

Holiday Childcare Survey 2016

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Key findings and areas for action

Every year the Family and Childcare Trust conducts a survey to gather information about the price of holiday clubs and their availability across Britain. The data – collected from local authorities – makes it possible to monitor changes in the price and availability of childcare during school holiday periods and identifies differences in provision across the regions and nations of Britain.

Accessible, high quality and affordable holiday childcare is essential for families. It enables parents to continue their ongoing commitments after the end of the school year, which might involve working, looking for jobs, studying, training, or any additional caring responsibilities. Without it, either parents cannot work, or children are put at risk of poor quality provision. For children, holiday clubs provide a safe, child-centred environment where they can form new friendships, take part in a range of activities, gain new skills and

experiences, and be better prepared for the following year.

This year's Holiday Childcare Survey, the 15th in the series, shows that over the summer break parents face both high prices and shortages of childcare, and the situation is worse for certain regions and groups of families. The Government has promised to provide extra help with childcare costs for school aged children through Universal Credit and the new Tax Free Childcare scheme. However, both these programmes have faced delays, and the survey findings indicate that families still face costs that many find unaffordable.

From September, parents and childcare providers will have the 'right to request' wrap-around and holiday childcare at schools, which will be explored in detail later in the report. This has the potential to increase the supply of holiday childcare, particularly in areas that already face gaps in provision.

Key findings

Table One: The weekly price of holiday childcare, 2016

Region/nation	Public sector (school, local authority) holiday clubs	Private and not-for-profit holiday clubs	Average weighted price ¹
East of England	£113.05	£120.53	£119.57
East Midlands	£95.50	£124.87	£123.46
Greater London	£80.82	£131.19	£121.81
North East	£94.84	£125.08	£122.52
North West	£95.41	£114.06	£111.42
South East	£133.63	£144.81	£141.87
South West	£96.53	£127.02	£113.60
West Midlands	£108.00	£123.66	£122.76
Yorkshire and Humberside	£91.30	£127.08	£124.06
England (Regional Average)	£101.01	£126.48	£122.34
Wales	£94.81	£127.43	£121.05
Scotland	£110.93	£109.61	£110.15
Britain average	£101.35	£125.03	£121.12

Childcare prices

▶ In Britain the average price of one week's full-time (50 hours) of holiday childcare is now £121.12, compared with £123.49 in 2015 (Table One), a 1.9 per cent decrease in price over the last 12 months. This is a small deviation from a general trend which has seen prices rise 21.9 per cent since 2010.

▶ Holiday clubs provided by the public sector cost an average of £101.35 per week, compared with £125.03 per week in the private and not-for-profit sector. These price differences are a result of subsidies and because local authorities and schools often have access to free premises and equipment.

1 Weighted to reflect the proportion of holiday childcare provided by each sector in the region

Key findings and areas for action

- ▶ The difference in price between public sector and private or not-for-profit sector provision varies significantly by region. This may indicate higher levels of subsidy for public sector provision in some local authorities.
- ▶ Families from certain regions face much higher holiday childcare costs. Average prices are 29 per cent higher in the South East (£141.87) than they are in Scotland (£110.15).
- ▶ The South East of England stands out as the region with the most expensive holiday childcare, with the most expensive provision in that area reported to be £600. This is nearly five times as much as the average price for Britain.

Availability

- ▶ Under the Childcare Act 2006 all local authorities in England and Wales have a legal obligation to make sure there is sufficient childcare for working parents and those undertaking training. Despite this duty, 29 per cent of responding local authorities in England and 17 per cent in Wales had insufficient data to see if their supply met parental demand. In Scotland, where the legislative framework is different, that figure is 54 per cent, representing 14 local authorities.
- ▶ Of those that did have the data, 88 per cent of local authorities in Britain reported having insufficient holiday childcare. In Wales that figure is 100 per cent. It is highly concerning that the vast majority of areas in Britain have gaps in their holiday childcare provision.
- ▶ The number of children aged between 4 and 15 living in local authorities with insufficient holiday childcare is estimated to be 5,076,755. However, this figure may be much higher, as it does not include non-respondents, or those local authorities with insufficient data.
- ▶ On the whole, gaps in holiday childcare provision have decreased over the past 12 months. However, there are large gaps remaining across the country. Not one local authority in Wales or the East of England reported having sufficient holiday childcare.
- ▶ Parents of children aged 12 or over, families who live in rural areas, and those with children with special educational needs and disability (SEND) face the biggest gaps in provision. Just 17 per cent of responding local authorities in England and 10 per cent in Scotland had sufficient holiday childcare for children with SEND. There were none in Wales.

- ▶ Despite these shortages, only 19 per cent of local authorities indicated that parents in their area had reported a lack of holiday childcare in the last 12 months. We hope that the introduction of the 'right to request' will give a voice to parents to request holiday childcare, and report shortages where they are found to exist.

Areas for action

Holiday childcare is an essential part of our country's infrastructure, enabling parents to juggle their caring obligations and work during the school holidays. It also has wider social and economic impacts as it provides a reliable workforce for employers, aids child development helping to reduce levels of inequality, and can narrow the gender pay and employment gap by supporting parents to continue work, training, education, and job searching. Despite the importance of holiday childcare, too many families struggle to find local provision that they can afford. Although there is a legal duty on local authorities in England and Wales to ensure there is sufficient childcare, there are large gaps remaining across the country.

While childcare has risen up the political agenda, the focus has been on the under-fives. The results of this years' survey have led us to conclude that the childcare needs of families with school-age children must be given higher priority.

The Family and Childcare Trust calls on the Government to:

- ▶ Commit to increasing availability to meet demand, with a particular focus on deprived areas. Central government should provide local authorities with identified grant funding to support this.
- ▶ Ensure that there are no further delays in Universal Credit and Tax Free Childcare and that the current timetable for roll out is adhered to.
- ▶ Publish detailed statutory guidance for all UK local authorities on auditing childcare market management, including a clear definition of childcare sufficiency and specific measurable indicators.
- ▶ Oblige local authorities to produce online information listing holiday clubs and activities.
- ▶ Give parents a legal entitlement to childcare from the end of parental leave throughout childhood, bringing it in line with the right to a school place.
- ▶ Support schools to coordinate local strategies together with local authorities, police

Key findings and areas for action

commissioners, leisure, arts and sports organisations, to ensure that there are enough varied summer holiday activities for children of secondary school age.

- ▶ Support parents to benefit from family friendly work by putting in place an information campaign for parents on their rights and entitlements at work.
- ▶ Make sure that the new 'right to request' improves access to affordable childcare for disadvantaged children by making the process as simple and effective as possible and running an information campaign targeting parents and providers on their new right.

