
Holiday Childcare Survey 2021

Sam Shorto, Vanessa Patel and Megan Jarvie



Contents

Acknowledgements.....	3
About this report.....	3
About Coram Family and Childcare	3
Summary	4
Section 1 - Holiday childcare prices	7
A. Prices for holiday childcare	7
B. Price changes for holiday childcare	8
C. Local variations in holiday childcare prices	8
D. Difference in holiday childcare prices between public and PVI sector provision.....	9
E. Holiday childcare prices compared to term time prices	10
Section 2 - Whether there is enough holiday childcare.....	12
A. Sufficiency duties for local authorities	12
B. Holiday childcare sufficiency in England	12
C. Holiday childcare sufficiency in Scotland.....	14
D. Holiday childcare sufficiency in Wales	15
E. Numbers of childcare providers and places	16
F. Holiday club opening times and dates.....	17
Section 3 - Impact of the right to request wraparound and holiday childcare in England.....	19
Methodology	20

Acknowledgements

We would like to thank the local authorities who shared their data with us, particularly during this challenging time. Thanks also to our colleagues at Coram Family and Childcare, particularly Hannah Parlett.

About this report

This report is the sixteenth 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 2021. This report provides detail on the cost and availability of childcare for children aged 4-14 years during the 13 weeks of school holiday per year. The provision of childcare covered in this report includes Ofsted-registered holiday clubs managed by the private, voluntary and independent sectors 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.

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.

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.

Summary

Holiday childcare is a lynchpin for millions of families in Great Britain, allowing parents to work or study, providing employers with a reliable workforce, and giving children the opportunity to socialise and have fun with other children. Despite almost twice as many school age children using holiday childcare than nurseries, it tends to receive far less attention than childcare for pre-school children.

This year has been particularly challenging for the holiday childcare sector and for the families reliant on it. There is a large amount of churn among holiday childcare providers even during normal years with different providers opening and closing for each holiday. But this year the changes have been far more significant than most years with providers having to make difficult decisions about whether they are willing and able to open, and whether there is enough demand from parents for their provision to be viable while meeting Government guidelines.

This has caused particular problems for families who may have struggled to find childcare to meet their needs and to plan ahead. While some will have employers who are sympathetic to these ongoing issues, others are likely to find an expectation that working patterns and childcare arrangements should now be back to normal.

Over the long summer holidays, families often use a combination of holiday childcare, annual leave and informal childcare from friends and grandparents. If parents cannot find holiday childcare they can afford, they are left with few options. While some families have found that the disruption of the last year has meant they have strengthened informal childcare arrangements in their community, those without support from family and friends are likely to find this summer particularly difficult.

Coram Family and Childcare did not run the Holiday Childcare Survey in 2020, the first year we have missed since the survey started in 2005. The disruption to the market at the time meant that we did not think we would be able to gather useful information. This means that this year we compare changes in price and availability to the last survey we ran in 2019.

As we look to recovery from the pandemic, it is more vital than ever that the importance of out of school childcare is recognised. It plays a vital role in making sure that parents are able to work and making sure children are safe, well fed and taking part in positive and fun activities during the break from school.

Price of holiday childcare

- ▶ The average price of holiday childcare is £145 per week in Britain. This is a 5 per cent rise since 2019.
- ▶ Prices in Scotland are slightly lower than in Wales, with Scotland considerably less expensive than in England.
- ▶ There are significant regional variations within England: prices in the South West are 19 per cent higher than in the North West.
- ▶ Holiday clubs in the private, voluntary and independent sector are on average 28 per cent more expensive than those run by local authorities. However, only 12 per cent of holiday childcare is run by local authorities across Great Britain.
- ▶ Parents pay more for childcare during the holidays than during term time: holiday childcare costs are more than twice as much per week as an after school club.

Table 1 - 2021 holiday childcare prices for England, Scotland and Wales, with percentage change from 2019.

Nation	Weighted average 2021	% change from 2019
Great Britain	£144.65	5%
England	£147.01	5%
Scotland	£118.05	3%
Wales	£134.18	2%

Is there enough holiday childcare?

- ▶ Only 33 per cent of English local authorities have enough holiday childcare available for parents in their area who work full time. 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.
- ▶ Shortages of holiday childcare provision have decreased slightly over the past year for most groups of children.
- ▶ The biggest gaps in England are for children living in rural areas¹ where only 12 per cent of local authorities say they have enough childcare, for 12 to 14 year olds, where 13 per cent have enough and for disabled children where 16 per cent have enough.
- ▶ There are different legal duties around childcare sufficiency in Scotland and Wales which makes direct comparison difficult, but there are also sufficiency gaps in both nations.
- ▶ 33 per cent of local authorities reported that the number of holiday childcare places in their area had decreased. Although reductions in use of childcare may not mean that this translates to immediate shortages, it raises significant concerns about whether there will be enough childcare places if childcare use rises back to pre-pandemic levels.

