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Holiday Childcare Survey 2025

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About this report

This report is the **20th annual Holiday Childcare Survey**. It is based on surveys of local authorities in England, Scotland and Wales, who responded to Coram Family and Childcare between April and June 2025. A total of 174 local authorities returned data, generating a response rate of 84%.

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

Questions on cost and sufficiency were revised and updated this year; further details can be found in the Introduction.

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

About Coram Family and Childcare

Coram Family and Childcare works to make the UK a better place for families, focussing on childcare and early years to make a difference to families’ lives now and in the long term. We are a leading voice on early education and childcare, carrying out research to aid understanding and drive change in national and local policy.



Executive summary

Holiday childcare is an essential part of the childcare picture, but one that is too often missing from conversations. Many parents rely on holiday childcare to start and stay in work and all children can benefit from the opportunity to have fun, socialise and be active during school breaks.

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

It is encouraging to see increasing recognition that childcare is essential for facilitating parental workplace participation, with the continued expansion of funded childcare in early years, support to develop wraparound childcare before and after school, and the introduction of free breakfast clubs. There is no longer an assumption that parents and employers are able to fit their work around the school day, or an expectation that they will do so. However, outside of school term time, the situation is very different. Holiday childcare remains the unspoken outlier of childcare policy and the gap that parents must bridge every school holiday.

Bridging that gap involves covering a cost that is challenging for many families but particularly those on low incomes. For childcare to cover the full summer holiday, families in Great Britain will pay £1,076 this year, per child. Parents on Universal Credit will have to find and pay the full amount in advance and wait a month to receive help through the childcare element (up to 85% of costs), as this is paid in arrears.

School holidays are also an important time for children. All children, but particularly those from disadvantaged backgrounds, can benefit from the opportunities that good quality holiday childcare provides so we were delighted when funding for the holiday activities and food (HAF) programme was extended to the end of March 2026. HAF funds local authorities to provide a range of holiday childcare, activities and food for children in receipt of benefits-related free school meals.

The year’s extension was to cover the period while the Spending Review was carried out. However, the Spending Review is now complete and there has been no news on the future of HAF. It is vital to include HAF in longer-term spending plans to give local authorities, HAF providers and parents the clarity and security needed, and to ensure disadvantaged children are not left without this valuable provision next year.

As with all forms of childcare, cost is not the only consideration. Finding a childcare place during the holidays can be difficult, especially for children who have special educational needs or disabilities (SEND) or additional learning needs (ALN). Through this year’s new, more detailed questions, our survey finds that many local authorities simply do not have the information needed to confirm whether they have enough holiday childcare for children in their area. This lack of detail presents serious challenges for planning, organising and delivering sufficient holiday childcare provision.

And true sufficiency is not solely about a place. For that place to be meaningful, it must be open at the times, and during the holiday periods, that parents need. However, our survey found that providers are less likely to be open during Christmas holidays and half term than during the summer holidays.


This year is the first time we have asked about childminders in the Holiday Childcare Survey, and it has given insight into the important role childminders play in ensuring parents have the holiday childcare they need, when they need it.

The providers who are most likely to be open all year round are childminders. Childminders are also much more likely to be open for a full day than public or PVI holiday clubs, in all nations other than Wales. Although this extended offer does come at a greater cost to parents, with childminders costing £55 more per week than a holiday club, it demonstrates that the well-known issue of the decline in childminders numbers is of considerable consequence for holiday childcare, as well as during term time.

Holiday childcare prices

- The average price of a holiday childcare club is £179 per week in Great Britain, up 4% since 2024.
- Price increases are highest in Wales again this year (6%), though not as steep as last year’s increase (15%), followed by England (4%) and Scotland (3%).
- There is significant variation in holiday childcare club prices across the English regions, ranging from £196 in the South East to £162 in the North West. The highest regional increase is in Yorkshire and the Humber (13%), which also saw the highest increase last year.
- This year we added new questions, to ask about the cost of holiday childcare with childminders. The average price of a week with a childminder during the holidays is £234 in Great Britain. This cost is fairly similar across the nations, being £233 per in England, £238 in Scotland and £249 in Wales.
- Parents and carers pay much more for childcare during the holidays than during term time. In Great Britain, a week at a holiday childcare club costs over two-and-a-half times more than an after-school club, £179 per week compared to £66.
- A family will pay £1,076 for six weeks of holiday childcare club for a school-age child, which is £677 more than they would pay for six weeks of term-time childcare after school.

Table 1 – Price of holiday childcare delivered by a public or private, voluntary and independent (PVI) provider, per week, by nation

	Price of holiday childcare per week	% change from 2024
Great Britain	£179.33	+4%
England	£178.47	+4%
Scotland	£167.87	+3%
Wales	£209.60	+6%