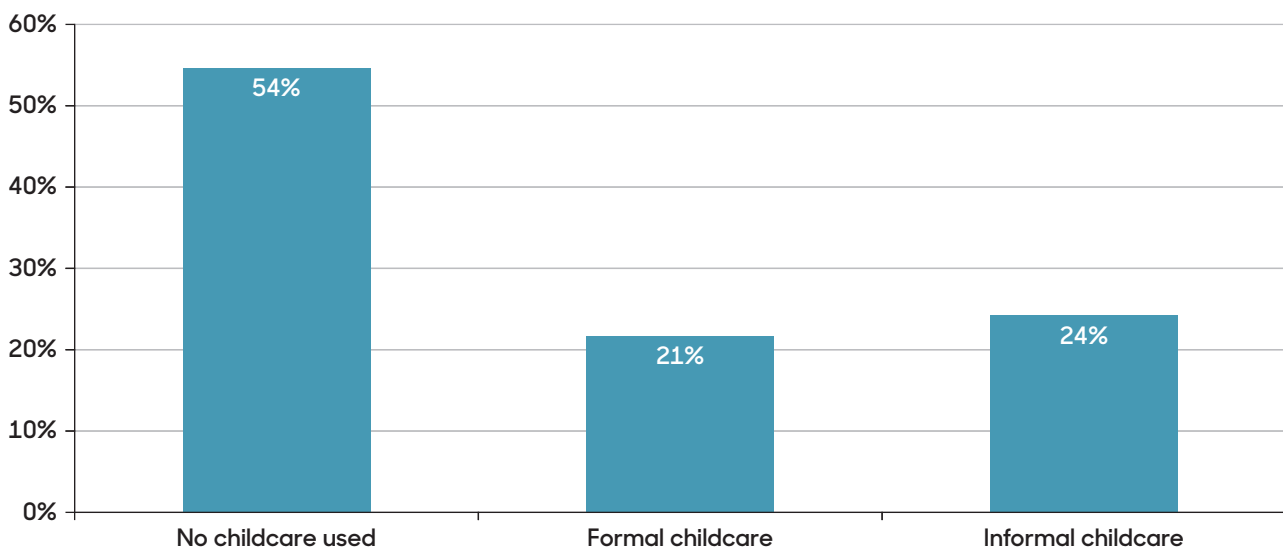
Introduction

In the weeks leading up to the school holidays children are normally counting down the days with excitement. But many parents experience a different range of emotions as they try to balance childcare, work and other commitments. While schools and school-based nurseries are closed, parents resort to many different strategies to find childcare in the holidays. Some have employers who support flexible working, for example, offering parents term-time only contracts. Many parents also resort to 'shift parenting' where they split their own annual leave and take it in turns to look after their children. Informal childcare from relatives and friends is also important, with the most recent Childcare and Early Years Survey of Parents showing that a quarter of working families with children under 15 used informal childcare over the school holidays,

most usually provided by grandparents (Department for Education, 2016a).

But not all families can rely on shift parenting or informal childcare provided by relatives and friends. About a fifth of parents also use formal childcare during the holiday period, most frequently childminders or holiday clubs – sometimes called play schemes – that provide activities for nine or ten hours every day. Across Britain, about one in five families use group-based holiday childcare. For older children, open access adventure playgrounds, sports camps and holiday activities run by museums, orchestras, theatre projects and other cultural organisations often function as de facto childcare. Figure One draws on the Childcare and Early Years Survey of Parents and shows holiday childcare use in England in 2014/15.

Figure One: Holiday childcare use among parents of children aged 5-14, 2014/15



Source: Childcare and Early Years' Survey of Parents (Department for Education, 2016a).

“Purely because childcare is expensive over the summer, I try to get as much help of family and friends as possible”
Jenny, mother from London

Introduction

Policy context

This report looks at the prices and availability of group-based holiday childcare, variously termed holiday clubs, play schemes, or holiday projects. Most of these book in children on a daily or weekly basis, but a few are 'open access' which is drop-in provision where children can turn up and undertake supervised play for as many hours as they wish. It is a diverse sector, in terms of ownership and the activities that it offers. It is also a new addition to the array of children's services. Until 20 years ago, there was little out-of-school childcare available in the UK, with just 350 clubs and 5,000 places in England and Wales in 1990 (New Opportunities Fund, 2003). The holiday care that did exist was largely restricted to inner cities and served the dual purpose of providing childcare for working parents and structured activities for disadvantaged children.

Female employment increased steadily throughout the 1980s and the 1990s. This economic change and pressure from activists led the Government to commit to expanding out-of-school childcare. In 1997 the Government set up the Out-of-School Childcare Initiative (OSCI) which ran until 1999 and created 40,000 childcare places, mostly for children aged 5-11. The 1998 green paper: Meeting the Childcare Challenge announced further support for out-of-school childcare, through funding from the Lottery's New Opportunities Fund (Department for Education and Employment, 1998). This grant stream ran until 2004; by then there were an estimated 555,340 places in after-school and holiday clubs in the UK.

In 2004, the Government published a further childcare strategy. *Choice for parents: the best start for children: a ten year strategy for childcare* committed the Government to creating an out-of-school childcare place for all children aged 3-14 (HM Treasury, 2004). In England this was now to be achieved through the Extended Schools Programme. It was envisaged that schools would deliver a range of services that would include out-of-school childcare, study support, family learning, parenting support and wider community access to schools' facilities (Department for Education and Skills, 2005). Between 2004 and 2011 about £300 million was made available annually through ring-fenced funding to deliver the extended schools programme.

Ring-fenced funding for extended schools ceased in 2011, with the money merged into the Local Authority Block of schools funding. By then there were an estimated 339,300 places in holiday clubs in England (Department for Education, 2014a). Some £356 million was allocated to extended schools funding in the financial year 2011-2012, although the removal of the ring-fence meant that local authorities did not have to spend this money on extended schools provision. At a time when there was pressure on budgets, it is possible that money that was theoretically ear-marked for developing out-of-school childcare has been diverted for other purposes. Today, this funding stream has been fully absorbed into schools funding in England. The Family and Childcare Trust would like to see greater transparency relating to the use of this money.

The ten year childcare strategy also paved the way for the Childcare Act 2006 and the legal obligations on English and Welsh local authorities to make sure that there is sufficient childcare for working parents and those undertaking training. We discuss the effectiveness of this duty later in the report. Previous holiday childcare surveys have highlighted shortages of holiday childcare (Family and Childcare Trust, 2013; 2014; 2015).

In recognition of on-going shortages of after school and holiday childcare, the Government will give parents a 'right to request' that their school consider providing wraparound and holiday childcare. The policy, which will come into effect at the start of Autumn term 2016, is explored in more detail later in the report.

As part of the 2016 Spring Budget the Government outlined plans to use the revenue from a new levy on the soft drinks industry to provide funding for schools to extend their school day by offering a wider range of activities for pupils. Taking effect from September 2016, this funding package will provide £10 million a year to expand breakfast clubs in up to 1,600 schools, £285 million a year for 25 per cent of secondary schools to offer after school activities for pupils and an additional £160 million to the primary school PE and sport premium to allow schools to improve their sport provision with new activities and after school clubs (HM Treasury, 2016).