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)
- ▶ 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

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

Areas for action

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

- ▶ Include out of school childcare within pandemic recovery planning, given its vital role around helping children to catch up on lost learning and supporting parents to work.
- ▶ As part of the evaluation of the Holiday Activities and Food programme, consider the role that this funding could have to improve access to affordable, high quality childcare and feed this learning into future funding.
- ▶ Move to upfront payments for the childcare element of Universal Credit so that it offers comparable support to families claiming Tax Free Childcare. This will mean that parents can get the support they need to be able to pay the higher childcare costs during school holidays.
- ▶ 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: children in rural areas, 12 to 14 year olds and disabled children.

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 Great Britain.

A. Prices for holiday childcare

Overall, parents in Great Britain now pay an average of £145 per week for full time holiday childcare. Prices in Scotland (£118) and Wales (£134) are lower than in England (£147).

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

Nation/region	Price of holiday childcare per week
Great Britain	£144.65
England	£147.01
Scotland	£118.05
Wales	£134.18
East of England	£142.49
East Midlands	£155.96
London, Inner	£152.73
London, Outer	£146.54
North East	£153.72
North West	£129.09
South East	£141.52
South West	£160.30
West Midlands	£152.54
Yorkshire and Humber	£143.60

English regional differences:

- ▶ There is significant variation in holiday childcare prices across the English regions, with large differences even between regions that are close to each other. For example, the difference between North-East and North-West is £24.63 per week.
- ▶ Among these regions, the average price per week for holiday childcare is 19 per cent higher in the South West (£160.30) than in the North West (£129.09).
- ▶ These variations highlight the postcode lottery that families face in finding affordable holiday childcare in their area.

B. Price changes for holiday childcare

In Great Britain, prices for holiday childcare have risen by 5 per cent since 2019. This is largely driven by rises in England, where price rises have been higher than Scotland and Wales.

Table 3 - Price changes in holiday childcare from 2019, by nation and region, weighted

Nation/region	% difference in price from 2019
Great Britain	5%
England	5%
Scotland	3%
Wales	2%
East of England	-2%
East Midlands	10%
London, Inner	3%
London, Outer	6%
North East	-1%
North West	9%
South East	-9%
South West	7%
West Midlands	15%
Yorkshire and Humber	10%

There is some notable variation in price changes for holiday childcare across the English regions, with prices decreasing in some regions and increasing in others. The variation in price increases is likely to reflect volatility in the childcare market as the sector responds to a range of challenges related to Covid-19 as well ongoing challenges. 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.

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 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.

In the average local authority in Great Britain, the most expensive holiday childcare is 58 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 (+ 60 per cent and – 42 per cent).

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
Great Britain	58%	-40%
England	60%	-42%
Scotland	29%	-18%
Wales	57%	-34%
East of England	48%	-27%
East Midlands	68%	-47%
London, Inner	77%	-57%
London, Outer	74%	-42%
North East	49%	-37%
North West	56%	-39%
South East	49%	-35%
South West	63%	-35%
West Midlands	73%	-61%
Yorkshire and Humber	48%	-43%

English regional differences:

- ▶ The highest price variations are found in Inner London, Outer London and East and West Midlands.
- ▶ For all regions, the most expensive prices are between 29 per cent and 77 per cent above 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 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.

D. Difference in holiday childcare prices between public and PVI 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 5 shows that, across Great Britain, holiday clubs provided by the private and voluntary sector are an average of 28 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. Some private providers will also make a profit. The price difference between types of providers in Scotland (11 per cent) is notably lower than in Wales (36 per cent) and England (29 per cent). The proportion of public sector provision is also much higher in Scotland (37 per cent).

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

Nation	Public sector	Private, voluntary and independent sector	% difference	% public sector provision
Great Britain	£116.26	£148.68	28%	12%
England	£116.88	£150.51	29%	12%
Scotland	£113.65	£125.89	11%	37%
Wales	£99.70	£135.98	36%	7%

Though holiday childcare tends to be cheaper in the public sector, in many areas families will struggle to find available places. Across Great Britain, there are approximately seven holiday clubs run by the private, voluntary and independent sector for every one managed by the public sector, according to survey responses.