1

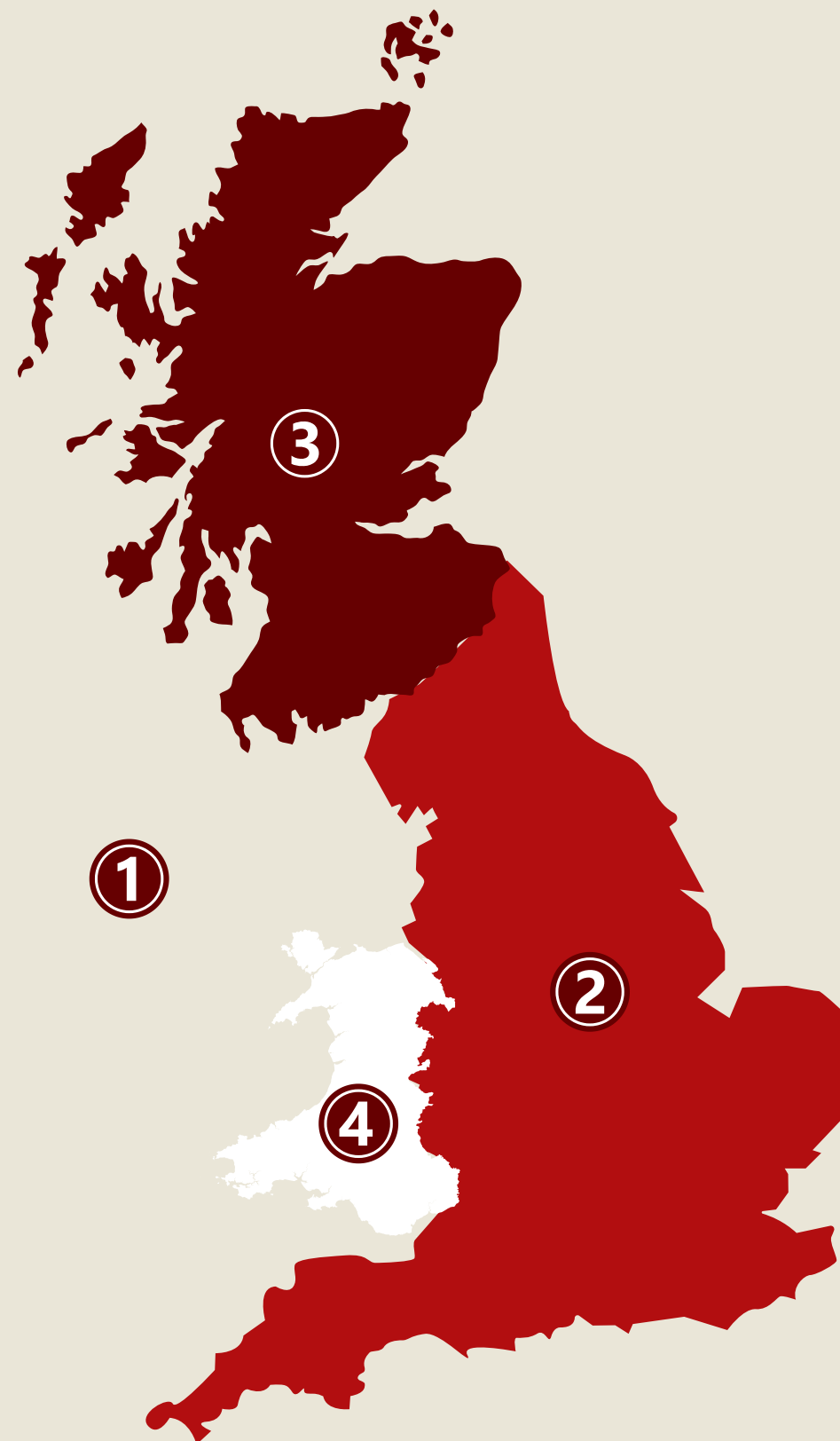
Great Britain

- Holiday childcare clubs cost £179 per week on average, a 4% increase since last year.
- A week of holiday childcare with a childminder costs an average of £234.
- A week at a holiday club costs two-and-a-half times more than a week at an after-school club (£179 per week compared to £66).
- Six weeks at a holiday childcare club costs £1,076 on average - £677 more than six weeks of childcare in an after-school club during term time.

2

England

- Average weekly holiday childcare club prices range from £196 in the South East to £162 in the North West.
- A week of holiday childcare with a childminder costs £233 on average.
- Four- to seven-year-olds experience the highest levels of holiday childcare sufficiency.
- Holiday childcare sufficiency is lowest for the same categories of children and families seen in previous years - older children, parents who work atypical hours and children with SEND.
- Only 9% of local authorities report enough places for at least three quarters of children with SEND.
- 78% of holiday clubs in England are open for a full day, the lowest level in Great Britain.



3

Scotland

- The average price of a holiday club in Scotland is £167.87 per week, the lowest price in Great Britain.
- Holiday childcare with a childminder costs £238 per week on average.
- No local authorities say they have enough holiday childcare for parents who work atypical hours or children who live in rural areas.
- 92% of childcare clubs and 96% of childminders are open during the summer holiday.
- Only 9% of childcare clubs and 22% of childminders are open during the Christmas holiday, the lowest level in Great Britain.

4

Wales

- Wales saw the greatest holiday club price increases, up 6% since 2024.
- A week of holiday childcare with a childminder costs £249 on average.
- Four- to seven-year-olds experience the highest levels of holiday childcare sufficiency.
- Wales has the highest percentage of providers open over summer, Easter, half term and teacher training days in Great Britain, for both holiday clubs and childminders.

Is there enough holiday childcare?

- Our sufficiency questions changed this year, shifting the focus from geographical coverage within a local authority to the number of children in an area, and gathering more detailed data on levels of provision. New categories were also added, to ask about availability of holiday childcare with childminders.
- Local authorities across England, Scotland and Wales were asked to report on the percentage of children for whom they have sufficient childcare across a range of categories in terms of: '100%', '75% to 99%', '50% to 74%', '25% to 49%', 'less than 24%' or 'Data not held or cannot tell'.
- Across Great Britain, just over half of holiday clubs and nearly 8 in 10 childminders are open for a full day (8am to 6pm).
- The highest level of provision is over the summer holiday, with 87% of holiday clubs and 94% of childminders open during this period across Great Britain. The lowest level of holiday club provision is over teacher training days, with only 44% of clubs in Great Britain open during these days, followed by the Christmas holiday (54%). However, this is not the case for childminders, with 94% covering teacher training days and 78% covering the Christmas break.

England

- Many local authorities do not have a clear picture of whether they have enough holiday childcare for the children in their area, with half or more responding 'data not held or cannot tell' for all questions. Whilst higher levels of uncertainty are perhaps an inevitable trade-off with asking more detailed questions, this is not an unusual response. Previous surveys have frequently found that local authorities have much less information about the availability of holiday childcare than for childcare in early years.

- The highest levels of sufficiency reported in England are for four- to seven-year-olds, with 37% of local authorities reporting enough places for at least three quarters of children, followed by 8- to 11-year-olds (31%) and parents working full time (29%).
- Despite looking at sufficiency in a different way, the categories of children for whom sufficiency is lowest follow the same pattern as previous years with older children, parents working atypical hours and children with special educational needs and disabilities least well-served. Whilst the low percentages for the first two of these categories is significantly driven by the high numbers unable to answer the question (around 7 in 10), the same is less true for children with SEND. Whilst uncertainty was still reasonably high (6 in 10) for children with SEND, local authorities were more likely to have the information needed to answer this question, but no more likely to have sufficiency.
- Provision for children with SEND is very low, with only 9% of local authorities reporting enough places for at least three quarters of children.
- Several regions in England had no local authorities reporting enough places for parents who work atypical hours.
- Yorkshire and the Humber region has the highest levels of holiday childcare sufficiency in five out of seven categories, leading the way in all but older children (where East of England reported the most provision) and children with SEND (where the South East reported the most provision).
- England has the lowest percentage of holiday clubs open for a full day (78%) in Great Britain.

Scotland

- The majority of Scottish local authorities do not hold the data needed to assess their holiday childcare sufficiency, with at least 7 in 10 responding 'data not held or cannot tell' for all categories of holiday childcare.

- No local authorities report having enough holiday childcare for parents working atypical hours or children in rural areas.
- Scotland has a high percentage of providers open over the summer holiday (92% of holiday clubs and 96% of childminders), but the lowest percentage of providers open over the Christmas holiday in Great Britain, with only 9% of holiday clubs and 22% of childminders open during this time.

Wales

- Local authorities in Wales have a significantly better understanding of their overall local holiday childcare sufficiency than England and Scotland.

- Local authorities in Wales report the highest level of sufficiency for four- to seven-year-olds, with 47% reporting enough places for at least three quarters of children, followed by 8- to 11-year-olds (42%) and parents working full time (37%). However, it is important to note that all of these responses fell in the '75% to 99%' category, with no local authorities reporting 100% sufficiency in any category except parents working full time (16%).
- Wales has the highest percentage of providers open over summer, Easter, half term and teacher training days in Great Britain, for both holiday clubs and childminders.

Areas for action

Coram Family and Childcare calls on Government to:

- Maintain the holiday activities and food (HAF) programme after March 2026 to ensure disadvantaged children have affordable, high-quality childcare during school holidays.
- Support local authorities to increase data collection on holiday childcare provision in order to plan sufficient, year-round childcare for all children.
- Expand the scope of the early years workforce plans in the 'Giving every child the best start in life' strategy to include the school-aged childcare workforce.
- Allow upfront payments of the childcare element of Universal Credit during school holidays to alleviate the concentration of costs.
- Provide additional funding, training and support to holiday childcare providers to meet the needs of children with SEND.
- Encourage increased holiday childcare provision for older children and for parents who work atypical hours by supporting providers and local authorities with information on models of delivery and targeted funding.
- Take action to stem the decline of childminders and retain those currently in the sector, to ensure holiday childcare is available to fit a range of parental working patterns.