Introduction

Childcare affordability

Alongside moves to increase the availability of out-of-school childcare, a number of initiatives have also helped make childcare more affordable, summarised in Table Two. Parents of all three and four year olds get some part-time free early education in all parts of the UK and in England, Scotland and Wales this has been extended to the most deprived two year olds. The current infrastructure of support includes the subsidy of parents' childcare costs through the childcare element of Working Tax Credit. At present working parents on low incomes can receive up to 70 per cent of their childcare costs through the childcare element of Working Tax Credit, up to a maximum cost of £175 per week for one child in childcare and £300 per week for two or more children. But it is only the most deprived working families that receive this type of help, as the childcare payment starts to taper off steeply if the first earner in a household has a gross income of more than £15,910 per year. After this threshold, the level of tax credit support is reduced by 41 pence for every additional £1 that is earned. This means that there are many families on modest incomes - £25,000 to £35,000 gross household income per year - who are getting little or no help with their childcare costs through the childcare element of Working Tax Credit.

Tax credits are now being merged into the single Universal Credit. Within Universal Credit the overall maximum support levels for childcare costs of £175 or £300 per week will remain, although these will now be calculated monthly. However, from April 2016 all families receiving Universal Credit get up to 85 per cent of their childcare costs paid, up from 70 per cent the previous year. Universal Credit will also eventually be administered online and these two changes will enable greater flexibility for parents whose childcare costs fluctuate from week to week, for example, due to paying for holiday childcare. The delays to the roll out of Universal Credit mean that very few parents are currently benefiting from increased levels of support, and many parents will still be waiting a number of years.

At present parents not in receipt of the childcare element of Working Tax Credits are entitled to help with their childcare costs through employer-supported vouchers. About nine per cent of UK families get help with their childcare costs this way (House of Commons Library, 2014). An advantage of childcare vouchers is that they can be 'banked' and used at a time when childcare costs may be particularly high, for example, during the school holidays. The disadvantages of childcare vouchers are that only five per cent of employers offer them and many childcare providers do not accept them. The involvement of childminders, after-school and holiday clubs in the voucher scheme is particularly low in many areas.

In 2013 the Government announced that it intends to phase out the present employer-supported childcare voucher scheme and replace it with the Tax Free Childcare Scheme (HM Treasury, 2013). This will be an online system where parents bank their payments. For each £8 a parent pays in, the Government will add an additional £2 up to a maximum of £2,000 per year per child. The scheme will be rolled out during 2017, with parents of the under-fives being the first group to receive help. The support will eventually be available to all families with children up to the age of 12, or 17 for children with special educational needs and disabilities (SEND).

The extra help with childcare costs is welcome and the Tax Free Childcare scheme is an improvement on childcare vouchers. But there are concerns that channeling help to parents may cause above inflation price rises as hard-pressed providers see extra money in parents' pockets as a chance to increase costs (Ben-Galim, 2014). There is still a need for greater action to make sure all parents can find holiday childcare.

Introduction

Table Two: A summary of sources of help with childcare costs

	Level of support	Recipient group	Date available	Where available
Childcare element of Working Tax Credit	70% of childcare costs up to a maximum of £175 per week for 1 child or £300 per week for 2 or more children. Families receiving housing or council tax benefit get extra help, amounting to about 96% of costs in England	Nearly 400,000 low income working families	Present	UK-wide
Universal Credit	85% of childcare costs, with same maximum levels as Working Tax Credit, although no extra help for those receiving housing benefit	Low income working parents	Present	UK-wide
Childcare vouchers	Worth up to £55 per week for basic rate tax-payers	Working parents, but not self-employed and usually excludes those receiving tax credits	Presently available, but will not accept new applicants after 2017	UK-wide
Tax Free Childcare	20% of childcare costs up to a maximum of £2,000 per year. Families of children with SEND receive help up to a maximum of £4,000 per year	Working parents not in receipt of tax credits/ Universal Credit whose gross household income is higher than a specified minimum threshold but less than £100,000 per parent	From early 2017	UK-wide
Care to Learn	£175 in London and £160 per week outside	Parents under 20 at school or in further education	Presently available	Care to Learn applies to England, but equivalent schemes elsewhere in UK
Discretionary Learner Support	Discretionary	Parents over 20 in further education	Presently available	This fund applies to England, but equivalents elsewhere in UK
Childcare Grant	£155.24 a week for 1 child. Up to £266.15 a week for 2 or more children	Parents in full-time higher education who are eligible for student finance	Presently available	This fund applies to England, but equivalents elsewhere in UK

Methodology

The Family and Childcare Trust has carried out an annual survey of holiday childcare since 2002. The research, which examines childcare prices and supply, is based on a survey to local authority Family Information Services (sometimes called Children's Information Services in Scotland). A survey was sent out in May 2016 to all local authorities in England, Scotland and Wales. The survey asked the daily and weekly price of holiday childcare projects – sometimes called holiday play schemes – in their area.

A distinction was made between public sector holiday childcare (run by local authorities, school and other public sector bodies) and childcare run by private and not-for-profit sector providers. It is important to emphasise that this survey asks local authorities to report the price that parents pay for holiday childcare in their area. This survey does not ask providers to estimate how much it costs to deliver holiday childcare – this may well be a different amount, as some holiday childcare providers receive grants or in-kind subsidies such as the free use of premises.

We used our survey data to calculate average regional weekly prices for public sector provision and private and not-for-profit provision in England and average national prices for Scotland and Wales. We also calculated overall regional and national prices by weighting our figures for the public sector and the private and not-for-profit sector to reflect ownership patterns. Throughout the UK, most holiday childcare schemes are run by the private and not-for-profit sector, although the proportions vary between local authorities. As Table One shows, childcare that is delivered by the private, voluntary and independent (PVI) sector tends to be more expensive than that run by schools and local authorities. Our weighting formula takes into account the greater prominence of the private and not-for-profit sector in delivering holiday childcare and enables us to come up with a more precise calculation of average holiday childcare prices.

As previously noted, the Childcare Act 2006 obliges local authorities in England and Wales to ensure that there is sufficient childcare for working parents and those studying with the intention of returning to work. Local authorities are also obliged to have regard to the childcare needs of children with SEND. There is no equivalent legislation in Scotland, although the 2008 Early Years Framework requires that local authorities have 'a strategic view of childcare accessibility' and has a longer-term objective that families have 'access to integrated pre school and childcare services in every community matched to an assessment of local demand' (Scottish Government, 2008). In order to monitor whether local authorities are fulfilling the obligation to ensure sufficient childcare, the survey asked whether there was enough holiday childcare for different groups of children: 4–7 year olds, 8–11 year olds, children aged 12 and over, children with SEND, those living in rural areas, and the children of parents working full-time.

