
Holiday Childcare Survey 2022

Ellen Broomé, Lisa Kunwar Deer, Sam Shorto



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About this report

This report is the seventeenth annual Holiday Childcare Survey. It is based on surveys from local authorities in England, Scotland and Wales, which were returned to Coram Family and Childcare between April and June 2022. It provides detail on the cost (Section 1) and availability (Section 2) of childcare in Britain for children aged 4-14 years during the 13 weeks of school holiday per year. It compares data across the nations of Britain - England, Scotland and Wales; across regions in England; across the two main types of holiday childcare provider – ‘private, voluntary and independent’ (PVI) and the public sector; and compares data changes since last year (2021). There is also a section this year (Section 3) which explores how local authorities across Britain assess the extent of the impact of Covid-19 pandemic on the cost and availability of holiday childcare, since March 2020.

The provision of childcare covered in this report includes holiday clubs registered with an official regulator (Ofsted in England, Care Inspectorate in Scotland, and Care Inspectorate Wales), managed by the PVI sector 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.

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 PVI 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 1 on page 12)
- ▶ Annual leave to spend time with their children, either at home or going on holiday. Some parents may do ‘shift parenting’, where each uses their annual leave at different times. In couple families, this can mean that families do not have time off together.
- ▶ Informal care from grandparents, other relatives or friends.
- ▶ Term-time only working arrangements – these can be requested as a flexible working option, but in practice are rare outside the education sector.

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.

In addition to the Holiday Childcare Survey we also produce the Childcare Survey, which is published annually in the spring and covers early years and after school childcare. Previous reports are available from our website www.familyandchildcaretrust.org

Summary

Children and families across Britain need access to good quality, affordable holiday childcare for school age children. This provides the basis for parents to work or study and gives children the opportunity to socialise and have fun with other children. Most working parents do not have enough annual leave to cover the 13 weeks of school holidays across the year, so they will need to make alternative childcare arrangements during these periods.

The financial burden of holiday childcare is challenging for many families, but particularly those who are on low incomes. As we continue to recover from the Covid-19 pandemic, and in the context of record levels of inflation and cost of living pressures, it is more vital than ever that the importance of holiday childcare is recognised. It is a social and economic resource for the country, providing employers with a reliable workforce and making sure that children are safe, well fed and taking part in positive and fun activities during the break from school.

This year's holiday childcare survey highlights variations in price rises and availability of holiday childcare both between nations and between the regions of England.

Holiday childcare prices

Table 1 - 2022 holiday childcare prices for England, Scotland and Wales, with percentage change from 2021.

Nation	Price of holiday childcare per week 2022	% change from 2021
Great Britain	£147.70	5%
England	£148.09	4%
Scotland	£142.68	7%
Wales	£147.21	8%

- ▶ The average price of holiday childcare is £148 per week in Britain. This is a 5 per cent rise since 2021.
- ▶ Price increases are higher in Scotland (7 per cent)¹ and Wales (8 per cent) than in England (4 per cent).
- ▶ There are significant regional variations in the weekly price of holiday childcare within England with the highest costs in London and the South East and the lowest in the West Midlands and North East.
- ▶ Parents pay more for childcare during the holidays than during term time. In Britain holiday childcare costs are 2.2 times more per week than an after school club, that is £148 per week compared to £67.
- ▶ A family will pay nearly £890 for six weeks of holiday childcare for a school age child, which is £490 more than they would be paying for six weeks of term time childcare before and after school.

¹ We are advising caution on provider price data for Scotland due to a relatively low response rate to this question on the survey, and the inclusion of a number of high price provisions in one specific area of the country; this pushed the average price up more than would be expected had there been a higher number of data points.

Impact of the Covid-19 pandemic on holiday childcare prices

- ▶ Forty-two per cent of local authorities across Britain said that the pandemic had caused an increase in prices. This was reported differently across nations with 47 per cent of local authorities in England reporting an increase in costs followed by Wales (37 per cent) and Scotland (19 per cent).
- ▶ Comments from local authorities on the impact of the pandemic indicate that there has been a decrease in sustainability of settings due to cost pressures for the sector, and a lower demand for places due to a change in work patterns for some families.

Is there enough holiday childcare?

England

- ▶ England has seen an overall decrease in sufficiency of holiday childcare 'in all areas', with local authorities reporting decreases in the majority of categories, the most prominent being for disabled children (-10%) and parents working full time (-6 per cent).
- ▶ Only 27 per cent of local authorities have enough holiday childcare for parents working full time.
- ▶ The lowest levels are for disabled children, with only 7 per cent of local authorities reporting enough holiday childcare.

