

# UKHCA Statistics

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## A survey of homecare providers in Wales

Prepared for UKHCA member organisations  
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## Introduction

### Overview

There is a growing recognition of homecare that our sector is beset with some very significant challenges, not least that the sector is not sufficiently understood by key stakeholders and decision makers.

The need to recognise and work with providers or their representatives to achieve the necessary outcomes for people needing care, the policy imperatives, as well as the essential stability and sustainability for our vital part of the wider social care sector.

This work links commissioning and homecare to discuss outcomes, and address the challenges of inspecting against those outcomes.

This document summarises the responses to the survey.

The survey was designed to gather information on the homecare sector in Wales.

### Summary of provider response rate

- 85 out of approximately 434 domiciliary care agencies responded to the survey, or 20% of providers in Wales.
- Out of the 85 respondents, 52 completed all questions in the survey

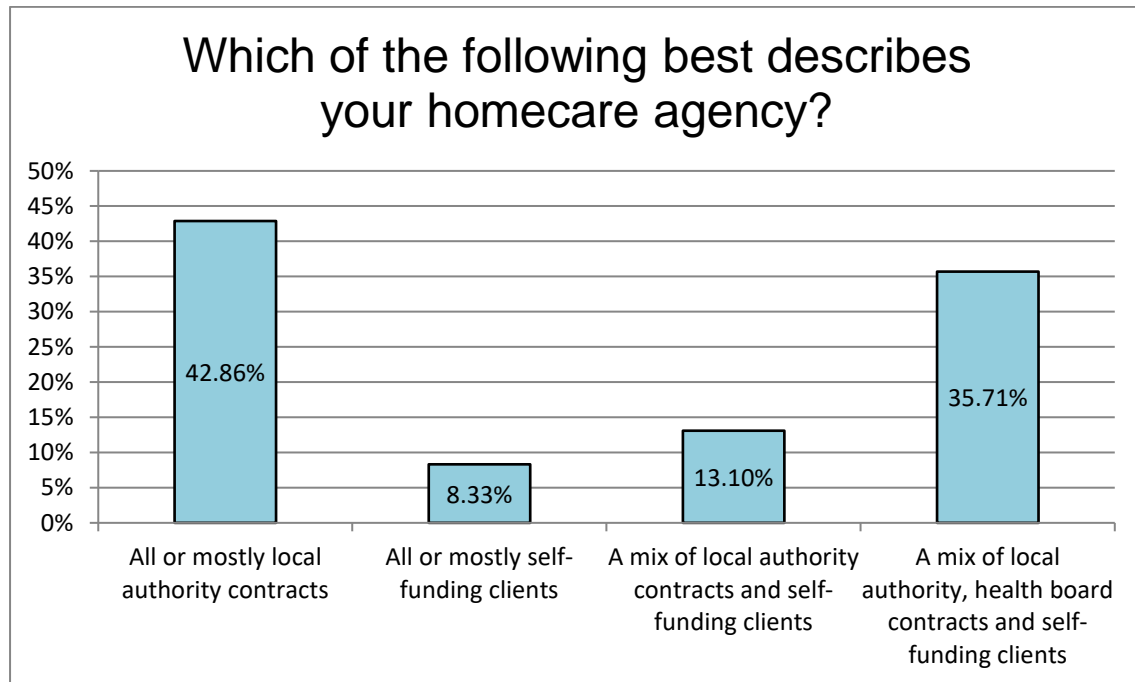
An analysis of results by region is presented at the end of this document.

## Market profile

### Q1. Which of the following best describes your homecare agency?

The data showed that the majority of respondents to the survey were dependent to some degree on local authority commissioned care packages.

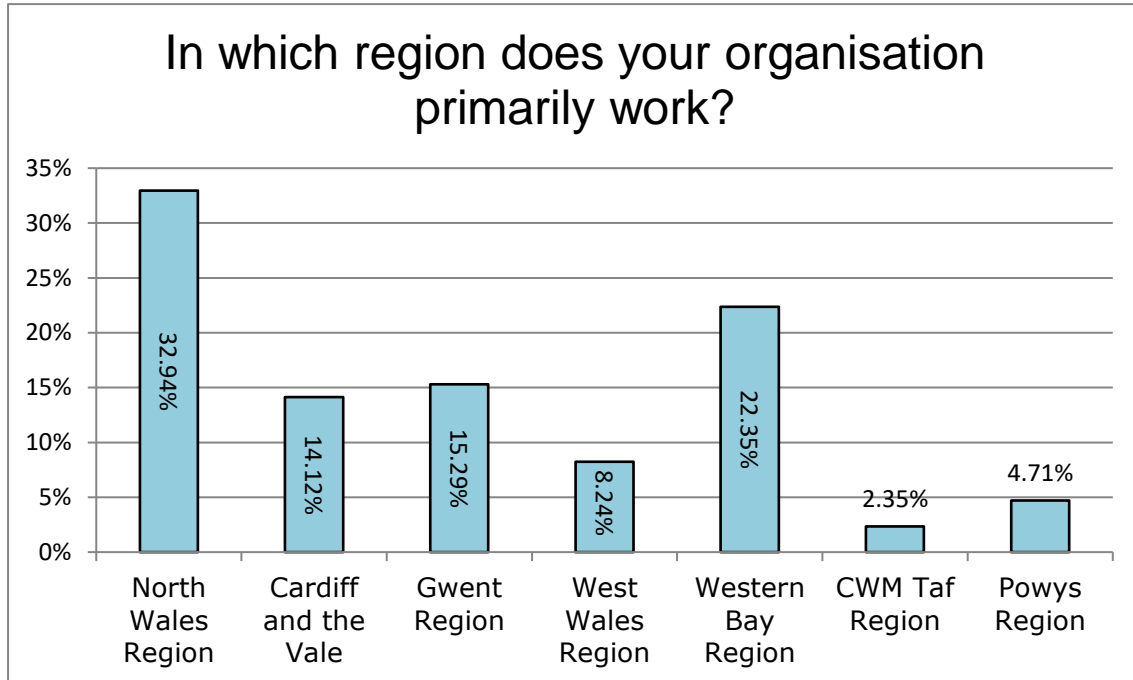
Only 8% of respondents provided exclusively to the self-funder/private market.



Answer Choices	Responses
All or mostly local authority contracts	42.86%
All or mostly self-funding clients	8.33%
A mix of local authority contracts and self-funding clients	13.10%
A mix of local authority, health board contracts and self-funding clients	35.71%

## Q2. In which region does your organisation primarily work?

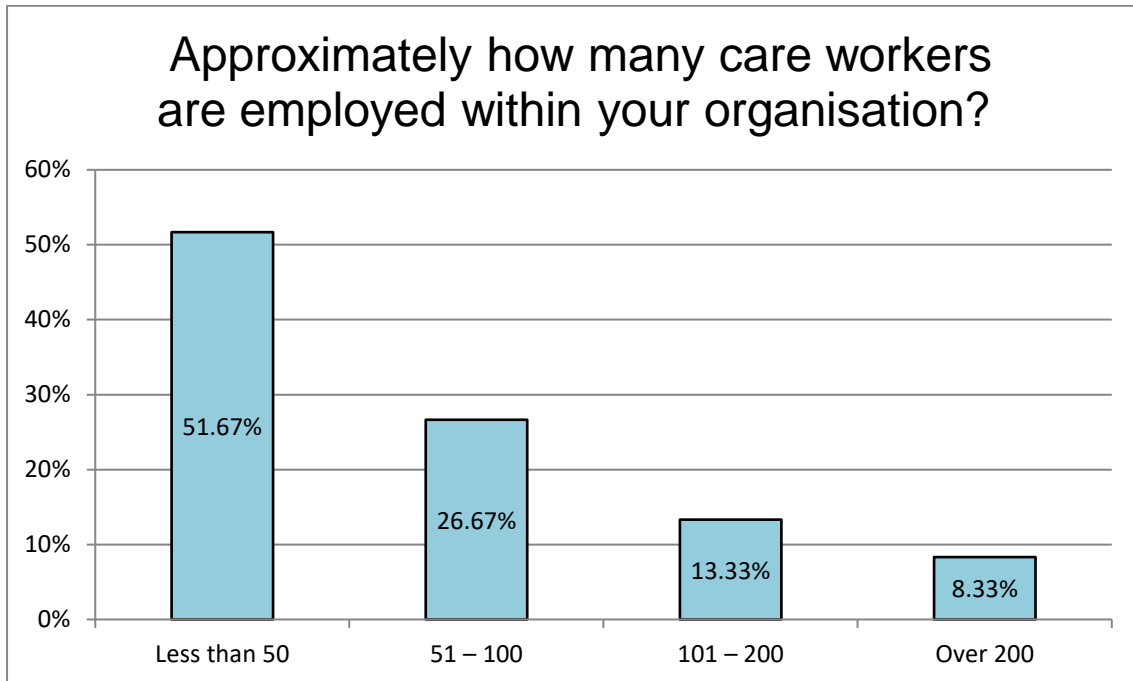
The survey saw respondents from all of the regions in Wales, with the highest level of responses coming from North Wales and Western Bay regions.



Answer Choices	Responses
North Wales Region	32.94%
Cardiff and the Vale	14.12%
Gwent Region	15.29%
West Wales Region	8.24%
Western Bay Region	22.35%
CWM Taf Region	2.35%
Powys Region	4.71%

**Q5. Approximately how many care workers are employed within your organisation?**

The majority of respondents represented smaller care providers who employed 50 or fewer care workers.



Answer Choices	Responses
Less than 50	51.67%
51 - 100	26.67%
101 - 200	13.33%
Over 200	8.33%

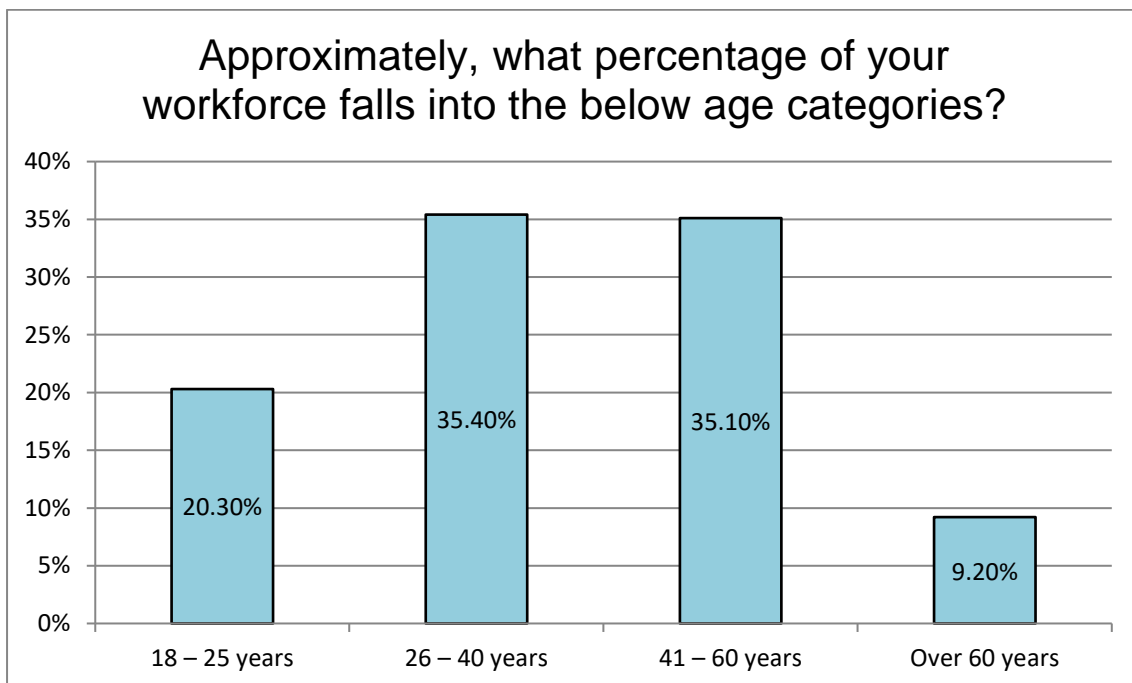
**Q6. Approximately, what percentage of your workforce falls into the below age categories?**

**Analysis:**

The figures indicate that the significant proportion of the workforce are between the ages of 26-60 years old, with the combined reported average making 70% of the workforce.

The lowest reported category was the 'Over 60 Years' who make up only 9% of the workforce.

This trend is generally consistent over all of the regions in Wales and reflects current age profiles in the social care workforce.



Answer Choices	Average reported percentage
18 – 25 years	20.30%
26 – 40 years	35.40%
41 – 60 years	35.10%
Over 60 years	9.20%

**Q7. Approximately, what percentage of your workforce are currently on the following contract types?**

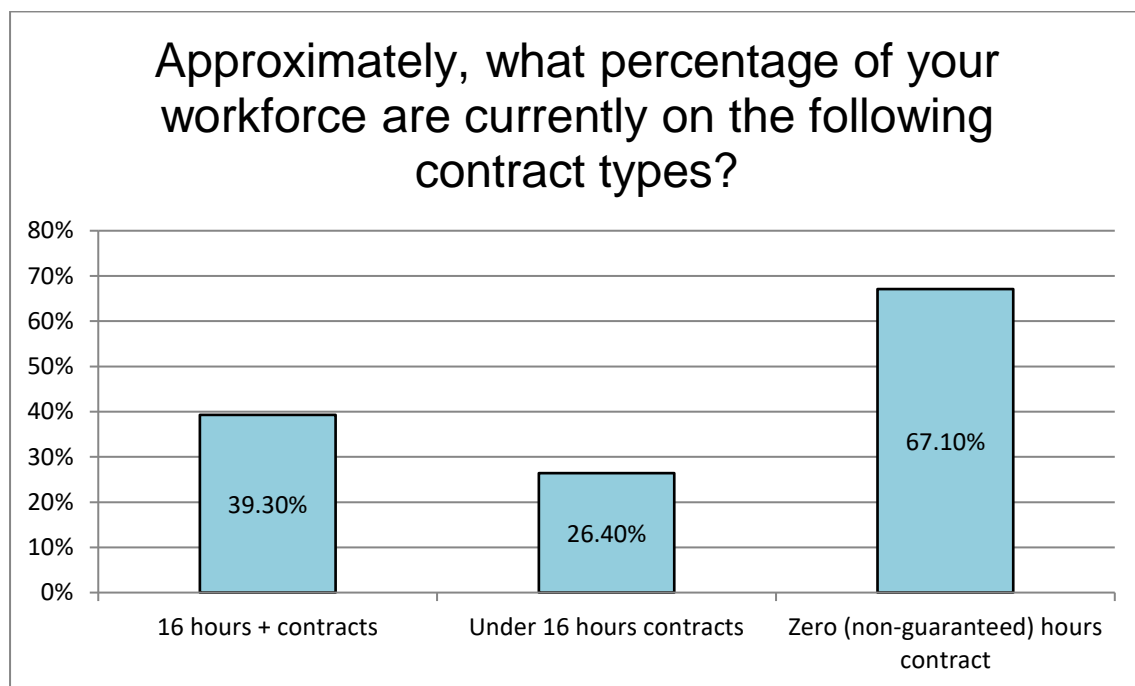
**Analysis:**

Respondents reported that 67% of their workforce were on zero-hours contracts (non-guaranteed hours.)