In order to ensure an adequate response rate, Freedom of Information Act requests were used to collect the information where the survey methodology had failed. Responses were eventually received from 177 of the 205 local authorities we surveyed, representing an 86 per cent response rate overall with a minimum 74 per cent response rate in each region or nation of Britain.

Holiday clubs – a diverse sector

The holiday childcare sector is diverse in relation to its ownership, and in the type of activities offered. This year's survey indicates that 16 per cent of holiday clubs were run by local authorities and schools. This is only one percentage point less than last year, but much lower than in 2014 when local authorities provided 22 per cent of holiday childcare. Much local authority provision is aimed at 4–7 year olds and is often located in children's centres. Cuts to the number of centres and the budgets of existing provision accounts for much of the reduction of local authority provision.

The largest providers of holiday childcare are the private and not-for-profit organisations, which between them provide 81.5 per cent of holiday childcare. This is a varied group of providers that include commercial holiday clubs run by national chains, small, single site businesses, as well as holiday clubs run by charities. There are also a growing number of multi-service childcare providers who may provide holiday care alongside other childcare services, daycare and out-of-hours provision.

There are differences between local authorities in patterns of ownership. For example, in some areas, schools are heavily involved in providing holiday childcare, but in other local authorities their involvement is small. Recent research from the Department for Education (2014b) indicates that there is less school-based provision per head of population in deprived areas than in the least deprived areas, with 15 per cent of schools offering holiday childcare in the most deprived areas, compared with 20 per cent elsewhere.

Holiday clubs that are subsidised are most often those offered by local authorities or schools. This accounts for the difference in price between public sector and private and not-for-profit sector provision shown in Table One. These subsidies can take the form of a direct grant from the local authority, school or another public body, an indirect subsidy through free use of school premises and equipment, or funding to offer free places to vulnerable children who may be at risk of neglect when not at school.

Parents have to book some holiday clubs weeks or months in advance. But in some areas there are also 'open access' clubs where children may turn up on the day. Open access clubs – sometimes called play schemes – are usually run by local authorities and are often subsidised. Most open access holiday clubs are located in deprived areas and serve a dual purpose of providing childcare for working parents and structured activities for disadvantaged children.

Generally, holiday clubs open at 8am and close at 6pm, offering ten hours of care per day. However, some holiday clubs, particularly open access clubs and much public sector provision offer care for a shorter period of the day and may not meet the needs of parents who work full-time.

Most clubs can accommodate between 30 to 50 children. Staff come from a range of backgrounds including youth work, teaching and sports coaching. There is a growing segmentation in the holiday childcare market, with a small number of clubs set up to cater for more prosperous families. This segmentation is reflected in the activities that they offer – such as horse riding and paint-balling – and in the prices they charge. But the majority of holiday clubs are used by families with more modest incomes. Generally, when children arrive in the morning they have a choice of different activities, which include arts, crafts, baking, drama, IT and sports, as well as time to relax with friends. There are also trips out to local sites and wider, to museums and theme parks.

The price of holiday childcare

In Britain, public sector holiday childcare now costs an average £101.35 per week, compared with £125.03 per week in the private and not-for-profit sector (Table One). These price differences are a result of subsidies and the free access to premises and equipment that holiday clubs often have. Taking into account different patterns of ownership, the overall price of one week of full-time (50 hours) holiday childcare is now £121.12. This is a weighted price which accounts for the greater proportion of holiday childcare provided by the private and not-for-profit sector.

The difference in price between public sector and private and not-for-profit sector provision varies significantly by region: in the South East, PVI provision is only 1 per cent more expensive than public provision, whereas in London it is 65 per cent more expensive (Table Three). This may indicate higher levels of subsidy for public sector provision in some local authorities. The biggest cost variation is in the maintained, rather than PVI sector, so this could be driven by the level of subsidies provided to public sector provision in different areas.

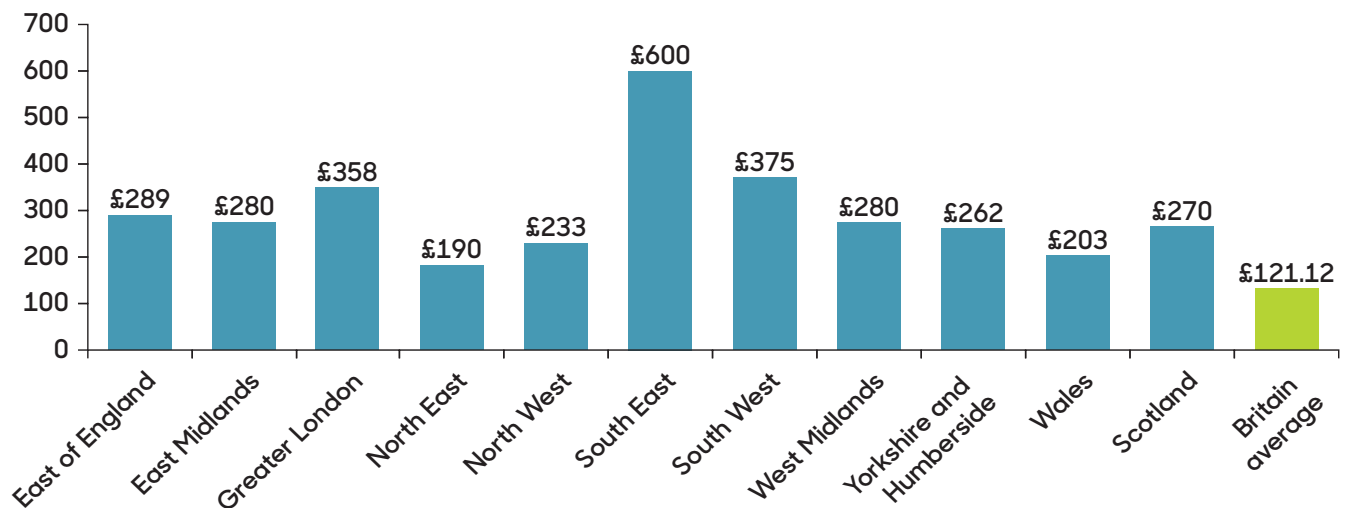
Table Three: Cost difference between maintained and PVI sector by region / nation

Region/nation	Maintained (school, local authority) sector holiday club or play scheme	Private, voluntary and independent sector holiday club or play scheme	Cost difference	Percentage difference
East of England	£113.05	£120.53	£7.48	7%
East Midlands	£95.50	£124.87	£29.37	31%
Greater London	£80.82	£131.19	£50.37	62%
North East	£94.84	£125.08	£30.24	32%
North West	£95.41	£114.06	£18.65	20%
South East	£133.63	£144.81	£11.18	8%
South West	£96.53	£127.02	£30.49	32%
West Midlands	£108.00	£123.66	£15.66	15%
Yorkshire and Humberside	£91.30	£127.08	£35.78	39%
England (Regional Average)	£101.01	£126.48	£25.47	25%
Wales	£94.81	£127.43	£32.62	34%
Scotland	£110.93	£109.61	-£1.32	-1%
Britain average	£101.35	£125.03	£23.68	23%

The South East of England stands out as the region with the most expensive holiday childcare, with the most expensive provision in that area reported to be £600. This is almost five times as much as the average price for Britain. Figure Two gives the most expensive holiday childcare clubs in each region and nation of Britain.