Scotland

- ▶ Scotland has seen an overall increase in sufficiency of holiday childcare 'in all areas', but from a low baseline and with substantial gaps in data. Local authorities here report an increase in the majority of categories, the highest being for 12-14 year olds (+11 per cent).
- ▶ Only 12 per cent of local authorities have enough holiday childcare for working parents.
- ▶ The lowest levels are for parents working atypical hours, with only 4 per cent of local authorities reporting enough holiday childcare.

Wales

- ▶ Wales has reported overall stability in sufficiency of holiday childcare 'in all areas', with local authorities reporting no change in the majority of categories.
- ▶ Only 11 per cent of local authorities have enough holiday childcare for working parents.
- ▶ The lowest levels are for disabled children, parents working atypical hours, children in rural areas and 12-14 year olds where no local authorities report having enough childcare for these groups.

Thirty per cent of local authorities across Britain reported a decrease in the number of PVI holiday childcare providers since last year, compared to 12 per cent reporting a decrease in public sector providers.

Impact of the Covid-19 pandemic on the availability of childcare

- ▶ Local authorities in England (33 per cent) were most likely to report a decrease in PVI providers, with the biggest decreases reported by local authorities in the West Midlands (57 per cent) and in Yorkshire and Humberside (50 per cent).
- ▶ Comments from local authorities on the impact of the pandemic indicate that there has been a decrease in the availability of holiday childcare. This has been due to staff shortages and difficulties in recruitment and retention, which particularly affected settings in rural areas and places for children with SEN and disabilities.

Areas for action

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

- ▶ Reform Universal Credit so it does not lock parents out of work – by increasing the maximum amount of childcare costs paid under Universal Credit and guaranteeing support for upfront childcare costs.
- ▶ Increase support for Family Information Services to provide good quality holiday childcare information and broker access to local provision that meets families' needs.
- ▶ Expand provision of the Holiday Activities and Food programme to improve access to affordable, high quality childcare for all children who need it.
- ▶ Support local authorities to ensure they have a comprehensive overview of the cost and availability of holiday childcare in their area to identify and plug gaps in provision.

Section 1 – Holiday childcare prices

This section describes the typical prices paid by parents for holiday childcare, and discusses how these have changed in the last year and how they vary across Britain. Where local authorities have quoted their average or lowest weekly holiday childcare costs as zero or very low, these figures have been excluded. Very low cost provision is predominantly for a small cohort of children who meet eligibility criteria. Including this data would prevent us from achieving our aim to present a calculation and analysis of holiday childcare prices for the majority of families who are not eligible for these subsidies.

A: Prices for holiday childcare

Overall, parents in Britain now pay an average of £148 per week for holiday childcare. Prices in Scotland (£143)² are lower than in England (£148) and Wales (£147).

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

Nation/region	Price of holiday childcare per week
Great Britain	£147.70
England	£148.09
Scotland	£142.68
Wales	£147.21
East of England	£138.52
East Midlands	£149.83
London, Inner	£160.56
London, Outer	£157.02
North East	£137.48
North West	£137.77
South East	£157.25
South West	£149.80
West Midlands	£134.83
Yorkshire and Humberside	£150.38

English regional differences:

- ▶ There is significant variation in holiday childcare prices across the English regions, ranging from £135 in the West Midlands to £161 in inner London; a price difference of £26 per week.
- ▶ The average cost for childcare in London (inner and outer) (£159), is 7.5 per cent higher than the average cost in Britain (£148).
- ▶ These variations highlight the postcode lottery that families face in finding affordable holiday childcare in their area.

² We are advising caution on provider price data for Scotland due to a relatively low response rate to this question on the survey, and the inclusion of a number of high price provisions in one specific area of the country; this pushed the average price up more than would be expected had there been a higher number of data points.

B. Price changes for holiday childcare

In Britain, prices for holiday childcare have risen by 5 per cent since 2021³. This is a large increase compared to previous years, and likely reflects cost pressures on provision since the Covid-19 pandemic including increased staff turnover and record inflation levels, which, it is reasonable to suggest, are reflected in prices.

Holiday childcare price increases are higher in Scotland (7 per cent rise) and Wales (8 per cent rise) than in England (4 per cent rise). However, Scotland's price data needs to be read with caution. There was a relatively low response rate to this question on the survey, and the inclusion of a number of high price provisions in one specific area of the country; this pushed the average price up more than would be expected had there been a higher number of data points. The 8 per cent increase in holiday childcare in Wales can reasonably be attributed to the nation having the highest proportion of provision in Britain (97 per cent) delivered by the PVI sector, which has been significantly affected by cost pressures since the pandemic. For more detail on this see section D 'difference in holiday childcare prices between public and PVI sector provision'.