Across North Wales, Gwent, Cardiff and the Vale, and West Wales, zero-hours had the highest reported average of workers, with the Gwent region reporting the highest average number of 87%.

There are several reasons that this could be the case, including voluntary choice by care workers who prefer the flexibility offered by a zero-hours contracts, a reflection of local commissioning practices and financial pressures on providers.

The results displayed show the average reported responses against the question profile.



Answer Choices	Average reported percentage
16 hours + contracts	39.30%
Under 16 hours contracts	26.40%
Zero (non-guaranteed) hours contract	67.10%



## Domiciliary care contracts

### Q3. Are you involved with providing outcome based contracted services?

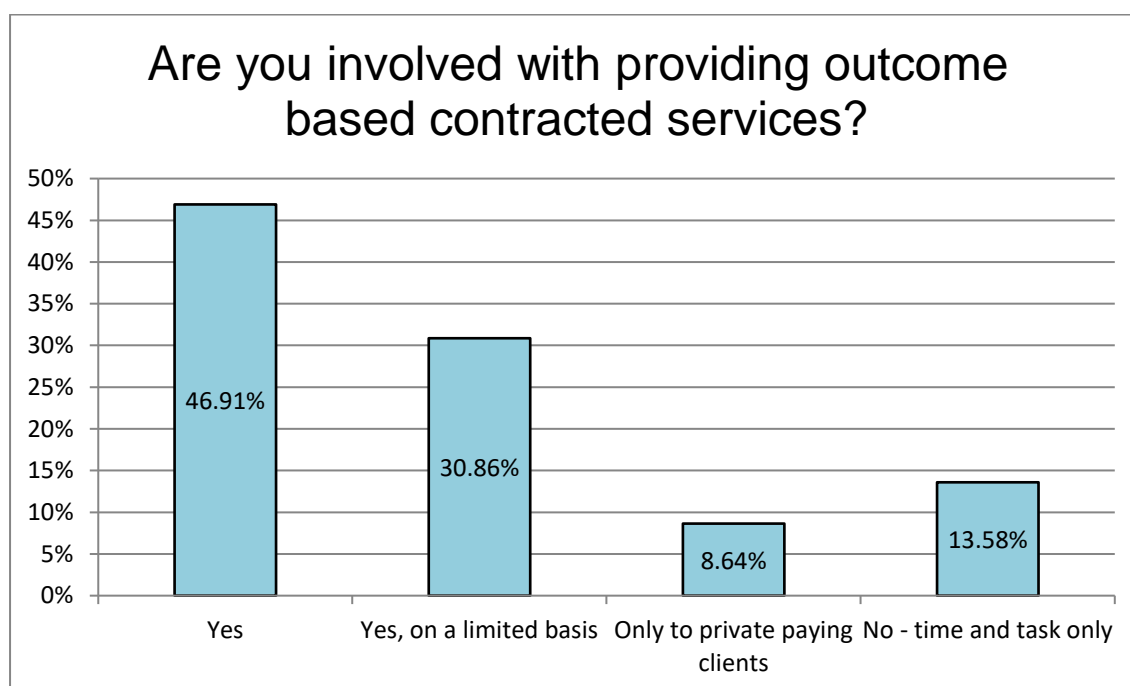
#### Analysis:

A high proportion of those who responded were involved in providing outcome based services to some extent.

14% of respondents provided time and task only; and only 9% provided outcomes based services to private paying clients.

The Gwent Region reported the highest level of providers who either only provide time and task, or only provide outcomes based services to self-funding (private paying clients). Cardiff and the Vale reported the lowest time and task only/only to self-funders at approximately 11%.

Regional analysis is detailed from page 25.



Answer Choices	Responses
Yes	46.91%
Yes, on a limited basis	30.86%
Only to private paying clients	8.64%
No - time and task only	13.58%

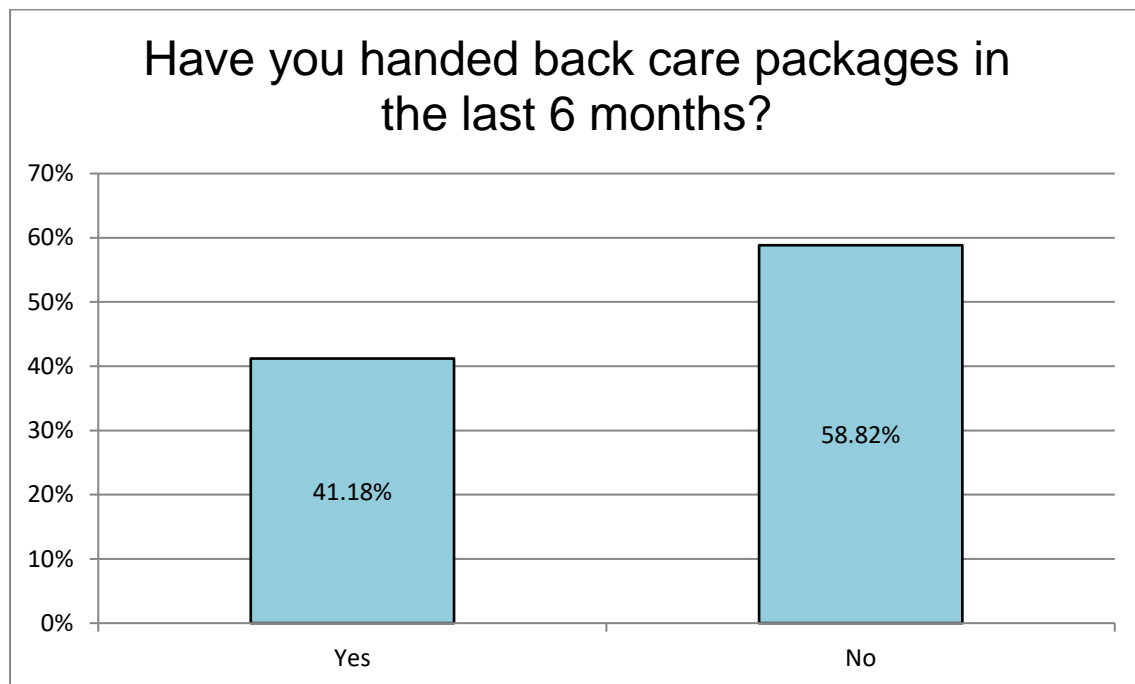
#### Q4. Have you handed back care packages in the last 6 months?

##### Analysis:

Over 40% of respondents reported handing back a care package within the last 6 months.

The figures for handing back contracts remained fairly consistent across all regions, with the exception of Gwent, where respondents reported that over 60% had handed a package of care back within the last 6 months.

Cardiff and the Vale reported the lowest figure, with only 16% of respondents having handed back a package of care in the last 6 months.



Respondents were given the opportunity to give a brief explanation of why care packages were handed back.

Although not all chose to give a reason, those that did give a reason have been summarised below.

<b>Reason for handing back care package</b>	<b>Number of times cited</b>
Insufficient staff numbers to safely deliver	8
Breakdown in relationship with service user or family	13
Clients no longer required care	2
Location of client	3
Low rates of funding	5
Refusal to re-assess care needs	5
Not enough time to meet care needs	2
Safeguarding concerns for staff	9

## Care Inspectorate Wales and regulation

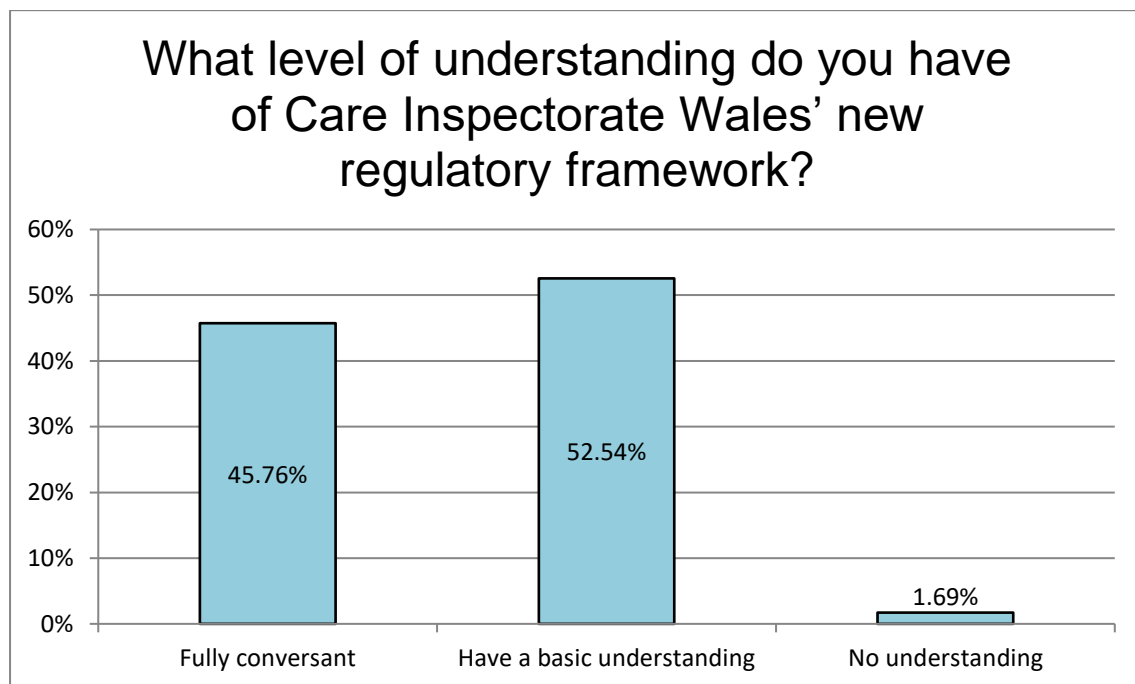
### Q8. What level of understanding do you have of Care Inspectorate Wales' new regulatory framework?

#### Analysis:

The vast majority of respondents reported as having some form of understanding the CIW's new regulatory framework.

This figure is largely similar across all of the Welsh regions, with the exception of West Wales, where 80% of respondents claimed to have only a basic understanding of the new regulatory framework.

It is probable that CIW will need to create guidance to the framework to assist providers to understand the changes and how this will impact on outcomes based delivery.



Answer Choices	Responses
Fully conversant	45.76%
Have a basic understanding	52.54%
No understanding	1.69%

### Q9. Do you feel confident in your knowledge of the new regulatory framework and how to prepare for an inspection?

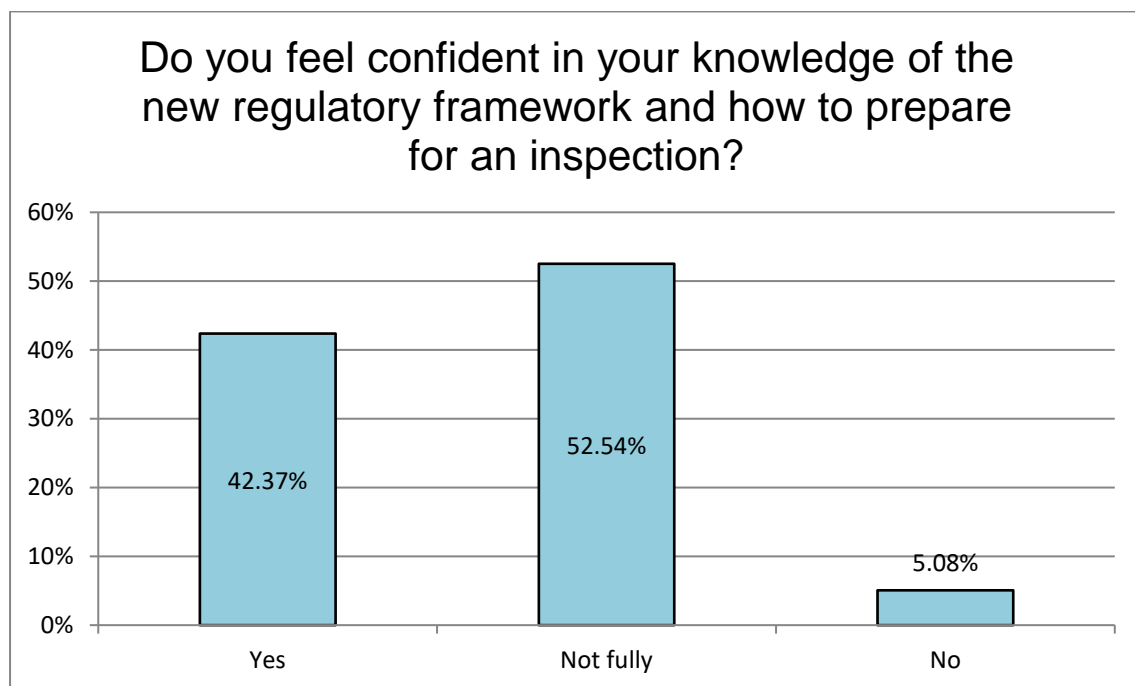
#### Analysis:

Only 42% of respondents felt fully confident in how to prepare for an inspection by Care Inspectorate Wales under the new regulatory framework.

This figure remains fairly consistent across the regions, ranging from 40-60% reporting as not fully confident in how to prepare for an inspection under the new regulatory framework.

These responses may be a reflection on current inspection processes as final guidance has yet to be published.

Again, it is likely that CIW will need to publish more information on the differences between the inspection regimes in order to allow providers to prepare fully for regulatory inspections.