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. Parents across Great Britain pay more than twice as much during the school holidays as they do during term time, with the greatest difference in Scotland.

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 have to 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	£144.65	£62.13	2.33
England	£147.01	£62.56	2.35
Scotland	£118.05	£62.86	1.88
Wales	£134.18	£54.13	2.48

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. 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 may have a smaller choice of providers, or miss out on financial help.

Tax Free Childcare	Aged under 12 or under 17 if child has a disability	<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 which 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 earn 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>
Universal Credit	Any age, with Ofsted registered providers	<p>Pays up to 85% of childcare costs up to £175 per week for one child and £300 for two or more children. This is set to replace tax credits and other benefits.</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 on a 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>

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.

Section 2 - Whether there is 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:

- ▶ 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.

B. Holiday childcare sufficiency in England

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.

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

	Yes: in all areas	Yes: in some areas	No	Data not collected or cannot tell
4-7 year olds	31%	33%	3%	34%
8-11 year olds	28%	30%	3%	39%
12-14 year olds	13%	26%	7%	54%
Disabled children	16%	29%	11%	44%
Parents working full time	33%	30%	2%	36%
Parents working atypical hours	15%	21%	12%	52%
Children in rural areas	12%	21%	10%	57%

- ▶ While 31 per cent of local authorities have enough childcare in all areas for 4 to 7 year olds, the equivalent figures for 8 to 11 year olds and 12 to 14 year olds are 28 percent and 13 per cent respectively.
- ▶ There are also large data gaps about holiday childcare for older children with 54 per cent of local authorities in England saying they do not have the information to accurately assess whether they have sufficient holiday childcare for children aged 12 to 14.
- ▶ Families with children in rural areas face some of the biggest shortages in holiday provision. Only 12 per cent report full sufficiency although 57 per cent do not know whether there is enough provision available.
- ▶ Shortages are also extreme for disabled children, with 16 per cent of local authorities in England reporting that they do not have sufficient holiday childcare for this group in any parts of their local area, and 44 per cent do not know whether there is enough provision available.

Shortages in holiday childcare have increased slightly over the past year, with fewer local authorities reporting that they have enough holiday childcare in the whole local area since 2019 – except for parents working full time or atypical hours where sufficiency has increased slightly.

Table 8 - Sufficiency of holiday childcare in England, by local authority, 2019 and 2021

	Yes: in all areas (2019)	Yes: in all areas (2021)
4-7 year olds	35%	31%
8-11 year olds	31%	28%
12-14 year olds	14%	13%
Disabled children	17%	16%
Parents working full time	31%	33%
Parents working atypical hours	14%	15%
Children in rural areas	16%	12%

As shown in Table 9, shortages of holiday childcare vary widely across the country. 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

Region	4-7 year olds	8-11 year olds	12-14 year olds	Disabled children	Parents working full time
East of England	22%	22%	0%	11%	22%
East Midlands	14%	14%	0%	14%	14%
London, Inner	18%	27%	9%	0%	36%
London, Outer	13%	13%	13%	13%	13%
North East	22%	11%	11%	0%	22%
North West	47%	50%	28%	29%	42%
South East	19%	19%	6%	0%	25%
South West	42%	33%	17%	33%	42%
West Midlands	44%	22%	22%	11%	22%
Yorkshire and Humber	54%	46%	15%	38%	69%

English regional differences:

- ▶ Yorkshire and Humber is the region with the highest proportion of local authorities reporting enough childcare in all areas for 4 to 7 year olds, disabled children and parents working full time.
- ▶ The North West has the highest proportion of local authorities reporting enough childcare for 8 to 11 year olds and 12 to 14 year olds.
- ▶ The greatest range in sufficiency was seen childcare for parents working full time. 69 per cent for local authorities from Yorkshire and Humber reported enough childcare in all areas as opposed to 13 per cent of local authorities from Outer London.
- ▶ In Inner London, the North East and South East there were no local authorities able to report enough childcare in all areas for disabled children. Similarly, in the East of England and East Midlands no local authorities were able to report enough childcare for twelve to fourteen year olds.

C. 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 (between 58 and 83 per cent reported 'data not collected or cannot tell'). This is shown in Table 10.

The majority of local authorities in Scotland did not hold the data that allowed them to answer whether there was enough childcare available locally.

