



Holiday Childcare Survey 2024

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About this report

This report is the 19th 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 2024. 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.coramfamilyandchildcare.org.uk.

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.

About Coram Family and Childcare

Coram Family and Childcare works to make the UK a better place for families, focusing on childcare and early years to make a difference to families’ lives now and in the long term.

We are part of the Coram group of children’s charities and organisations. Coram changes lives, laws and systems to create better chances for children, now and forever.



Executive summary

Holiday childcare provides an important opportunity for children to play and socialise during school breaks and is essential for working parents and carers to both start and stay in work.

Most working parents do not have enough annual leave to cover the 13 weeks of school holidays across the year, and it is not practical or possible to be away from many jobs for long stretches like the summer break or periods that may be busier for certain industries, like the Christmas holidays. Many do not have support from extended family members, like grandparents, so most families will need formal childcare for at least some of the school holidays.

The cost of holiday childcare is challenging for many families but particularly those on low incomes. We also know that children from disadvantaged backgrounds can really benefit from the opportunity to try new things that good quality holiday childcare provides, and holiday childcare can play an important part in keeping children in their early teens safe and engaged in positive activities. Currently, many disadvantaged children are eligible for the Holiday Activities and Food (HAF) programme, which funds local authorities to provide a range of holiday childcare, activities and food for children who are eligible for free school meals. Last year’s Holiday Childcare Survey found that three quarters of local authorities agreed the programme helps children be active, engage in enriching activities, eat healthily and stay safe. However, the funding for the HAF programme ends this year, so many disadvantaged children will be left without this valuable provision next year.

With many industries across the country struggling with staff vacancies, the value of facilitating parents’ participation in the labour market is clear. To facilitate that participation, this year saw significant additional investment in support for parents with childcare costs, including a welcome focus on wraparound childcare.

However, this is during term time only and leaves a large gap for families to bridge during the holidays. For the first time since the beginning of our survey, we found that families in Great Britain will pay over £1,000 for childcare to cover the full summer holiday.

Cost is not the only challenge. Parents tell us that finding a childcare place during the holidays is difficult, especially if their children have special educational needs or disabilities (SEND). In its 19th year, our survey finds fewer local authorities telling us they have enough childcare as well as significant variation in the availability of holiday childcare between the nations of Great Britain and within the regions of England.

Holiday childcare prices

Table 1 – Price of holiday childcare per week, by nation

Nation	Price of holiday childcare per week	% change from 2023
Great Britain	£174.91	+6%
England	£173.14	+5%
Scotland	£167.49	+4%
Wales	£208.82	+15%

- The average price of holiday childcare is £175 per week in Britain, up 6% since 2023.
- Price increases are highest in Wales again this year (15%), followed by England (5%) and Scotland (4%).
- There is significant variation in holiday childcare prices across the English regions, ranging from £216 in the South East to £153 in Inner London; a price difference of £63 per week. The highest regional increase is in Yorkshire and the Humber (13%).

Parents and carers pay much more for childcare during the holidays than during term time. In Great Britain, a week of holiday childcare costs two and a half times more than an after-school club, £175 per week compared to £69.

A family will pay £1,049 for six weeks of holiday childcare for a school-age child, which is £635 more than they would pay for six weeks of term-time childcare before and after school.

Is there enough holiday childcare?

England

- Many local authorities do not have a clear picture of whether they have enough holiday childcare in their area, with half or more responding ‘data not held or cannot tell’ for disabled children, 12- to 14-year-olds, parents working atypical hours and families in rural areas.
- Sufficiency has decreased across all categories of holiday childcare in England since last year, most notably for parents working full time which has dropped by 7 percentage points to 17%.
- The highest levels of sufficiency reported in England are for four- to seven-year-olds (25%), followed by 8- to 11-year-olds (21%) and parents working full time (17%).
- Provision for disabled children is extremely low, with only 3% of local authorities reporting enough childcare ‘in all areas’.
- Several regions in England had no local authorities reporting enough childcare in many categories, particularly for disabled children, parents who work atypical hours and families in rural areas.