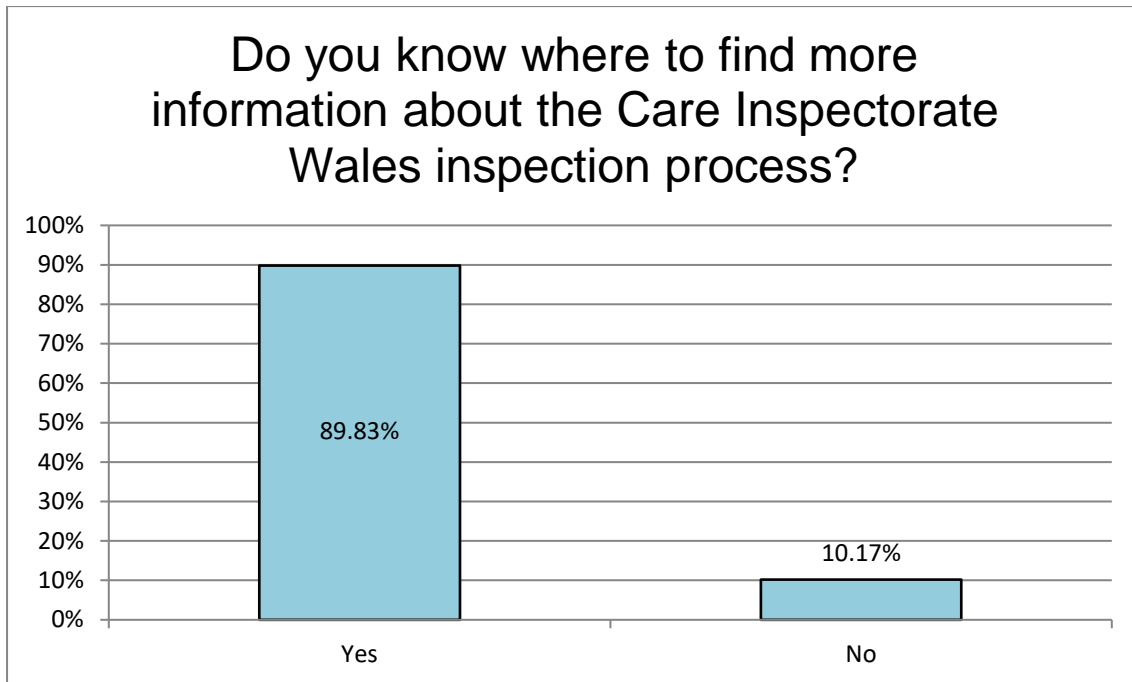


Answer Choices	Responses
Yes	42.37%
Not fully	52.54%
No	5.08%

**Q10. Do you know where to find more information about the Care Inspectorate Wales inspection process?**

**Analysis:**

This would suggest that the CIW website provides a comprehensive information hub and that providers are confident in accessing information.



**Q11. Are there any comments concerning registration with Care Inspectorate Wales?**

**Analysis:**

Of those who responded to this question, the most common comments were that there is not enough statutory guidance published by CIW, and that the registration process is overly long and complicated.

Again, Care Inspectorate Wales may want to consider offering more statutory guidance on standards in homecare, as well as publishing basic guidance on the registration process as a whole.

## Care workforce registration and Social Care Wales

### Q12. Have any of your care workforce registered with Social Care Wales?

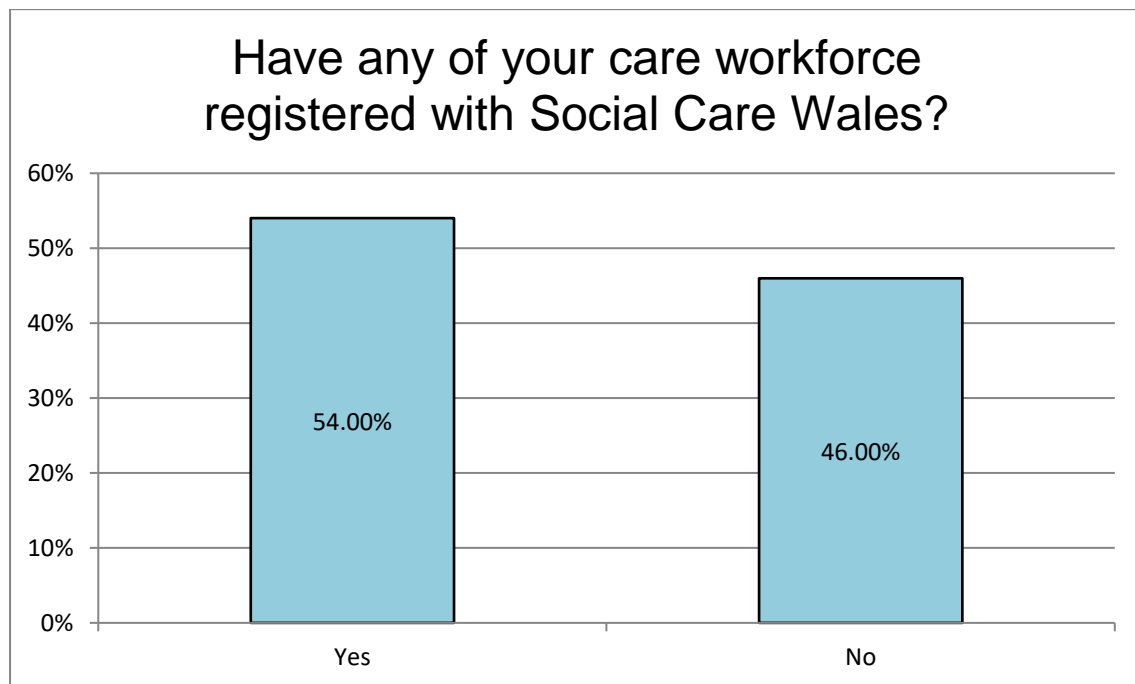
#### Analysis:

Out of those who responded to this question, 54% had some members of their care workforce who had already registered with Social Care Wales.

However, this means that there are still many providers who do not, as of yet, have any of their workforce that have registered.

There is a variation between regions, ranging between 38-62% reporting as having none of their care workforce currently registered. Gwent, and Cardiff and the Vale, have the most providers with none of their care workforce registered.

This may be as a result of providers waiting for the qualifying criteria to be finally established. These results were taken before the introduction of SCW online competence entry qualification was introduced.



Answer Choices	Responses
Yes	54.00%
No	46.00%

### Q13. Do all of your care workers intend to register?

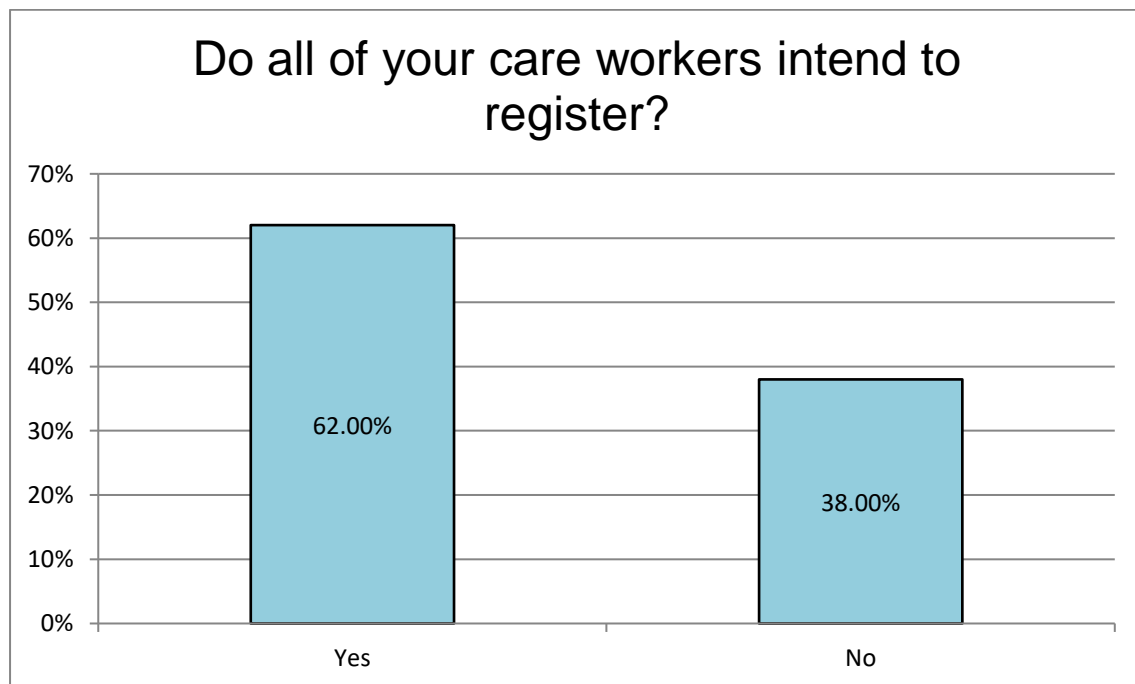
#### Analysis:

38% of respondents to this questions answered that not all of their care workers are intending to register with Social Care Wales.

Of those who left comments to explain why their care workers were not intending to register, the vast majority stated that some care workers were intending to leave the sector rather than register.

The most common reasons given were that care workers were too worried about achieving the required level of academic qualifications or did not want to have to attend further study or continuous improvement for a role that they have been performing for a period of time.

This represents a significant risk factor not to be ignored.



Answer Choices	Responses
Yes	62.00%
No	38.00%

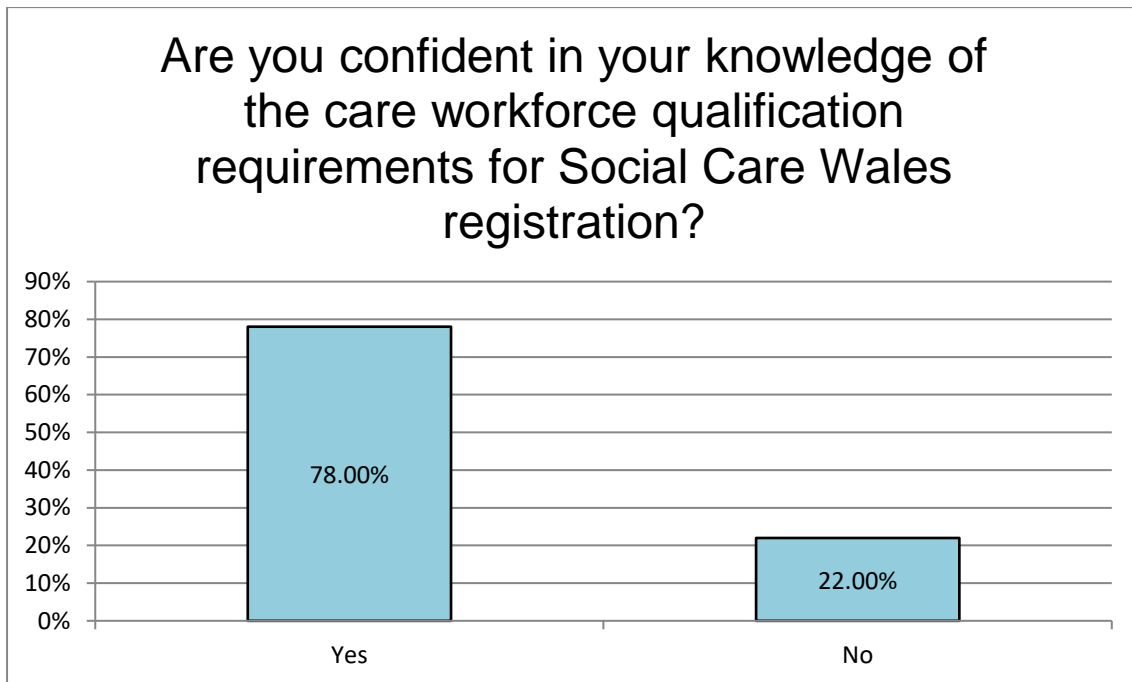


**Q14. Are you confident in your knowledge of the care workforce qualification requirements for Social Care Wales registration?**

**Analysis:**

The vast majority of respondents felt confident in their knowledge of qualification requirements for SCW registration.

However, over 20% reported that they were unsure of the qualifications requirements for their care workforce.



Answer Choices	Responses
Yes	78.00%
No	22.00%

**Q15. What percentage of your care workforce do you believe will not meet the current criteria for registration?**

**Analysis:**

Answers to this question varied, with some reporting that as many as 75% of their workforce may not meet the qualifications criteria, while others claimed that all of their staff would meet the criteria.

The average reported ineligibility from the providers who answered this question was 23%.

The average reported ineligibility was fairly consistent across all the regions of Wales.

This question was drafted prior to the announcement that SCW have introduced an online competency registration procedure however, there may be an element of resentment to CPD requirements.

**Q16. Are there any comments concerning registration of the workforce with Social Care Wales?**

Some of the most common comments were as follows:

- Qualifications are seen as a barrier to entry to care work;
- Providers are concerned that the fees will either put off care workers from applying or care providers will have to offer to pay them;
- The qualifications requirements are too difficult or too time consuming;
- More support and guidelines on registration for care workers is needed from Social Care Wales;
- Registration will drive away existing care workers;
- Social Care Wales take too long to confirm registration; and
- Many careworkers are not interested in studying or gaining further qualifications.

Generally, providers seem to be concerned that care worker registration will prove an additional barrier to recruitment, with potential applicants put off by the thought of having to gain additional qualifications, continual revalidation and cost implications.

**Q17. What percentage of your care workforce have one of the following qualifications?**

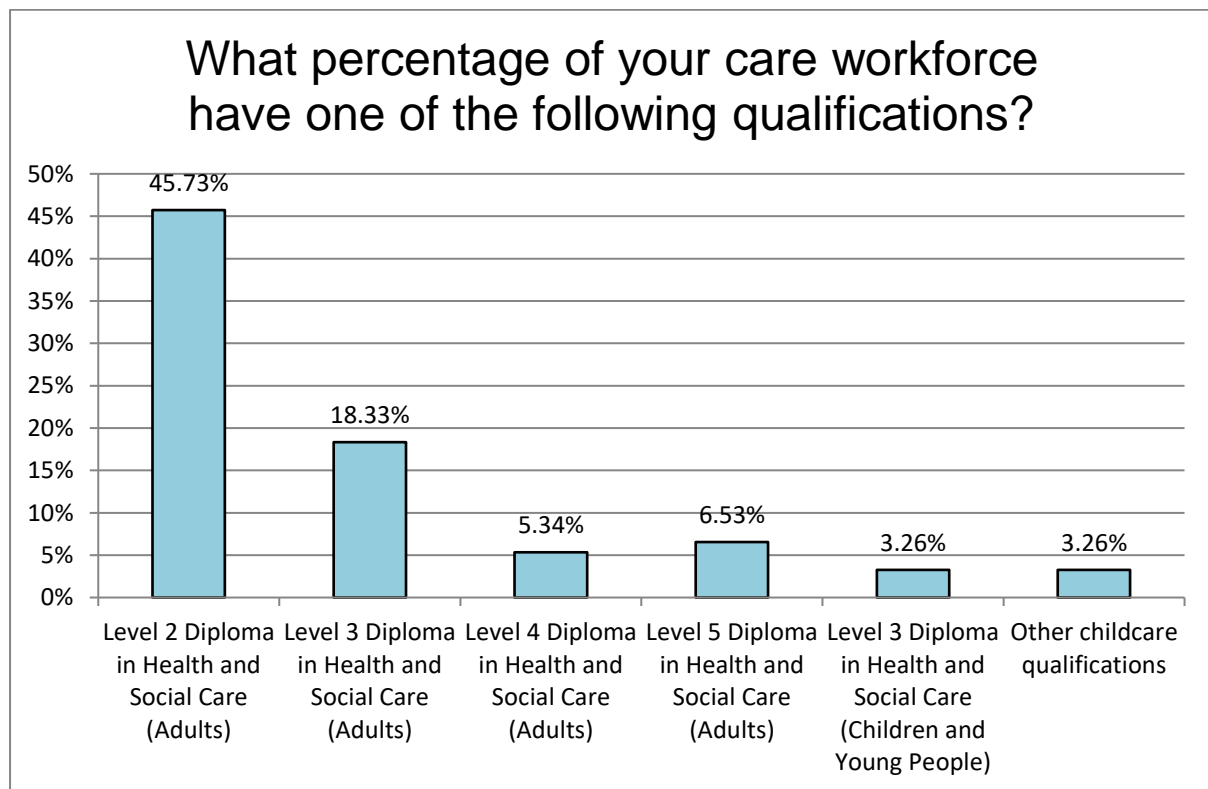
**Analysis:**

Based on this data, less than half of care workers have currently achieved a Level 2 diploma.