Introduction

This report looks at the prices of childcare and the availability of childcare in Great Britain for children aged 4 to 14 years during the 13 weeks of school holiday per year. Data is broken down by nation and region (in England) and by types of holiday childcare provider. For the first time, this breakdown includes childminders as well as private, voluntary and independent (PVI) providers and the public sector. The report looks at price changes since last year (2024) for PVI and public sector providers.

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

The report looks at the price of childcare before the support to help pay for childcare (Tax-Free Childcare or Universal Credit) is taken into account, as this allows us to track price changes over time and recognises that different families will also be eligible for different levels of support depending on their circumstances.

In line with changes to our annual Childcare Survey, it was decided to update the long-standing questions on holiday childcare sufficiency. Previous surveys asked local authorities to report whether they had sufficient holiday childcare in terms of 'Yes: in all areas', 'Yes: in some areas', 'No' or 'Data not held or cannot tell'. This year local authorities were asked to report on the percentage of children for whom they have sufficient holiday childcare, either '100%', '75% to 99%', '50% to 74%', '25 to 49%', 'For 24% or less' or 'Data not held or cannot tell'. This changes the focus from geographical locations ('areas') within a local authority, to children. The change takes into account feedback from local authorities on the way in which sufficiency information is collected and assessed in practice, and feedback that the space between the responses 'Yes: in all areas' and 'No', covered by only one option of 'Yes: in some areas', was very wide. The new question was developed with local authority input.

Looking at provision as a percentage of children gives a more accurate picture of current circumstances. Due to the difference in this year's questions, it is not possible to make direct comparisons with last year's sufficiency results.

This year, we have included questions about holiday childcare places available with childminders, who are an important part of the holiday childcare sector.

Choices about holiday childcare

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

- Formal holiday childcare provided by the local authority, a PVI provider or a childminder.
- 'Holiday camp' type activities such as football or drama – these typically do not run for the whole holiday but may cover a few weeks and are not required to register with a regulator. If they are not registered with an official regulator, parents cannot use childcare subsidies 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.



Glossary 1 – Terms used in this report

Holiday childcare – 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.

School-age – between the ages of 4 and 16. Children reach compulsory school age the term after their 5th birthday but many start school when they are 4.

Childcare sufficiency – the quality of having enough childcare places to meet the needs of children and families. If a local authority has enough childcare for all its children, then it is said to have childcare sufficiency.

Private, voluntary and independent (PVI) holiday clubs – holiday clubs not run by local authorities or schools. They may be run by private companies, independent schools or voluntary organisations such as charities.

Public sector holiday clubs – holiday clubs run by the local authority, also known as ‘maintained’ holiday clubs.

Childminder – a registered child carer who works with children for more than two hours a day in domestic premises (usually their own home) or, in England, in approved non-domestic premises (such as a community or village hall).

SEND – stands for ‘special educational needs and disabilities’ and is widely used in England but less so in Scotland and Wales. SEND is an umbrella term that covers a wide range of additional needs and disabilities such as autism, learning disabilities, cerebral palsy and epilepsy.

ALN – stands for ‘additional learning needs’ and is widely used in Wales. Like SEND, ALN is an umbrella term that covers a wide range of additional needs and disabilities.

Glossary 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 (Ofsted in England, Care Inspectorate in Scotland, and Care Inspectorate Wales). Many activity-based providers, such as sports or drama clubs that run for a few weeks in the summer, as well as childcare providers caring only for older children, are not required to register.

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



Box 1		
Childcare support	Age of child	Details
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.</p> <p>Can only be used with ‘approved childcare’ [1].</p> <p>Tax-Free Childcare replaces the childcare vouchers scheme that has closed for new applications but can still be used by families who registered on or before 4 October 2018.</p> <p>Parents and their partner (if they have one) must work at least the equivalent of 16 hours a week at the national minimum wage or national living wage.</p> <p>Cannot be used alongside 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 childcare element	No minimum age and up to 16, or 17 if child has a disability	<p>Pays up to 85% of childcare costs up to £1,031.88 per month for one child or £1,768.94 per month for two or more children.</p> <p>Universal Credit cannot be claimed alongside Tax-Free Childcare. Parents must have an income below a certain level – this varies based on families’ circumstances.</p> <p>The actual amount families get will tend to be less than 85% of their childcare costs as Universal Credit is reduced as people earn more.</p> <p>Families are usually required to pay childcare costs upfront, with the Universal Credit childcare element paid to them in arrears. Parents or carers may receive help paying for childcare costs upfront if they are starting work or increasing their hours.</p>
Holiday activities and food (HAF) programme	School-age children from reception to year 11 (age 4 to 16)	<p>HAF funds local authorities to provide a range of free activities, food and childcare to children in receipt of benefits-related free school meals (FSM) during school holidays in England only. Local authorities are expected to offer the equivalent of 6 weeks’ HAF provision in total over the year, made up of a minimum of 4 days during Easter, 16 during summer and 4 during Christmas.</p> <p>Funding for the HAF programme has only been confirmed up to March 2026.</p>

[1] <https://www.gov.uk/tax-free-childcare>

1. Holiday childcare prices

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

Table 2. Average weekly price of holiday childcare, by nation and region, weighted for public and PVI holiday clubs

Nation/region	Price of holiday childcare per week	
	Holiday clubs	Childminders
Great Britain	£179.33	£233.83
England	£178.47	£232.61
Scotland	£167.87	£238.05
Wales	£209.60	£248.84
East Midlands	£178.85	£219.97
East of England	£170.77	£261.54
London, Inner	£177.69	£306.12
London, Outer	£169.54	£280.10
North East	£182.83	£228.98
North West	£162.39	£199.54
South East	£196.23	£263.28
South West	£169.79	£191.29
West Midlands	£167.41	£213.13
Yorkshire and the Humber	£194.41	£238.23

A. Prices for holiday childcare

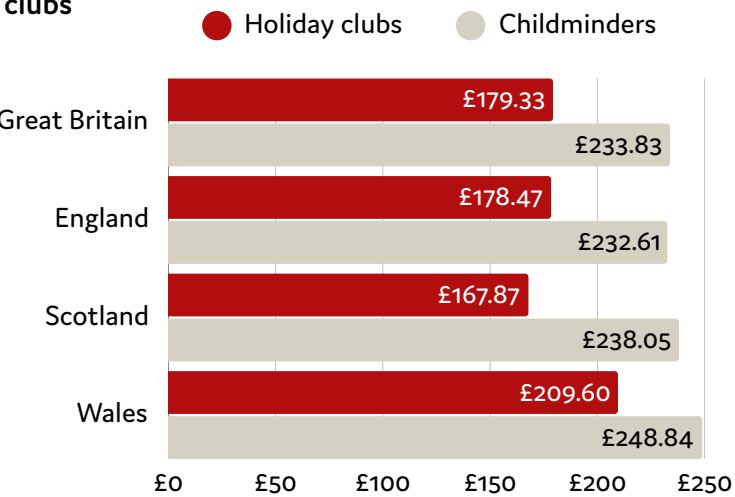
Table 2 shows data on the average price of holiday childcare per week across different regions and nations of Great Britain. The data highlights substantial geographical variation in affordability.

Across Great Britain, parents and carers now pay an average of £179.33 per week for holiday childcare at a club and £233.83 per week for holiday childcare with a childminder.

