases in the proportion of local authorities reporting sufficiency 'in all areas' for all the seven categories of holiday childcare.

This decrease is most marked for 8 to 11 year olds, with 7 per cent fewer local authorities reporting enough childcare 'in all areas' and for 12 to 14 year olds, where there is a 4 per cent decrease. In all other categories there has been a decrease of between 1 to 3 percentage points.

As shown in **table 9**, shortages of holiday childcare vary widely across England. This means that parents in some areas will find it more difficult to find childcare than in others.

**Table 9 - Proportion of local authorities reporting sufficient holiday childcare 'in all areas' in England, regional**

	4-7 year olds	8-11 year olds	12-14 year olds	Disabled children	Parents working full time	Parents working atypical hours	Children in rural areas
East of England	0%	0%	0%	0%	0%	0%	0%
East Midlands	11%	11%	0%	0%	11%	0%	0%
London, Inner	9%	9%	0%	0%	0%	0%	0%
London, Outer	14%	14%	7%	0%	14%	7%	0%
North East	33%	22%	11%	11%	33%	11%	25%
North West	43%	43%	26%	14%	39%	22%	21%
South East	35%	35%	12%	6%	35%	12%	15%
South West	25%	25%	0%	0%	27%	0%	11%
West Midlands	30%	10%	10%	10%	30%	10%	0%
Yorkshire and Humberside	31%	31%	15%	0%	31%	8%	40%

The North West is the region with the highest proportion of local authorities reporting enough holiday childcare 'in all areas' for all categories of holiday childcare except for 'children in rural areas'. Yorkshire and Humberside report the highest level of sufficiency 'in all areas' for this category.

None of the East of England's local authorities have reported sufficiency of holiday childcare 'in all areas' for any of the seven categories.

The proportion of local authorities across all regions reporting sufficient holiday childcare for 'parents working full time' ranges from 0 per cent in the East of England and Inner London to 39 per cent in the North West.

The proportion of local authorities across all regions reporting sufficient holiday childcare for disabled children is low, ranging from 0 per cent in the East of England, East Midlands, Inner and Outer London and the South West to 14 per cent in the North West.

Parents working atypical hours are not well served with holiday childcare with 0 to 22 per cent of local authorities across the regions reporting sufficiency 'in all areas'.

### C. Holiday childcare sufficiency in Scotland

In Scotland, local authorities have a statutory duty to consult with parents on the delivery of early education and childcare and to publish a plan based on the results of their consultation.

**Table 10** shows that a high proportion of local authorities in Scotland did not hold the data that allowed them to answer whether there was enough childcare available locally. Across all the categories of holiday childcare 50 to 65 per cent of local authorities reported 'data not held or cannot tell'.

Analysis of the available data shows that the level of sufficiency 'in all areas' across the seven categories of holiday childcare is very low. The highest single proportion of local authorities (5 per cent) report sufficiency 'in all areas' for 4 to 7 year olds and 8 to 11 year olds. And no local authorities report sufficiency of childcare 'in all areas' for the remaining five categories.

**Table 11** shows that there has been a decrease in the proportion of local authorities reporting sufficient childcare 'in all areas' across all categories of holiday childcare. This is most marked for 12 to 14 year olds (-15 per cent), children living in rural areas (-14 per cent), parents working full time (-12 per cent) and 8 to 11 year olds (-11 per cent). This data should be treated with caution given the high proportion of local authorities not holding data on this.