Table 3 - Price changes in holiday childcare from 2021, by nation and region, weighted

Nation/region	% difference in price from 2021
Great Britain	5%
England	4%
Scotland	7%
Wales	8%
East of England	-4%
East Midlands	5%
London, Inner	6%
London, Outer	9%
North East	0%
North West	0%
South East	10%
South West	3%
West Midlands	4%
Yorkshire and Humberside	5%

There is some notable variation in price changes for holiday childcare across the English regions, with high price rises in outer London and the South East, stability in the North East and West, and a decrease in the East of England. This variation reflects the volatility in the childcare market as the sector continues to recover from the impact of the pandemic, and reflects current economic and workforce pressures.

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. This puts into sharp focus the role of local authorities in providing good quality holiday childcare information, and brokering access to provision that meets the needs of their families.

³ The calculation of price changes from year to year excludes price data from local authorities where the change is greater than 50%, as this suggests an error in the data for the current or previous year. This is a more accurate calculation than if it was based simply on the difference between the overall figures for both years.

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.

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 Britain, the most expensive holiday childcare is 62 per cent above the national average and the least expensive is 36 per cent below. This is mostly accounted for by the wide variation in England (+ 66 per cent and – 37 per cent).

Table 4 - Highest and lowest prices of holiday childcare per week as a percentage above or below average prices, weighted

Nation/region	Most expensive	Least expensive
Great Britain	62%	-36%
England	66%	-37%
Scotland	19%	-28%
Wales	37%	-34%
East of England	51%	-27%
East Midlands	64%	-49%
London, Inner	92%	-44%
London, Outer	122%	-39%
North East	40%	-33%
North West	61%	-37%
South East	54%	-31%
South West	53%	-37%
West Midlands	71%	-48%
Yorkshire and Humberside	50%	-36%

English regional differences:

- ▶ The highest price variations are found in Inner London, Outer London and East and West Midlands.
- ▶ For all regions, the most expensive prices are between 40 per cent and 122 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 ‘private, voluntary and independent’ (PVI) sector provision

The prices presented in this report take into account the different prices and availability of holiday clubs managed by the PVI sector compared with those managed by the public sector. Table 5 shows that, across Britain, holiday clubs provided by the PVI sector are an average of 21 per cent more expensive than those in the public sector. These price differences are in part due to subsidies and low cost access to premises and equipment that holiday clubs in the public sector may have, and also reflect PVI providers offering, in some cases, a more expensive range of activities. Some PVI providers will also make a profit.

PVI providers in England and Scotland are 21 per cent and 22 per cent more expensive respectively, than public sector providers. Scotland has a higher proportion (26 per cent) of public sector provision than England (11 per cent). This is in contrast to Wales where PVI prices are 35 per cent higher than the public sector and where 97 per cent of provision is delivered by the PVI.

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

Nation	Public sector	Private, voluntary and independent sector (PVI)	% difference	% of provision which is provided by the public sector
Great Britain	£123.46	£150.00	21%	12%
England	£123.87	£150.29	21%	11%
Scotland	£121.01	£147.33	22%	26%
Wales	£109.76	£147.77	35%	3%

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

E. Holiday childcare prices compared to term time prices

Parents who use holiday childcare are likely to use after school clubs during school terms. Whereas during term time they are only buying childcare for before and after the school day, during the holidays they need to buy childcare for the full day, meaning prices are considerably more expensive. **Table 6** shows that parents across Britain pay more than twice as much (2.22) during the school holidays as they do during term time. The greatest increase in childcare costs in the holidays can be found in Wales where it is 2.37 times more expensive than term time care.

It should be noted that this increase in payments for childcare during the school holidays impacts families the most during the summer. Our calculations shows that in Britain a family will pay nearly £890 for six weeks of holiday childcare for a school age child, which is £490 more than they would be paying for six weeks of term time childcare before and after school.

For many families, the jump in prices from term time to holiday childcare is difficult to manage. Parents using Tax Free Childcare accounts can ‘even out’ their spend across the year by paying into their account every month and then spending more in the summer, but parents on Universal Credit have to absorb the higher costs upfront, waiting for them to be repaid in subsequent benefits payments.