There are notable regional variations within England:

- The South East has the highest price per week for holiday clubs at £196.23, compared to the North West at £162.39 per week.
- Inner London has the highest childminder price at £306.12 per week, compared to the South West which has the lowest childminder cost at £191.29 per week.
- In southern regions such as London, the South East, and East of England, prices for childminders are generally more expensive.
- By comparison, average holiday club prices in England do not follow the same pattern, with the highest prices seen in the South East, Yorkshire and the Humber and the North East.

Figure 1. Average weekly price of holiday childcare, by nation, weighted for public and PVI holiday clubs



B. Price changes

Table 3 shows Great Britain’s weighted average price changes for holiday childcare from 2024 to 2025, by region and nation. The overall 4% price increase from 2024 to 2025 for Great Britain is consistent with the rate of inflation (4% at the time of writing [2]).

Table 3. Price changes in holiday childcare in holiday clubs from 2024, by nation and region, weighted

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

England’s holiday childcare costs have risen by 4%, the same as the average price rise for Great Britain. Scotland saw a slightly lower increase (3%), while Wales reported the largest increase (6%). Wales has seen the largest year-on-year price increase every year, since 2022. This may be due to its relatively low proportion of public sector provision (see Section C). Higher prevalence of public sector provision (which is usually less expensive than that delivered by the PVI sector) can help moderate prices across a region. In addition, holiday childcare in Wales is frequently provided by early years settings such as nurseries, which tend to have higher fees than activity-based holiday clubs.

Within England, there are regional variations. Yorkshire and the Humber stands out with a substantial 13% increase; the same percentage increase as last year and more than triple the national average of 4%. Notably, the South East was the only region to report a decrease in holiday childcare prices, dropping by –3%, which contrasts sharply with other regions. The North East and South West both reported 8% increases, double the national average. The West Midlands reported a more moderate increase of 2%, below the national average. Price changes in both Inner and Outer London, as well as the East Midlands, were in line with the national average.

The differences in price fluctuations across Great Britain highlights the many factors influencing childcare costs in the different nations and regions, potentially reflecting variations in local economic conditions and demand for holiday childcare. With small numbers of holiday childcare providers in a given area, a single large provider's price adjustments or entry to/exit from the market can significantly impact average local costs. This volatility in holiday childcare costs makes it challenging for families to plan for work and the care they will need. This underscores the crucial role of local authorities in sharing information and facilitating access to quality holiday childcare options that cater to the needs of their communities.

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

C. Difference in holiday childcare prices between public and private, voluntary and independent (PVI) sector provision

This section considers the different prices and availability of holiday clubs managed by the PVI sector compared with those managed by the public sector.

In all three nations, average holiday club prices in the PVI sector are higher than average prices in the public sector (see table 4). In Great Britain as a whole, PVI holiday clubs are 21% more expensive than public sector holiday clubs. The price differences between the public and PVI clubs partially stem from factors like subsidies (funding from local authorities) and lower running costs for public sector holiday clubs which have access to buildings and equipment at reduced rates. Furthermore, some PVI providers offer a wider range of activities, leading to higher costs.

Scotland reports the most substantial difference in prices between sectors; PVI club prices are 24% higher than public sector prices on average. In both England and Wales, PVI prices are 20% higher than public sector prices.

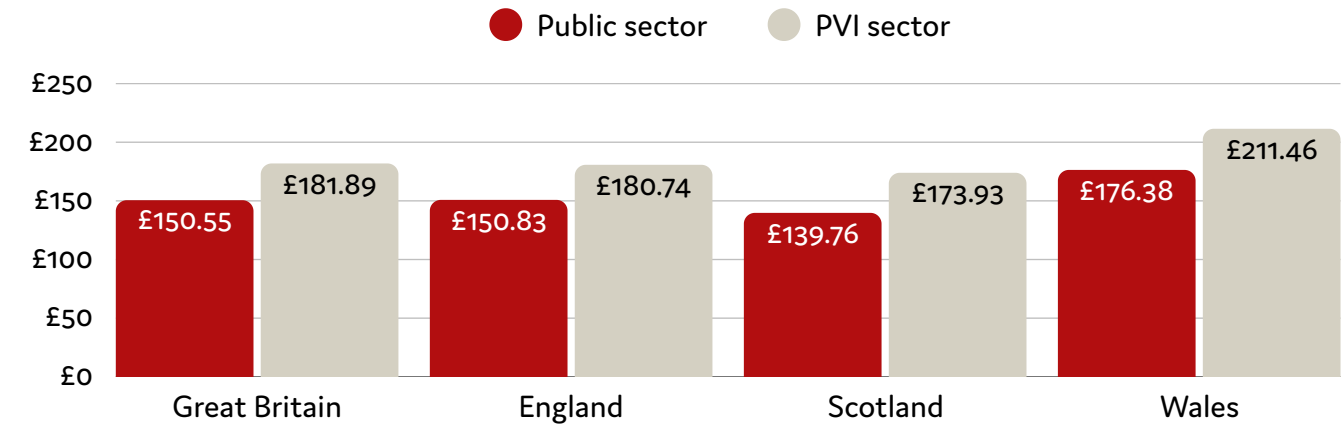
Table 4 also shows the percentage of holiday childcare provision that is delivered by the public sector. Wales has the lowest proportion of provision delivered by the public sector at 7% (although this is more than double last year's figure, 3%), while Scotland has the highest at 17%. In England, it is 9%.

Public sector holiday club prices are lowest in Scotland (£139.76 per week) and highest in Wales (£176.38 per week). Similarly, PVI sector holiday club prices are also lowest in Scotland (£173.93 per week) and highest in Wales (£211.46 per week). While public sector clubs are more affordable for families, parents and careers in many areas will struggle to secure a place.

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

Nation	Public sector	PVI sector	% difference - PVI vs public*	Percentage of provision which is provided by the public sector
Great Britain	£150.55	£181.89	21%	9%
England	£150.83	£180.74	20%	9%
Scotland	£139.76	£173.93	24%	17%
Wales	£176.38	£211.46	20%	7%

Figure 2. Price difference between average prices in public and PVI sector, by nation



D. Holiday childcare prices compared to term time prices

Parents and carers who need holiday childcare during school breaks are likely to need after-school care during term time. For most of the year, these families will only buy childcare for the hours before and after school days, whereas during school holidays they will need to purchase childcare for the full day, meaning costs are considerably higher.

In England, Scotland and Wales, the weekly cost of holiday clubs (both PVI and public sector) is substantially higher than the cost of after-school clubs. Table 5 shows that weekly holiday club costs are up to three times higher than a week of care in an after-school club. Wales' holiday clubs are three times more expensive than after-school clubs, with six weeks of holiday childcare costing £842.72 more than term-time after-school provision.

England's holiday clubs are just over two-and-a-half times more expensive than its term time after-school provision, with six weeks of holiday provision costing families £674.58 more than group-based care during term time. Scotland's holiday clubs are just under two-and-a-half-times more expensive, with six weeks of holiday childcare costing £569.43 more than term-time after-school care.

Cost-of-living rises continue to place significant financial strain on many households and the surge in childcare costs from term-time to holiday periods increases these pressures for many families with school-aged children.

While parents using Tax-Free Childcare accounts can spread their expenses evenly throughout the year, by regularly contributing and drawing more during summer, those on Universal Credit will, in most cases, bear the higher upfront costs before they are repaid in arrears.

