
Holiday Childcare Survey 2018

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About this report

This report is the seventeenth annual Holiday Childcare Survey. It is based on surveys from local authorities in England, Scotland and Wales, which were returned to Family and Childcare Trust between April and June 2018. 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.

About the Family and Childcare Trust

The Family and Childcare Trust 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.

Summary

High quality holiday childcare is essential for both families and the economy: as well as enabling parents to work, it gives children the opportunity to take part in positive activities that they might not otherwise access.

About twice as many children use school age childcare as nurseries – about 3 million per year, yet holiday childcare for school-aged children is often overlooked when we talk about childcare policy.

This is despite its importance to parents, children and to the economy. For parents and carers, finding childcare during the holidays can be particularly challenging. The price is normally significantly higher than term time childcare, which can throw off carefully managed budgets. There are also substantial gaps in availability, meaning many parents will find it difficult to find childcare that covers their working patterns and suits their children's needs.

Where holiday childcare is unavailable or too expensive, parents are left with few options. Many cannot call on family and friends to provide all the informal childcare they need, and will not have enough annual leave to cover the long break, and some struggle to stay in work.

The Holiday Childcare Survey 2018, our seventeenth annual survey, once again finds that problems around availability and affordability of holiday childcare persist.

Price of holiday childcare

- ▶ The average price of holiday childcare is £133 per week in Britain. This is a 4 per cent rise since 2017.
- ▶ Prices in Scotland and Wales are similar to each other, while prices in England are about £10 per week higher.
- ▶ There are significant regional variations within England: prices in the East of England are 35 per cent higher than in Inner London and the West Midlands.
- ▶ Holiday clubs in the private, voluntary and independent sector are on average 22 per cent more expensive than those run by local authorities. However, only 13 per cent of holiday provision is run by local authorities, and the proportion varies in different local areas – meaning many parents cannot access this cheaper provision.
- ▶ Parents face considerably higher prices during the holidays than during term time: holiday childcare costs are almost two and a half times as much per week as an after school club.

Table 1: 2018 holiday childcare prices for England, Scotland and Wales, with percentage change from 2017

Nation	Weighted average 2018	% change from 2017
England	£134.66	5%
Scotland	£124.44	1%
Wales	£124.85	4%
Britain	£133.34	4%

Sufficiency of holiday childcare

- ▶ The majority of local authorities in England do not have, or do not know whether they have, enough holiday childcare available across their local area. Only 25 per cent of English local authorities have enough holiday childcare available for parents in their area who work full time.
- ▶ Shortages of holiday childcare provision have decreased slightly over the past year for all groups of children. For example, in 2017, 29 per cent of English local authorities had enough holiday childcare for 4–7 year olds: this has now risen to 33 per cent.
- ▶ The biggest gaps in England are for disabled children, where only 13 per cent of local authorities say they have enough childcare, and for 12 to 14 year olds, where 14 per cent have enough.
- ▶ There are different legal duties around childcare sufficiency in Scotland and Wales which makes direct comparison difficult, but there are sufficiency gaps in both nations.

Right to request wraparound and holiday childcare

- ▶ The right to request holiday childcare allows parents to request that their child’s school provides before and after school and/or holiday childcare, or opens up their facilities for another provider to do so.
- ▶ The right to request has so far not helped to fill the gaps in childcare supply – only 4 per cent of local authorities report a positive impact for holiday childcare. This has not changed since last year.

Box 1: 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 private 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 through the tax and benefits system to help meet the cost of holiday provision (see box 2 below).
- ▶ ‘Shift parenting’ between two parents, 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.

Areas for action

Across Britain, many parents find it difficult or impossible to access affordable, high quality childcare that suits the needs of their children and allows them to work. For all families, there is a need for reform to a simple, progressive funding system to support parents to be able to access high quality childcare and be better off working.

But there is a particular need for urgent action for families with school age children, where shortages are acute and too often the existing support to help pay for childcare does not work.

