

---

# Holiday Childcare Survey 2019

Joshua Cottell, Suzanne Descateaux and Lester Coleman

---



---

# 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 .....	9
D. Difference in holiday childcare prices between public and PVI sector provision.....	10
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. Holiday club opening times and dates .....	16
Section 3 - Impact of the right to request wraparound and holiday childcare.....	18
Methodology .....	20

---

# Acknowledgements

---

We would like to thank the local authorities who shared their data with us. Thanks also to our colleagues at Coram Family and Childcare, particularly Claire Harding, Hannah Parlett, Joanna Watts and Megan Jarvie.

## About this report

This report is the fifteenth 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 2019. 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](http://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

Millions of families in Great Britain rely on childcare for their school age children including during the school holidays. High quality childcare allows parents to work or study, providing employers with a reliable workforce, and gives children the opportunity to take part in positive activities with other children.

However, once again our annual Holiday Childcare Survey finds significant gaps in the availability of holiday childcare and high prices that can mean parents see little or no financial gain from working once they have paid for childcare.

Where holiday childcare is unavailable or too expensive, parents are left with few options. Rather than looking forward to the long break, many parents dread the juggling act between family, friends and annual leave to make sure that their children are well looked after, and some struggle to stay in work.

About twice as many children use school age childcare as nurseries, but it does not yet receive the same policy focus. Some of the support set up to help families does not manage the fluctuating costs between term and holiday time, pushing families towards debt in order to manage the higher holiday costs.

Over recent years, we have seen significant investment in pre-school childcare: now is the time to make sure that we are fixing the childcare system for children of all ages.

### Price of holiday childcare

- ▶ The average price of holiday childcare is £138 per week in Britain. This is a 3 per cent rise since 2018.
- ▶ Prices in Scotland are slightly lower than in Wales, and both are considerably less expensive than in England.
- ▶ There are significant regional variations within England: prices in the South East are 37 per cent higher than in the North West.
- ▶ Holiday clubs in the private, voluntary and independent sector are on average 25 per cent more expensive than those run by local authorities. However, only 10 per cent of holiday provision is run by local authorities, and the proportion varies in different local areas, meaning many parents cannot access this cheaper provision.
- ▶ Parents 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 - 2019 holiday childcare prices for England, Scotland and Wales, with percentage change from 2018.**

Nation	Weighted average 2019	% change from 2018
Great Britain	£138.06	3%
England	£139.60	3%
Scotland	£123.22	0%
Wales	£129.77	2%

---

## Is there enough holiday childcare?

- ▶ Only 31 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 all groups of children.
- ▶ The biggest gaps in England are for disabled children, where only 17 per cent of local authorities say they have enough childcare, and for 12 to 14 year olds, where 14 per cent have enough.
- ▶ There are different legal duties around childcare sufficiency in Scotland and Wales which makes direct comparison difficult, but there are sufficiency gaps in both nations.

## Right to request wraparound and holiday childcare

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

### Box 1: Choices about holiday childcare

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

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

---

## Areas for action

Across Britain, many parents find it difficult or impossible to access affordable, high quality childcare that suits the needs of their children and allows them to work. There are many different schemes available aiming to help parents access and pay for childcare, but these are confusing, leaving parents slipping through the net and not getting the support they are entitled to. For all families, there is a need for reform to a simple, progressive funding system to support parents to be able to access high quality childcare and be better off working. But there is a particular need for urgent action for families with school age children, where shortages are acute and too often the existing support to help pay for childcare does not work.

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

- ▶ Fix the support for childcare costs to meet the needs of school age children by moving to upfront payments for the childcare element of Universal Credit. This will mean that parents can get the support they need to be able to pay the higher childcare costs during school holidays when they arise.
- ▶ Strengthen the 'right to request' policy so that it tackles the persistent gaps in school age childcare provision. This should include placing a duty on schools to assess and respond to requests and providing better information for parents on making effective applications.
- ▶ Assess whether Tax Free Childcare is achieving its aim of helping parents into work or to work more or whether the budget could be reinvested to better support the families who are struggling the most.
- ▶ Make sure there is enough year round childcare for every working family that needs it, including school age children. Governments should prioritise the groups that currently face the biggest shortages: 12 to 14 year olds and disabled children.
- ▶ Work with families and childcare providers to build understanding of high quality holiday childcare – the types of holiday childcare provision that appeal to parents and children and supports children's development.