Scotland

- The majority of Scottish local authorities do not hold the data needed to assess their holiday childcare sufficiency, with at least 46% responding ‘data not held or cannot tell’ for all categories of holiday childcare.
- For those local authorities able to answer, there has been no change to sufficiency in the majority of categories since last year, remaining low overall. The exception to this is provision for parents working full time, which has increased from 0% to 4%.
- No local authorities report having enough holiday childcare ‘in all areas’ for 12- to 14- year-olds, disabled children, parents working atypical hours or children in rural areas.

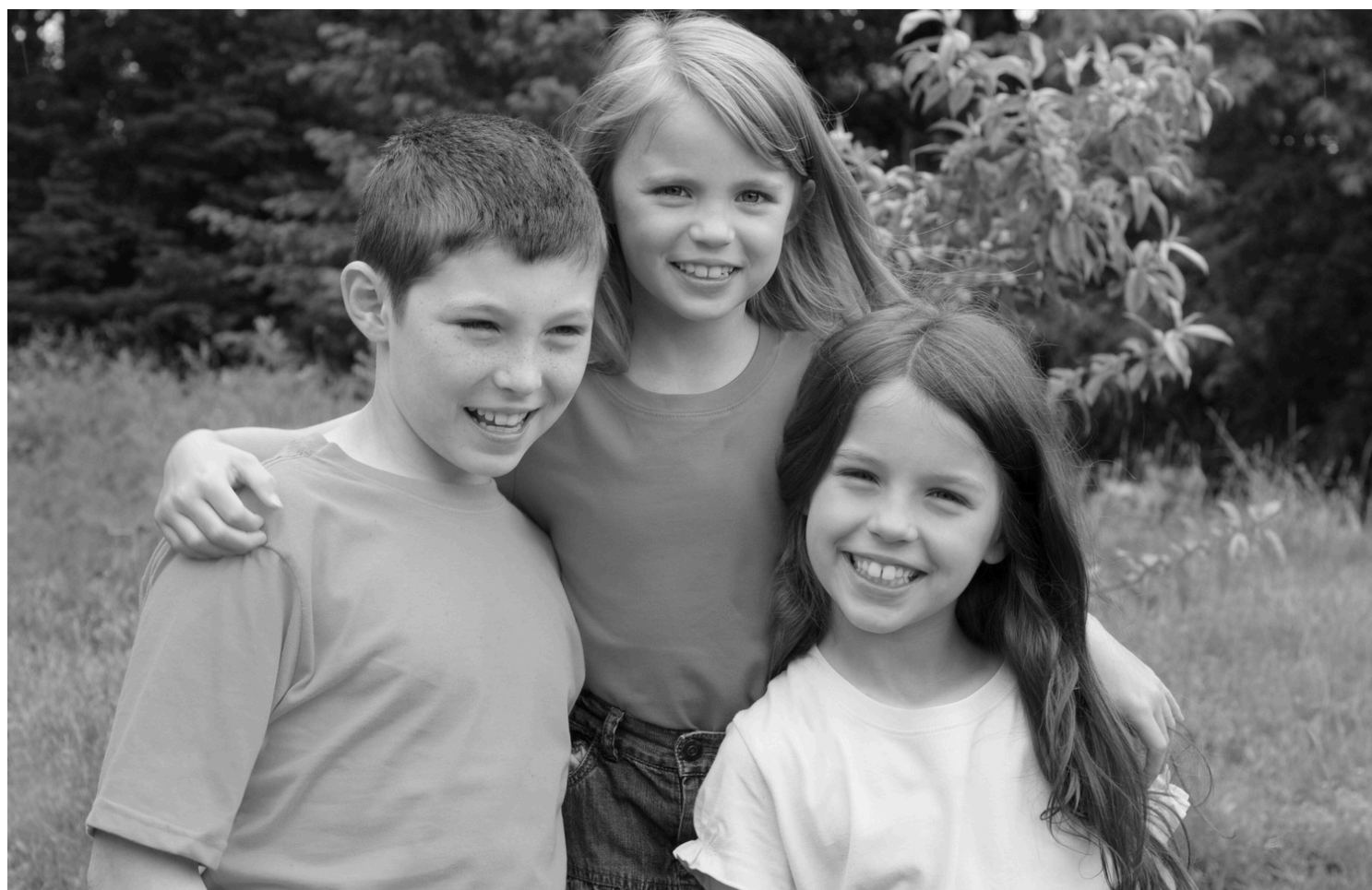
Wales

- Local authorities in Wales have a significantly better understanding of their overall local holiday childcare sufficiency than England and Scotland.
- Following increases last year, this year Wales has seen a decrease in the number 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 four- to seven-year-olds, 8- to 11-year-olds and parents working full time, all at 10%.
- No local authorities report having enough holiday childcare ‘in all areas’ for 12- to 14-year-olds, disabled children, parents working atypical hours or children in rural areas.