The Family and Childcare Trust are calling on the UK, Scottish and Welsh Governments to:

- ▶ Fix the support for childcare costs to meet the needs of school age children by:
 - Moving to upfront payments for the childcare element of Universal Credit. This will mean that parents can get the support they need to be able to pay the higher childcare costs during school holidays when they arise.
 - Making sure that every family is able to claim financial support to help them to pay for holiday childcare. Currently some parents are not able to claim tax free childcare, Universal Credit or working tax credit to help with the cost of childcare because it is not – and is not required to be – registered with Ofsted, Care Inspectorate or Care Inspectorate Wales. Governments should introduce a light-touch registration process for short-term or short-hours childcare.
- ▶ Strengthen the 'right to request' policy so that it tackles the persistent gaps in school age childcare provision. This should include placing a duty on schools to assess and respond to requests and providing better information for parents on making effective applications.
- ▶ Monitor what effect tax free childcare is having on childcare prices and availability, and whether it is achieving its aim of helping parents into work or to work more.
- ▶ Make sure there is enough year round childcare for every working family that needs it, including school age children. Governments should prioritise the groups that currently face the biggest shortages: 12 to 14 year olds and disabled children.
- ▶ Work with schools and local authorities to find a childcare solution for teacher training days, when childcare is often a particular problem.

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.

1A. Prices for holiday childcare

Overall, parents in Britain now pay an average of £133 per week for full time holiday childcare. Prices in Scotland and Wales are about £10 a week lower than in England. There is significant variation in holiday childcare prices across Britain, with large differences even between regions that are close to each other. Average prices are 35 per cent higher in the East of England than they are in the Inner London or the West Midlands. This highlights the postcode lottery that families face in finding affordable holiday childcare in their area.

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

Region/nation	Price of holiday childcare per week
England	£134.66
Scotland	£124.44
Wales	£124.85
Britain	£133.34
East of England	£169.38
East Midlands	£129.80
London, Inner	£125.01
London, Outer	£147.21
North East	£148.58
North West	£126.51
South East	£133.87
South West	£130.22
West Midlands	£125.90
Yorkshire and Humber	£130.89

1B. Price changes for holiday childcare

In Britain, prices for holiday childcare have risen by 4 per cent since 2017. This is largely driven by rises in England and Wales, whereas prices in Scotland have risen by only 1 per cent.

Table 3: Price changes in holiday childcare from 2017, by region and nation, weighted

Region/nation	Difference in price from 2017
England	5%
Scotland	1%
Wales	4%
Britain	4%
East of England	17%
East Midlands	5%
London, Inner	6%
London, Outer	6%
North East	10%
North West	3%
South East	-3%
South West	6%
West Midlands	3%
Yorkshire and Humber	5%

While prices have not risen in all areas, in some places they have risen by a considerable degree. This is likely to reflect volatility in the childcare market as the sector responds to a range of challenges including minimum wage changes, pension auto-enrolment, business rates and inflation. 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. Table 4 shows a high rate of change in the number of local providers available, particularly for private and voluntary sector childcare – although overall the numbers increasing and decreasing are about the same, there is considerable variation between areas.

Table 4: Number of providers in local authority area, change since 2017, Britain

	Public sector	Private sector
Increased	14%	28%
Stayed the same	31%	27%
Decreased	14%	27%
Don't know	24%	18%
No providers in either year	17%	1%

The Family and Childcare Trust is concerned that this volatility will make it increasingly difficult for families to make plans based on the price and availability of holiday childcare in their local area.

1C. 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 are able to set their own prices to parents according to local market conditions. As such, average regional price figures often mask considerable variation within regions. Some maintained or voluntary providers are able to access significant cash or in-kind subsidies, including cheap or free rent, which allow them to charge very low prices to parents – but this is fairly rare and will not be accessible to most families.

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.

Table 5: Holiday childcare prices per week, regional and national max and min as % of regional and national average, weighted

Region/nation	Most expensive	Least expensive
England	165%	54%
Scotland	130%	69%
Wales	139%	65%
Britain	161%	56%
East of England	166%	51%
East Midlands	169%	35%
London, Inner	159%	43%
London, Outer	166%	66%
North East	158%	74%
North West	165%	61%
South East	151%	56%
South West	190%	56%
West Midlands	172%	50%
Yorkshire and Humber	153%	50%

The highest price variations are found in the South West, and the East and West Midlands. This high level of price variation highlights the complexity of local holiday childcare markets. For this reason, it is important that parents are able to 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.