Table 6 - Holiday childcare prices compared to after school club prices

Nation	Holiday club per week	After school club per week	Holiday club price as a multiple of after school club price
Great Britain	£147.70	£66.52	2.22
England	£148.09	£66.75	2.22
Scotland	£142.68	£66.75	2.14
Wales	£147.21	£62.24	2.37

Box 1: 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 (Ofsted in England, Care Inspectorate in Scotland, and Care Inspectorate Wales). 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.

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.

Tax Free Childcare	Aged under 12 or under 17 if child has a disability	<p>Covers 20% of childcare costs up to a maximum of £2,000 per child per year or £4,000 for disabled children. Tax Free Childcare replaces the childcare vouchers scheme which has closed for new applications but can still be used by families who already have an account.</p> <p>Parents and their partner (if they have one) must earn at least the equivalent of 16 hours a week at the national minimum wage or national living wage.</p> <p>Can be received alongside the 30 hours extended entitlement for 3 to 4 year olds, but not Working Tax Credit or Universal Credit.</p> <p>Take up of Tax Free Childcare has been much lower than the Government forecast, meaning that many eligible parents are missing out on support.</p>
Universal Credit	Any age, with providers registered with an official regulator.	<p>Pays up to 85% of childcare costs up to £646 per month for one child or £1108 per month 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>

Section 2 – Is there 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:

Because these duties are slightly different in different parts of Britain, 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.

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.

B. Holiday childcare sufficiency in England

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. However, as shown in **table 7**, for four categories of holiday childcare, local authorities were most likely to report ‘data not held or cannot tell’ - ‘children in rural areas’ (50 per cent); parents working atypical hours (48 per cent); 12-14 year olds (46 per cent) and disabled children (45 per cent).

Level of sufficiency ‘in all areas’ across the seven categories of holiday childcare is variable, with the highest proportion of local authorities (30%) reporting sufficiency for 8-11 year olds, and the lowest (7 per cent) for disabled children.

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

	Yes: in all areas	Yes: in some areas	No	Data not held or cannot tell
4-7 year olds	29%	41%	3%	27%
8-11 year olds	30%	35%	4%	31%
12-14 year olds	14%	30%	9%	46%
Disabled children	7%	32%	17%	45%
Parents working full time	27%	36%	5%	33%
Parents working atypical hours	10%	26%	16%	48%
Children in rural areas	15%	31%	4%	50%

- ▶ Local authorities (30 per cent) were most likely to report sufficient holiday childcare ‘in all areas’ for 8-11 year olds, followed by 4-7 year olds (29 per cent) and ‘parents working full time’ (27 per cent).
- ▶ Low proportions of local authorities reported sufficient holiday childcare ‘in all areas’ for disabled children (7 per cent); parents working atypical hours (10 per cent); 12-14 year olds (14 per cent); and children in rural areas (15 per cent). These are also the categories for which local authorities reported having low levels of data.

As shown in **table 8**, over the past year there has been a decrease in the proportion of local authorities reporting sufficiency ‘in all areas’ for the majority of categories of holiday childcare (disabled children; parents working full time; parents working atypical hours; and 4-7 year olds).

Table 8 - Sufficiency of holiday childcare in England, by local authority, 2021 and 2022

	Yes: in all areas (2022)	Yes: in all areas (2021)	Percentage point change, 2021-2022
4-7 year olds	29%	31%	-2%
8-11 year olds	30%	28%	2%
12-14 year olds	14%	13%	1%
Disabled children	7%	16%	-10%
Parents working full time	27%	33%	-6%
Parents working atypical hours	10%	15%	-5%
Children in rural areas	15%	12%	3%

- ▶ This decrease is most marked for disabled children where there are 10 per cent fewer local authorities reporting enough childcare ‘in all areas’ and for ‘parents working full time’ where there is a 6 per cent decrease.
- ▶ There are also decreases in sufficiency of childcare for parents working atypical hours (-5 per cent); and 4-7 year olds (-2 per cent).

Over the same period there has been a slight increase in the proportion of local authorities reporting holiday childcare sufficiency ‘in all areas’ for children in rural areas (3 per cent increase), 8-11 year olds (2 per cent increase) and 12-14 year olds (1 per cent increase).

As shown in **Table 9**, shortages of holiday childcare vary widely across the country. This means that parents in some areas will find it more difficult to find childcare than in others.