Areas for action

Coram Family and Childcare calls on Government to:

- Encourage increased data collection to make sure local areas have the information they need to plan sufficient holiday childcare for all children.
- Provide additional funding, training and support to holiday childcare providers to meet the needs of children with SEND.
- Encourage increased holiday childcare provision for older children, those in rural areas and for parents who work atypical hours by supporting providers and local authorities with information on models of delivery and targeted funding.
- Maintain the Holiday Activities and Food (HAF) programme after its planned end date of March 2025 to improve access to affordable, high-quality childcare for all children who need it.
- Extend the funded early education entitlements to 48 weeks per year, to make sure provision meets the needs of working parents and carers year-round, and remove the work criteria to give disadvantaged children the same holiday childcare as their more affluent peers.



Introduction

This report looks at the prices and the availability of childcare in Great Britain for children aged 4 to 14 years during the 13 weeks of school holiday per year. Data is broken down by nation and region (in England) and by the two main types of holiday childcare provider, 'private, voluntary and independent' (PVI) and the public sector; and looks at changes since last year (2023).

The childcare provision 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 friends or grandparents), or holiday camps (such as for football or drama) that are not registered with an official regulator are excluded from this report.

Choices about holiday childcare

Most working parents do not have enough annual leave to cover the 13 weeks of school holidays so 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 a local authority or a PVI provider.
- 'Holiday camp' 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 1 on page 11).
- Annual leave to spend time with their children. 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, 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.

The recent focus on early years childcare and wraparound care is very welcome, but this report highlights the unmet needs of school-aged children during school holidays. The new Government should take the opportunity to reform the system to one of year-round entitlement and address the gaps for disabled children and those from disadvantaged backgrounds.

1. Holiday childcare prices

This section outlines the typical prices of holiday childcare paid by parents and carers, how this varies across Britain and the percentage change over the last year.

A. Prices for holiday childcare

Table 2 provides data on the average price of holiday childcare per week across different regions and nations of Great Britain. Overall, parents and carers in Britain now pay an average of £175 per week for holiday childcare. Scotland has the lowest national average at £167, followed by England at £173, while Wales has the highest at £209, significantly higher than the overall British average.

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

Nation / Region	Price of holiday childcare per week
Great Britain	£174.91
England	£173.14
Scotland	£167.49
Wales	£208.82
East of England	£174.29
East Midlands	£155.40
London, Inner	£152.56
London, Outer	£158.01
North East	£166.28
North West	£155.40
South East	£215.68
South West	£155.04
West Midlands	£159.45
Yorkshire and the Humber	£173.32

There are notable regional variations within England:

- The South East has the highest average price at £216, while Inner London has the lowest at £153, a price difference of £63.
- There is variation within London, with Inner London (£153) being cheaper than Outer London (£158).
- The cost of childcare in the South East of England (£216) is 23% more expensive than the average cost in Britain (£175).
- There is some regional clustering of prices. The North East, North West and East Midlands all have relatively lower prices compared to the southern regions like the South East and East of England.

These variations highlight the continued difference in affordability of holiday childcare depending on where families live.

B. Price changes

Table 3 shows Great Britain’s weighted average price changes in holiday childcare from 2023 to 2024, by region and nation. The overall 6% price increase from 2023 to 2024 for Great Britain is above the rate of inflation which, at the time of writing, stands at 2.8% [1].

Whilst inflation has decreased recently, the impact is still being felt and holiday childcare costs have not been reduced to reflect that. The childcare sector, like many industries, has been grappling with the rising cost of food, energy and rent, impacting the affordability of services for parents and carers.

England’s holiday childcare costs have risen by 5%, just below the national average of 6%. Scotland experienced a slightly lower increase at 4%, while Wales saw the largest increase of 15%. Wales’ large increase, consistent with the previous year and the year before that, may be due to a high proportion of PVI provision compared to maintained provision, which can regulate market prices.