**Table 10 - Sufficiency of holiday childcare in Scotland, by local authority**

	Yes: in all areas	Yes: in some areas	No	Data not held or cannot tell
4-7 year olds	5%	32%	14%	50%
8-11 year olds	5%	27%	14%	55%
12-14 year olds	0%	18%	23%	59%
Disabled children	0%	18%	14%	68%
Parents working full time	0%	29%	10%	62%
Parents working atypical hours	0%	9%	27%	64%
Children in rural areas	0%	18%	18%	65%

**Table 11 - Sufficiency of holiday childcare in Scotland, by local authority, 2022 and 2023**

	Yes: in all areas (2023)	Yes: in all areas (2022)	Percentage point change, 2022-2023
4-7 year olds	5%	12%	-7%
8-11 year olds	5%	15%	-11%
12-14 year olds	0%	15%	-15%
Disabled children	0%	8%	-8%
Parents working full time	0%	12%	-12%
Parents working atypical hours	0%	4%	-4%
Children in rural areas	0%	14%	-14%

## D. Holiday childcare sufficiency in Wales

Welsh local authorities were required to produce a sufficiency assessment and action plan in 2017 and every five years thereafter and to report to the Welsh government annually through a progress update. As shown in **table 12**, a low proportion of Welsh local authorities have reported 'data not held or cannot tell' compared to their counterparts in England and Wales so have more information on which to judge holiday childcare sufficiency.

Local authorities in Wales report the highest level of sufficiency of holiday childcare 'in all areas' for parents working full time (18 per cent), followed by 4 to 7 year olds and 8 to 11 year olds at 14 per cent.

Local authorities report zero per cent sufficiency 'in all areas' for parents working atypical hours and children in rural areas.

**Table 13** shows that the number of local authorities reporting sufficient holiday childcare provision 'in all areas' has increased across all categories except for parents working atypical hours and children in rural areas where no local authorities report sufficiency. The highest increases in sufficiency (+8 per cent) have been for 4 to 7 year olds, 8 to 11 year olds and parents working full time. In addition, sufficiency 'in all areas' has increased from 0 per cent last year to 5 per cent this year for disabled children and 12 to 14 year olds.

**Table 12 - Sufficiency of holiday childcare in Wales, by local authority**

	Yes: in all areas	Yes: in some areas	No	Data not held or cannot tell
4-7 year olds	14%	64%	14%	9%
8-11 year olds	14%	64%	14%	9%
12-14 year olds	5%	27%	59%	9%
Disabled children	5%	57%	29%	10%
Parents working full time	18%	59%	14%	9%
Parents working atypical hours	0%	14%	68%	18%
Children in rural areas	0%	38%	38%	25%

**Table 13 - Sufficiency of holiday childcare in Wales, by local authority, 2022 and 2023**

	Yes: in all areas (2023)	Yes: in all areas (2022)	Percentage point change, 2022-2023
4-7 year olds	14%	5%	+8%
8-11 year olds	14%	5%	+8%
12-14 year olds	5%	0%	+5%
Disabled children	5%	0%	+5%
Parents working full time	18%	11%	+8%
Parents working atypical hours	0%	0%	0%
Children in rural areas	0%	0%	0%

**E. Number of childcare providers and places**

**Table 14** illustrates that local authorities are reporting overall stability in the number of holiday childcare providers in the public sector. Thirty-nine per cent reported that the number has stayed the same since 2022, with 11 per cent reporting an increase and 17 per cent a decrease. However, in relation to the number of private, voluntary and independent (PVI) providers there is less stability with 26 per cent reporting that numbers had stayed the same, 24 per

cent reporting an increase and 33 per cent a decrease. For families that rely on holiday childcare, the closure of settings in some areas could cause significant problems for families, particularly if it means longer travel time, provision that their child does not know or enjoy, or that there is more competition for a smaller number of places.

In contrast to the decrease in the number of providers in some areas, the number of childcare places is more stable. This is likely down to an increase in the number of places per provider.

**Table 15** shows that local authorities in Britain (23 per cent) were most likely to report a decrease in childcare places followed by an increase (21 per cent) and stability (17 per cent). Local authorities in England (24 per cent) were most likely to report a decrease, those in Scotland stability (13 per cent) or a decrease (13 per cent) and in Wales an increase (32 per cent). Over two-thirds of local authorities in Scotland (67 per cent) were not able to report on the change in number of holiday childcare places over the year.