Government support with childcare costs, such as Tax-Free Childcare and the childcare element of Universal Credit, can only be used with provision that is registered with an official regulator (Ofsted in England, Care Inspectorate in Scotland, and Care Inspectorate Wales). We know that many parents use activity-based providers, such as sports or drama clubs, to cover their childcare needs, especially during the long summer break.

However, activity-based clubs, as well as childcare providers caring only for older children, are not required to register so parents eligible for government support may have a smaller choice of providers or miss out on financial help. There is some childcare support available for parents who are in training or education, but this varies with the parent's age, the type of qualification they are undertaking, and the policies of their education provider.

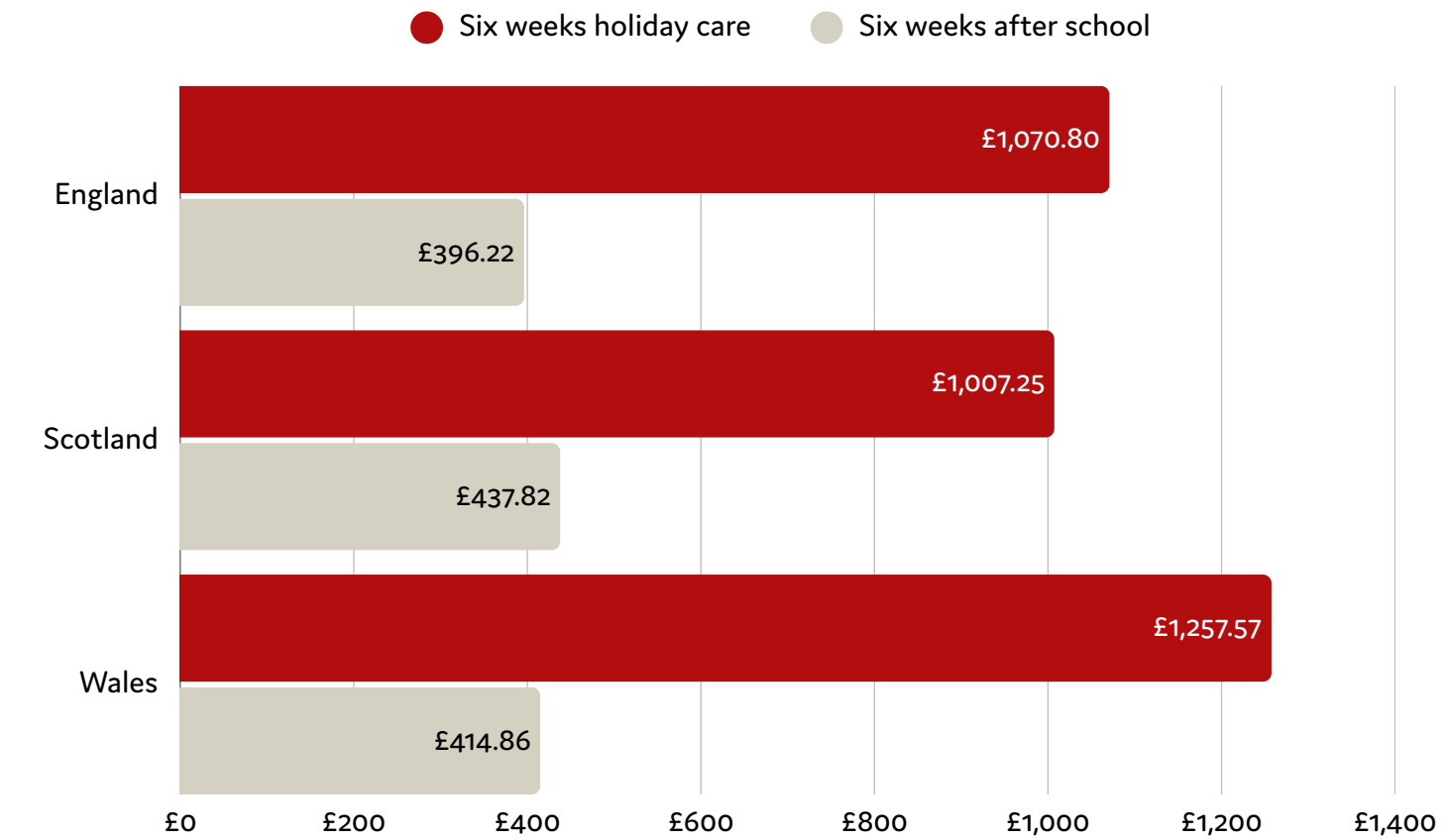
The holiday, activities and food (HAF) programme, which funds holiday activities, childcare and food for children in receipt of benefits-related free school meals in England, has proved to be popular and effective at meeting the holiday childcare needs of children in low-income families. However, at the time of writing, the government has not confirmed whether funding for this programme will continue beyond March 2026, meaning local authorities and families are unable to plan beyond this date.

2. Is there enough holiday childcare?

Table 5. Holiday childcare prices compared to after-school club prices

Nation	Holiday clubs (public and PVI sector combined)	After-school club per week (from Childcare Survey 2025)	Holiday club price as multiple of after-school club price	Six weeks holiday care	Six weeks after-school	Difference
Great Britain	£179.33	£66.48	2.7	£1,075.99	£398.89	£677.10
England	£178.47	£66.04	2.7	£1,070.80	£396.22	£674.58
Scotland	£167.87	£72.97	2.3	£1,007.25	£437.82	£569.43
Wales	£209.60	£69.14	3.03	£1,257.57	£414.86	£842.72

Figure 3. Holiday childcare prices compared to after-school club prices



This section examines whether there is enough holiday childcare for different groups – known legally as ‘childcare sufficiency’.

This year, we changed the questions we asked local authorities about holiday childcare sufficiency to increase the accuracy and reliability of data. For this reason, we have not included comparisons to last year’s data as we have done in previous years.

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 Great Britain.

Because these duties vary slightly in different parts of Great Britain, we present sufficiency data separately for the three nations. The data is based on local authorities’ assessments at the time of the survey, which may differ from their published Childcare Sufficiency Assessments if the local situation has changed since this was last published.

Local authorities were asked to report the percentage of school-age children in their area for whom they have enough holiday childcare. This is a different question to previous years which asked local authorities to report if they had holiday childcare sufficiency in ‘all’, ‘some’, or ‘no’ areas. We updated the question to capture more specific information about the level of childcare sufficiency, and to change the focus of the main questions from geographical areas to children.

We have asked local authorities to report on childminders providing holiday childcare to school-age children for the first time. Because this is a new question for the Holiday Childcare Survey, we have seen higher levels of uncertainty than for our long-established questions about public sector and private, voluntary and independent (PVI) holiday clubs.

We have also updated our wording to ask about childcare for ‘children and young people with SEND’ in England and Scotland, and about childcare for ‘children and young people with ALN’ (additional learning needs) in Wales, rather than for ‘disabled children’. This is because special educational needs and disabilities/additional learning needs encompass a wider range of additional needs.

These new, more detailed questions have resulted in a greater number of local authorities reporting ‘Data not held or cannot tell’ and as such we have included the number of responses received, to clarify the number of local authorities represented by the percentages. However, by increasing the specificity of the questions, we have increased the reliability of the data that we have received.

B. Holiday childcare sufficiency in England

In England, local authorities have a legal duty to secure sufficient childcare (so far as is reasonably practicable) and to report on how they are meeting their duty annually, including childcare for school-age children and young people up to age 14 (or 18 if they are disabled). This duty requires local authorities to consider the needs of individual children and families, such as disabled children and different types of families.