Table 3 - Price changes in holiday childcare from 2023 to 2024, by region and nation, weighted

Nation / Region	Difference in price from 2023 to 2024
Great Britain	+6%
England	+5%
Scotland	+4%
Wales	+15%
East of England	+7%
East Midlands	+3%
London, Inner	+8%
London, Outer	-2%
North East	-1%
North West	+8%
South East	+3%
South West	+3%
West Midlands	+2%
Yorkshire and the Humber	+13%

Within England, there are notable regional variations. Yorkshire and the Humber stands out with a substantial 13% increase, far exceeding the national average of 6%. This contrasts sharply with the North East and Outer London who saw a price decrease of 1% and 2% respectively. There is variation within London, with Inner London experiencing an 8% rise while Outer London saw a 2% decrease. The East of England also saw an above-average increase at 7%. Meanwhile, regions like the East Midlands, the South East and the South West all had modest 3% increases, falling below the national average. The West Midlands had the lowest increase in England at 2%.

These differences highlight the many factors influencing childcare costs across different parts of the country, potentially reflecting variations in local economic conditions and demand for childcare services. With fewer holiday childcare providers than early years services in a given area, a single large provider's price adjustments or entry/exit to the market can significantly impact local costs. This volatility in holiday childcare availability and affordability makes it challenging for families to plan for work and the care they will need. This underscores the crucial role of local authorities in sharing information and facilitating access to quality holiday childcare options that cater to the needs of their communities.



[1] <https://www.ons.gov.uk/economy/inflationandpriceindices>

C. 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 4 - Price difference between average prices in public and PVI sector, by nation

Nation	Public sector	PVI sector	Percentage difference - PVI vs public	Percentage of provision which is provided by the public sector
Great Britain	£145.18	£177.92	+18%	11%
England	£145.75	£176.08	+17%	11%
Scotland	£148.18	£170.93	+13%	17%
Wales	£100.21	£208.54	+52%	3%

In all nations, the prices charged by the PVI sector are higher than those in the public sector. Across Britain, holiday clubs provided by the PVI sector are an average of 18% more expensive than those in the public sector. The price differences between the public and PVI sectors partially stem from factors like subsidies (funding from local authorities) and lower running costs for public sector holiday clubs which have access to buildings and equipment at reduced rates. Additionally, some PVI providers offer a wider range of activities at premium prices, contributing to higher costs. The gap is most significant in Wales, where PVI prices are 52% higher than the public sector, followed by England (17%), and Scotland (13%).

The table also shows the percentage of holiday childcare provision coming from the public sector. Wales has the lowest public sector provision at 3%, while Scotland has the highest at 17% and England has 11%. Wales stands out with the largest price gap between the PVI and public sector (52%) and the lowest public sector provision (3%).

This suggests that families in Wales may face more significant affordability challenges for holiday childcare.

The average cost of public sector holiday childcare is lowest in Wales (£100 per week) and highest in Scotland (£148 per week). The average cost of PVI holiday childcare is lowest in Scotland (£171 per week) and highest in Wales (£209 per week). While public sector places are more affordable for parents and carers, in many areas, notably Wales, families will struggle to find those places.

D. Holiday childcare prices compared to term time prices

Parents and carers who use holiday childcare are likely to use after-school clubs during school terms. During term time, parents and carers only buy childcare for the hours before and after school days, whereas during the holidays they will need to purchase childcare for the full day, meaning prices are considerably more expensive.



Table 5 - 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	Average cost of six weeks of holiday care	Average cost of six weeks of after-school care	Difference
Great Britain	£174.91	£69.14	2.53	£1,049.48	£414.86	+\$634.63
England	£173.14	£69.22	2.50	£1,038.84	£415.33	+\$623.50
Scotland	£167.49	£67.27	2.49	£1,004.96	£403.64	+\$601.32
Wales	£208.82	£68.89	3.03	£1,252.90	£413.35	+\$839.55

Across all nations, the weekly prices for holiday childcare are substantially higher than after-school club prices. Table 5 shows that holiday care costs are up to three times more than after-school care weekly. There are notable national variations in the cost difference between holiday and after-school care. Wales' holiday childcare is three times more expensive than their after-school clubs, with six weeks of holiday childcare costing £840 more than term-time after-school provision. England's holiday provision is two-and-a-half times more expensive than its term time after-school provision, with six weeks of holiday provision costing families £624 more than provision during term time. Scotland's holiday childcare is two-and-a-half-times as expensive, with six weeks of holiday childcare costing £601 more than term-time after-school provision.