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

	Yes: in all areas	Yes: in some areas	No	Data not collected or cannot tell
4-7 year olds	13%	25%	4%	58%
8-11 year olds	8%	21%	8%	63%
12-14 year olds	4%	17%	8%	71%
Disabled children	4%	9%	9%	78%
Parents working full time	8%	13%	4%	75%
Parents working atypical hours	4%	4%	8%	83%
Children in rural areas	15%	8%	8%	69%

Table 11 shows there has been a decrease in the proportion of local authorities which say they have enough holiday childcare in most categories, the exceptions being for parents working atypical hours and children in rural areas – but this should be treated with caution given the high proportion of local authorities not holding data.

Table 11 - Changes to sufficiency of holiday childcare in Scotland by local authority since 2019

	Yes: in all areas (2019)	Yes: in all areas (2021)
4-7 year olds	15%	13%
8-11 year olds	11%	8%
12-14 year olds	11%	4%
Disabled children	7%	4%
Parents working full time	19%	8%
Parents working atypical hours	0%	4%
Children in rural areas	8%	15%

D. Holiday childcare sufficiency in Wales

Welsh local authorities are more likely to have 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. Sufficiency rates in all areas are much lower compared to England, while differences in data collection mean that comparisons to Scotland are difficult.

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

	Yes: in all areas	Yes: in some areas	No	Data not collected or cannot tell
4-7 year olds	5%	68%	5%	21%
8-11 year olds	5%	68%	5%	21%
12-14 year olds	5%	26%	37%	32%
Disabled children	0%	37%	32%	32%
Parents working full time	5%	58%	5%	32%
Parents working atypical hours	5%	16%	47%	32%
Children in rural areas	0%	40%	20%	40%

- ▶ 5 per cent have enough childcare in all areas for 4 to 7 year olds, and this is same for 8 to 11 year olds and 12 to 14 year olds. In some areas, however, 68 per cent have enough childcare for 4 to 7 year olds and 8 to 11 year olds which then drops to 26 per cent for 12 to 14 year olds.
- ▶ Note there are less data gaps compared to the English and Scottish data.
- ▶ Shortages are extreme for 12 to 14 year olds, disabled children and parents working atypical hours. 47 per cent of local authorities do not have enough childcare for parents working atypical hours.

The number of local authorities reporting sufficient holiday childcare provision in all of their area has changed significantly since last year, with decreases seen in most categories (Table 13). In particular, the biggest decrease in sufficient holiday childcare provision is for 4 to 7 year olds.

Table 13: Changes to sufficiency of holiday childcare in Wales by local authority since 2019

	Yes: in all areas (2019)	Yes: in all areas (2021)
4-7 year olds	29%	5%
8-11 year olds	19%	5%
12-14 year olds	0%	5%
Disabled children	5%	0%
Parents working full time	19%	5%
Parents working atypical hours	5%	5%
Children in rural areas	8%	0%

E. Numbers of childcare providers and places

Tables 14 and 15 show significant change in childcare markets locally and a large number of local authorities reporting drops in the number of providers and childcare places. While use of all types of childcare has decreased over the last year and so some market contraction could be expected, this still raises cause for concern. For families that rely on holiday childcare, the closure of local settings 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.

Table 14 - Proportion of local authorities reporting a change in number of holiday childcare providers since 2019, Great Britain

	Public sector	Private sector
Increased	10%	21%
Stayed the same	29%	22%
Decreased	20%	38%
Data not collected or cannot tell	22%	18%
No providers in either year	19%	2%

Table 15 – Places in local authority area, change since 2019, by nation

	Great Britain	England	Scotland	Wales
Increased	18%	19%	17%	16%
Same as 2019	13%	10%	17%	21%
Decreased	33%	34%	22%	42%
Data not collected or cannot tell	36%	37%	43%	21%

F. 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 16 shows the proportion of holiday clubs which are open for short, medium, and long days in the holidays. Across Great Britain, holiday clubs in the private and voluntary sector are more likely to be open for long days than those in the public sector.

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
Public sector	Great Britain	19%	26%	40%	15%
	England	17%	26%	41%	16%
	Scotland	35%	25%	31%	8%
	Wales	24%	29%	47%	0%
Private and voluntary sector	Great Britain	8%	23%	52%	19%
	England	8%	22%	51%	20%
	Scotland	3%	27%	66%	11%
	Wales	9%	37%	58%	8%

- ▶ Within the public sector, 31 per cent of settings provide long day childcare in Scotland, compared to 47 per cent in Wales and 41 per cent in England.
- ▶ Within the private and voluntary sector, 66 per cent of settings are open for long days in Scotland compared to 58 per cent in Wales and 51 per cent in England.