## 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 £138 per week for full time holiday childcare. Prices in Scotland (£123) and Wales (£130) are lower than in England (£140).

**Table 2 - Average weekly price of holiday childcare, by nation and region, weighted<sup>1</sup>**

Nation/region	Price of holiday childcare per week
<b>Great Britain</b>	£138.06
<b>England</b>	£139.60
<b>Scotland</b>	£123.22
<b>Wales</b>	£129.77
East of England	£136.05
East Midlands	£142.66
London, Inner	£128.82
London, Outer	£145.17
North East	£144.00
North West	£118.63
South East	£162.22
South West	£153.82
West Midlands	£130.66
Yorkshire and Humber	£130.34

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 £25 per week.
- ▶ Among these regions, the average price per week for holiday childcare is 37 per cent higher in the South East (£162.22) than in the North West (£118.63).
- ▶ These variations highlight the postcode lottery that families face in finding affordable holiday childcare in their area.

<sup>1</sup> Weighted data provides a more realistic average to account for differences in the population of children and number of childcare providers in the local authority areas.

## B. Price changes for holiday childcare

In Great Britain, prices for holiday childcare have risen by 3 per cent since 2018. This is largely driven by rises in England and Wales, whereas prices in Scotland have remained flat.

**Table 3 - Price changes in holiday childcare from 2018, by nation and region, weighted**

Nation/region	Difference in price from 2018
<b>Great Britain</b>	3%
<b>England</b>	3%
<b>Scotland</b>	0%
<b>Wales</b>	2%
East of England	-5%
East Midlands	8%
London, Inner	5%
London, Outer	-3%
North East	-6%
North West	-4%
South East	10%
South West	20%
West Midlands	5%
Yorkshire and Humber	0%

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 including minimum wage changes, pension auto-enrolment, business rates and inflation. In general, there are fewer holiday childcare providers in any given area than early years providers. This means that if one large provider changes their prices, or if a large provider opens or closes, it can have a significant impact on local prices. This volatility makes it difficult for families to make plans based on the price and availability of holiday childcare in their local area.

Table 4 shows a high rate of change in the number of local providers available, particularly for private and voluntary sector childcare – although overall the numbers increasing and decreasing are about the same, there is considerable variation between areas.

**Table 4 - Proportion of local authorities reporting a change in number of holiday childcare providers since 2018, Great Britain**

	Public sector	Private sector
Increased	14%	29%
Stayed the same	40%	26%
Decreased	20%	27%
Don't know	16%	16%
No providers in either year	10%	1%



## 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 61 per cent above the national average and the least expensive is 44 per cent below. This is mostly accounted for by the wide variation in England (+64 per cent and -45 per cent).

**Table 5 - Highest and lowest prices of holiday childcare per week as a percentage above or below average prices, weighted**

Nation/region	Most expensive	Least expensive
<b>Great Britain</b>	61%	-44%
<b>England</b>	64%	-45%
<b>Scotland</b>	30%	-30%
<b>Wales</b>	44%	-41%
East of England	83%	-29%
East Midlands	61%	-49%
London, Inner	82%	-70%
London, Outer	63%	-38%
North East	47%	-48%
North West	56%	-41%
South East	59%	-37%
South West	57%	-45%
West Midlands	78%	-59%
Yorkshire and Humber	59%	-52%

English regional differences:

- ▶ The highest price variations are found in Inner London and East and West Midlands. The most expensive prices in Inner London are 82 per cent above the national average and the least expensive are 70 per cent below the average.
- ▶ For all regions, the most expensive prices are between 30 per cent and 83 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 6 shows that, across Great Britain, holiday clubs provided by the private and voluntary sector are an average of 25 per cent more expensive than those in the public sector. These price differences are in part due to subsidies and the free access to premises and equipment that holiday clubs in the public sector often have, and may also reflect private providers offering, for example, a more expensive range of activities. The price difference between types of providers in Scotland (7 per cent) is notably lower than in England (26), and the proportion of public sector provision is also much higher in Scotland (23 per cent). We have not presented data for Wales here because only two local authorities reported prices in the public sector.