The price of holiday childcare

Figure Two: Most expensive holiday childcare for full-time place per week, by region, 2016



Overall, holiday childcare is 1.9 per cent cheaper than it was last year (Table Four). However, whereas prices have fallen in the public sector (by 7.5 per cent) they have risen slightly in the private and not-for-profit sector (by 0.1 per cent). This reflects the growing gap between public sector provision, which in most areas is cheaper than that offered by private and not-for-profit organisations. However, there is much less public sector provision and it does not always run over the full working day.

Table Four indicates that prices have not fallen evenly across Britain. Average prices have risen over the past 12 months in as many regions as they have fallen. As a result, families from certain regions face much higher holiday childcare costs than elsewhere (Table One). Average prices are 29 per cent higher in the South East (£141.87) than they are in Scotland (£110.15). These findings highlight the postcode lottery that parents face in finding affordable holiday childcare in their area.

The price of holiday childcare

Table Four: Percentage change in holiday childcare prices over a 12 month period 2015-2016, by region and nation (increases in red, decreases in green).

Region/nation	Public sector (school, local authority) holiday clubs	Private and not-for-profit sector holiday clubs	Average weighted prices
East of England	-1.4%	-12.0%	-12.5%
East Midlands	3.0%	6.9%	8.6%
Greater London	-17.5%	-7.7%	-11.3%
North East	-15.7%	-6.5%	-6.7%
North West	-7.7%	6.3%	4.1%
South East	6.2%	6.3%	2.8%
South West	-12.4%	-2.0%	-11.3%
West Midlands	-6.7%	6.7%	5.2%
Yorkshire and Humberside	-11.7%	9.6%	8.8%
England	-6.9%	0.3%	-1.9%
Wales	-12.5%	8.8%	5.3%
Scotland	-7.5%	-9.8%	-8.7%
Britain	-7.5%	0.1%	-1.9%

Source: Family and Childcare Trust Holiday Childcare Survey, 2015; 2016

“ *The price of childcare has definitely gone up over the last few years... It's extremely hard. Half my salary goes to childcare and then I have to add rent, council tax and other expenses* ”
 Aneka, East Midlands, mother of one

The price of holiday childcare

Though prices have fallen slightly over the past year, this represents only a small deviation from the general trend which has seen prices rise considerably over the last 6 years (2010–2016). Since 2010, prices of public sector childcare have increased by 23 per cent and

private and not-for-profit provision by 20.7 per cent. When ownership patterns are taken into account, the prices of holiday clubs have increased by 21.9 per cent over the last six years (Table Five).

Table Five: Percentage change in holiday childcare prices 2010–2016, by region and nation (increases in red, decreases in green).

Region/nation	Public sector (school, local authority) holiday clubs	Private and not-for-profit sector holiday clubs	Average weighted prices
East of England	36.2%	1.0%	18.2%
East Midlands	27.0%	40.7%	50.7%
Greater London	9.2%	28.6%	38.4%
North East	50.4%	15.7%	43.2%
North West	13.2%	7.3%	16.9%
South East	35.9%	28.0%	34.2%
South West	0.7%	12.4%	8.8%
West Midlands	65.4%	33.3%	55.4%
Yorkshire and Humberside	-12.4%	29.6%	22.7%
England	22.3%	21.0%	30.7%
Wales	61.0%	25.4%	50.9%
Scotland	6.4%	13.6%	9.7%
Britain	23.0%	20.7%	21.9%

Source: Family and Childcare Trust Holiday Childcare Survey, 2010; 2016

Can holiday childcare be offered more cheaply?

While many parents may struggle with the costs of holiday childcare, the quality, supply and flexibility of provision should not be compromised in order to reduce costs. Their prices are still cheaper than those charged by childminders, with The Family and Childcare Trust's *Childcare Survey* indicating that a parent might expect to pay £207 per week for full-time holiday care from a childminder (Family and Childcare Trust, 2016).

The costs of providing holiday childcare could be reduced through making better use of public buildings to provide care. Schools are an obvious underutilised asset for providing holiday childcare. Many are already used, which is one of the drivers of lower costs in the public sector. We hope that the introduction of parents' and providers' 'right to request' wrap-around and holiday childcare from schools.

Provision in school buildings, whether through the PVI or public sector, must respond to the needs of working parents. Many people might argue for more

holiday childcare provision in the public sector, given the difference in price outlined in Table One. However, increasing the amount of subsidised school-based holiday childcare risks undercutting neighbouring private and not-for-profit provision and worsening existing shortages. The record of the public sector in responding to the childcare needs of working parents is not as good as the PVI sector, as illustrated by the more limited opening times in the public sector. If school-based holiday childcare is to be expanded, it must not be at the expense of childcare flexibility and its availability to working parents.

It may also be possible to make some savings by using parent volunteers alongside paid staff, which may also have advantages if parents have additional skills to offer. This could be particularly welcomed by parents who are not working or are working part time and are looking for positive activities for their children during the school holidays.

The roll out of tax free childcare could make holiday

The price of holiday childcare

childcare more affordable for parents, provided that the additional subsidy does not cause prices to go up. Research has warned that demand-side subsidies can have an inflationary effect on market prices (Ben-Galim, 2014). Prices should be monitored carefully following the roll out of tax free childcare with action taken if it does indeed have an inflationary effect. In the short term, providers of holiday childcare should be encouraged to register to enable parents to claim tax free childcare for costs.

Gaps in holiday childcare supply

The Childcare Act 2006 requires local authorities in England and Wales to make sure there is enough childcare as far as is 'reasonably practical' for working parents and those undertaking work-related training. In England, regulations also specify that local authorities have regard for the childcare needs of parents receiving working tax credits and those that have children with SEND.

In order to ensure sufficient childcare, local authorities need to know about any gaps they might have. Regulations in England require that local authorities audit their supply of childcare to see if it satisfies parental demand. These audits have to be carried out annually and should include an action plan to show how gaps will be filled (Department for Education, 2014c). While the Childcare Act 2006 also covers Wales, different sections of this legislation apply and regulations differ. Despite these duties, 29 per cent of responding local authorities in England and 17 per cent in Wales had insufficient data to see if their supply met parental demand (Table Six).

There is no equivalent legislation to the Childcare Act 2006 in Scotland, although the 2008 Early Years Framework requires that local authorities have 'a strategic view of childcare accessibility' (Scottish Government, 2008). While more local authorities in Scotland are now looking at whether there is enough childcare, we were concerned that 54 per cent of those that responded to the survey still had insufficient data to show if their supply met parental demand.