The cost-of-living crisis has placed significant financial strain on many households and the surge in childcare costs from term-time to holiday periods increases these pressures for many families. While parents using Tax-Free Childcare accounts can spread their expenses evenly throughout the year, by regularly contributing and drawing more during summer, those on Universal Credit will usually bear the higher upfront costs before they are repaid in arrears.

2. Is there enough holiday childcare?

Support with childcare costs

Government support with childcare costs, like Tax-Free Childcare or childcare through Universal Credit, can only be used with provision that is 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 so parents eligible for this support 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.

Box 1

Tax-Free Childcare	<p>The child must be 11 years old or under, or up to 16 years old if they have a disability.</p> <p>Adopted children are eligible, but foster children are not.</p>	<p>Parents and carers are eligible for up to £2,000 a year for each of their children to help with the costs of childcare. This goes up to £4,000 a year if a child is disabled.</p> <p>Parents/carers and their partners (if they have one) can usually get Tax-Free Childcare if they are working 16 hours a week, on sick or annual leave, on shared parental/maternity/paternity or adoption leave and going back to work within 31 days of the date they first applied. Parents and carers may also be eligible if they are not working if they are in receipt of certain benefits.</p> <p>Tax-Free Childcare can be received alongside the 30 hours extended entitlement for three- to four-year-olds but you cannot get it at the same time as claiming Working Tax Credit, Child Tax Credit, Universal Credit or childcare vouchers.</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>
Universal Credit	<p>Any age, with providers registered with an official regulator.</p>	<p>Pays up to 85% of childcare costs paid back to parents and carers. The maximum amount a month is £1,014.63 for one child and £1,739.37 for two or more children.</p> <p>The actual amount families get will tend to be less than 85% of their childcare costs as Universal Credit is reduced as people earn more.</p>

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 differ slightly in different parts of Britain, we present 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, childcare provision '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 have to audit childcare sufficiency annually, including considering the funded early education entitlements, childcare for school-age children (including holidays), disabled children, and different types of families. However, as shown in Table 6, for four categories of holiday childcare, local authorities were most likely to report 'data not held or cannot tell' – 12- to 14-year-olds (53%), parents working atypical hours (52%), children in rural areas (50%) and disabled children (47%).

Table 6 - Sufficiency of holiday childcare in England (% LAs)

	Yes to all	Yes: some	No	Data not collected or cannot tell
4- to 7-year-olds	25%	42%	4%	29%
8- to 11-year-olds	21%	44%	3%	33%
12- to 14-year-olds	7%	32%	9%	53%
Disabled children	3%	29%	21%	47%
Parents working full time	17%	42%	3%	37%
Parents working atypical hours	3%	34%	12%	52%
Children in rural areas	7%	35%	7%	50%

We asked local authorities whether they have enough holiday childcare 'in all areas', across seven categories of holiday childcare (see Table 6).

The highest proportion of local authorities (25%) reporting sufficiency ‘in all areas’ was for four- to seven-year-olds, followed by 8- to 11-year-olds (21%) and parents working full time (17%). Few local authorities reported enough holiday childcare ‘in all areas’ for 12- to 14-year-olds (7%), children in rural areas (7%), disabled children (3%) and parents working atypical hours (3%). These are also the categories for which local authorities reported having low levels of data.

Table 7 - Sufficiency of holiday childcare in England, for 2023 and 2024 (% LAs)

	Yes: in all areas (2024)	Yes: in all areas (2023)	Percentage point change, 2023-2024
4- to 7-year-olds	25%	26%	-1%
8- to 11-year-olds	21%	23%	-3%
12- to 14-year-olds	7%	10%	-3%
Disabled children	3%	5%	-2%
Parents working full time	17%	24%	-7%
Parents working atypical hours	3%	9%	-6%
Children in rural areas	7%	13%	-6%

As shown in Table 7, over the past year there has been a decrease in the proportion of local authorities reporting having enough childcare ‘in all areas’ for all the seven categories of holiday childcare, continuing the trend observed in last year’s Holiday Childcare Survey, which also saw a decrease across all categories. This decrease is most marked for parents working full time, with 7% fewer local authorities reporting enough childcare ‘in all areas’. There have also been significant decreases in having enough childcare for parents working atypical hours (-6%) and children in rural areas (-6%). In all other categories, there have been small decreases of between 1 to 3 percentage points.