1D. Difference in holiday childcare prices between public and private and voluntary sector provision

The prices presented in this report take into account the different prices and availability of holiday clubs managed by the private and voluntary sector compared with those managed by the public sector. Table 6 shows that, across Britain, holiday clubs provided by the private and voluntary sector are an average of 22 per cent more expensive than those in the public sector. These price differences are in part due to subsidies and the free access to premises and equipment that holiday clubs in the public sector often have, and may also reflect private providers offering, for example, a more expensive range of activities. The price difference between types of providers in Scotland is notably lower than in England and Wales, and the proportion of public sector provision is also much higher in Scotland.

Table 6: Price difference between average prices in public and PVI sector, by nation

Nation	Public sector	Private and voluntary sector	% difference	% public sector provision
England	£110.42	£136.28	23%	12%
Scotland	£117.47	£122.66	4%	25%
Wales	£106.50	£124.87	17%	12%
Britain	£110.78	£134.70	22%	13%

Though holiday childcare tends to be cheaper in the public sector, in many areas families will struggle to find available places. Across Britain, there are approximately seven holiday clubs run by the private sector for every one managed by the public sector. In about one in six local authorities, there is no public sector provision.

1E. Holiday childcare prices compared to term time prices

Parents who use holiday childcare are likely to use after school clubs during school terms. There is a significant gap between the prices of after school clubs and holiday childcare – parents across the country pay more than twice as much during the holidays as they do during term time.

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 or Working Tax Credit have to absorb the higher costs upfront, waiting for them to be repaid in subsequent benefits payments.

Table 7: 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
England	£134.66	£56.82	2.4
Scotland	£124.44	£56.74	2.2
Wales	£124.85	£50.64	2.5
Britain	£133.34	£56.38	2.4

Box 2: Support with childcare costs

Support with childcare costs, including holiday childcare, is available to parents in some circumstances through tax relief and benefits. This support is only available to parents who use childcare registered with an official regulator. Many activity-based providers, such as sports or drama clubs which 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 therefore have a smaller choice of providers, or miss out on financial help.

► Tax relief schemes:

- Tax free childcare is available to all working parents with a child aged under 12, or up to 16 if the child has a disability. It covers 20 per cent of childcare costs up to a maximum of £2000 per year, or £4000 for disabled children. Take up of Tax Free Childcare has been much lower than the Government forecast, meaning that many eligible parents are missing out on support.
- Childcare vouchers are employer-managed schemes meeting up to £55 of childcare costs per parent per week. From October 2018, Childcare Vouchers will no longer be available to new applicants, although families already using them can continue to do so.

► Benefits system:

- Universal Credit is currently being rolled out to all claimants. This process is expected to continue until the early 2020s, and until this point some families will continue to use the older system of Working Tax Credit.
- Universal Credit funds up to 85 per cent of childcare costs up to a maximum of £175 per week for one child or £300 per week for two or more children. 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. These caps have not been changed for over ten years, while childcare costs have increased significantly.
- The childcare element of Working Tax Credit funds up to 70 per cent of childcare costs up to the same thresholds as Universal Credit. Under this system, childcare costs are considered when calculating housing benefit, which can mean parents get as much or more under Universal Credit.

► Support for parents who are in training and education:

- 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 Family and Childcare Trust website.

Section 2.

Whether there is enough 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’.

2A. 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:

In England, local authorities have to 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.

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.

Welsh local authorities were required to produce a sufficiency assessment and action plan in 2017 and every five years thereafter, and report to the Welsh government annually through a progress update.

Because these duties are slightly different in different parts of the UK, we have presented sufficiency data separately for the three nations. This 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.

2B. Holiday childcare sufficiency in England

33 per cent of English local authorities report having enough holiday childcare in all of their local areas for children between the ages of four and seven. As children get older, families are likely to find it increasingly difficult to access childcare. Table 8 shows that the proportion of local authorities with enough holiday childcare in all of their local area is highest for the youngest children, then narrows to 28 per cent for 8 to 11 year olds, and 14 per cent for 12 to 14 year olds. There are also large data gaps about holiday childcare for older children. Two fifths of local authorities in England say they do not have the information to accurately assess whether they have sufficient holiday childcare for 12 to 14 year olds.

Families with disabled children face some of the biggest shortages in holiday provision. 15 per cent of local authorities in England report that they do not have sufficient holiday childcare for this group in any parts of their local area, and 34 per cent do not know whether there is enough provision available.