No region reported a figure above 50% for care workers who currently have a Level 2 diploma.

This would suggest that there is still considerable training required to achieve a fully-qualified and registered homecare workforce in Wales.

The results displayed show the average reported responses against the question profile.



Answer Choices	Average reported %
Level 2 Diploma in Health and Social Care (Adults)	45.73%
Level 3 Diploma in Health and Social Care (Adults)	18.33%
Level 4 Diploma in Health and Social Care (Adults)	5.34%
Level 5 Diploma in Health and Social Care (Adults)	6.53%
Level 3 Diploma in Health and Social Care (Children and Young People)	3.26%
Other childcare qualifications	3.26%

**Q18. What support do you feel the care workforce will need to complete the registration process?**

The survey asked respondents to give their opinions on what support careworkers will need in order to successfully register with Social Care Wales. A summary of the most common responses can be found below.

The most commonly cited support needed included:

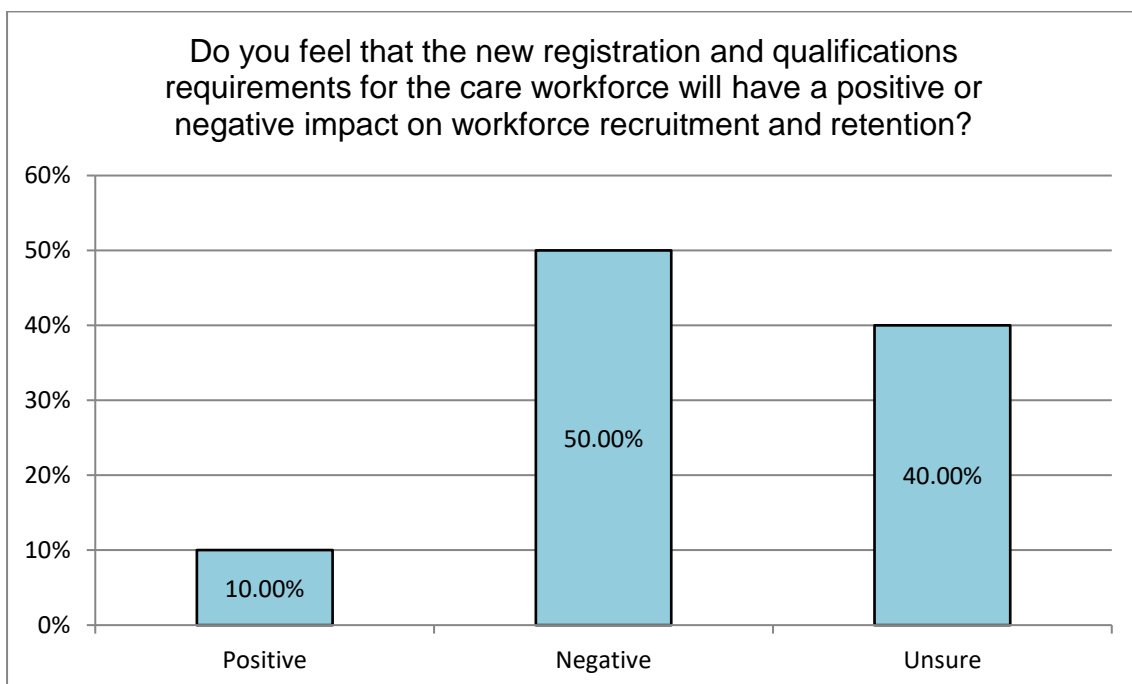
- Improving computer skills/access to computers for careworkers;
- Giving careworkers paid time for completing registration requirements;
- Financial support for the registration fee;
- Clear guidelines for careworkers and a simple registration process;
- Individual support for careworkers from management;
- Improved access to training opportunities; and
- Greater raising of awareness of registration by Social Care Wales.

**Q19. Do you feel that the new registration and qualifications requirements for the care workforce will have a positive or negative impact on workforce recruitment and retention?**

**Analysis:**

The results show that the majority of respondents believe that the new requirements will either have a negative impact on recruitment, or are unsure of what the implication will be.

This is fairly consistent across all regions; very few providers reported feeling that registration requirements for the care workforce are a positive move.



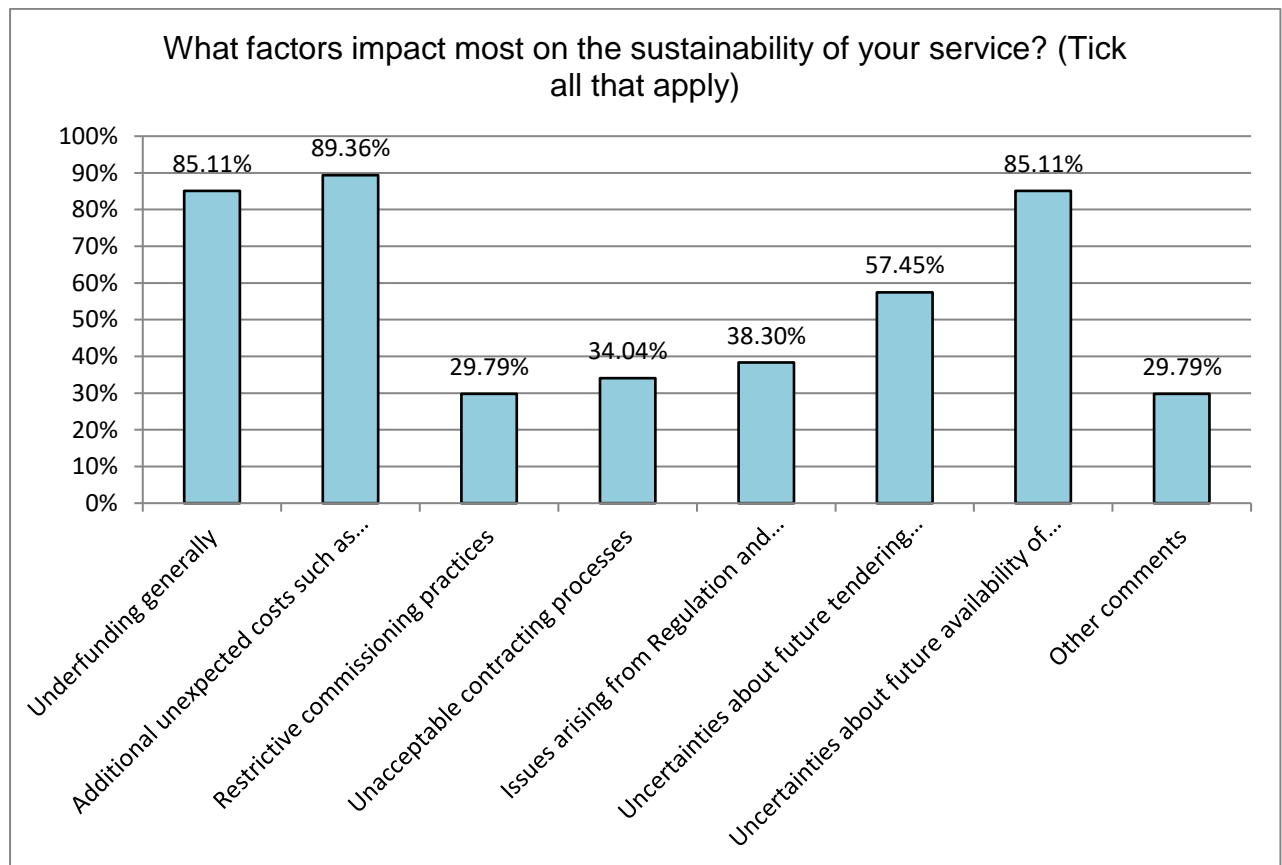
## Sustainability and stability of the social care sector in Wales

**Q20. Sustainability of the sector is a major concern for providers, commissioners and government strategic planning. What factors impact most on the sustainability of your service? (Tick all that apply)**

### Analysis:

Fee levels and funding remains a top priority. This, on top of the additional costs incurred to meet legislative responsibilities will not enable providers to properly re-invest in their businesses, and may restrict growth.

It is argued that workforce recruitment & retention will be addressed by various initiatives of Welsh Government and SCW will have an effect, however, the implications of Brexit are still uncertain.



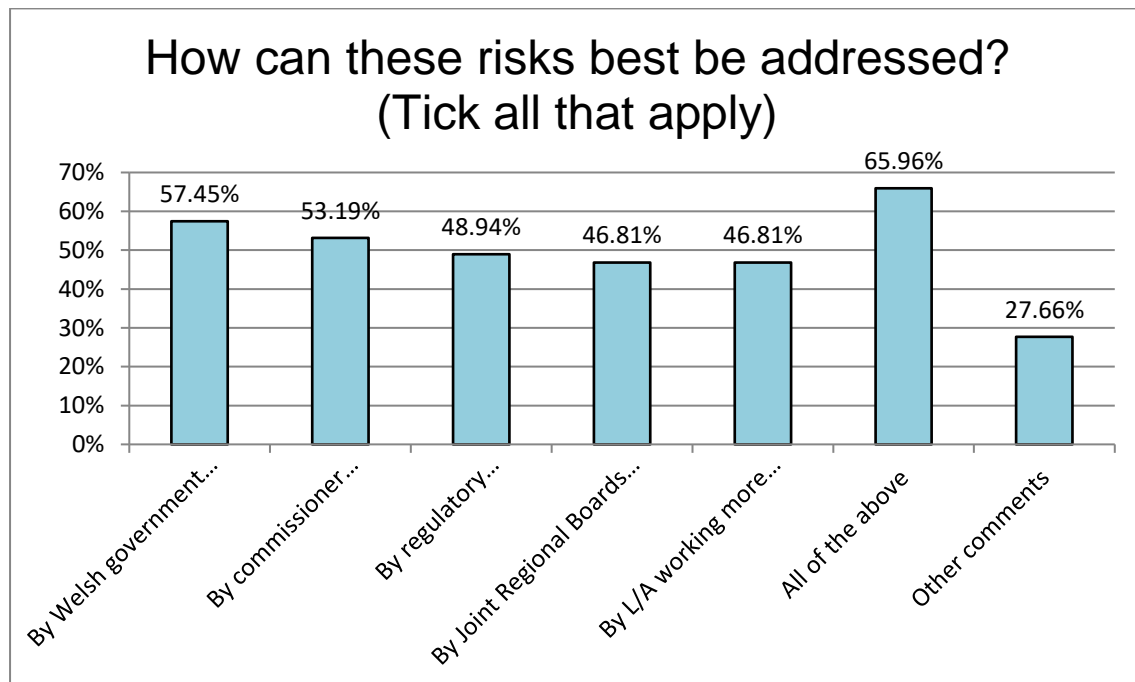
Answer Choices	Responses
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Underfunding generally	85.11%
Additional unexpected costs such as registration fees, training etc	89.36%
Restrictive commissioning practices	29.79%
Unacceptable contracting processes	34.04%
Issues arising from Regulation and Inspection	38.30%
Uncertainties about future tendering opportunities	57.45%
Uncertainties about future availability of workforce	85.11%
Other comments	29.79%

**Q21. How can these risks best be addressed? (Tick all that apply)**

**Analysis:**

The views of providers are very much spread equally over a number of options, which may indicate that the approach to resolving potential risk is equally shared by all stakeholders.

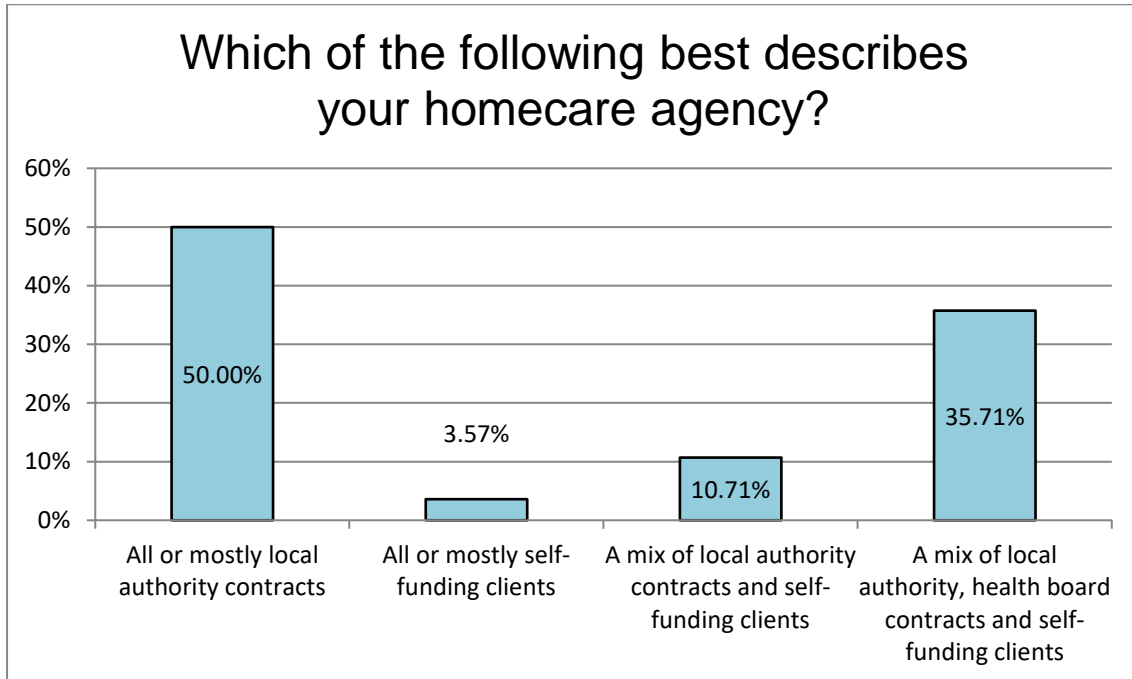


Answer Choices	Responses
By Welsh government listening and working with providers/representative organisations at all Wales level	57.45%
By commissioner representatives listening and working with providers/representative organisations at all Wales level	53.19%
By regulatory organisations listening and working with providers/representative organisations at all Wales level	48.94%
By Joint Regional Boards listening and working with providers/representatives at all Wales level	46.81%
By L/A working more closely with the domiciliary care sector	46.81%
All of the above	65.96%
Other comments	27.66%