**Table 14 - Proportion of local authorities reporting a change in number of holiday childcare providers in the public and PVI sectors since 2022 - Great Britain**

	Public sector	PVI sector
Increased	11%	24%
Stayed the same	39%	26%
Decreased	17%	33%
Don't know	21%	16%
No providers in either year	12%	0%



**Table 15 – Proportion of local authorities reporting a change in number of holiday childcare places since 2022 – nations**

	Great Britain	England	Scotland	Wales
Increased	21%	22%	8%	32%
Same as 2022	17%	18%	13%	18%
Decreased	23%	24%	13%	23%
Data not held or cannot tell	39%	35%	67%	27%

## F. Holiday childcare opening times and holiday periods

We asked local authorities about the opening times of holiday clubs in their area – how long they are open for each day and in which holiday period.

Families may need holiday childcare to be available throughout the typical working day. **Table 16** shows the proportion of holiday clubs that are open for short, medium, and long days in the holidays.

- Across Britain, holiday clubs in the PVI sector (40 per cent) are more likely to be open for long days than those in the public sector (26 per cent).

- Within the PVI sector, 68 per cent of settings are open for long days in Wales compared to 44 per cent in Scotland and 37 per cent in England.
- Within the public sector, 56 per cent of settings provide long day holiday childcare in Scotland, compared to 24 per cent in England and 15 per cent in Wales.
- There are gaps in data from local authorities in England in relation to opening times of public sector holiday childcare. Local authorities report that opening times are 'unknown' for 39 per cent of settings.

- There are data gaps across all nations in relation to PVI holiday provision opening times. This is most marked in England where local authorities report that data is 'unknown' for 32 per cent of settings. In Wales data is 'unknown' for only 7 per cent of PVI holiday settings.

Families may need holiday childcare for different school holidays throughout the year, from the long summer break to half terms, and for teacher training days<sup>5</sup>. **Table 17** shows that the availability of childcare varies significantly depending on the type of provider and holiday period.

**Table 16 - Proportion of childcare settings open for short, long or medium days in the holidays, by nation**

	Nation	Short day – up to 7 hours	Medium day – 7 to 9 hours	Long day – more than 9 hours	Unknown
<b>Public sector</b>	Great Britain	18%	21%	26%	35%
	England	17%	20%	24%	39%
	Scotland	22%	22%	56%	0%
	Wales	31%	54%	15%	0%
<b>Private, voluntary and independent (PVI) sector</b>	Great Britain	12%	20%	40%	28%
	England	11%	21%	37%	32%
	Scotland	33%	8%	44%	15%
	Wales	4%	22%	68%	7%

5 Known as INSET days or In-Service days in different parts of Britain.

**Table 17 - Proportion of childcare settings open in each school holiday, by nation**

	Nation	Summer	Easter	Christmas	Half term	Teacher training days
<b>Public sector</b>	Great Britain	85%	71%	32%	64%	15%
	England	83%	67%	35%	60%	10%
	Scotland	100%	98%	9%	89%	60%
	Wales	100%	100%	15%	100%	23%
<b>Private, voluntary and independent (PVI) sector</b>	Great Britain	87%	77%	50%	65%	21%
	England	85%	76%	51%	63%	17%
	Scotland	94%	77%	36%	71%	61%
	Wales	98%	91%	47%	90%	33%

- In Britain 85 per cent of public sector holiday childcare is open in the summer holidays, compared to 87 per cent of PVI provision. Providers across the PVI (50 per cent) and public (32 per cent) sectors are least likely to be open during the Christmas holidays.
- Across the nations, there is a very high level of provision in the summer holidays in Wales by the public sector (100 per cent) and the PVI sector (98 per cent), and in Scotland in the public sector (100 per cent) and PVI sector (94 per cent). This is lower in England in the public sector (83 per cent) and PVI sector (85 per cent).
- Christmas holiday childcare is lowest in Scotland across public sector (9 per cent) and PVI sector (36 per cent).
- Teacher training days are least well catered for across both sectors in England and Wales. In Scotland, the majority of holiday providers are open on teacher training days in the public sector (60 per cent) and PVI sector (61 per cent). This can be a particular problem for parents because they are single days, generally at the end of a holiday, and therefore difficult to coordinate for annual leave or informal childcare.