Table 8: Sufficiency in England, by local authority

	Yes: in all areas	Yes: in some areas	No	Data not collected or cannot tell
4-7 year olds	33%	40%	1%	26%
8-11 year olds	28%	42%	4%	27%
12-14 year olds	14%	36%	11%	39%
Disabled children	13%	38%	15%	34%
Parents working full time	25%	44%	3%	28%
Children in rural areas ¹	9%	39%	6%	45%

Shortages in holiday childcare have reduced slightly over the past year, with more local authorities reporting that they have enough holiday childcare in the whole local area since 2017 – except for families with disabled children, where the figure is flat.

Table 9: Sufficiency in England, by local authority, 2017 and 2018

	Yes: in all areas (2018)	Yes: in all areas (2017)
4-7 year olds	33%	29%
8-11 year olds	28%	26%
12-14 year olds	14%	11%
Disabled children	13%	13%
Parents working full time	25%	24%
Children in rural areas	9%	8%

Shortages vary widely across the country. This means that parents in some areas will find it more difficult to find childcare than in others. As shown in Table 10, Yorkshire and Humber is the region with the highest proportion of local authorities reporting full sufficiency for four to seven year olds, disabled children, and parents working full time. In the East Midlands, Inner London and the South East, there were no local authorities able to report full sufficiency for disabled children.

¹ In this and subsequent tables, only applies to local authorities which are wholly or partially rural.

Table 10: Proportion of local authorities reporting sufficient childcare 'in all areas' in England, regional

Region	4-7 year olds	8-11 year olds	12-14 year olds	Disabled children	Parents working full time
East of England	20%	20%	20%	20%	20%
East Midlands	14%	14%	14%	0%	14%
London, Inner	30%	30%	10%	0%	40%
London, Outer	14%	14%	14%	21%	14%
North East	33%	33%	17%	25%	25%
North West	50%	41%	18%	14%	41%
South East	31%	31%	13%	0%	13%
South West	7%	7%	0%	7%	7%
West Midlands	43%	29%	21%	7%	14%
Yorkshire and Humber	60%	40%	13%	27%	47%

2C. Holiday childcare sufficiency in Scotland

Scottish local authorities have different sufficiency duties to English local authorities, and in most cases the data they hold means they do not know whether they have sufficient holiday childcare for different groups.

Table 11: Sufficiency for Scotland, by local authority

	Yes: in all areas	Yes: in some areas	No	Data not collected or cannot tell
4-7 year olds	7%	22%	0%	70%
8-11 year olds	7%	22%	0%	70%
12-14 year olds	4%	15%	4%	78%
Disabled children	4%	19%	0%	77%
Parents working full time	11%	19%	0%	70%
Children in rural areas	5%	21%	0%	74%

There has been a modest increase in the proportion of local authorities which say they have enough holiday childcare for younger children, and a reduction in the proportion saying they have enough for disabled children – but this should be treated with caution given the high proportion of local authorities not holding data.

Table 12: Changes to sufficiency in Scotland by local authority since 2017

	Yes: in all areas (2018)	Yes: in all areas (2017)
4-7 year olds	7%	4%
8-11 year olds	7%	4%
12-14 year olds	4%	4%
Disabled children	4%	8%
Parents working full time	11%	8%
Children in rural areas	5%	4%

2D. Holiday childcare sufficiency in Wales

Welsh local authorities are more likely to have enough data to judge whether they have enough childcare than their Scottish or English counterparts. The Welsh Government has recently changed the rules local authorities have to follow to assess sufficiency, and this seems to have meant they have access to more high quality information. However, almost twice as many local authorities in Wales reported that they do not know whether there is enough holiday childcare in their area this year than in 2017 for all groups of children except disabled children. Sufficiency rates are broadly comparable to England, while differences in data collection mean that comparisons to Scotland are difficult.

Table 13: Sufficiency for Wales, by local authority

	Yes: in all areas	Yes: in some areas	No	Data not collected or cannot tell
4-7 year olds	25%	65%	0%	10%
8-11 year olds	20%	65%	5%	10%
12-14 year olds	0%	33%	39%	28%
Disabled children	11%	47%	26%	16%
Parents working full time	20%	65%	5%	10%
Children in rural areas	0%	50%	19%	31%

The number of local authorities reporting sufficient holiday childcare provision in all of their area has changed significantly since last year, with increases seen in most categories. As noted above, many Welsh local authorities have changed their data collection in the last year, so comparisons should be treated with some caution.