Table 9 - Proportion of local authorities reporting sufficient holiday childcare ‘in all areas’ in England, regional

	4-7 year olds	8-11 year olds	12-14 year olds	Disabled children	Parents working full time	Parents working atypical hours	Children in rural areas
East of England	0%	0%	0%	0%	0%	0%	0%
East Midlands	14%	14%	0%	0%	14%	0%	0%
London, Inner	9%	27%	9%	9%	27%	18%	0%
London, Outer	25%	31%	19%	0%	19%	6%	0%
North East	33%	22%	22%	13%	33%	11%	0%
North West	45%	45%	30%	10%	40%	16%	27%
South East	31%	38%	6%	6%	31%	0%	9%
South West	30%	20%	0%	0%	20%	0%	0%
West Midlands	33%	22%	22%	22%	22%	22%	20%
Yorkshire and Humber	46%	46%	17%	8%	38%	23%	50%

- ▶ Yorkshire and Humber is the region with the highest proportion of local authorities reporting enough holiday childcare ‘in all areas’ for 4 to 7 year olds (46 per cent), 8-11 year olds (46 per cent) and children in rural areas (50 per cent).
- ▶ The North West has the highest proportion of local authorities reporting enough holiday childcare for parents working full time (40 per cent), and for 12-14 year olds (30 per cent).
- ▶ The proportion of local authorities across all regions reporting sufficient holiday childcare for disabled children is low, ranging from 0 per cent in the East of England, East Midlands, outer London and the South West to 22 per cent in the West Midlands.
- ▶ Parents working atypical hours are also not well served with holiday childcare with 0 per cent to 23 per cent of local authorities across the regions reporting sufficiency ‘in all areas’.
- ▶ Children in rural areas are also missing out on access to enough childcare with local authorities in only four regions reporting sufficiency ‘in all areas’: Yorkshire and Humber (50 per cent), North West (27 per cent), West Midlands (20 per cent) and the South East (9 per cent).
- ▶ None of the East of England’s local authorities have reported sufficiency of holiday childcare ‘in all areas’, for any of the seven categories.

C. Holiday childcare sufficiency in Scotland

In Scotland, local authorities have a statutory duty to consult with parents on the delivery of early education and childcare, and to publish a plan based on the results of their consultation. **Table 10** shows that the majority of local authorities in Scotland did not hold the data that allowed them to answer whether there was enough childcare available locally. Across all the categories of holiday childcare 50 to 77 percent of local authorities reported 'data not held or cannot tell'.

Analysis of the data that was made available shows that the level of sufficiency 'in all areas' across the seven categories of holiday childcare is variable. The highest proportion of local authorities (15 per cent) report sufficiency for 8-11 and 12-14 year olds, and the lowest (4 per cent) for parent working atypical hours.

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

	Yes: in all areas	Yes: in some areas	No	Data not held or cannot tell
4-7 year olds	12%	31%	4%	54%
8-11 year olds	15%	27%	8%	50%
12-14 year olds	15%	19%	12%	54%
Disabled children	8%	15%	8%	69%
Parents working full time	12%	19%	8%	62%
Parents working atypical hours	4%	8%	12%	77%
Children in rural areas	14%	23%	5%	59%

Table 11 shows that, over the past year, there has been an increase in the proportion of local authorities which say they have enough holiday childcare in most categories, most notably for 12-14 year olds (11 per cent increase). There has been a small decrease in the proportion of local authorities reporting sufficient childcare 'in all areas' for 4-7 year olds (-1 per cent) and children in rural areas (-2 per cent). This data should be treated with caution given the high proportion of local authorities not holding data.

Table 11 - Sufficiency of holiday childcare in Scotland, by local authority, 2021 and 2022

	Yes: in all areas (2022)	Yes: in all areas (2021)	Percentage point change, 2021-2022
4-7 year olds	12%	13%	-1%
8-11 year olds	15%	8%	7%
12-14 year olds	15%	4%	11%
Disabled children	8%	4%	3%
Parents working full time	12%	8%	3%
Parents working atypical hours	4%	4%	0%
Children in rural areas	14%	15%	-2%

D. Holiday childcare sufficiency in Wales

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. As shown in table 12, a low proportion of Welsh local authorities have reported 'data not held or cannot tell' compared to their counterparts in England and Wales, so have more information on which to judge holiday childcare sufficiency. Analysis of the data shows low levels of holiday childcare sufficiency 'in all areas' across all categories.

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

	Yes: in all areas (2022)	Yes: in some areas (2021)	No	Data not held or cannot tell
4-7 year olds	5%	53%	26%	16%
8-11 year olds	5%	53%	26%	16%
12-14 year olds	0%	32%	53%	16%
Disabled children	0%	47%	37%	16%
Parents working full time	11%	42%	26%	21%
Parents working atypical hours	0%	16%	68%	16%
Children in rural areas	0%	50%	36%	14%

- ▶ Local authorities report zero percent sufficiency 'in all areas' for disabled children, parents working atypical hours, children in rural areas and 12-14 year olds.
- ▶ Local authorities report the highest level of sufficiency of holiday childcare for parents working full time, although this is only 11 per cent, followed by 4-7 and 8-11 year olds at 5 per cent.