**Table 6 - 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	£113.02	£141.15	25%	10%
England	£113.25	£142.78	26%	12%
Scotland	£115.37	£123.29	7%	23%
Wales	Insufficient data	Insufficient data	Insufficient data	Insufficient data

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 nine holiday clubs run by the private sector for every one managed by the public sector, according to survey responses. In about one in four local authorities, there is no public sector provision.

## 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 holidays as they do during term time. In Wales, the difference is two and a half times higher for holiday childcare.

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 7 - Holiday childcare prices compared to after school club prices**

Nation	Holiday club per week	After school club per week	Holiday club price as a multiple of after school club price
Great Britain	£138.06	£57.36	2.41
England	£139.61	£58.17	2.40
Scotland	£123.22	£54.17	2.27
Wales	£129.77	£48.77	2.66

**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.</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.

35 per cent of English local authorities report having enough holiday childcare in all of their local areas for children between the ages of four and seven. Table 8 shows that as children get older, families are likely to find it increasingly difficult to access childcare.

**Table 8 - 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	35%	37%	1%	27%
8-11 year olds	31%	38%	2%	29%
12-14 year olds	14%	31%	13%	42%
Disabled children	17%	31%	19%	34%
Parents working full time	31%	36%	2%	30%
Parents working atypical hours	14%	30%	12%	44%
Children in rural areas <sup>2</sup>	16%	34%	11%	38%

- ▶ Whereas 35 per cent 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 31 percent and 14 per cent respectively.
- ▶ Note there are also large data gaps about holiday childcare for older children. Two fifths of local authorities in England say they do not have the information to accurately assess whether they have sufficient holiday childcare for 12 to 14 year olds.
- ▶ Families with disabled children face some of the biggest shortages in holiday provision, with 19 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 34 per cent do not know whether there is enough provision available.
- ▶ Parents working atypical hours - outside the usual 9am-5pm - face some of the biggest shortages, with only 14 per cent of local authorities reporting enough childcare for this group. Note that nearly half of local authorities did not know or did not collect data for this group.
- ▶ Shortages are also extreme for children in rural areas. Only 16 per cent report full sufficiency although 38 per cent do not know whether there is enough provision available.

Shortages in holiday childcare have reduced slightly over the past year, with more local authorities reporting that they have enough holiday childcare in the whole local area since 2018 (see Table 9, below).

**Table 9 - Sufficiency of holiday childcare in England, by local authority, 2018 and 2019**

	Yes: in all areas (2019)	Yes: in all areas (2018)
4-7 year olds	35%	33%
8-11 year olds	31%	28%
12-14 year olds	14%	14%
Disabled children	17%	13%
Parents working full time	31%	25%
Parents working atypical hours <sup>3</sup>	14%	NA
Children in rural areas	16%	9%

As shown in Table 10, 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.

<sup>2</sup> In this and subsequent tables, only applies to local authorities which are wholly or partially rural.

<sup>3</sup> This question was asked for the first time this year.

**Table 10 - 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	Parents working atypical hours
East of England	27%	18%	18%	18%	18%	10%
East Midlands	22%	22%	22%	11%	22%	22%
London, Inner	33%	33%	11%	13%	44%	14%
London, Outer	19%	19%	13%	19%	20%	13%
North East	44%	44%	22%	33%	44%	11%
North West	61%	44%	28%	33%	44%	22%
South East	40%	53%	7%	7%	40%	20%
South West	8%	0%	0%	0%	8%	0%
West Midlands	38%	22%	11%	0%	22%	0%
Yorkshire and Humber	50%	43%	7%	23%	43%	21%

English regional differences:

- ▶ The North West is the region with the highest proportion of local authorities reporting enough childcare in all areas for four to seven year olds, twelve to fourteen year olds, disabled children, and parents working full time.
- ▶ The proportion of local authorities reporting enough holiday childcare for parents working atypical hours ranges from 22 per cent in the North West to no local authorities in the South West or West Midlands. Note that a large proportion of local authorities reported not holding data for this group.
- ▶ The greatest range in sufficiency was seen for regions having holiday childcare in all areas was for 4 to 7 year olds. 61 per cent for local authorities from the North West reported enough childcare in all areas as opposed to 8 per cent of local authorities from the South West.
- ▶ In the South West and West Midlands there were no local authorities able to report enough childcare in all areas for disabled children.

## 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 74 and 85 per cent reported 'data not collected or cannot tell'). This is shown in Table 11.