Local authorities in England report high levels of uncertainty; between 53% and 72% of local authorities reported ‘Data not held or cannot tell’ for each category of holiday childcare.

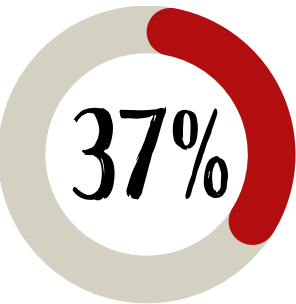


Table 6 – Holiday childcare sufficiency in England

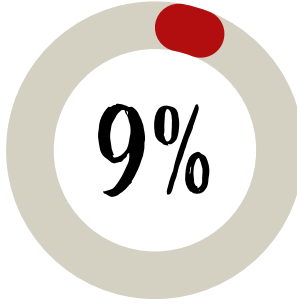
	100%	75% to 99%	50% to 74%	25% to 49%	For 24% or less	Data not held or cannot tell	Number of local authorities
Four- to seven-year-olds	10%	27%	4%	4%	2%	53%	129
8- to 11-year-olds	8%	23%	8%	3%	2%	57%	129
12- to 14-year-olds	2%	8%	4%	8%	7%	72%	129
Children and young people with SEND	1%	9%	12%	8%	5%	66%	129
Parents working full time (9am to 5pm on weekdays)	7%	22%	7%	1%	5%	58%	129
Parents working atypical hours (outside 9am to 5pm on weekdays)	2%	5%	8%	5%	9%	71%	129
Families living in rural areas	2%	11%	9%	1%	5%	72%	81

As shown in table 6, the highest proportion of local authorities reporting holiday childcare sufficiency for at least 75% of children in their area is for four- to seven-year-olds (37%), 8- to 11-year-olds (31%) and parents working full time (29%). Local authorities also report the highest levels of certainty for these categories.

Very few local authorities say they have enough holiday childcare for at least 75% of children aged 12 to 14 (9%), children with SEND (9%) or children whose parents work atypical hours (6%). It is important to note that local authorities also report high levels of uncertainty for these categories (between 66% and 72%).



OF LOCAL AUTHORITIES WHO RESPONDED HAVE ENOUGH HOLIDAY CHILDCARE FOR AT LEAST 75% OF FOUR- TO SEVEN-YEAR-OLDS



OF LOCAL AUTHORITIES WHO RESPONDED HAVE ENOUGH HOLIDAY CHILDCARE FOR AT LEAST 75% OF CHILDREN WITH SEND



Table 7 - Proportion of local authorities in England reporting sufficient holiday childcare for at least 75% of children in their area, by region

Region	Four- to seven-year-olds	8- to 11-year-olds	12- to 14-year-olds	Children and young people with SEND	Parents working full-time (9am to 5pm on weekdays)	Parents working atypical hours (outside 9am to 5pm on weekdays)	Children in rural areas	Total responses
East Midlands	25%	13%	13%	0%	13%	0%	0%	8
East of England	44%	33%	22%	0%	44%	11%	29%	9
London, Inner	18%	27%	0%	0%	27%	0%	0%	11
London, Outer	33%	33%	7%	7%	27%	0%	0%	15
North East	27%	0%	0%	9%	18%	0%	11%	11
North West	38%	33%	14%	5%	33%	5%	7%	21
South East	41%	47%	18%	24%	29%	6%	17%	17
South West	17%	8%	0%	8%	8%	0%	0%	12
West Midlands	45%	36%	18%	18%	36%	18%	14%	11
Yorkshire and the Humber	71%	57%	0%	14%	50%	21%	67%	14

As shown in table 7, availability of holiday childcare varies widely across England and between categories of provision. This means that parents and carers will find it more difficult to access childcare depending on where they live or their child’s needs.

Sufficiency of holiday childcare for four- to seven-year-olds is highest in Yorkshire and the Humber by some margin, with 71% of local authorities who responded telling us they have sufficiency for at least 75% of children in their area. The second highest levels of sufficiency for this age group is seen in the West Midlands and the East of England, where 45% and 44% of local authorities who responded report sufficiency for most children.

Yorkshire and the Humber also report the highest levels of sufficiency for 8- to 11-year-olds (57% of local authorities who responded), followed by the South East (47% of local authorities who responded).

Holiday childcare sufficiency for young people aged 12 to 14 is low across all regions. The East of England reports the highest levels, with 22% of local authorities who responded saying they have enough holiday childcare for at least 75% of 12- to 14-year-olds in their area, while no local authorities (0%) who responded to our survey in Inner London, the North East, the South West or Yorkshire and the Humber say they have enough holiday childcare for young people in this age group.

Similarly, three regions in England – the East Midlands, the East of England and Inner London – report extremely low levels of holiday childcare sufficiency for children and young people with SEND. No local authorities (0%) in these regions who responded told us they have enough holiday childcare for at least 75% of children in their area with additional needs and disabilities. The highest levels of holiday childcare sufficiency reported for this category were seen in the South East (24% of local authorities).

Holiday childcare sufficiency is much higher for children whose parents work full time than it is for children whose parents work atypical hours, although the former peaks at only 50% of local authorities in Yorkshire and the Humber who responded reporting sufficiency for at least 75% of children in their area. Yorkshire and the Humber also report the highest levels of sufficiency for children whose parents work atypical hours, although at lower levels; 21% of local authorities in this region report sufficiency for at least 75% of children in this category.

Sufficiency of holiday childcare in rural areas is generally low with the exception of Yorkshire and the Humber, where 67% of local authorities who responded report having enough holiday childcare for at least 75% of children living in rural areas.



C. Holiday childcare sufficiency in Scotland

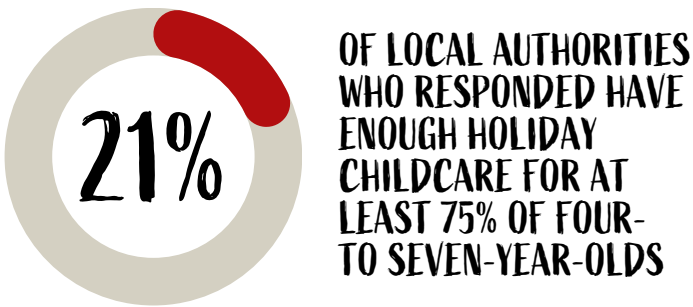
Published in 2022, the Scottish Government’s ‘Best Start: Strategic early learning and school age childcare plan for Scotland 2022-26’ [3] sets out the Government’s childcare plan, including its plan for holiday childcare for primary-school-age children.

The Government has committed to building a system of school-age, year-round childcare by 2026, prioritising the needs of low-income families and ensuring that those on the lowest incomes can access childcare free of charge. However, local authorities do not have a general childcare sufficiency duty for school-age holiday childcare.