## Section 3 – Meeting the holiday childcare needs of children with special educational needs and/ or disabilities (SEND)

Again this year, our holiday childcare survey shows that a low level of local authorities across Britain report that they have sufficient holiday childcare ‘in all areas’ for children with disabilities. This ranges from 0 per cent in Scotland to 5 per cent in Wales and 4 per cent in England. These are reductions in sufficiency for children with SEND since 2022, apart from in Wales which has seen an increase from 0 per cent last year to 5 per cent this year.

This year’s survey asked local authorities for feedback on their view of what may be affecting access to holiday childcare for families of children with SEND, and the barriers and facilitators to delivering sufficient provision.

- **Table 18** shows that 53 per cent of local authorities report that their local ‘**holiday activities and food programme**’ improves access to holiday childcare for children with SEND at least ‘a little’ (consisting of 14 per cent reporting ‘improves access a lot’ and 39 per cent reporting ‘improves access a little’). Some local

authorities (8 per cent) feel that the programme has ‘no effect on access’, and no local authorities feel that it ‘decreases access a little/ or a lot’.

- **The ‘local offer’ of services for children with SEND** – Forty-one per cent of local authorities feel that their ‘local offer’ of services for children with SEND improves access to holiday childcare at least ‘a little’ (consisting of 9 per cent reporting ‘improves access a lot’ and 32 per cent reporting ‘improves access a little’). Some local authorities (9 per cent) feel that the ‘local offer’ has ‘no effect on access’, 1 per cent feel that it decreases access ‘a little’ with no areas reporting that it ‘decreases access a lot’.
- **Help with childcare costs for parents of school-age children through Tax Free Childcare** – Thirty-one per cent of local authorities feel that Tax Free Childcare improves access to holiday childcare for children with SEND at least ‘a little’ (consisting of 5 per cent reporting ‘improves access a lot’ and 26 per cent reporting ‘improves access

a little’). Some local authorities (15 per cent) feel that Tax Free Childcare has ‘no effect on access’, 1 per cent feel that it decreases access ‘a little’ with no areas reporting that it ‘decreases access a lot’.

- Across all these factors affecting access to holiday childcare for children with SEND, a high proportion of local authorities (40 to 53 per cent) reported ‘data not held or cannot tell’.

This year’s survey also asked local authorities for feedback on what they think are the facilitators and barriers to providing sufficient and accessible childcare for children with SEND. The following is an overview of the feedback made in comments from over one hundred local authorities. These centre on issues related to affordability and suitability of holiday childcare; location of provision and transport; staffing levels, skills and understanding; and funding, resources and facilities to meet children’s SEND needs.

**Table 18 - In your view, to what extent do the following affect access to holiday childcare for children with SEN and/or disabilities (SEND) in your local area?**

	Improves access a lot	Improves access a little	No effect on access	Decreases access a little	Decreases access a lot	Data not held or cannot tell
The local Holiday Activities and Food programme	14%	39%	8%	0%	0%	40%
Your area’s ‘Local offer’ of services for children with SEND	9%	32%	9%	1%	0%	50%
Help with childcare costs for parents of school age children, through Tax Free childcare	5%	26%	15%	1%	0%	53%

In your view, what are the main facilitators and barriers to providing enough holiday childcare places for children with special educational needs and/ or disabilities (SEND) in your local authority area and for families being able to access this childcare?

### Facilitators

- **Tax Free Childcare** is available for children with SEND up to the age of 16.
- Families may feel that **home-based childcare** such as childminders of nannies can offer flexible childcare that can meet an individual child's SEND needs.
- Some local authorities offer **funding or training** to settings to develop inclusive practices and provide specialist support.
- Expansion of **Holiday Activities and Food** programme to children with SEND (as well as those eligible for free school meals) in some areas has increased accessibility of holiday childcare.
- **Family Information Services** in some areas provide information to settings on requests for places for children with SEND to help them to plan provision to meet needs.