**Table 11 - 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	15%	11%	0%	74%
8-11 year olds	11%	15%	0%	74%
12-14 year olds	11%	11%	0%	78%
Disabled children	7%	7%	4%	81%
Parents working full time	19%	52%	0%	29%
Parents working atypical hours	0%	4%	11%	85%
Children in rural areas	8%	13%	0%	79%

Table 12 shows there has been an increase in the proportion of local authorities which say they have enough holiday childcare in all categories – but this should be treated with caution given the high proportion of local authorities not holding data.

**Table 12 - Changes to sufficiency of holiday childcare in Scotland by local authority since 2018**

	Yes: in all areas (2019)	Yes: in all areas (2018)
4-7 year olds	15%	7%
8-11 year olds	11%	7%
12-14 year olds	11%	4%
Disabled children	7%	4%
Parents working full time	19%	11%
Parents working atypical hours	0%	N/A
Children in rural areas	8%	5%

## D. Holiday childcare sufficiency in Wales

Welsh local authorities are more likely to have enough data to judge whether they have enough childcare than their Scottish or English counterparts. The Welsh Government has recently changed the rules local authorities have to follow to assess sufficiency, and this seems to have meant they have access to more high quality information. Sufficiency rates are broadly comparable to England, while differences in data collection mean that comparisons to Scotland are difficult.

**Table 13 - 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	29%	33%	5%	33%
8-11 year olds	19%	43%	5%	33%
12-14 year olds	0%	29%	29%	43%
Disabled children	5%	38%	29%	29%
Parents working full time	19%	52%	0%	29%
Parents working atypical hours	5%	24%	43%	29%
Children in rural areas	8%	31%	23%	38%

- ▶ Whereas 29 per cent 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 19 per cent and zero per cent respectively.
- ▶ Note there are also less data gaps compared to the English and Scottish data.
- ▶ Families with disabled children face shortages in holiday provision, with 29 per cent of local authorities in Wales reporting that they do not have sufficient holiday childcare for this group in any parts of their local area.
- ▶ Shortages are also extreme for children in rural areas. Just 8 per cent of local authorities report full sufficiency and 23 per cent do not have sufficient holiday childcare provision for this group.

The number of local authorities reporting sufficient holiday childcare provision in all of their area has remained about the same as last year for most categories of children (Table 14). However, the proportion of Welsh local authorities reporting enough holiday childcare has increased slightly while the proportion reporting enough holiday childcare for disabled children has nearly halved.

**Table 14: Changes to sufficiency of holiday childcare in Wales by local authority since 2018**

	Yes: in all areas (2019)	Yes: in all areas (2018)
4-7 year olds	29%	25%
8-11 year olds	19%	20%
12-14 year olds	0%	0%
Disabled children	5%	11%
Parents working full time	19%	20%
Parents working atypical hours	5%	N/A
Children in rural areas	8%	0%

## E. Holiday club opening times and dates

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

Families may need holiday childcare to be available throughout the typical working day. Table 15 shows the proportion of holiday clubs which are open for short, medium, and long days in the holidays. Across Great Britain, holiday clubs in the private and voluntary sector are more likely to be open for long days (47 per cent provide days for more than nine hours) than those in the public sector (24 per cent). However, these figures should be treated with caution as many local authorities reported not holding information about opening hours for some or all of the settings in their area.

**Table 15 - 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	25%	18%	37%	20%
	England	21%	18%	39%	23%
	Scotland	43%	23%	34%	0%
	Wales <sup>4</sup>	54%	0%	0%	46%
Private and voluntary sector	Great Britain	5%	12%	47%	35%
	England	5%	13%	44%	38%
	Scotland	4%	10%	84%	2%
	Wales	7%	14%	53%	26%

- ▶ In Great Britain as a whole, local authorities do not know about the opening times for 20 per cent of public sector holiday clubs, and 35 per cent of private and voluntary sector holiday clubs.
- ▶ The high proportion of unknown responses for public sector provision in Great Britain may be because much of this is provided by schools rather than directly by the local authority.
- ▶ Within the public sector, 34 per cent of settings provide long day childcare in Scotland compared to 39 per cent in England. Within the private and voluntary sector, 44 per cent of settings are open for long days in England compared to 84 per cent in Scotland.

<sup>4</sup> Only four local authorities out of the 22 in Wales provided information about when providers in the maintained sector are open.