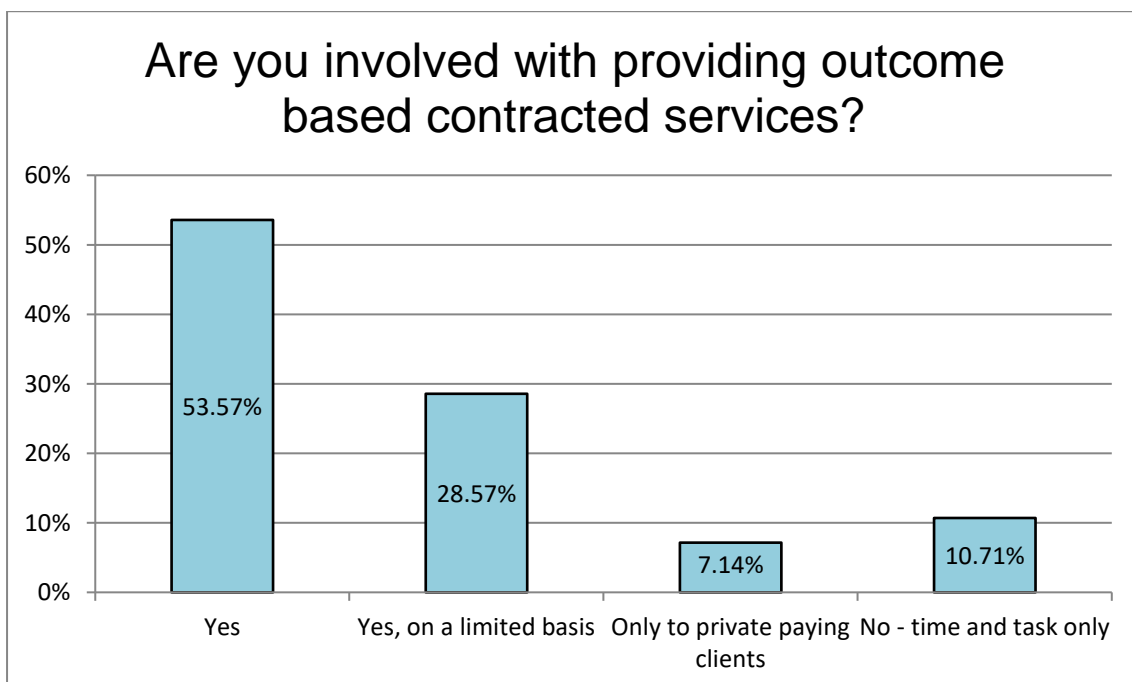


## North Wales Region

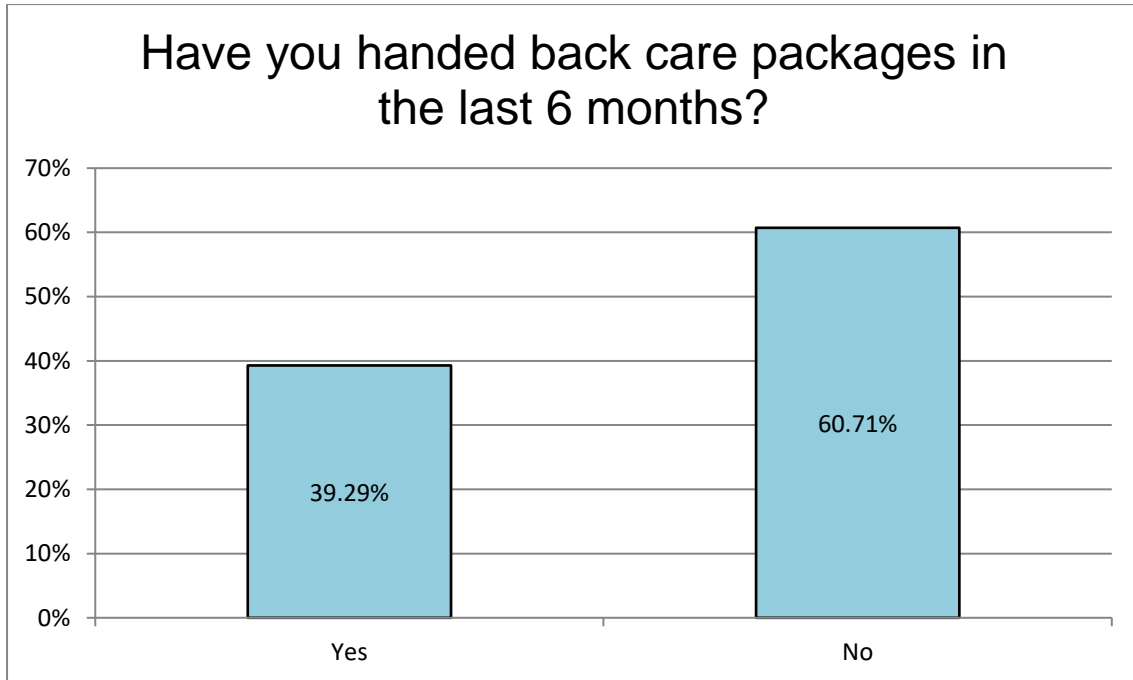
**Q1. Which of the following best describes your homecare agency?**



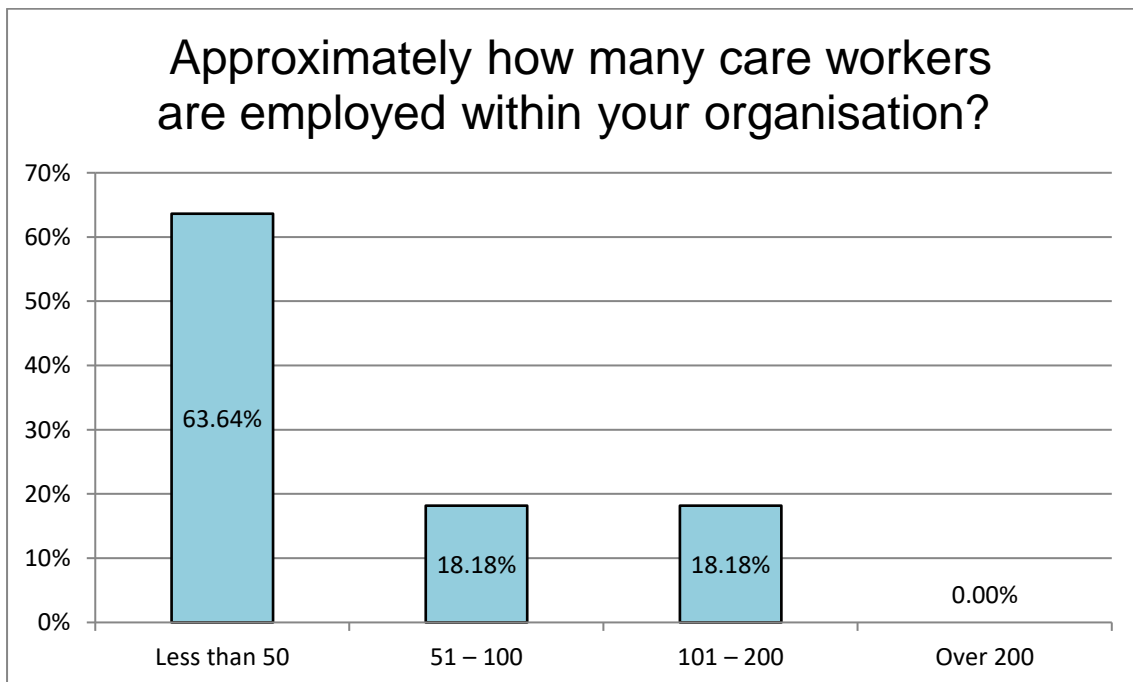
**Q3. Are you involved with providing outcome based contracted services?**



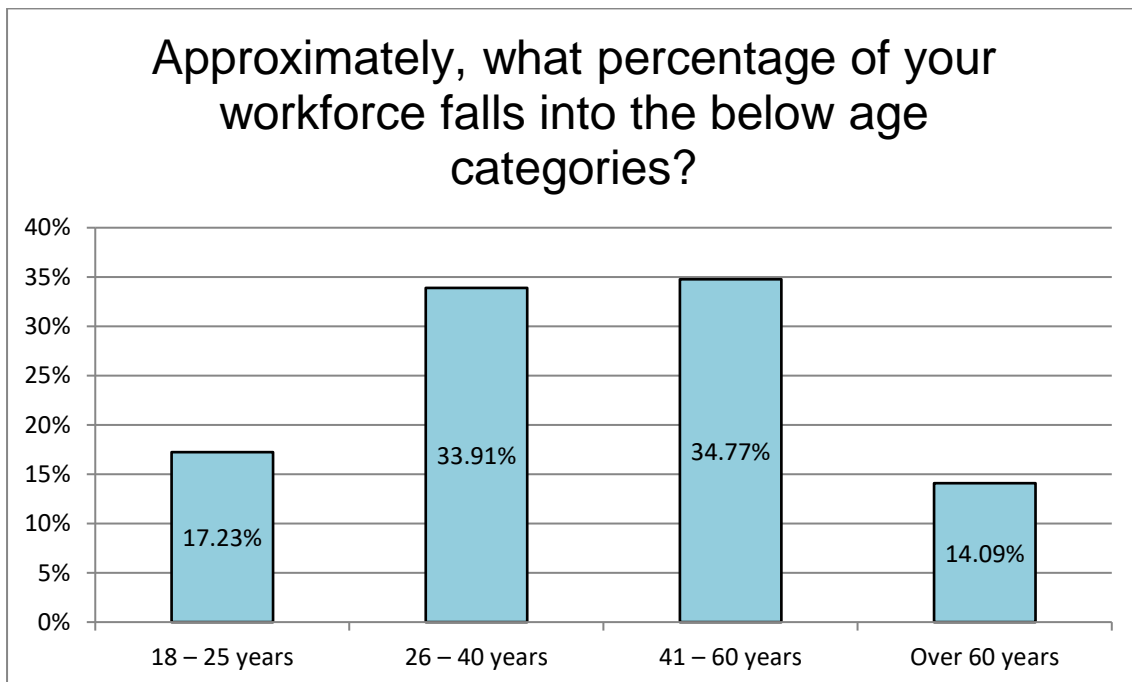
**Q4. Have you handed back care packages in the last 6 months?**