Table 8 - Holiday childcare sufficiency in Scotland

	100%	75% to 99%	50% to 74%	25% to 49%	For 24% or less	Data not held or cannot tell	Number of local authorities
Four- to seven-year-olds	4%	17%	4%	0%	4%	71%	24
8- to 11-year-olds	4%	13%	8%	0%	4%	71%	24
12- to 14-year-olds	4%	4%	0%	4%	13%	75%	24
Children and young people with SEND	4%	4%	4%	4%	8%	75%	24
Parents working full time (9am to 5pm on weekdays)	4%	8%	13%	0%	4%	71%	24
Parents working atypical hours (outside 9am to 5pm on weekdays)	0%	0%	8%	0%	17%	75%	24
Families living in rural areas	0%	0%	0%	6%	6%	88%	17

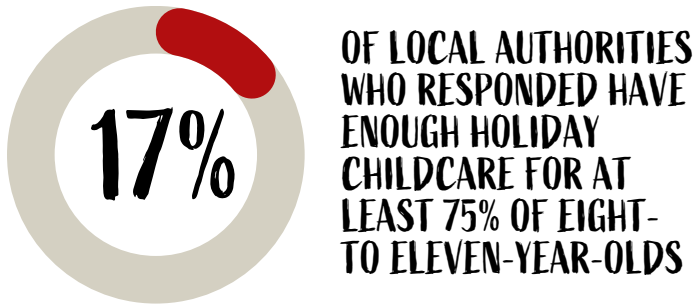
The absence of a requirement to monitor the supply of holiday childcare, along with changes to our questions outlined on page 7, accounts for why a particularly high proportion of local authorities in Scotland answered ‘Data not held or cannot tell’.



When asked whether they had enough holiday childcare for different groups of children and young people in their area, between 71% and 88% of local authorities in Scotland answered ‘Data not held or cannot tell’ (see table 8).

The highest levels of sufficiency in Scotland are reported for four- to seven-year-olds; 21% of local authorities who responded to our survey told us they have enough provision for at least 75% of children in this age group.

The next highest levels of holiday childcare sufficiency are for 8- to 11-year-olds and children whose parents work full time, with 17% and 13% of local authorities who responded reporting enough provision for at least 75% of children in these categories. However, with high levels of uncertainty reported, it is important to note that the true levels of sufficiency may actually be higher.



[3] <https://www.gov.scot/publications/best-start-strategic-early-learning-school-age-childcare-plan-scotland-2022-26/>

D. Holiday childcare sufficiency in Wales

Welsh local authorities were first required to produce a Childcare Sufficiency Assessment and Action Plan in 2017 and every five years thereafter (most recently in 2022) and to report to the Welsh government annually through a progress update. This duty includes childcare for school-age children and young people up to age 14 (or 18 if they are disabled) and requires local authorities to consider the needs of individual children and families, such as disabled children and different types of families.

The length of time since local authorities were last required to publish a full Childcare Sufficiency Assessment and Action Plan, in addition to the changes to our questions as outlined on page 7, may explain the high proportion of local authorities in Wales answering ‘Data not held or cannot tell’.

As shown in table 9, when asked about levels of holiday childcare sufficiency for children in their area, between 42% and 67% of local authorities in Wales who responded to our survey answered ‘Data not held or cannot tell’.

The highest levels of holiday childcare sufficiency in Wales are reported for children aged four to seven; 47% of local authorities who responded told us they have enough holiday childcare in their area for children in this age group.

42% of local authorities who responded report enough holiday childcare for at least 75% of 8- to 11-year-olds, and 37% of local authorities report enough holiday childcare for at least 75% of children whose parents work full time.

Only 5% of local authorities who responded to our survey say they have enough holiday childcare for at least 75% of 12- to 14-year-olds, children and young people with ALN and children whose parents work atypical hours.

Table 9 - Holiday childcare sufficiency in Wales

	100%	75% to 99%	50% to 74%	25% to 49%	For 24% or less	Data not held or cannot tell	Number of local authorities
Four- to seven-year-olds	0%	47%	5%	0%	5%	42%	19
8- to 11-year-olds	0%	42%	5%	5%	5%	42%	19
12- to 14-year-olds	0%	5%	0%	0%	32%	63%	19
Children and young people with ALN	0%	5%	16%	5%	16%	58%	19
Parents working full time (9am to 5pm on weekdays)	16%	21%	0%	11%	0%	53%	19
Parents working atypical hours (outside 9am to 5pm on weekdays)	0%	5%	0%	11%	26%	58%	19
Families living in rural areas	0%	11%	0%	11%	11%	67%	18

E. Number of holiday childcare providers and places

Table 10 illustrates that local authorities in Great Britain report overall stability in the number of holiday childcare providers in the public sector, with 34% of local authorities who responded to our survey reporting that the number has remained the same since 2024. 9% of local authorities report an increase in public sector holiday childcare providers, and 15% report a decrease; a reversal of the trend reported last year in which 17% of local authorities reported an increase and 9% reported a decrease in the number of public sector providers since 2023.

27% of local authorities who responded report that the number of private, voluntary and independent (PVI) sector providers in their area has stayed the same since 2024. A slightly higher proportion of local authorities (33%) say the number of PVI sector providers has increased since 2024 and a slightly lower proportion of local authorities say it has decreased (23%).

These findings indicate that there is greater volatility in the PVI sector compared to the public sector.

However, the PVI sector represents the majority of provision, with 19% of local authorities who responded telling us they had no public sector providers in either 2024 or 2025, but only 1% of local authorities who responded telling us they had no PVI sector providers in either of these years.

The closure of settings in some areas could cause problems for families that rely on holiday childcare, and can result in longer travel time, a provision that their child does not know or enjoy, or more competition for a smaller number of places.

This year was the first year we have asked local authorities in Great Britain about childminders providing holiday childcare for school-age children and this may account for the high proportion of local authorities (61% of those who responded) answering ‘don’t know’ for this category of provider. Of local authorities who were able to provide data, 17% say the number of childminders in their area has decreased since 2024, 12% say it has increased and 8% say it has stayed the same.

Table 10 - Proportion of local authorities reporting a change in number of holiday childcare providers in the public and PVI sectors since 2024 - Great Britain

	Public sector	PVI sector	Childminders
Increased	9%	33%	12%
Stayed the same	34%	27%	8%
Decreased	15%	23%	17%
No providers in either year	19%	1%	1%
Don’t know	24%	17%	61%
Number of responses	172	171	171

Table 11 - Proportion of local authorities reporting a change in number of holiday childcare places since 2024, by nation

	Great Britain	England	Scotland	Wales
Increased	33%	36%	17%	32%
Same as 2024	12%	11%	21%	5%
Decreased	16%	16%	4%	26%
Data not collected or cannot tell	40%	37%	58%	37%
Number of responses	172	129	24	19

Table 11 shows us that, among local authorities who were able to provide data, the largest proportion of local authorities in England and Wales who responded (36% and 32% respectively) report that the number of holiday childcare places in their area has increased since 2024.

In Scotland, the largest proportion of local authorities who were able to provide data (21% of those who responded) say that the number of holiday childcare places in their area has stayed the same since 2024, although 17% say the number of places has increased in their area.

However, the largest proportion of local authorities across Great Britain (40% of those who responded) say they do not collect the data or cannot tell us whether or how the number of holiday childcare places has changed since 2024.

F. Holiday childcare opening times and holiday periods

Families may need holiday childcare to be available throughout the typical working day. Table 12 illustrates what proportion of holiday clubs are open for the full day (8am to 6pm, Monday to Friday).

Across Great Britain, holiday clubs in the PVI sector are more likely to be open for a full day (57% of settings) than holiday clubs in the public sector (44% of settings), but childminders are substantially more likely to be open for a full day (78% of childminders) than either type of holiday club.

Holiday clubs in Wales (74%) are more likely to be open for a full day than in Scotland (68%), and both are much more likely to be open for a full day than in England (53%).