Families may need holiday childcare for different school holidays throughout the year, from the long summer break to half terms and teacher training days<sup>5</sup>. Table 16 shows that the availability of childcare varies significantly depending on the holiday, with far more settings opening in the summer than at Christmas, and a very low proportion in England and Wales open for teacher training days. Teacher training days can be a particular problem for parents because they are single days, generally at the end of a holiday, and therefore difficult to coordinate for annual leave or informal childcare. These figures should be treated with caution as we only received responses to this question from 48 per cent of local authorities.

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

	Nation	Summer	Easter	Christmas	Half term	Teacher training days
Public sector	Great Britain	85%	72%	19%	58%	14%
	England	87%	78%	24%	64%	9%
	Scotland	78%	51%	3%	37%	32%
	Wales <sup>6</sup>	100%	100%	54%	100%	0%
Private and voluntary sector	Great Britain	95%	88%	44%	79%	27%
	England	94%	88%	47%	81%	22%
	Scotland	99%	81%	23%	53%	58%
	Wales	95%	95%	40%	89%	34%

- ▶ 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.
- ▶ 85 per cent of public sector settings are open during the summer term compared to just 19 per cent during Christmas. Within the private and voluntary sector, 95 per cent are open in the summer compared to 27 per cent during teacher training days.
- ▶ Christmas holidays and teacher training days have the lowest proportions of childcare providers open.
- ▶ Noting the difficulties of childcare availability for teacher training days, Scotland provides the most cover compared to other nations. 32 per cent of settings within the public sector and 58 per cent within the private and voluntary sector are open.

<sup>5</sup> Known as INSET days or In-Service days in different parts of Britain.

<sup>6</sup> See footnote 5.

## Section 3 - Impact of the right to request wraparound and holiday childcare in England

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

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

We asked English local authorities whether their monitoring of the market for childcare shows that the right to request wraparound and holiday childcare has had an impact on whether there is enough childcare in their area. A total of 82 out of 151 local authorities answered the question relating to holiday care, and 83 answered the question relating to wraparound (before and after school) care. These response rates were lower than for the rest of the survey because the questions were optional.

As shown in Table 17, local authorities reported that the right to request is having a similar effect on both wraparound and holiday childcare. The effect local authorities report is negligible, with only 6 per cent saying that the right has had any impact on wraparound care and 4 per cent for holiday care.

**Table 17 - Impact of the 'right to request' on childcare sufficiency: local authorities in England**

	Positive impact	No impact	Negative impact	Don't know
Wraparound care	6%	45%	0%	49%
Holiday care	4%	53%	0%	43%

- ▶ The vast majority of local authorities do not know what impact this policy is having on the availability of holiday childcare, or think that it is having no impact at all.
- ▶ 49 per cent of local authorities did not know what impact the right to request was having on wraparound care, as did 43 per cent on holiday care,
- ▶ 45 per cent of local authorities thought that the right to request was having no impact on whether there is enough wraparound care, as did 53 per cent on holiday care.

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

---

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

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

---

## Methodology

---

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

This report is based on surveys sent to all Family Information Services at local authorities in April 2019. 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 96 per cent of local authorities. The lowest response rate for any region was 79 per cent. Some local authorities did not give data for all questions, or gave data in a format that we could not use. The effective response rate for the price question was therefore 82 per cent. The response rate for the questions on the right to request, only asked of English local authorities, was 55 per cent. This is because this question was not subject to Freedom of Information requests.

---

## Weighting

In line with the 2017 and 2018 surveys, we have weighted cost data within regions and nations. This ensures that results from small local authorities which have relatively small child populations do not unduly influence overall results. Data is weighted against the age 5-14 population based on ONS mid-year population estimates<sup>7</sup>. Within local authorities, we have weighted cost data for PVI and maintained setting providers against the number of providers in that area. This is based on an assumption that the types of settings will have the same number of children on average.

## Tracking change over time

When comparing prices over time, we have only included local authorities where we have data for both 2018 and 2019. 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 2018 data after the survey deadline for the year, but 2019 data within the deadline: in these cases, we have included the data in this year's calculations although they do not appear in the 2018 survey. This approach produces slightly different results to comparing regional weighted prices from the 2018 survey to regional weighted prices in the 2019 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.

---

<sup>7</sup> Mid-2018 Population Estimates for UK, England and Wales, Scotland and Northern Ireland