### Barriers

- The high cost of childcare overall makes it difficult for parents to afford, especially with the current high cost of living and especially if a child needs specialist support/ provision.
- Parents may find it difficult to get information about holiday provision that can meet their child's needs.
- There may be a long waiting time to access childcare that meets their child's needs as well as their own need for childcare to facilitate work or study.
- There can be a mismatch of expectations between what a parent feels their child needs from a holiday childcare setting and what a provider can offer to meet their child's needs.
- The distances to childcare provision that can meet a child's needs may be too long and/or costly, particularly for those in rural areas.
- Few providers offer transport services and sometimes these have a range of requirements which do not meet the child/families' needs (including distance of travel and pick-up/drop-off times).
- Current childcare recruitment and retention problems for settings overall have led to difficulties in providing specialist support to children with SEND if needed.
- Staff may feel that they lack the knowledge, skills and confidence to meet a range of SEND needs.
- Funding or allowing staff to attend training to develop skills adds pressure to current budget and staffing pressures on settings.
- Lack of opportunities for staff to develop knowledge about statutory requirements around 'reasonable adjustments' and developing an inclusive setting.
- **High cost of specialist staff** to provide 1:1 support where necessary adds to current business cost pressures experienced by settings.
- Less **access to Government funding** to help settings develop accessible practice or provide specialist support for individual children.
- **Physical access** into and within premises, as well as **facilities and equipment** on offer, may not meet a child's needs.

**"Specialist holiday clubs are significantly more expensive and with the current cost of living crisis, it makes these clubs unaffordable to many"**

**"Recruitment and retention issues are impacting the staffing levels across all types of provisions, but this is more in relation to providing provisions for SEND children, particularly those with high levels of need"**

**"Capacity to support high level needs children in holiday clubs is becoming increasingly challenging without further support in terms of additional funding in the system to enable 1:1 staffing to be offered"**

## Section 4 – Meeting the holiday childcare needs of disadvantaged children in England – Holiday Activities and Food (HAF) programme

This year's survey asked local authorities in England for feedback on their view of the benefits of the Holiday Activities and Food (HAF) programme for children and families. This is a national scheme which funds local authorities to provide a range of Easter, summer and Christmas holiday childcare, activities and food for children from reception to Year 11 who are eligible for free school meals. The HAF programme is not primarily intended to provide childcare to support working parents but this is a potential benefit of the scheme. In some areas, holiday childcare is being run alongside the HAF scheme, with children eligible for HAF attending for free and others paying. We see an opportunity within this scheme for providing high-quality, inclusive holiday childcare provision.

- **Table 19** shows that 44 per cent of local authorities 'agree' or 'strongly agree' that the HAF programme helps to provide access to holiday childcare for children with SEND (consisting of 37 per cent saying they 'agree' and 7 per cent saying they 'strongly agree'). Fifteen per cent are more negative saying that they 'disagree' (14 per cent) or 'strongly disagree' (1 per cent).
- Thirty-four per cent of local authorities 'agree' or 'strongly agree' that the HAF programme helps to provide sufficient childcare for working parents (consisting of 30 per cent saying they 'agree' and 4 per cent saying they 'strongly agree'). Twenty-seven per cent are more negative saying that they 'disagree' (22 per cent) or 'strongly disagree' (5 per cent).
- Again, in answer to this question a high proportion of local authorities (39 to 40 per cent) reported 'data not held or cannot tell'.

We also asked local authorities for their view on the extent to which the HAF programme is achieving its objectives around providing opportunities for children.