Within the public sector, 62% of holiday clubs in Scotland are open for the full day compared to 42% in England and 37% in Wales.

Families may need holiday childcare for different school holidays throughout the year, from the long summer break to half terms, and for teacher training days. Table 13 shows that the availability of childcare varies significantly depending on the type of provider and holiday period.

Across Great Britain, public sector holiday clubs are the setting type most likely to be open during the school summer holiday (98% of settings) but childminders are most likely to be open during the Easter (93%) and Christmas (78%) holidays, half term (94%) and during teacher training days (sometimes called INSET days) (94%).

During the summer holiday, there are very high levels of public sector provision in Scotland (100% of settings), Wales (100%) and England (97%).

Only 9% of holiday clubs (public and PVI) are open during the Christmas holiday in Scotland. Scotland also has the lowest proportion of childminders open during the Christmas holiday (22%).

Table 12 - Proportion of settings open for the full day (8am to 6pm, Monday to Friday) in school holidays, by nation and type of setting

Nation	Public sector	PVI sector	All holiday clubs (public and PVI sector combined)	Childminders
Great Britain	44%	57%	55%	78%
England	42%	54%	53%	78%
Scotland	62%	69%	68%	80%
Wales	37%	76%	74%	71%

In Wales, 53% of holiday clubs (public and PVI) are open during the Christmas holiday and England 57% of holiday clubs are open during this time. However, much higher proportions of childminders in Wales (73%) and England (78%) are open over the Christmas holiday.

Teacher training days are the least well catered for across both types of holiday clubs in England (38%).

This can be a particular problem for parents and carers because they are single days, generally at the end of a holiday, making co-ordination of annual leave or informal childcare a challenge. In Scotland and Wales, 67% and 69% of holiday clubs (public and PVI) are open during teacher training days respectively.



Table 13 - Proportion of childcare settings open in each school holiday, by nation

	Nation	Summer	Easter	Christmas	Half term	Teacher training days
Public sector	Great Britain	98%	87%	43%	73%	38%
	England	97%	85%	50%	68%	28%
	Scotland	100%	96%	2%	88%	62%
	Wales	100%	97%	25%	97%	69%
PVI sector	Great Britain	86%	84%	55%	77%	44%
	England	85%	83%	58%	75%	39%
	Scotland	90%	75%	11%	73%	68%
	Wales	99%	96%	55%	95%	69%
All holiday clubs (public and PVI sector combined)	Great Britain	87%	84%	54%	77%	44%
	England	86%	83%	57%	75%	38%
	Scotland	92%	79%	9%	76%	67%
	Wales	99%	96%	53%	95%	69%
Childminders	Great Britain	94%	93%	78%	94%	94%
	England	93%	92%	78%	93%	93%
	Scotland	96%	93%	22%	96%	96%
	Wales	100%	100%	73%	100%	100%

The Holiday Childcare Survey 2025 findings show that families still face very high childcare bills during the school holidays, particularly during the six-week summer break. The increase in government-funded early education has reduced childcare costs for working parents of under-fives in England, but prices continue to rise for school-aged children. Left unaddressed, this carries the risk that parents are encouraged back into work while their children are very young, only to find it is not sustainable once their child starts school.

On top of rising costs, availability of holiday childcare places is far from guaranteed. Probing more deeply into the question of sufficiency this year showed that local authorities frequently cannot say whether they have enough holiday childcare. They are least likely to have enough places for children with SEND, older children and parents working outside of typical hours.

Coverage over the summer holidays is good, but fewer providers are open over the Easter and Christmas breaks and during half term.

Childminders provide a solution, with findings showing childminders are much more likely to be open during all school holidays and are more likely to be open for a full day. However, childminder costs are higher than holiday clubs, and the number of childminders has declined significantly in recent years.

For the current patchwork of holiday childcare support to truly work for families, longer-term planning is essential, along with a recognition that childcare needs extend past the school calendar. Disadvantaged families should have the security of free holiday childcare, support with costs should be timely for those who need it, and information should be readily available.

Areas for action

Coram Family and Childcare calls on Government to:

- Maintain the holiday activities and food (HAF) programme after March 2026 to ensure disadvantaged children have affordable, high-quality childcare during school holidays.
- Support local authorities to increase data collection on holiday childcare provision in order to plan sufficient, year-round childcare for all children.
- Expand the scope of the early years workforce plans in the ‘Giving every child the best start in life’ strategy to include the school-aged childcare workforce.
- Allow upfront payments of the childcare element of Universal Credit during school holidays to alleviate the concentration of costs.
- Provide additional funding, training and support to holiday childcare providers to meet the needs of children with SEND.
- Encourage increased holiday childcare provision for older children and for parents who work atypical hours by supporting providers and local authorities with information on models of delivery and targeted funding.
- Take action to stem the decline of childminders and retain those currently in the sector, to ensure holiday childcare is available to fit a range of parental working patterns.



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 in local authorities between April and June 2025. Respondents were able to fill in a form or reply online. After one month, we sent Freedom of Information requests to those local authorities that had not responded, with a request to return within the statutory deadline. Local authorities who responded without the need for a Freedom of Information request were promised that individual responses would not be published, with only regional/national averages provided in the report. This is consistent with previous surveys, and we do it to encourage honest and accurate data reporting. When Freedom of Information requests are used, some local authorities automatically publish their own responses so we cannot make the same promise. However, we do not report these Freedom of Information individual responses in this report, nor do we say which responses were acquired through Freedom of Information requests.

Data sources

Average, maximum and minimum childcare prices are provided by local authorities rather than being calculated by Coram Family and Childcare from information directly given to us by providers.

Similarly, assessments of sufficiency are provided by local authorities rather than being based on data collected by the Coram Family and Childcare research team. Where possible, we have kept questions consistent with previous versions of the survey to allow for tracking over time.

However, this year, as with our annual childcare survey, we have made a number of changes to the questions that we ask. We did this to include childminders, reflecting their important place in the holiday childcare market, and to update terminology, to gather more detailed information, and to make the survey easier for respondents to complete. We used slightly different surveys for local authorities in England, Scotland and Wales to reflect the different policy environments and terminology in the three nations.

Response rates

We received responses from 84% of local authorities in Britain. Regional response rates range from 75% to 100%. Some local authorities did not give data for all questions or gave data in a format that we could not use.

Data gaps and exclusions

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

Where response rates for a question are particularly low and may have affected the reliability of the data, this is noted in the relevant section of the report.

Price changes

The calculations for year-to-year price changes (Section 1B) are based only on those local authorities who gave figures for both this year and last year. As a result, the overall price figure will differ from the figure that would be reached simply by calculating the percentage change between this year's and last year's figures. These calculations also exclude price data from local authorities where the change is greater than 50%, as this suggests an error in the data for the current or previous year. These measures are taken to provide a more representative and accurate figure for price changes than would be reached by simply calculating the difference between the overall figures for both years.

While we have included questions about childminder costs for the first time since starting the Holiday Childcare Survey, the price change figure is only for maintained and PVI providers, ensuring consistency with the previous survey.

Weighting

In line with recent surveys, we have weighted cost data within regions and nations. This ensures that results from small local authorities that have relatively small child populations do not unduly influence overall results.

Data are weighted against the age 5 to 14 population based on ONS midyear population estimates. 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. We have not included childminders in any weightings, as they typically have fewer places than maintained or PVI providers.











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