**Q5. Approximately how many care workers are employed within your organisation?**

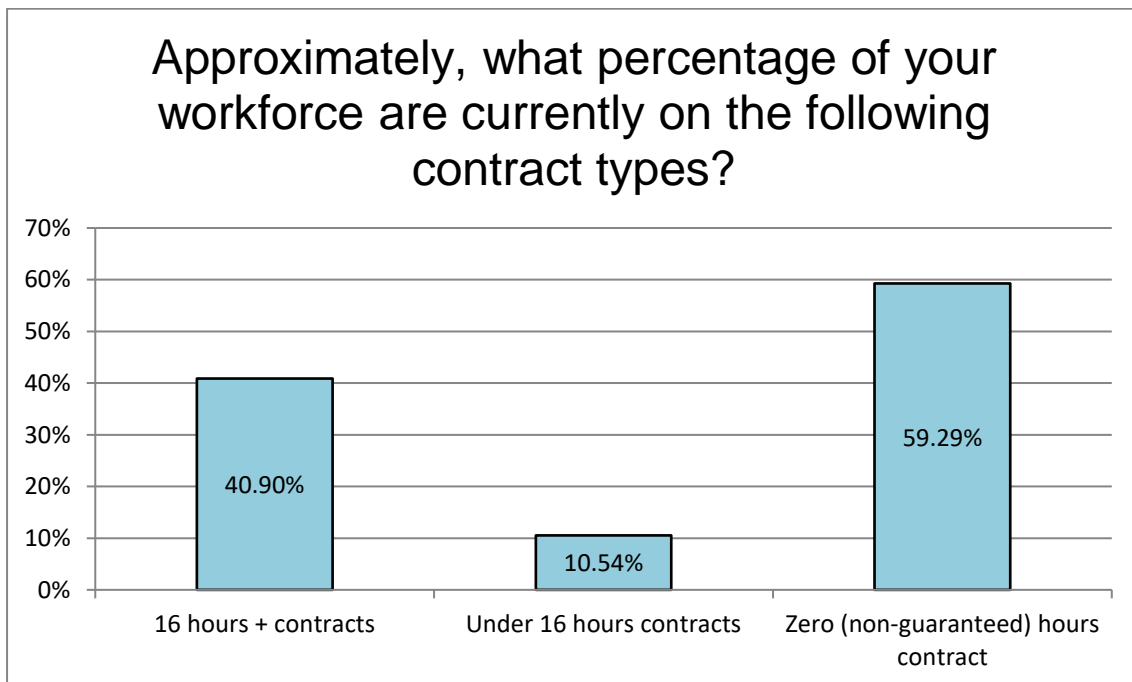


**Q6. Approximately, what percentage of your workforce falls into the below age categories?**

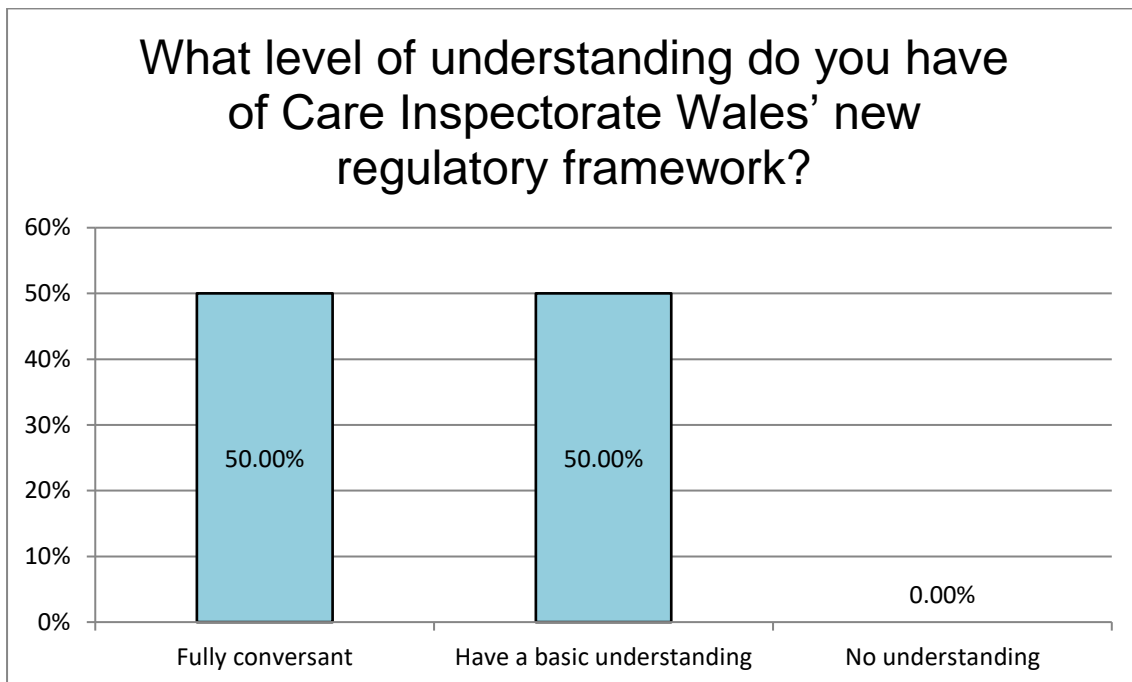


**Q7. Approximately, what percentage of your workforce are currently on the following contract types?**

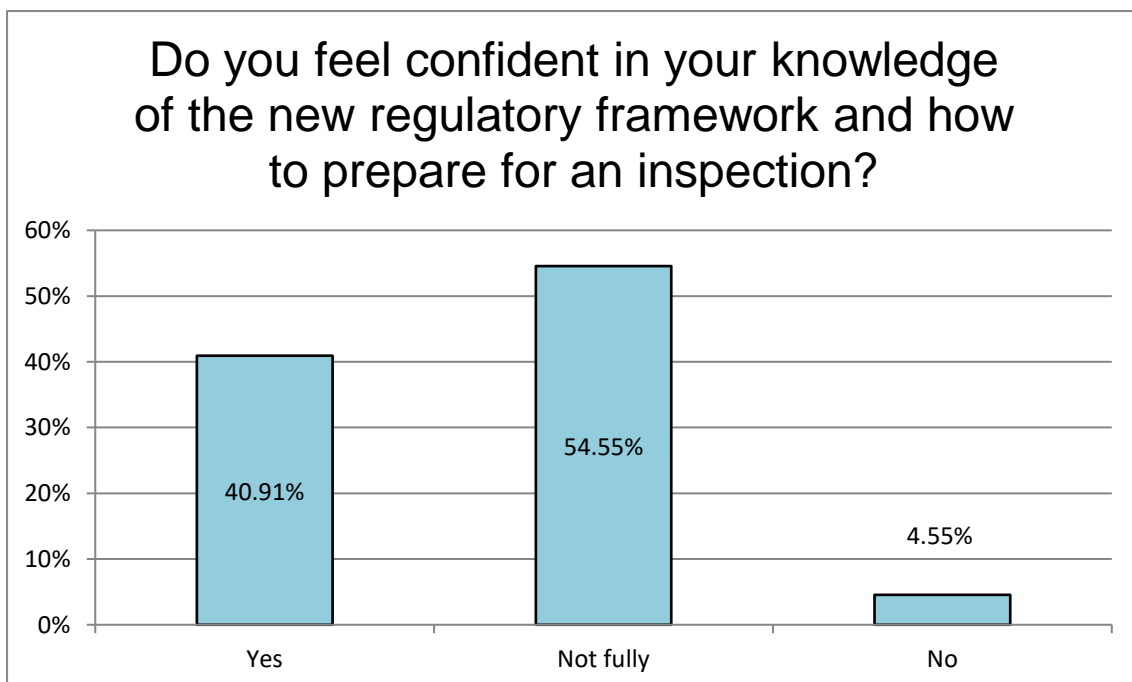
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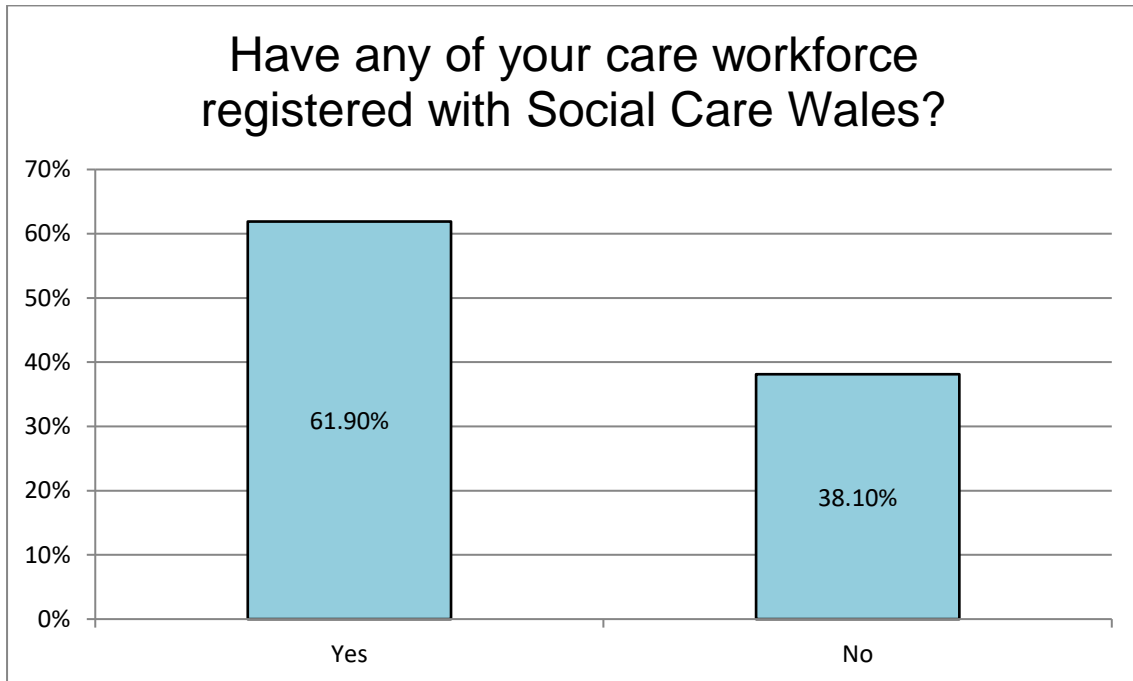
**Q8. What level of understanding do you have of Care Inspectorate Wales' new regulatory framework?**



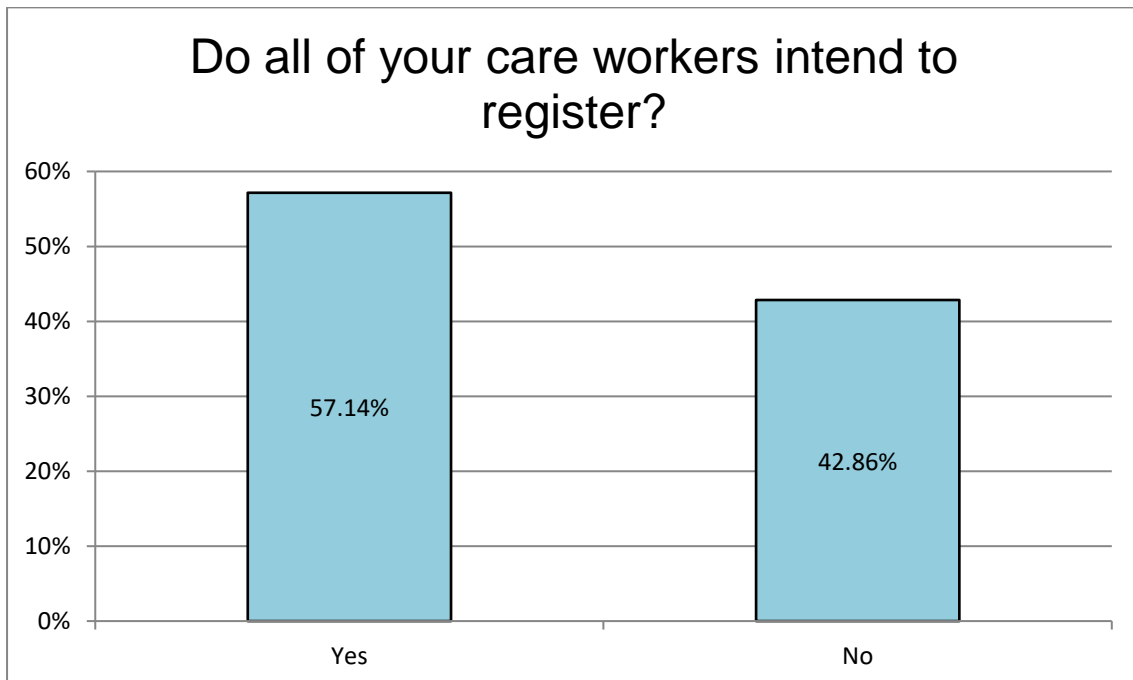
**Q9. Do you feel confident in your knowledge of the new regulatory framework and how to prepare for an inspection?**



**Q12. Have any of your care workforce registered with Social Care Wales?**



**Q13. Do all of your care workers intend to register?**



**Q14. Are you confident in your knowledge of the care workforce qualification requirements for Social Care Wales registration?**

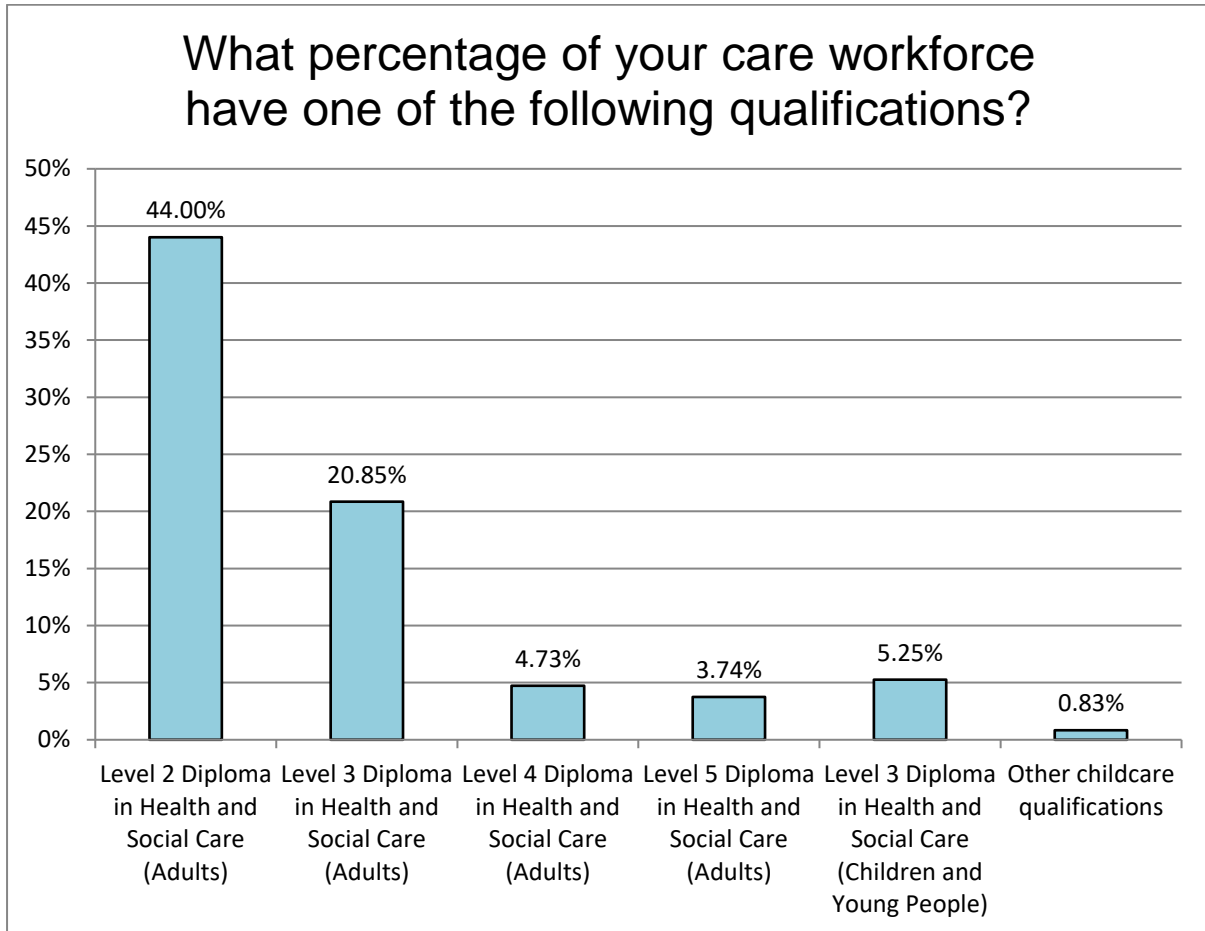


**Q15. What percentage of your care workforce do you believe will not meet the current criteria for registration?**

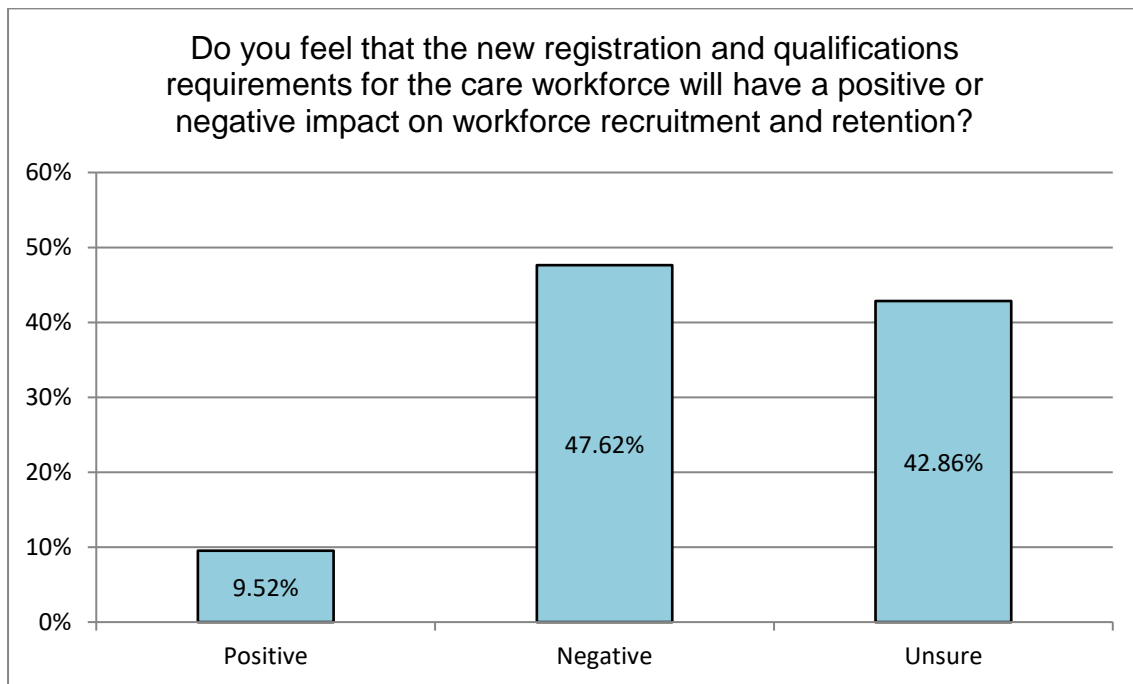
The average reported ineligibility from the providers who answered this question was **23%**.