Table 13 shows that the number of local authorities reporting sufficient holiday childcare provision 'in all areas' has remained stable for 4-7 and 8-11 year olds, disabled children and children in rural areas.

There has been a decrease in holiday childcare sufficiency 'in all areas' for 12-14 year olds and parents working atypical hours (-5 per cent), and an increase for parents working full time (5 per cent).

Table 13 - Sufficiency of holiday childcare in Wales, by local authority, 2021 and 2022

	Yes: in all areas (2021)	Yes: in all areas (2022)	Percentage point change, 2021-2022
4-7 year olds	5%	5%	0%
8-11 year olds	5%	5%	0%
12-14 year olds	0%	5%	-5%
Disabled children	0%	0%	0%
Parents working full time	11%	5%	5%
Parents working atypical hours	0%	5%	-5%
Children in rural areas	0%	0%	0%

E. Number of childcare providers and places

Table 14 illustrates that local authorities are reporting overall stability in the number of holiday childcare providers in the public sector. Forty-four per cent reported that the number has stayed the same since 2021, with 19 per cent reporting an increase and 12 per cent a decrease. However, in relation to the number of private, voluntary and independent (PVI) providers there is less stability with 30 per cent of local authorities reporting a decrease, 29 per cent an increase and 25 per cent no change. For families that rely on holiday childcare, the closure of settings in some areas could cause significant problems for families, particularly if it means longer travel time, provision that their child does not know or enjoy, or that there is more competition for a smaller number of places.

Table 14 - Proportion of local authorities reporting a change in number of holiday childcare providers in the public and PVI sectors since 2021 - Great Britain

	Public sector	PVI sector
Increased	19%	29%
Stayed the same	44%	25%
Decreased	12%	30%
Don't know	19%	16%
No providers in either year	7%	1%

Table 15 shows that local authorities in Britain were most likely to report an increase in childcare places (27 per cent) followed by a decrease (21 per cent) and stability (19 per cent). Compared to this, local authorities in England were more likely to report an increase (31 per cent), those in Scotland stability (27 per cent) and in Wales a decrease (37 per cent). Almost the majority of local authorities in Scotland (50 per cent) were not able to report on the change in number of holiday childcare places over the year.

Table 15 – Proportion of local authorities reporting a change in number of holiday childcare places since 2021 – nations

	Great Britain	England	Scotland	Wales
Increased	27%	31%	12%	21%
Same as 2021	19%	16%	27%	26%
Decreased	21%	21%	12%	37%
Data not held or cannot tell	33%	33%	50%	16%

F. Holiday childcare opening times and holiday periods

We asked local authorities about the opening times of holiday clubs in their area – how long they are open for each day and in which holiday period.

Families may need holiday childcare to be available throughout the typical working day. **Table 16** shows the proportion of holiday clubs which are open for short, medium, and long days in the holidays.

Table 16 - Proportion of childcare settings open for short, long or medium days in the holidays, by nation

	Nation	Short day – up to 7 hours	Medium day – 7 to 9 hours	Long day – more than 9 hours	Unknown
Public sector	Great Britain	13%	18%	24%	40%
	England	9%	14%	27%	49%
	Scotland	29%	35%	13%	0%
	Wales	44%	11%	11%	33%
Private and voluntary sector	Great Britain	10%	17%	42%	32%
	England	11%	15%	40%	35%
	Scotland	12%	42%	48%	12%
	Wales	7%	19%	69%	11%

- ▶ Across Britain, holiday clubs in the PVI sector are more likely to be open for long days than those in the public sector.
- ▶ Within the PVI sector, 69 per cent of settings are open for long days in Wales compared to 48 per cent in Scotland and 40 per cent in England.
- ▶ Within the public sector, 27 per cent of settings provide long day holiday childcare in England, compared to 13 per cent in Scotland and 11 per cent in Wales.
- ▶ There are gaps in data from local authorities in England and Wales in relation to opening times of public sector holiday childcare. They report that opening times are ‘unknown’ for 49 per cent and 33 per cent of settings respectively.
- ▶ This is the same for England in relation PVI holiday provision where they report that data is ‘unknown’ for 35% of settings.

Families may need holiday childcare for different school holidays throughout the year, from the long summer break to half terms and teacher training days⁴. **Table 17** shows that the availability of childcare varies significantly depending on the type of provider and holiday period.