Table 14: Changes to sufficiency in Wales by local authority since 2017

	Yes: in all areas (2018)	Yes: in all areas (2017)
4-7 year olds	25%	16%
8-11 year olds	20%	11%
12-14 year olds	0%	5%
Disabled children	11%	5%
Parents working full time	20%	11%
Children in rural areas	0%	17%

2E. Holiday club opening times and dates

We asked local authorities about the opening times of holiday clubs in their area – how long they are open for each day, which holidays they are open in, and the number of weeks over the summer that holiday clubs open for.

Families may need holiday childcare to be available throughout the typical working day. Table 15 shows the proportion of holiday clubs which are open for short, medium, and long days in the holidays. Across Britain, holiday clubs in the private and voluntary sector are more likely to be open for long days than those in the public sector. However, these figures should be treated with caution as many local authorities reported not holding information about opening hours for some or all of the settings in their area. In Britain as a whole, local authorities do not know about the opening times for 54 per cent of public sector holiday clubs, and 37 per cent of private and voluntary sector holiday clubs. The high proportion of unknown responses for public sector provision may be because much of this is provided by schools rather than directly by the local authority.

Table 15: Proportion of 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
Public sector	England	7%	15%	18%	61%
	Scotland	8%	11%	75%	6%
	Wales	20%	20%	20%	40%
	Britain	7%	14%	24%	54%
Private and voluntary sector	England	5%	10%	47%	39%
	Scotland	4%	29%	44%	23%
	Wales	7%	25%	58%	10%
	Britain	5%	11%	47%	37%

Families may need holiday childcare throughout the year, from the long summer break to teacher training days.² Table 16 shows that the availability of childcare varies significantly depending on the holiday, with far more settings opening in the summer than at Christmas, and a very low proportion in England and Wales open for teacher training days. Teacher training days 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. These figures should be treated with caution as we only received responses to this question from 66 per cent of local authorities.

Table 16: Proportion of settings open in each holiday, by nation

	Nation	Summer	Easter	Christmas	Half term	Teacher training days
Public sector	England	94%	81%	46%	74%	26%
	Scotland	93%	89%	2%	79%	62%
	Wales	93%	93%	4%	56%	4%
	Britain	94%	84%	32%	74%	35%
Private and voluntary sector	England	70%	65%	39%	63%	20%
	Scotland	77%	72%	32%	63%	70%
	Wales	98%	95%	43%	89%	49%
	Britain	73%	68%	39%	65%	26%

The length of the summer holiday poses a particular challenge for many parents. For some parents, it is important that childcare is available throughout the holidays, whereas others will only use formal childcare for a few weeks.

Table 17 shows that less than three quarters of private and voluntary sector holiday clubs are open for every week of the holiday, and less than half of public sector holiday clubs are open for every week. We do not know whether those holiday clubs which are open for shorter periods 'overlap' and whether there are particular weeks in the holidays which are hard for parents to cover. The short operating window of maintained clubs is a particular concern as they are often cheaper, so parents may be forced to use a more expensive club during the weeks they are not available. However, these figures should be treated with caution as we only received responses to this question from 61 per cent of local authorities.

² Known as INSET days or In-Service days in different parts of Britain.

Table 17: Settings open in the summer holiday, proportion open for different numbers of weeks

	Nation	Every week of the holiday	4 to 5 weeks	2 to 3 weeks	1 week only	Unknown
Public sector	England	45%	25%	24%	2%	5%
	Scotland	57%	11%	14%	0%	19%
	Wales	32%	48%	0%	0%	20%
	Britain	45%	25%	21%	1%	7%
Private and voluntary sector	England	73%	16%	4%	0%	6%
	Scotland	76%	20%	2%	0%	1%
	Wales	76%	19%	3%	0%	1%
	Britain	74%	17%	4%	0%	5%

Section 3.

Impact of the right to request wraparound and holiday childcare in England

The right to request wraparound (before and after school) and holiday childcare was introduced in September 2016 for England. It was designed to encourage schools to make more use of their existing facilities by:

- ▶ Enabling parents to request that the school their child attends considers establishing wraparound or holiday childcare, and
- ▶ Enabling childcare providers to request to use school facilities for wraparound or holiday provision at times when the school is not using them.