Table 8 - Proportion of local authorities reporting sufficient holiday childcare ‘in all areas’ in England, regional

	4- to 7-year-olds	8- to 11-year-olds	12- to 14-year-olds	Disabled children	Parents working full time	Parents working atypical hours	Children in rural areas
East of England	20%	10%	0%	0%	0%	0%	0%
East Midlands	0%	0%	0%	0%	0%	0%	0%
London, Inner	13%	13%	0%	0%	13%	0%	0%
London, Outer	6%	6%	0%	0%	0%	0%	0%
North East	20%	20%	20%	0%	10%	10%	50%
North West	37%	32%	16%	6%	26%	0%	0%
South East	41%	24%	12%	6%	31%	6%	17%
South West	20%	20%	0%	0%	20%	0%	0%
West Midlands	17%	17%	0%	0%	17%	0%	0%
Yorkshire and the Humber	50%	50%	7%	7%	36%	7%	0%

As shown in Table 8, shortages of holiday childcare vary widely across England and between categories of provision. This means that parents and carers will find it more difficult to access childcare depending on where they live or their child’s needs.

The highest proportion of local authorities reporting enough childcare ‘in all areas’ is for four- to seven-year-olds (50%) and 8- to 11-year-olds (50%) in Yorkshire and the Humber and for children in rural areas in the North East (50%).

Sufficiency of holiday childcare for children in rural areas is generally very low, with the South East being the only other region reporting sufficiency, at 17%. Sufficiency is also extremely low for disabled children, with most regions reporting 0% and three reporting 7% or lower, and for parents working atypical hours, with most regions reporting 0% and three regions reporting 10% or lower.

Table 9 - Sufficiency of holiday childcare in Scotland (% LAs)

	Yes to all	Yes: some	No	Data not collected or cannot tell
4- to 7-year-olds	4%	38%	13%	46%
8- to 11-year-olds	4%	30%	13%	52%
12- to 14-year-olds	0%	17%	13%	70%
Disabled children	0%	9%	22%	70%
Parents working full time	4%	17%	21%	58%
Parents working atypical hours	0%	0%	25%	75%
Children in rural areas	0%	7%	21%	71%

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 proportion of local authorities (4%) report sufficiency ‘in all areas’ for four- to seven-year-olds, 8- to 11-year-olds and parents working full time. No local authorities report sufficiency of holiday childcare ‘in all areas’ for the remaining four categories.

The proportion of local authorities across all regions reporting having enough holiday childcare for parents working full time (from 9am to 5pm on weekdays) ranges from 0% in the East of England, the East Midlands and Outer London to 36% in Yorkshire and the Humber.

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 9 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, the most common response was ‘data not held or cannot tell’.

Table 10 - Sufficiency of holiday childcare in Scotland, for 2023 and 2024 (% LAs)

	Yes: in all areas (2024)	Yes: in all areas (2023)	Percentage point change, 2023-2024
4- to 7-year-olds	4%	5%	-0%
8- to 11-year-olds	4%	5%	-0%
12- to 14-year-olds	0%	0%	0%
Disabled children	0%	0%	0%
Parents working full time	4%	0%	+4%
Parents working atypical hours	0%	0%	0%
Children in rural areas	0%	0%	0%

Table 10 shows that there has been no change in the proportion of local authorities reporting sufficient childcare ‘in all areas’ across most categories of holiday childcare. There has been a very slight decrease (less than 1 percentage point) in the proportion of local authorities reporting sufficiency for four- to seven-year-olds and 8- to 11-year-olds. There has been a small increase (4%) in the proportion of local authorities reporting sufficiency for parents working full time. This data should be treated with caution given the high proportion of local authorities not holding data on this.