⁴ Known as INSET days or In-Service days in different parts of Britain.

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

	Nation	Summer	Easter	Christmas	Half term	Teacher training days
Public sector	Great Britain	92%	87%	30%	72%	22%
	England	88%	82%	34%	76%	19%
	Scotland	100%	99%	19%	60%	27%
	Wales	100%	100%	56%	100%	33%
Private and voluntary sector	Great Britain	87%	78%	46%	75%	18%
	England	85%	78%	49%	74%	15%
	Scotland	94%	62%	16%	62%	60%
	Wales	99%	90%	31%	91%	21%

- ▶ In Britain 92 per cent of public sector holiday childcare is open in the summer holidays, compared to 87 per cent of PVI provision. Providers across the PVI (46 per cent) and public (30 per cent) sectors are least likely to be open during the Christmas holidays.
- ▶ Across the nations, there is very high levels of provision in the summer holidays in Wales by the public (100 per cent) and the PVI (99 per cent) sectors, and in Scotland in the public (100 per cent) and PVI (94 per cent) sectors. This is lower in England in the public (88 per cent) and PVI (85 per cent) sectors.
- ▶ Christmas holiday childcare is lowest in Scotland across public (19 per cent) and PVI (16 per cent) sectors.
- ▶ Teacher training days are least well catered for across both sectors in Britain. This 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.

Section 3 – Impact of the Covid-19 pandemic on holiday childcare across Britain

Our survey asked local authorities across Britain to assess the extent of the impact of Covid-19 on aspects of holiday childcare, since March 2020.

Table 18 shows that the greatest impact has been on the cost of childcare, with 42 per cent of local authorities reporting an increase. This is followed by a decrease in the number of holiday clubs in the PVI sector being reported by 28 per cent of local authorities, while the impact on the number of places in the sector is variable with 21 per cent reporting ‘no change’ 21 per cent an increase, and 20 per cent a decrease.

This resonates with findings in Section 1 (A&B) of the report which illustrates an overall increase in the cost of holiday childcare and Section 2 (E) which describes that local authorities are reporting a decrease in the number of holiday childcare providers in the PVI sector.

Table 18 - Impact of the COVID-19 pandemic on holiday childcare provision – Great Britain

	Increased	No change	Decreased	Data not held or cannot tell
Cost of holiday childcare	42%	23%	4%	32%
Number of holiday clubs - public sector	11%	49%	12%	28%
Number of holiday clubs - PVI	25%	23%	28%	24%
Number of holiday club places - public sector	7%	42%	8%	43%
Number of holiday club places - PVI	21%	21%	20%	38%
Overall holiday childcare sufficiency	13%	31%	12%	45%
Quality of holiday childcare	4%	38%	3%	56%

For other aspects of holiday childcare (number of public sector holiday clubs and places; overall sufficiency and quality of holiday childcare) local authorities were most likely to report ‘no change’, rather than an increase or decrease. However, the data on the impact of the pandemic on ‘overall childcare sufficiency’ and ‘quality of holiday childcare’ should be read with caution as a high proportion of local authorities, 45 per cent and 56 per cent respectively, report a data gap here.

Differences across nations, and across regions in England, in relation to local authority assessments of the impact of the pandemic on holiday childcare since March 2020, are as follows:

Cost of childcare:

- ▶ Local authorities in England (47 per cent) were most likely to report an increase in costs since the pandemic followed by Wales (37 per cent) and Scotland (19 per cent), who were most likely to report ‘no change’ in costs.
- ▶ Price increases due to the pandemic were reported by the highest proportions of local authorities in Yorkshire and Humberside (67 per cent), West Midlands (63 per cent), East Midland (57 per cent) and South East (53 per cent).

Number of PVI providers

- ▶ Local authorities in England (33 per cent) were most likely to report a decrease in the number of PVI providers. However, local authorities in Wales (35 per cent) and Scotland (40 per cent) were most likely to report 'no change'.
- ▶ Local authorities in the West Midlands (57 per cent) and Yorkshire and Humberside (50 per cent) were most likely to report decreases in the number of PVI providers, with outer London (53 per cent) and the East of England (50) per cent reporting increases.

Number of PVI places

- ▶ Local authorities in England (26 per cent) were most likely to report an increase in PVI holiday childcare places, with Wales (33 per cent) and Scotland (28 per cent) most likely to report 'no change'.
- ▶ Local authorities in outer London (60 per cent) and the South West (50 per cent) were most likely to report an increase in PVI holiday childcare places.