Table Six. Availability of holiday childcare 2016.

Nation	Percentage of respondents with no data for one or more groups	Of those with data, percentage with insufficient holiday childcare
England	28.5%	87.5%
Wales	16.7%	100.0%
Scotland	53.8%	77.8%
Britain	31.1%	87.8%

On the whole, gaps in holiday childcare provision are smaller than last year. For instance, 19 per cent of responding local authorities had sufficient holiday childcare for working parents in 2015, compared with 23 per cent this year (Table Seven). However, the results reveal that there are large gaps remaining across the country. Not one local authority in Wales or the East of England reported having sufficient childcare for any of the groups of children we asked about.

There are particular challenges for local authorities in assessing if there is enough holiday childcare. There is no agreed definition of *sufficiency* in law or statutory guidance, so local authorities have no consistent reference against which to judge if they have enough (Office for Public Management, 2008). There is also no administrative data on the numbers of places in holiday clubs in England. This is because provision for children over eight and that run by school governing bodies does not have to be registered by Ofsted.

The Childcare and Early Years Providers Survey suggested that in England there were an estimated 7,200 holiday clubs offering 341,400 places in 2013 (Department for Education, 2014a). Although changes to the sampling method of this survey make year-on-year comparisons difficult, place numbers remained constant during the preceding five years, after an earlier large expansion in the first years of the century.

Despite the growth of places since 2000, many local authorities are reporting shortages of holiday childcare. This year's survey found that, of those that did have the data, 88 per cent of local authorities across Britain reported having insufficient holiday childcare. In Wales, that figure is 100 per cent (Table Six). The number of children aged between 4 and 15 living in these local authorities with insufficient holiday childcare is estimated to be 5,076,755². However, this figure may be much higher, as it does not include children from local authorities that did not respond, or those that did not have sufficient data.

Certain groups of families face worse shortages than others. Parents of children aged 12 or over, families who live in rural areas, and those with children with SEND face the biggest gaps in provision. Just 17 per cent of responding local authorities in England and 10 per cent in Scotland had sufficient holiday childcare for children with SEND. There were none in Wales.

2 Figure based on mid-2015 population estimates (ONS, 2015a)

Gaps in holiday childcare supply

Despite these shortages, only 19 per cent of local authorities indicated that parents had reported a lack of holiday childcare, a fall from 2015. We hope that

the introduction of the 'right to request' will give a voice to parents to request holiday childcare, and report shortages where they exist.

Table Seven: Percentage of responding local authorities with sufficient holiday childcare in all of their area for the following groups - 2016, with 2015 figures in brackets - Increases in green, decreases in red.

Region/Nation	4-7 year olds	8-11 year olds	Children aged 12 and over	Children with SEND	Children of working parents	Lack of holiday childcare reported
East of England	0% (9%)	0% (0%)	0% (0%)	0% (0%)	0% (0%)	30% (13%)
East Midlands	17% (0%)	17% (0%)	17% (0%)	0% (0%)	17% (0%)	20% (38%)
Greater London	23% (12%)	27% (12%)	15% (4%)	23% (8%)	27% (12%)	32% (29%)
North East	44% (55%)	44% (55%)	22% (18%)	22% (36%)	33% (45%)	0% (18%)
North West	55% (47%)	45% (45%)	32% (25%)	27% (15%)	50% (45%)	9% (20%)
South East	38% (28%)	31% (28%)	15% (0%)	15% (11%)	23% (11%)	7% (35%)
South West	33% (38%)	25% (31%)	0% (0%)	17% (8%)	17% (15%)	8% (17%)
West Midlands	33% (25%)	17% (17%)	0% (0%)	0% (8%)	17% (8%)	33% (33%)
Yorkshire and Humberside	46% (50%)	38% (43%)	15% (0%)	23% (21%)	31% (29%)	15% (14%)
England	34% (29%)	29% (25%)	15% (5%)	17% (12%)	27% (18%)	18% (24%)
Wales	0% (5%)	0% (0%)	0% (14%)	0% (0%)	0% (30%)	44% (65%)
Scotland	36% (17%)	32% (17%)	24% (13%)	10% (9%)	24% (11%)	5 (24%)
Britain	30% (26%)	26% (23%)	14% (5%)	14% (11%)	23% (19%)	19% (27%)

Source: Family and Childcare Trust Holiday Childcare Surveys, 2015; 2016

While gaps may have narrowed slightly in the past 12 months, Table Eight shows that over the long term, shortages are increasing. Since 2012, there are fewer local authorities reporting sufficient childcare across Britain for three out of five of the groups we asked about, and gaps have remained low for the other two.

There are two reasons for these growing gaps. First, as the economy has grown, the numbers and proportion of women in work has increased. In the period January to March some 69.2 per cent of the female working age

population was employed in the UK, compared with 65.5 per cent in the same period in 2012, amounting to an extra 890,000 women in the UK labour market (ONS, 2016). This could have created extra demand for childcare, to which the market has not yet responded. At the same time, clubs are closing in the public sector through funding cuts, and in the private and not-for-profit sector because providers cannot break even. This years' survey finds that 46 local authorities reported that overall number of places in holiday clubs had fallen in their area since 2015.

Table Eight: Percentage of responding local authorities with sufficient holiday childcare in all of their area for the following groups - 2016, with 2012 figures in brackets - Increases in green, decreases in red.

Nation	4-7 year olds	8-11 year olds	Children aged 12 and over	Children with SEND	Children of working parents
England	34% (39%)	29% (14%)	15% (14%)	17% (13%)	27% (36%)
Wales	0% (0%)	0% (0%)	0% (0%)	0% (0%)	0% (0%)
Scotland	36% (62%)	32% (62%)	24% (25%)	10% (31%)	24% (50%)
Britain	30% (38%)	26% (29%)	14% (14%)	14% (14%)	23% (34%)

Source: Family and Childcare Trust Holiday Childcare Surveys, 2012; 2016

Gaps in holiday childcare supply

Activities for older children

The Family and Childcare Trust is particularly concerned that such little progress has been made to meet the holiday childcare needs of older children, a group who are frequently forgotten in debates about 'childcare'. Activities for them are sometimes not viewed as 'childcare' and are not considered in childcare sufficiency reports. It is significant to note that 43 local authorities in Britain did not know if they had enough childcare for this group. Childcare for older children has not attracted the attention that is given to childcare for under-fives.

Children of secondary school age may attend sports or cultural activities in the school holidays, or activities organised by local authority youth services that function as de facto childcare. Much of this type of provision has seen extensive funding cuts since 2010. Although the Welsh Government has published a play strategy, in England there is little strategic thinking on holiday activities for children of secondary school age. In both central and local government, there is no over-arching champion to take forward this area of work. The Family and Childcare Trust is calling on the Department for Education to work with the Department for Culture, Media and Sport and the Home Office to ensure that there is enough de facto childcare for older children. At a local level we would also like local authority leisure and children's services departments to work with police commissioners, schools, leisure, arts and sports organisations and other relevant bodies to develop local strategies to ensure that there are enough varied summer holiday activities for children of secondary school age.