Families may need holiday childcare for different school holidays throughout the year, from the long summer break to half terms and teacher training days². Table 17 shows that the availability of childcare varies significantly depending on the holiday, with far more settings opening in the half term than at Christmas, and a very low proportion in England 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.

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

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

	Nation	Summer	Easter	Christmas	Half term	Teacher training days
Public sector	Great Britain	36%	29%	20%	67%	47%
	England	56%	48%	16%	44%	10%
	Scotland	29%	15%	34%	77%	62%
	Wales	15%	11%	16%	91%	87%
Private and voluntary sector	Great Britain	82%	70%	34%	66%	19%
	England	80%	68%	34%	64%	16%
	Scotland	84%	68%	3%	65%	62%
	Wales	100%	96%	51%	95%	31%

- ▶ In Great Britain as a whole, the private and voluntary sector provides a greater proportion of settings that are open during all the holiday periods compared to the public sector. The exception is teacher training days where the public sector provides a greater proportion of settings open.
- ▶ 67 per cent of public sector settings are open during the half term compared to just 20 per cent during Christmas, 29 per cent during Easter holidays and 36 per cent during summer holidays. Within the private and voluntary sector, 82 per cent are open in the summer compared to 19 per cent during teacher training days.
- ▶ There are significant drops in the proportion of holiday childcare opening for summer and Easter holidays compared to previous years particularly in the public sector, most likely as a result of the effects of Covid meaning that it was not possible or preferable for provision to open this year and is likely to make it harder for families to find childcare or their first choice of childcare this year.
- ▶ Christmas holidays have the lowest proportions of childcare providers open.

Section 3 – Holidays Activity and Food Programme

The Department for Education has been funding the Holiday Activity and Food programme since 2018 in England. It started in 2018 with a small number of pilot areas with just £2m funding, and this year has expanded to all local authorities and £220m in funding. The programme aims to help fill the holiday gap, which includes learning loss, isolation and hunger, all of which can become more common over the school holidays, particularly for disadvantaged families. The funding is to provide free holiday clubs for school-aged children eligible for benefits-related Free School Meals for 6 weeks per year: 4 weeks in the summer, 1 week at Easter and 1 week at Christmas. The funding is passed to local authorities to coordinate for their local area. It is not expected that all eligible children will attend, and local authorities are encouraged to make provision available for non-eligible children who are able to pay.

Although childcare is not a principal aim of this funding, given the scale of this work and the fact that it provides a safe space for children to be looked after, we were interested to hear about the impacts that it had on local holiday childcare markets. In many areas, local authorities worked with private or voluntary providers of holiday childcare providers, which will make an impact on the local market more likely.

Table 18 shows the proportion of local authorities reporting an increase, decrease or no impact of the Holiday Activity and Food programme on the price, sufficiency and quality of local childcare. The vast majority of local authorities were not able to say what, if any, impact the programme had on local childcare. In many ways, this is unsurprising given that most areas are only just delivering this programme for the first time and so it is early for seeing impacts. Local authorities have also not been asked to monitor effects on childcare markets.

Table 18 - Proportion of local authorities reporting impact on price, sufficiency and quality of childcare settings as a result of the Holiday Activity and Food programme

	Increase	No impact	Decrease	Data not collected or cannot tell
Prices	0%	17%	0%	83%
Sufficiency	7%	10%	1%	83%
Quality	8%	9%	0%	82%

- ▶ Of the local authorities that provided data, 8 per cent reported an increase in quality of childcare settings and 7 per cent reported an increase in sufficiency.
- ▶ However, the majority reported no impact of the Holiday Activity and Food programme in their area on price, sufficiency or quality (17 per cent, 10 per cent and 9 per cent respectively).
- ▶ The Holiday Activity and Food programme did not result in a decrease in prices or quality, although 1 per cent report a decrease in sufficiency.
- ▶ As noted above, given the majority of local authorities couldn't provide data, the data should be treated with some caution.

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 2021. 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.

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 83 per cent of local authorities. The lowest response rate for any region was 67 per cent. Some local authorities did not give data for all questions, or gave data in a format that we could not use.

Weighting

In line with recent 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 estimates³. 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.

³ Mid-2020 Population Estimates for UK, England and Wales, Scotland and Northern Ireland

Tracking change over time

When comparing prices over time, we have only included local authorities where we have data for both 2019 and 2021. 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 2019 data after the survey deadline for the year, but 2021 data within the deadline: in these cases, we have included the data in this year's calculations although they do not appear in the 2019 survey. This approach produces slightly different results to comparing regional weighted prices from the 2019 survey to regional weighted prices in the 2021 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 our annual [Childcare Survey](#) released in the spring.