Number of public sector providers and places

- ▶ Local authorities in all nations of Britain were most likely to report 'no change' in relation to the impact of the pandemic on the number of public sector holiday childcare providers and places.
- ▶ However, local authorities in the West Midlands (57 per cent) were most likely to report a decrease in public sector providers, and in the South East (31 per cent) an increase in public sector holiday childcare places.

Holiday childcare sufficiency

- ▶ Local authorities in all nations of Britain were most likely to report 'no change' in relation to the impact of the pandemic on overall sufficiency of holiday childcare.
- ▶ However, local authorities in the East of England (30 per cent), South West (30 per cent) and the South East (25 per cent) were most likely to report an increase in overall sufficiency, while those in the West Midlands (44 per cent) were most likely to report a decrease.
- ▶ This data should be read with caution due to the high proportion of data gaps reported here.

Quality of holiday childcare

- ▶ Local authorities in all nations of Britain were most likely to report 'no change' in relation to the impact of the pandemic on the overall quality of holiday childcare.
- ▶ This data should be read with caution due to the high proportion of data gaps reported here.

How has holiday childcare has been impacted by the Covid-19 pandemic, since March 2020?

– Comments from local authorities.

Local authorities across Britain were asked to share their views on the extent to which holiday childcare has been impacted by the pandemic since March 2020. The following is an overview of the feedback made in comments from over ninety local authorities. These centred on impacts related to the demand, sustainability and availability of childcare:

Some providers are unsure if their holiday clubs are sustainable due to running costs and low numbers. This is a huge concern for us as a local authority, if more of the holiday clubs close this may have a huge impact on the families that are relying on these providers for out of school childcare.

(Local authority, North West)

Demand and sustainability

- ▶ Lower demand for holiday childcare due to parents being more able to work from home, and due to the increase in cost for childcare.
- ▶ Parents requesting more flexibility from providers in relation to hours and cost.
- ▶ Parents moving to childminders who may be able to offer more flexibility in provision.

Access to wrap around and holiday childcare has been significantly impacted by COVID-19. Responding to guidance from Public Health England and DfE have been a challenge for providers and with a combination of parental unemployment, increased home-working and concerns about infection, the demand for holiday childcare has significantly reduced.

(Local authority, West Midlands)

Availability

- ▶ Lower capacity/ reduced places in settings due to staff shortages.
- ▶ Higher staff turnover and subsequent difficulties in recruitment and retention; this is exacerbated for settings in rural areas.
- ▶ Children with SEN and disabilities are experiencing shortages in holiday childcare.
- ▶ The Holiday Activities and Food programme (HAF) in England has brought significant benefits to children.

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.

Data collection

This report is based on surveys sent to all Family Information Services at local authorities between April and June 2022. Respondents were able to fill in a form or reply online. After one month, we sent Freedom of Information requests to those local authorities which had not responded, with a request to return within the statutory deadline.

Local authorities who responded without the need for a Freedom of Information request were promised that individual responses would not be published, with only regional/national averages provided in the report. This is consistent with previous surveys, and we do it to encourage honest and accurate data reporting. When Freedom of Information requests are used, some local authorities automatically publish their own responses, so we cannot make the same promise. However, we do not report these Freedom of Information individual responses in this report, and nor do we say which responses were acquired through Freedom of Information requests.

Data sources

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

Where possible, we have kept questions consistent with previous versions of the survey to allow for tracking over time.

Response rates

We received responses from 83 per cent of local authorities in Britain. Response rates across the nations range from 82-87 per cent. Some local authorities did not give data for all questions, or gave data in a format that we could not use.

Data gaps and exclusions

Where local authorities have quoted their average or lowest weekly holiday childcare costs as zero or very low, these figures have been excluded. Very low cost provision is predominantly for a small cohort of children who meet eligibility criteria. Including this data would prevent us from achieving our aim to present a calculation and analysis of holiday childcare prices for the majority of families, who are not eligible for these subsidies (Section 1).

Where response rates for a question are particularly low and may have affected the reliability of the data, this is noted in the relevant section of the report. For this year's survey, data gaps have been noted in relation to a relatively low response rate to the survey question on price data from Scotland's local authorities (Section 1A&B).

The calculation of price changes from year to year (Section 1B) excludes price data from local authorities where the change is greater than 50%, as this suggests an error in the data for the current or previous year. This is a more accurate calculation than if was based simply on the difference between the overall figures for both years.

Weighting

In line with recent surveys, we have weighted cost data within regions and nations. This ensures that results from small local authorities 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 estimates⁵. 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.

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