D. Holiday childcare sufficiency in Wales

Welsh local authorities were first required to produce a sufficiency assessment and action plan in 2017 and every five years thereafter (most recently in 2022) and to report to the Welsh government annually through a progress update. In previous years, a much lower proportion of Welsh local authorities have reported ‘data not held or cannot tell’ compared to their counterparts in England and Scotland. However, as shown in Table 11, a sizeable proportion of local authorities do not have the data that allows them to answer whether there is enough holiday childcare in their area this year. This is particularly notable for provision for 12- to 14-year-olds (43%) and children in rural areas (41%).

Local authorities in Wales report low sufficiency of holiday childcare ‘in all areas’ across all categories of provision. 10% of local authorities report sufficiency ‘in all areas’ for four- to seven-year-olds, 8- to 11-year-olds and parents working full time. No local authorities reported having enough childcare ‘in all areas’ for the remaining four categories.



Table 11 - Sufficiency of holiday childcare in Wales (% LAs)

	Yes to all	Yes: some	No	Data not collected or cannot tell
4- to 7-year-olds	10%	52%	19%	19%
8- to 11-year-olds	10%	43%	19%	29%
12- to 14-year-olds	0%	14%	43%	43%
Disabled children	0%	33%	33%	33%
Parents working full time	10%	52%	19%	19%
Parents working atypical hours	0%	14%	67%	19%
Children in rural areas	0%	35%	24%	41%

Table 12 shows that the number of local authorities reporting sufficient holiday childcare provision ‘in all areas’ has decreased across all categories except for parents working atypical hours and children in rural areas where it has remained at 0%.

The largest decrease in sufficiency (-9%) was for parents working full time.

Table 12 - Sufficiency of holiday childcare in Wales, for 2023 and 2024 (% LAs)

	Yes: in all areas (2024)	Yes: in all areas (2023)	Percentage point change, 2023-2024
4- to 7-year-olds	10%	14%	-4%
8- to 11-year-olds	10%	14%	-4%
12- to 14-year-olds	0%	5%	-5%
Disabled children	0%	5%	-5%
Parents working full time	10%	18%	-9%
Parents working atypical hours	0%	0%	0%
Children in rural areas	0%	0%	0%

E. Number of childcare providers and places

Table 13 illustrates that local authorities in Britain report overall stability in the number of holiday childcare providers in the public sector, with 37% reporting that the number has remained the same since 2023. 17% of local authorities report an increase in public sector holiday childcare providers, and 9% report a decrease.

33% of local authorities report that the number of PVI providers has stayed the same since 2023.

However, local authorities also report relatively high increases (27%) and decreases (21%) in the number of PVI sector providers in their area. The closure of settings in some areas could cause problems for families that rely on holiday childcare, and can result in longer travel time, a provision that their child does not know or enjoy, or more competition for a smaller number of places. However, the proportion of local authorities reporting a decrease in the number of PVI sector providers is lower than we have seen in the last two years.

Table 13 - Proportion of local authorities reporting a change in number of holiday childcare providers in the public and PVI sectors since 2023 - Great Britain

	Public sector	PVI sector
Increased	17%	27%
Stayed the same	37%	33%
Decreased	9%	21%
No providers in either year	14%	0%
Don't know	23%	19%

Table 14 shows that, after those who were not able to give an answer, local authorities (26%) in Britain are most likely to report an increase in the number of holiday childcare places since 2023. More than half of local authorities in Scotland (57%) were not

able to give an answer but, for those who were, 22% said the number of holiday childcare places had stayed the same. In Wales, the highest proportion of local authorities (33%) said the number of places had decreased.

Table 14 - Proportion of local authorities reporting a change in number of holiday childcare places since 2023 – nations

	England	Scotland	Wales	GB
Increased	29%	13%	24%	26%
Same as 2023	24%	22%	14%	22%
Decreased	16%	9%	33%	17%
Data not collected or cannot tell	32%	57%	29%	35%

F. Holiday childcare opening times and holiday periods

Families may need holiday childcare to be available throughout the typical working day. Table 15 illustrates what proportion of holiday clubs are open for the full day (8am to 6pm, Monday to Friday).

Across Britain, holiday clubs in the PVI sector (47%) are more likely to be open for a full day than holiday clubs in the public sector (36%).

In all sectors, holiday clubs in Wales (77%) are more likely to be open for a full day than in Scotland (71%), and both are much more likely to be open for a full day than in England (42%).