**Q17. What percentage of your care workforce have one of the following qualifications?**

The results displayed show the average reported responses against the question profile.



**Q19. Do you feel that the new registration and qualifications requirements for the care workforce will have a positive or negative impact on workforce recruitment and retention?**

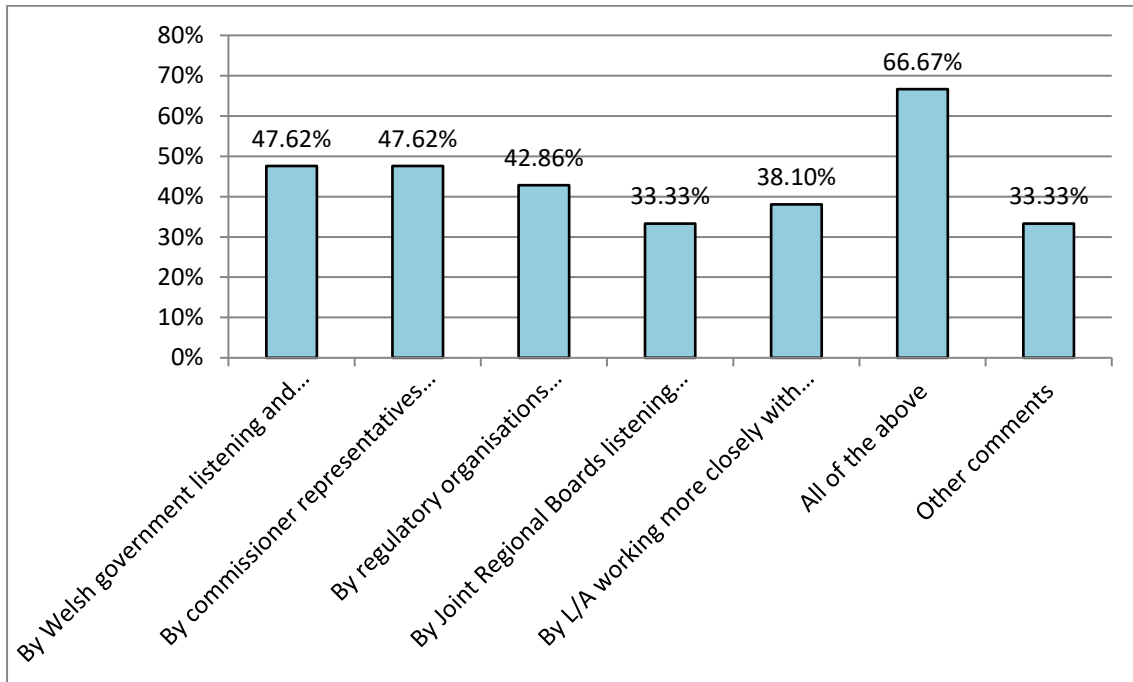


**Q20. Sustainability of the sector is a major concern for providers, commissioners and government strategic planning. What factors impact most on the sustainability of your service? (Tick all that apply)**

Answer Choices	Responses
Underfunding generally	90.48%
Additional unexpected costs such as registration fees, training etc	85.71%
Restrictive commissioning practices	33.33%
Unacceptable contracting processes	28.57%
Issues arising from Regulation and Inspection	42.86%
Uncertainties about future tendering opportunities	66.67%
Uncertainties about future availability of workforce	80.95%
Other comments	28.57%

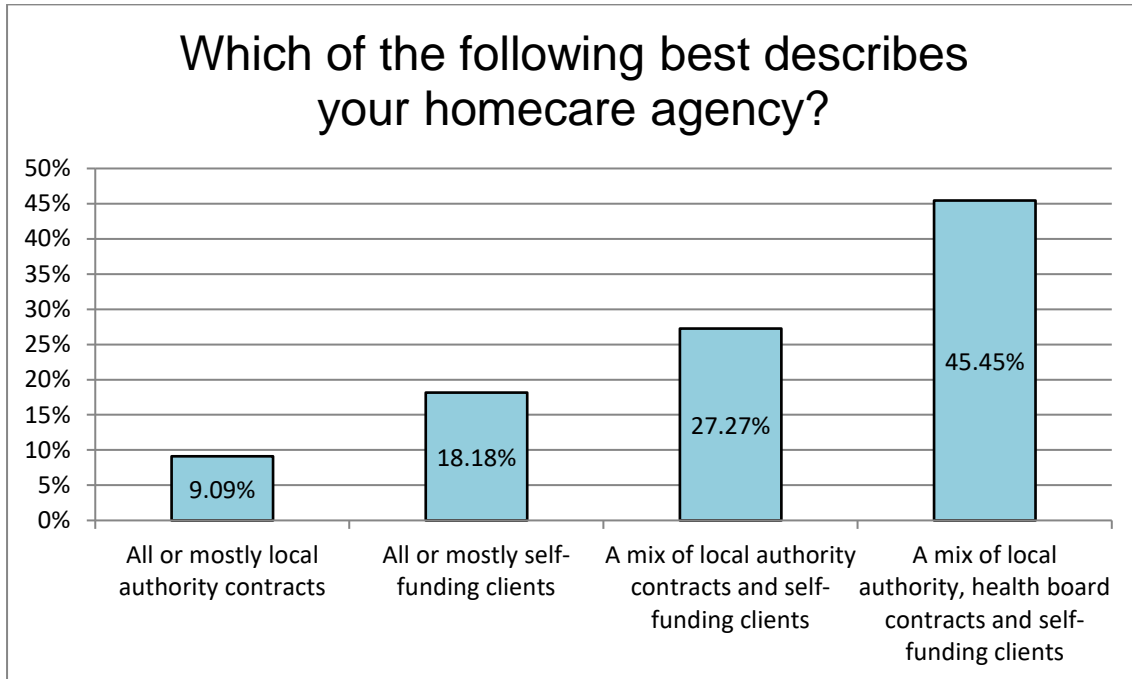


**Q21. How can these risks best be addressed? (Tick all that apply)**

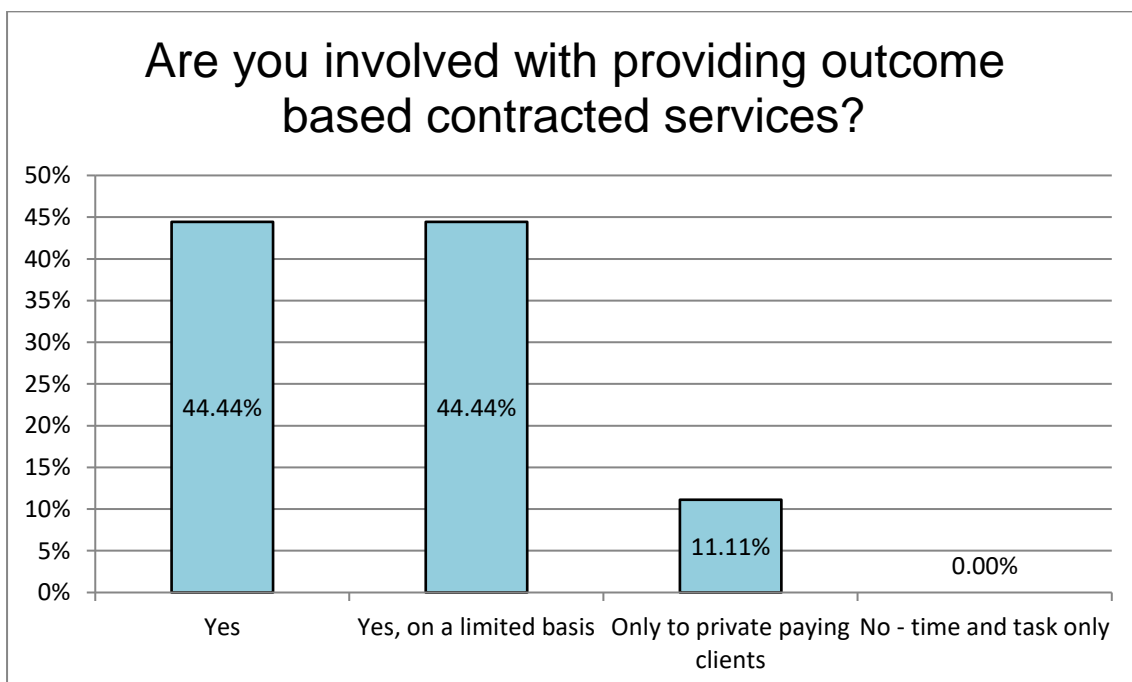


## Cardiff and the Vale

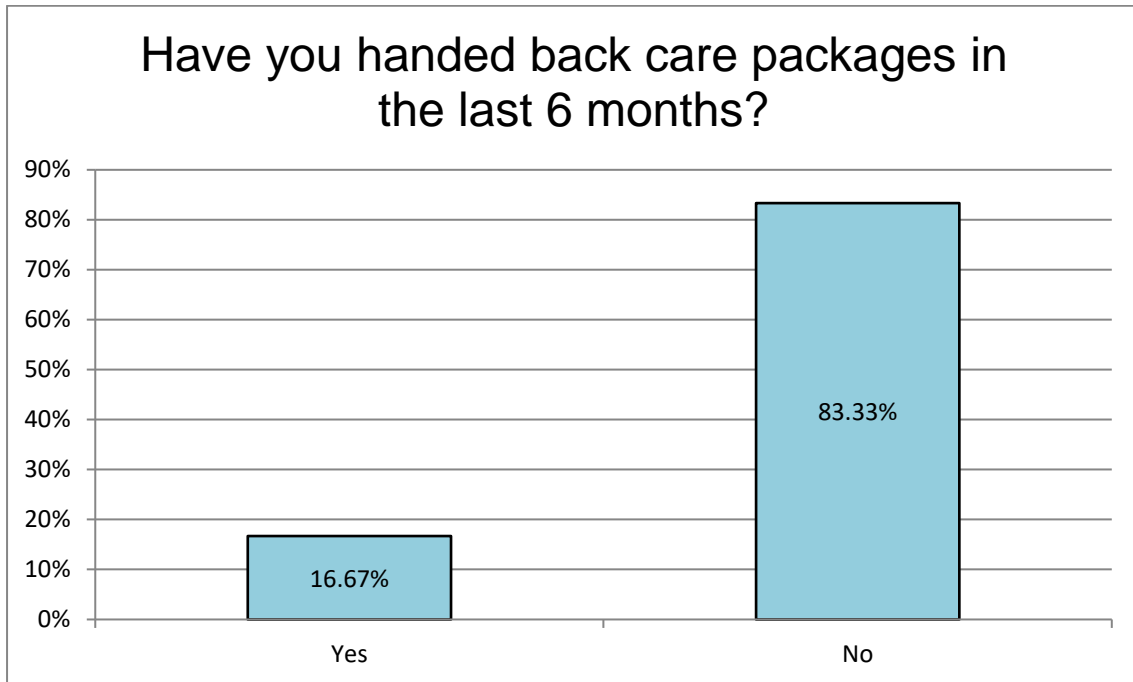
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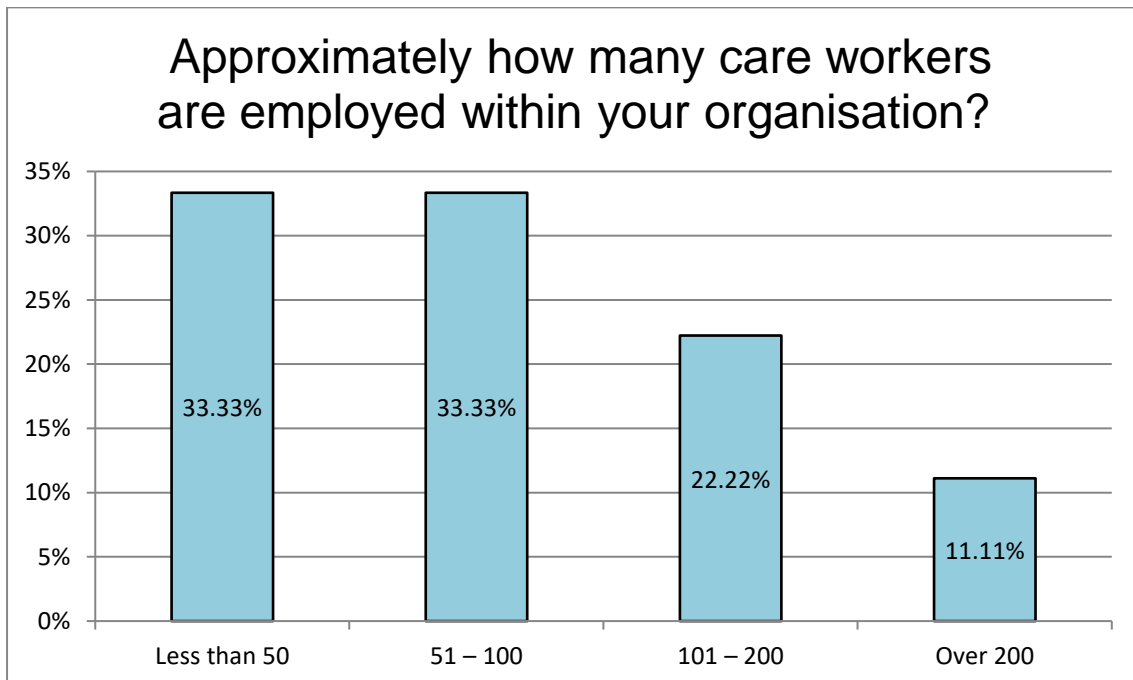
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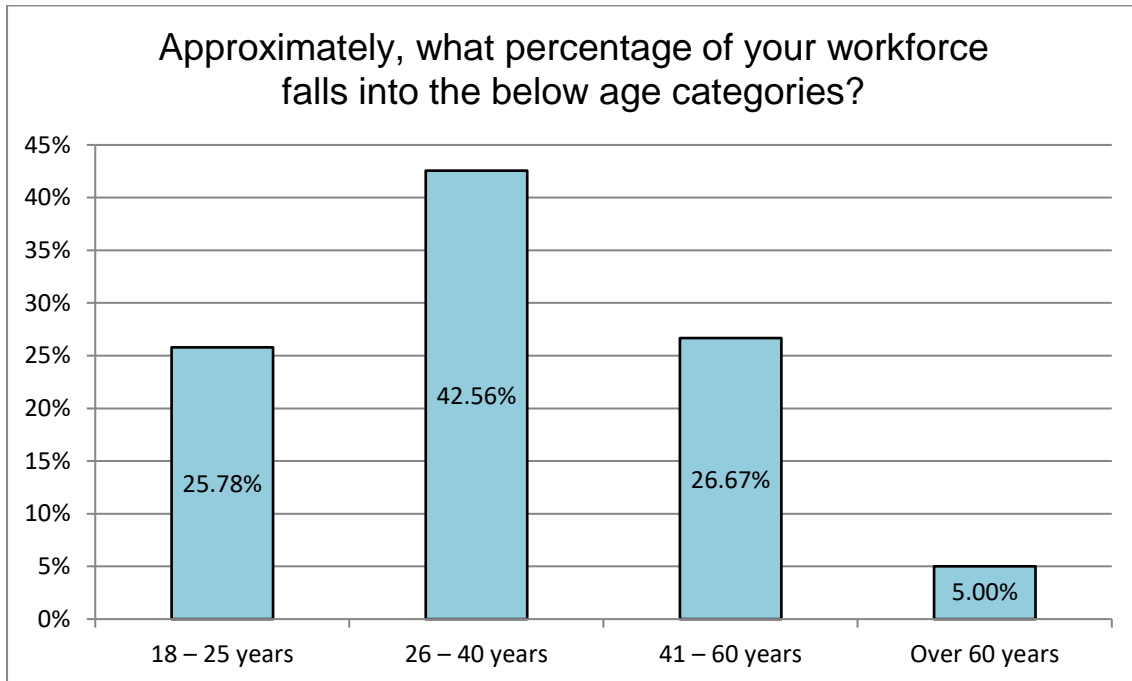
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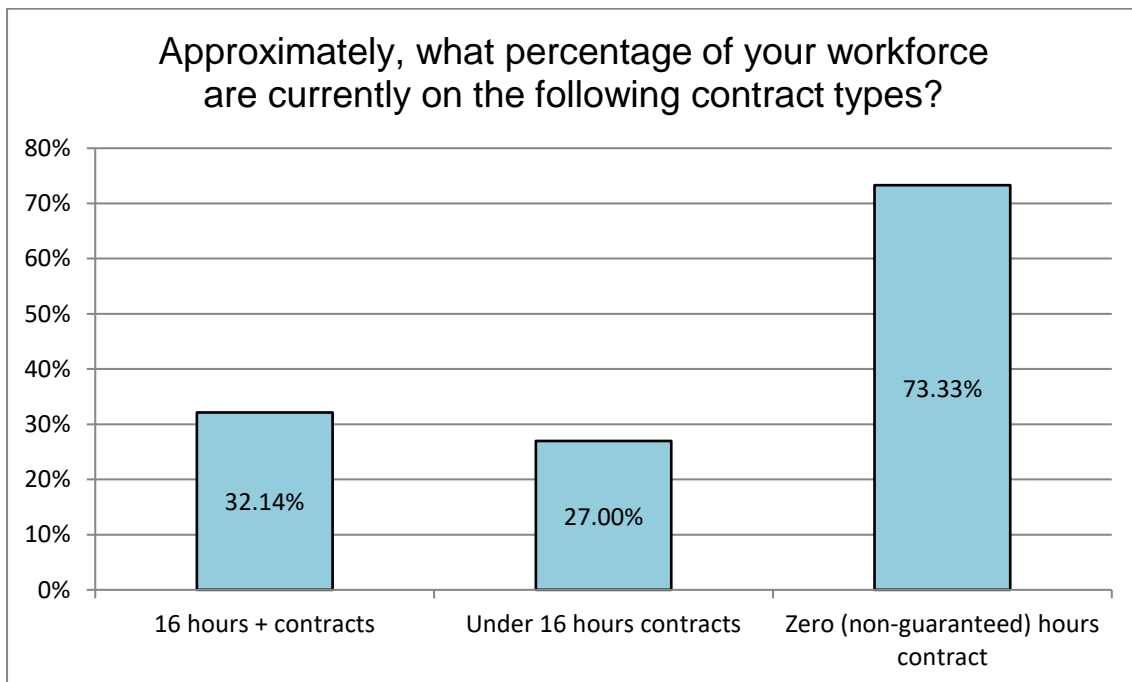