- **Table 20** shows that over three quarters of local authorities 'agree' or 'strongly agree' that the HAF programme **helps children to be active in the school holidays** (78 per cent), **take part in engaging and enriching activities** (78 per cent) and **eat healthily** (77 per cent). No local authorities 'disagree' or 'strongly disagree' on any of these indicators.
- Nearly three quarters of local authorities 'agree' or 'strongly agree' that the HAF programme **helps children to be safe and not socially isolated** (73 per cent), and to have **greater knowledge about health and nutrition** (72 per cent); on the latter indicator 1 per cent 'disagree'.
- Sixty-one per cent of local authorities 'agree' or 'strongly agree' that the HAF programme **helps children to be more engaged with school and other services**, and 6 per cent 'disagree'.

**Table 19: To what extent do you agree or disagree that the Holiday Activities and Food (HAF) programme in your area helps to provide the following?**

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Data not held or cannot tell
Sufficient childcare for working parents	4%	30%	0%	22%	5%	39%
Access to holiday childcare for children with SEN and/ or Disabilities	7%	37%	0%	14%	1%	40%

**Table 20: To what extent do you agree or disagree that the Holiday Activities and Food (HAF) programme in your area helps to provide the following?**

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Data not held or cannot tell
Eat healthily	33%	44%	0%	0%	0%	23%
Be active	42%	36%	0%	0%	0%	22%
Take part in activities	38%	40%	0%	0%	0%	22%
Be safe and not socially isolated	38%	35%	0%	0%	0%	27%
Know about health and nutrition	19%	53%	0%	1%	0%	28%
Be more engaged with school and local services.	12%	49%	0%	6%	0%	33%



# Methodology

Note on terminology: holiday childcare refers to any childcare not provided by parents or main carers that is available for school-age children in the school holidays and is registered with Ofsted in England and the Care Inspectorates in Wales and Scotland.

## Data collection

This report is based on surveys sent to all Family Information Services at local authorities between April and June 2023. Respondents were able to fill in a form or reply online. After one month, we sent Freedom of Information requests to those local authorities that had not responded, with a request to return within the statutory deadline.

Local authorities who responded without the need for a Freedom of Information request were promised that individual responses would not be published, with only regional/national averages provided in the report. This is consistent with previous surveys and we do it to encourage honest and accurate data reporting. When Freedom of Information requests are used, some local authorities automatically publish their own responses so we cannot make the same promise. However, we do not report these Freedom of Information individual responses in this report, nor do we say which responses were acquired through Freedom of Information requests.

## Data sources

Average, maximum and minimum childcare prices are provided by local authorities rather than being calculated by Coram Family and Childcare from information directly from providers. Similarly, assessments of sufficiency are provided by local authorities rather than being based on data collected by the Coram Family and Childcare research team.

Where possible, we have kept questions consistent with previous versions of the survey to allow for tracking over time.

## Response rates

We received responses from 86 per cent of local authorities in Britain. Response rates across the nations range from 81 to 100 per cent. Some local authorities did not give data for all questions or gave data in a format that we could not use.

## Data gaps and exclusions

Where local authorities have quoted their average or lowest weekly holiday childcare costs as zero or very low, these figures have been excluded. Low cost provision is predominantly for a small cohort of children who meet eligibility criteria. Including this data would prevent us from achieving our aim to present a calculation and analysis of holiday childcare prices for the majority of families, who are not eligible for these subsidies (Section 1).

Where response rates for a question are particularly low and may have affected the reliability of the data, this is noted in the relevant section of the report.

The calculation of price changes from year to year (Section 1B) excludes price data from local authorities where the change is greater than 50 per cent as this suggests an error in the data for the current or previous year. This is a more accurate calculation than if it was based simply on the difference between the overall figures for both years.

## Weighting

In line with recent surveys, we have weighted cost data within regions and nations. This ensures that results from small local authorities that have relatively small child populations do not unduly influence overall results. Data are weighted against the age 5 to 14 population based on ONS mid-year population estimates<sup>6</sup>. Within local authorities, we have weighted cost data for PVI and maintained setting providers against the number of providers in that area. This is based on an assumption that the types of settings will have the same number of children on average.





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