Within the public sector, 73% of holiday clubs in Wales are open for the full day compared to 69% in Scotland and 32% in England.

Table 15 - Proportion of settings open for the full day (8am to 6pm, Monday to Friday) in school holidays, by nation and type of setting

Nation	Public Sector	Private, independent and voluntary (PVI) sector	All sectors
Great Britain	36%	47%	46%
England	32%	43%	42%
Scotland	69%	71%	71%
Wales	73%	77%	77%

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. Table 16 shows that the availability of childcare varies significantly depending on the type of provider and holiday period.

Across Britain, childcare providers (public and PVI) are most likely to be open during the school summer holiday (86%) and least likely to be open during the Christmas holiday (53%).

During the summer holiday, there are very high levels of public sector provision in Scotland (100%) and Wales (100%). In England, the highest levels of holiday childcare provision is run by the PVI sector (85%).

Only 5% of childcare settings are open during the Christmas holiday in Scotland. In England, it is 55%, and in Wales it is 65%.

Teacher training days are the least well catered for across both sectors in England (34%). This can be a particular problem for parents and carers because they are single days, generally at the end of a holiday, making co-ordination of annual leave or informal childcare a challenge. In Scotland and Wales, 75% and 71% of provisions are open during teacher training days respectively.

Table 16 - Proportion of childcare settings open in each school holiday, by nation

	Nation	Summer	Easter	Christmas	Half term	Teacher training days
Public sector	Great Britain	80%	74%	36%	61%	31%
	England	78%	71%	39%	57%	21%
	Scotland	100%	98%	2%	95%	80%
	Wales	100%	100%	67%	100%	67%
Private, independent and voluntary (PVI) sector	Great Britain	86%	83%	55%	71%	42%
	England	85%	82%	56%	68%	35%
	Scotland	91%	79%	5%	75%	74%
	Wales	95%	90%	65%	90%	71%
Overall	Great Britain	86%	82%	53%	70%	41%
	England	84%	81%	55%	67%	34%
	Scotland	93%	82%	5%	79%	75%
	Wales	95%	90%	65%	90%	71%

Conclusion

The findings of the Holiday Childcare Survey 2024 show a clear gap in childcare provision during school holidays and a pattern of increased costs and low availability of places, particularly for children with SEND. This is a consistent, ongoing trend that our survey has highlighted for many years, and one which will only change if the disparity between term-time and holiday childcare entitlement is acknowledged and action taken to bridge the gap.

The additional investment in funded early education places and wraparound childcare is very welcome, and has the potential to make a real difference to children and families during term-time, but not including school holidays means it is still impractical for many parents to work, and leaves others facing unaffordable costs every school holiday.

We recognise that some of our recommendations will take time to implement but the new Government has a real opportunity to change the experience of school-aged children and families during the school breaks. Meeting the needs of disadvantaged children and those with SEND should be an early priority, followed by reform of the system, to provide the year-round support that families need.

Areas for action

- Encourage increased data collection to make sure local areas have the information they need to plan sufficient holiday childcare for all children.
- Provide additional funding, training and support to holiday childcare providers to meet the needs of children with SEND.
- Encourage increased holiday childcare provision for older children, those in rural areas and for parents who work atypical hours by supporting providers and local authorities with information on models of delivery and targeted funding.
- Maintain the Holiday Activities and Food (HAF) programme after its planned end date of March 2025 to improve access to affordable, high-quality childcare for all children who need it.
- Extend the funded early education entitlements to 48 weeks per year, to make sure provision meets the needs of working parents and carers year-round and remove the work criteria to give disadvantaged children the same holiday childcare as their more affluent peers.

Data collection

This report is based on surveys sent to all Family Information Services at local authorities between April and June 2024. 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 our 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 given to Coram Family and Childcare by 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 85% of local authorities in Britain. Regional response rates range from 62% to 100%. 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 calculations for year-to-year price changes (Section 1B) are based only on those local authorities who gave figures for both this year and last year. As a result, the overall price figure will differ from the figure that would be reached simply by calculating the percentage change between this year's and last year's figures. These calculations also exclude 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. These measures are taken to provide a more representative and accurate figure for price changes than would be reached by simply calculating 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 [2]. 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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