Children with special educational needs and disability

Table Seven shows that families with children with SEND are another group who find it difficult to find childcare. Finding affordable childcare can be a particular problem for these families with children with SEND. Some providers charge higher prices for this group, and they often do not cover parents' work schedules. The physical size of older children can increase requirements for manual handling training and can make some providers reluctant to take on children with challenging behaviour or developmental impairments. It is also a greater challenge to provide quality childcare that offers opportunities for children with SEND to do similar activities to their peers, so parents are sometimes reluctant to use provision that does not help their children thrive.

As children without SEND access childcare provision less once they are in secondary school, the mainstream childcare market is relatively limited and fewer options exist for young people with SEND. Some older children with SEND are expected to attend the same provision as much younger children and take part in activities which are not age appropriate. Young people with SEND want the opportunity to do activities other teenagers may take for granted. They want to enjoy spending time with their friends, learning new skills, having fun and being independent. These aspirations are presently not being met.

We believe that central Government recognises that there are shortages of appropriate childcare for children with SEND. The Family and Childcare Trust welcomes last year's announcement that the Government will increase the amount of help in the new Tax Free Childcare scheme to cover 40 per cent of the childcare costs of children with SEND (Table Two). Through market mechanisms, this extra support may encourage childcare providers to develop additional places. But there is still a need to monitor development and hold local authorities to account for failing to increase the amount of childcare that is suitable for children with SEND.

“ I have got her in 2 holiday clubs that provide for her specific needs... but the holiday clubs don't run for a full day so I have had to change my hours around for the summer holidays to fit round them ”

Jo, Cheshire,
mother of older child with SEND

Gaps in holiday childcare supply

Filling the gaps

One of the reasons that so few local authorities have enough holiday childcare for all working parents is that there are almost always fewer places in deprived areas (Department for Education, 2014b). For all types of childcare there is a tendency for there to be more provision where high proportions of parents are working and can pay for childcare. In deprived areas, there is usually less demand for childcare. Existing providers, in turn, may find it harder to break even or expand provision and new providers may be deterred from entering the market. Holiday childcare providers face particular challenges to business sustainability in that most parents only book one or two weeks care every year, often at short notice. Holiday providers may not easily be able to predict if they can fill their places and this, too, may deter expansion.

A further reason that holiday childcare gaps persist is that providers may lack information about potential local markets for their services. If local authority childcare sufficiency reports are not undertaken, then potential providers will not know about gaps in the market. The Family and Childcare Trust is disappointed that 29 per cent of responding local authorities in England and 17 per cent in Wales had insufficient data to see if their supply of holiday childcare met parental demand. In Scotland, where there is no duty to assess the sufficiency of childcare, the figure is 54 per cent, representing 14 local authorities (Table Six).

In England and Wales many childcare sufficiency reports also lack detailed action plans that identify how gaps in provision might be filled and this is a further reason that gaps in provision remain. But the process of intervention in the holiday childcare market can be fraught with difficulties. The Childcare Act 2006 allows local authorities to be the 'provider of last resort' when market mechanisms fail to fill gaps in supply. In the past, some local authorities responded to gaps in provision by setting up their own holiday childcare schemes. Such provision is often provided at a lower price than private and not-for-profit provision, as running costs may be subsidised or the holiday project may use free premises. In some cases, subsidised public sector holiday provision risks undercutting private and not-for-profit provision. Where local authorities and schools do deliver they need to ensure that they do not price other providers out of the market.

There are a number of ways that holiday childcare providers could be helped to expand provision in deprived areas and elsewhere. We would like central Government (including the devolved administrations) to establish a clear definition of childcare sufficiency, including specific measurable indicators. We also believe that there is a need for updating statutory guidance for local authorities on assessing childcare sufficiency and on effective childcare market management, including clarifying where it is appropriate to expand the public sector when the free market fails to fill supply shortages. In addition, improving consumer information would better match parents needing childcare with vacant places.

At present, local authorities are not being given the means to fill gaps in provision, and not being held to account when they fail to do so. We believe that the sufficiency duty in the Childcare Act 2006 is not fit for purpose. A more effective means of closing gaps in provision would be to legislate for an entitlement to childcare, giving parents the same right to this service as they have to a school place. This entitlement should be accompanied by identified grant funding that helps local authorities and providers to deliver this entitlement. This funding needs to cover start-up costs, and help new providers cover their expenses in their first months of operation.

We also welcome a new policy beginning this September, which gives parents a 'right to request' their school provide childcare before and after school, and during holidays. If implemented carefully, the plans have the potential to help fill some of the gaps in out-of-school childcare.

'Right to request' holiday childcare

Holiday childcare is sometimes available in schools as part of a growing extended schools programme. Extended schools are those that provide a range of services beyond their core function of classroom education, including childcare outside of school hours and during holidays. Recent years have seen a large increase in the availability of these services, with forthcoming research from the Family and Childcare Trust indicating that extended schools have now become the norm (Diss, 2016).

As well as providing another source of childcare for parents, extended schools can offer a range of extra benefits. Initial evaluations of pilot programmes reported a range of positive outcomes, including greater educational achievement and motivation among children, increased parental involvement, and improved community relations (Cummings et al, 2004). Further evaluations highlighted that services improved educational outcomes for disadvantaged students and facilitated the development of soft skills, cultural enrichment and cultural capital (Diss, 2016).

In addition, childcare provided within schools is often favoured by parents and children as a trusted environment, where other children, parents and staff are likely to be familiar faces. Clubs may also have access to school facilities and, given the reduced premises costs, they are usually a much cheaper option too.

Making use of school buildings that may be unused during school holidays has the potential to increase the supply and decrease the cost of holiday childcare. To facilitate this, last autumn the Government announced plans to provide parents and childcare providers with a 'right to request' that schools provide childcare before and after school and during school holidays. Following a consultation process, final guidance for schools was published in May, with the policy to start at the beginning of autumn term 2016 (Department for Education 2016b; 2016c). The guidance provides three models of childcare that schools may consider if they decide to deliver on requests. Services may be managed in-house by the schools themselves; externally by independent providers; or with a blend of external and in-house management. The right will apply to parents of children from reception class age up to year nine, and childcare providers, including childminders, will also be given the right to request the use of school facilities for out-of-school and holiday childcare.

The proposed 'right to request' has the potential to offer a range of benefits to parents by opening up a further source of much-needed holiday childcare. In addition, it may be less expensive and more familiar than existing

alternatives. More broadly, childcare within schools can improve educational attainment, particularly for disadvantaged children, and strengthen ties between parents and schools. However, there are a number of issues that need to be carefully considered if these opportunities are to be realised.