We asked English local authorities whether their monitoring of the market for childcare shows that the right to request wraparound and holiday childcare has had an impact on whether there is enough childcare in their area. A total of 107 out of 152 local authorities answered the question relating to holiday care, and 105 answered the question relating to wraparound care. These response rates were lower than for the rest of the survey because the questions were optional.

As shown in Table 18, local authorities reported that the right to request is having a similar effect on both wraparound and holiday childcare. The effect local authorities report is negligible, with only 5 per cent saying that the right has had any impact on wraparound care and 4 per cent for holiday care. The vast majority of local authorities appear to not know what impact this policy is having on the availability of holiday childcare, or to think that it is having no impact at all.

When we asked the same question last year, local authorities gave a very similar response. It is disappointing to see that this policy is still yet to achieve its potential to increase the supply of wraparound and holiday childcare. This suggests that it is no longer a case of waiting for the policy to 'bed in', but instead there is a need to review and rework the policy in order for it to make an impact on filling the current gaps in supply of school age childcare.

Table 18: Impact of the 'right to request' on childcare sufficiency, by local authority

	Positive impact	No impact	Negative impact	Don't know
Holiday care	4%	52%	1%	43%
Wraparound care	5%	50%	0%	45%

The right to request should be put on a statutory footing, so that schools would be obliged to consider the requests that were made rather than simply being encouraged to do so. They could also be obliged to tell local authorities about requests made and their responses to support local authorities role in making sure there is enough childcare locally. This could be coupled with a communications drive to improve awareness of the right to request with parents and to help them to understand how to make a successful request. This could include providing clarity on how parents can escalate their request if they are refused or do not feel that their request was fully considered.

In many areas, the right to request could offer a better way to fill existing gaps in holiday childcare. Utilising school buildings during the holiday can bring prices down, providing affordable and high quality childcare during the holidays. It is important that central and local governments and schools work together to increase the impact of this policy.

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.

This report is based on surveys sent to all Family Information Services at local authorities in April 2018. Respondents were able to fill in a form or reply online. After a month, we sent Freedom of Information requests to those local authorities which had not responded. The questions about the impact of the right to request in England were not included in the Freedom of Information requests. The deadline for Freedom of Information requests was in late June.

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, and nor do we say which responses were acquired through Freedom of Information requests and which through surveys.

Data sources

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

Where possible, we have kept questions consistent with previous versions of the survey to allow for tracking over time. However, we have introduced some new questions to this year's survey to find out more about the availability of childcare experienced by parents. Three questions were introduced, focusing on the number of hours per day holiday clubs are open, which holidays they are open in, and how many weeks of the summer holiday settings are open for.

Response rates

We received responses from 95 per cent of local authorities. The lowest response rate for any region was 88 per cent. Some local authorities did not give data for all questions, or gave data in a format that we could not use. The effective response rate for the price question was therefore 81 per cent. The response rate for the questions on the right to request, only asked of English local authorities, was 70 per cent. This is because these questions were not subject to Freedom of Information requests.

Weighting

In line with the 2016 and 2017 surveys, we have weighted cost data within regions and nations. This ensures that results from small local authorities which have relatively small child populations do not unduly influence overall results. Data is weighted against the age 5-14 population based on ONS mid-year population estimates.³ 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.

Tracking change over time

When comparing prices over time, we have only included local authorities where we have data for both 2017 and 2018. This is to avoid results being skewed by different local authorities having missing data year-on-year. Where we saw unusually large increases or decreases, we checked with local authorities if there had been errors in the data they gave us or our interpretation of it.

Changes are weighted against this year's population data as described above. In some cases, we received 2017 data after the survey deadline for the year, but 2018 data within the deadline: in these cases, we have included the data in this year's calculations although they do not appear in the 2017 survey. This approach produces slightly different results to comparing regional weighted prices from the 2017 survey to regional weighted prices in the 2018 survey – we believe it gives a more accurate reflection of the changes experienced by families.

Data we do not collect

We only include data on activities which are described by local authorities as holiday childcare. Some parents will use activity camps or clubs (for example sports and arts) as de facto childcare, and depending on the way they are registered much of this provision will not be captured in this survey. Necessarily, the survey also excludes all types of informal childcare (e.g. grandparents, friends, babysitters). We do not capture specific information on childminder prices during the holidays but general information on childminder prices is available in the main Childcare Survey.

³ Mid-2017 Population Estimates for UK, England and Wales, Scotland and Northern Ireland