Firstly, schools that decide to provide childcare during holidays need to ensure that the rates they set are affordable for parents. The guidance advises that schemes should be broadly cost-neutral, with any profits generated to be reinvested back in the service or the school. Schools should also be encouraged to be transparent in how they set their rates and include parents and governors in the decision process.

Secondly, for the policy to be fully effective, schools will need to make parents aware of their new right to request, and provide clear guidance on how to submit requests, including details of any timeframes or thresholds the schools may have established for submitting and considering requests. In addition, parents should be advised how and where to escalate the matter if a request is refused, for instance through the local authority or academy trust. It would be sensible for local authorities to be included in the request process so that they can monitor numbers of requests and support neighbouring schools to offer joint provision.

Thirdly, as research suggests that disadvantaged families are less likely to use extended services (Diss, 2016; Carpenter et al., 2012; Wallace et al., 2009) schools and local authorities will need to monitor and promote their inclusion. This is another reason for ensuring that rates are broadly affordable. Failure to address this issue could widen the existing gap in access to childcare between families from different backgrounds, which may in turn exacerbate inequalities in childhood achievement and parental employment.

Finally, the 'right to request' guidance should be put on a statutory footing. This would mean that schools would be obliged to fully consider the requests that were made rather than simply be encouraged to do so. Under the current guidance, parents and childcare providers have no recourse if a school decides not to follow the guidance.

The 'right to request' may offer a new way to fill existing gaps in holiday childcare, but those involved in implementing the policy will need to proceed with care if it is to effectively address these important issues.

'Right to request' holiday childcare

“Summer holidays and any type of holidays become a huge challenge. It is not only because of the finances or the high prices, but also because of the inconvenience of childcare being quite far from the house. So pick up and drop off become very difficult”

Petra, Southwark, mother of two

Fixing holiday childcare



The findings of this year's Holiday Childcare Survey highlights the persistent high prices of holiday childcare, and the shortages in provision across the country. The average price of one week's full time holiday childcare is now £121.12, and 88 per cent of local authorities in Britain reported having insufficient holiday childcare. Though there are small improvements from last year, the longer term trend is one of rising prices and growing shortages. Holiday childcare prices have risen by 21.9 per cent in the last six years, and shortages of provision have worsened rather than improved, with more than five million children now living in areas with insufficient childcare.

Parents rely on a range of different strategies in order to negotiate this lottery of high prices and severe shortages. They may have access to informal childcare from relatives or friends, or the transport needed to travel to more distant provision. Some might also have an accommodating employer and opportunities to work flexibly. Many families also resort to 'shift parenting' where they split their own annual leave and take it in turns to look after their children.

But many parents cannot depend on these arrangements. They may not have regular access to informal care, the means to travel, a partner with whom they can divide their holiday, or the ability to work flexibly. Since June 2014, workers have had the right to request flexible work, though for many, this offer exists in name only. The 2011 Workplace Employment Relations Survey (DfBIS, 2013) found that only a third (34 per cent) of workplaces allowed flexi-time working and 16 per cent allowed term-time only contracts. There are also some groups of workers who have less access to flexible work practices. These include the least well-qualified, those who work in male-dominated workplaces, and those in manufacturing industries.

According to research from the Family and Childcare Trust (2014) 22 per cent of parents said their employers were unsympathetic or very unsympathetic to requests to change working hours over school holidays. The study also highlighted the strategies that parents used to make sure they could care for their children in the absence of holiday childcare. Nearly a third of parents took unpaid leave and 17 per cent had taken days off sick because they could not find childcare. An

Fixing holiday childcare

additional 12 per cent of parents had left a job because they could not find holiday care. Such courses of action affect family incomes and parents' careers. They also have a wider impact on workplaces and the economy. If the pattern of sick leave identified in the survey applied to all UK parents, one day missed to cover childcare represents nearly 900,000 days of avoidable absence every year, costing the UK economy nearly £100 million every year³.

As well as ensuring a reliable workforce for employers, holiday childcare aids child development by helping to reduce levels of inequality, and can narrow the gender pay and employment gap by supporting parents to continue working, training, studying or looking for work. It can also enable parents to maintain other responsibilities such as caring for older relatives.

For these reasons there is an urgent need to pay greater regard to out-of-school childcare. This has received far less policy attention than under-fives provision, both at a central government and local level. Out-of-school childcare providers often struggle to be sustainable, especially those that operate in deprived areas. There is a continuing need for financial support from public subsidies in this sector.

In the UK there is a reliance on a regulated mixed market to provide sufficient childcare. But market mechanisms are failing to address shortages. Moreover, the sufficiency duties enshrined in the Childcare Act 2006 are not working. Local authorities are not ensuring sufficient childcare and they are not being held to account for this failure.

All of the major political parties now recognise the importance of high quality and affordable childcare for families. The extra help with childcare costs through Tax Free Childcare, Universal Credit, and the extension of free early education have been welcomed by families, and the new 'right to request' has the potential to help with shortages. But for too long, the childcare of school-age children has felt like a forgotten issue. The Family and Childcare Trust believes that it is time to re-think out-of-school childcare and calls on the Government and devolved administrations to commit to the following actions:

- ▶ Commit to increasing availability to meet demand, with a particular focus on deprived areas. Central government should provide local authorities with identified grant funding to support this.
- ▶ Ensure that there are no further delays in Universal Credit and Tax Free Childcare and that the current timetable for roll out is adhered to.
- ▶ Publish detailed statutory guidance for all UK local authorities on auditing childcare market management, including a clear definition of childcare sufficiency and specific measurable indicators.
- ▶ Oblige local authorities to produce online information listing holiday clubs and activities.
- ▶ Give parents a legal entitlement to childcare from the end of parental leave throughout childhood, bringing it in line with the right to a school place.
- ▶ Support schools to coordinate local strategies together with local authorities, police commissioners, leisure, arts and sports organisations, to ensure that there are enough varied summer holiday activities for children of secondary school age.
- ▶ Support parents to benefit from family friendly work by putting in place an information campaign for parents on their rights and entitlements at work.
- ▶ Make sure that the new 'right to request' improves access to affordable childcare for disadvantaged children by making the process as simple and effective as possible and running an information campaign targeting parents and providers on their new right.

³ Based on average gross weekly earnings for 2015 of £528 per week (ONS, 2015b)

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About the Family and Childcare Trust

The Family and Childcare Trust is the leading national charity in the field of policy, research and advocacy on childcare and family issues, working closely with government, local authorities, businesses and charities to achieve positive and long lasting change for families across the UK. Our vision is a society where all families are well-supported and have genuine choices about their lives.

The Family and Childcare Trust's annual childcare costs survey is the definitive report on childcare costs and sufficiency in the UK and its data are used by the Department for Education and OECD. For further information, go to www.familyandchildcaretrust.org



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