**Q6. Approximately, what percentage of your workforce falls into the below age categories?**

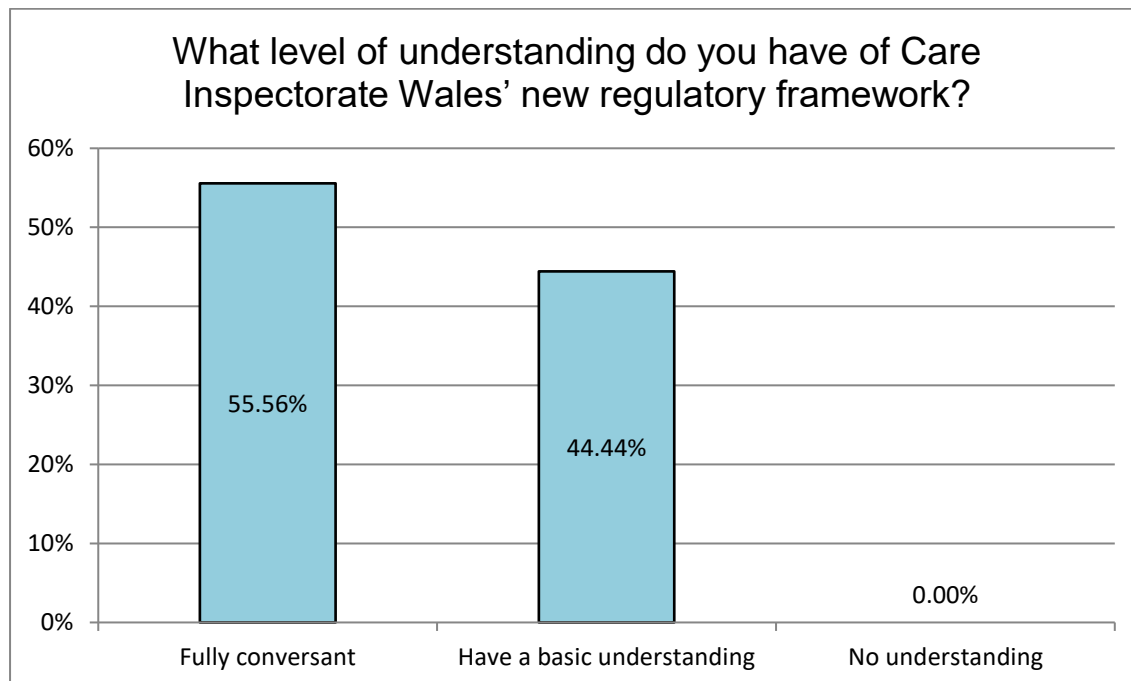


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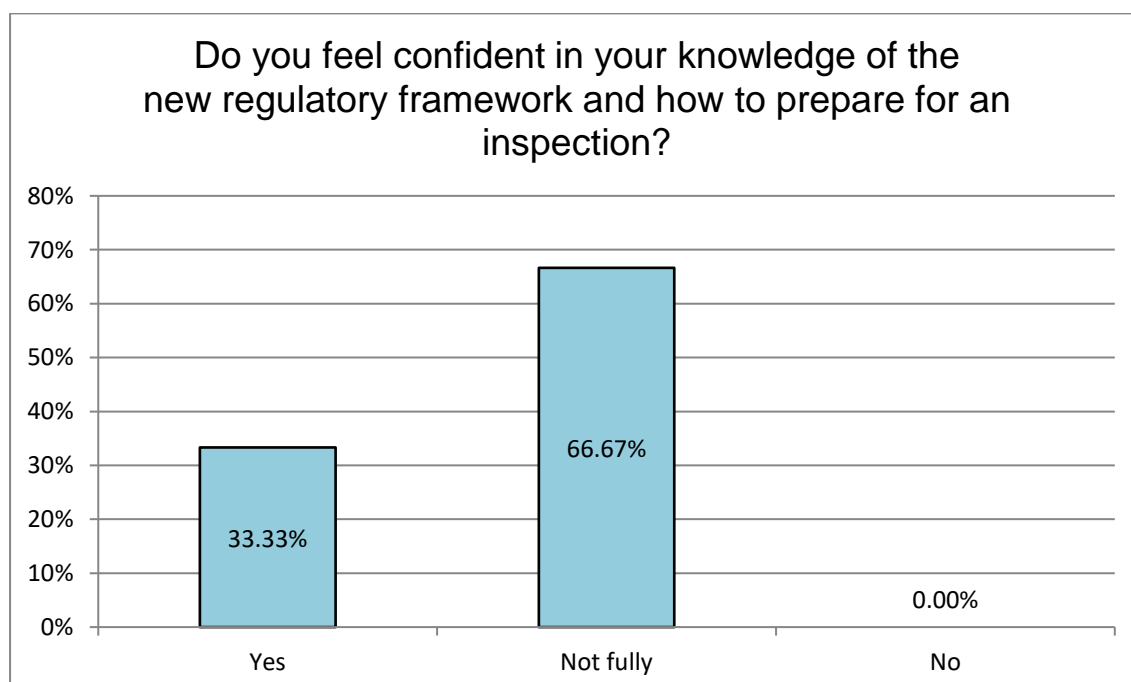
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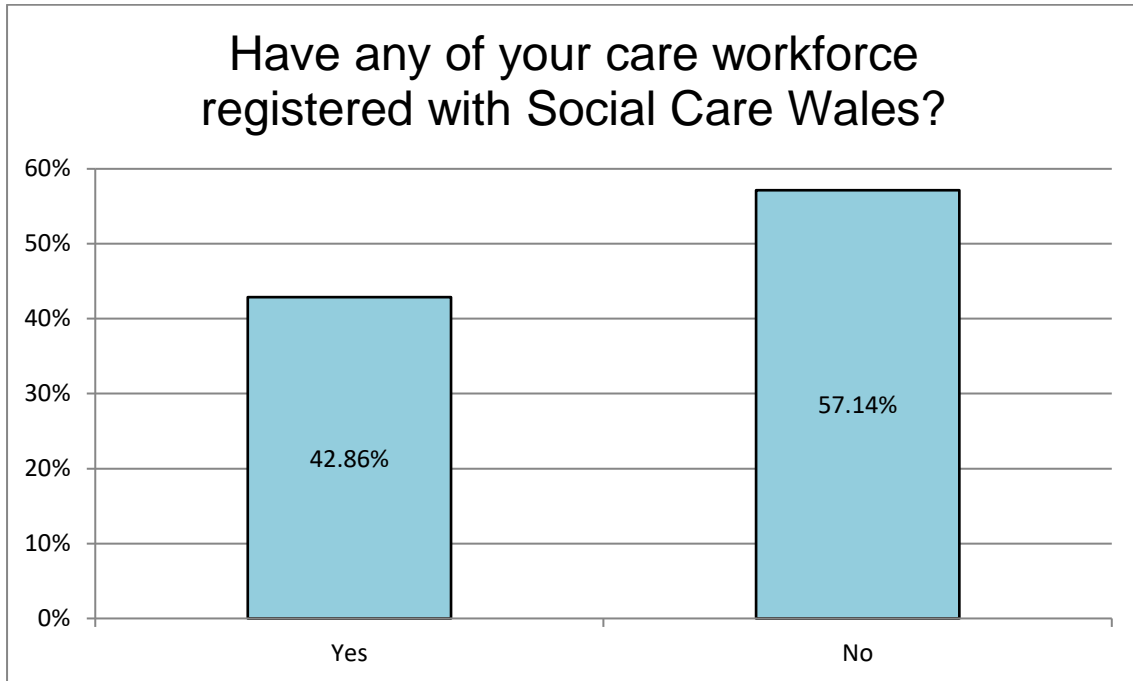
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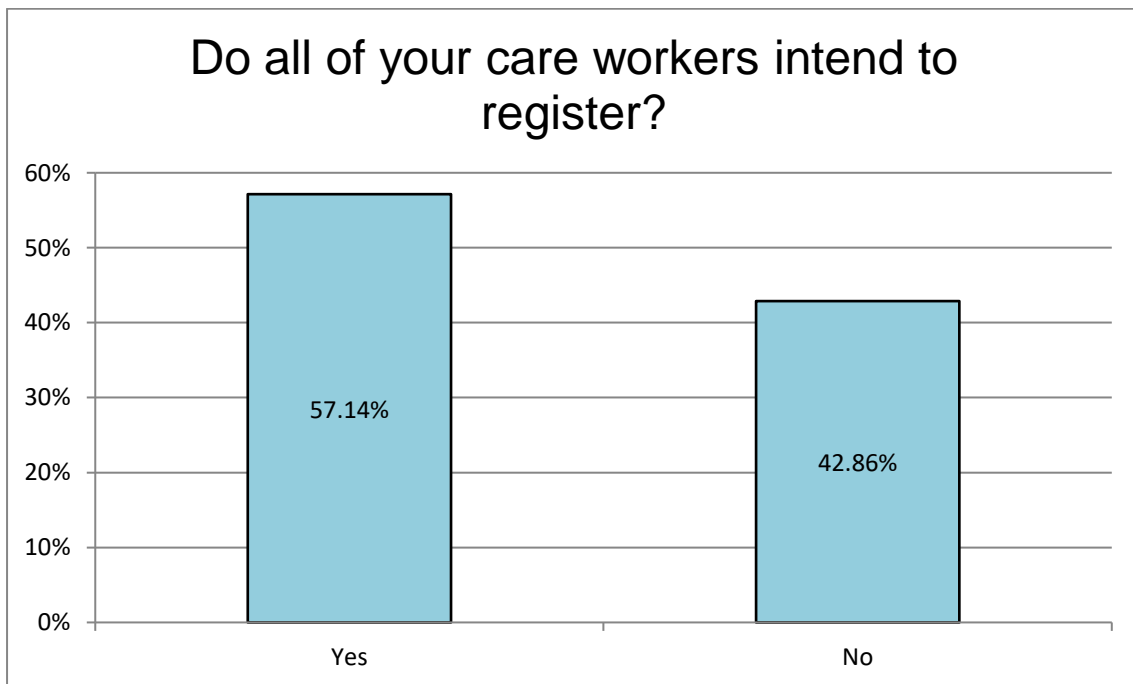
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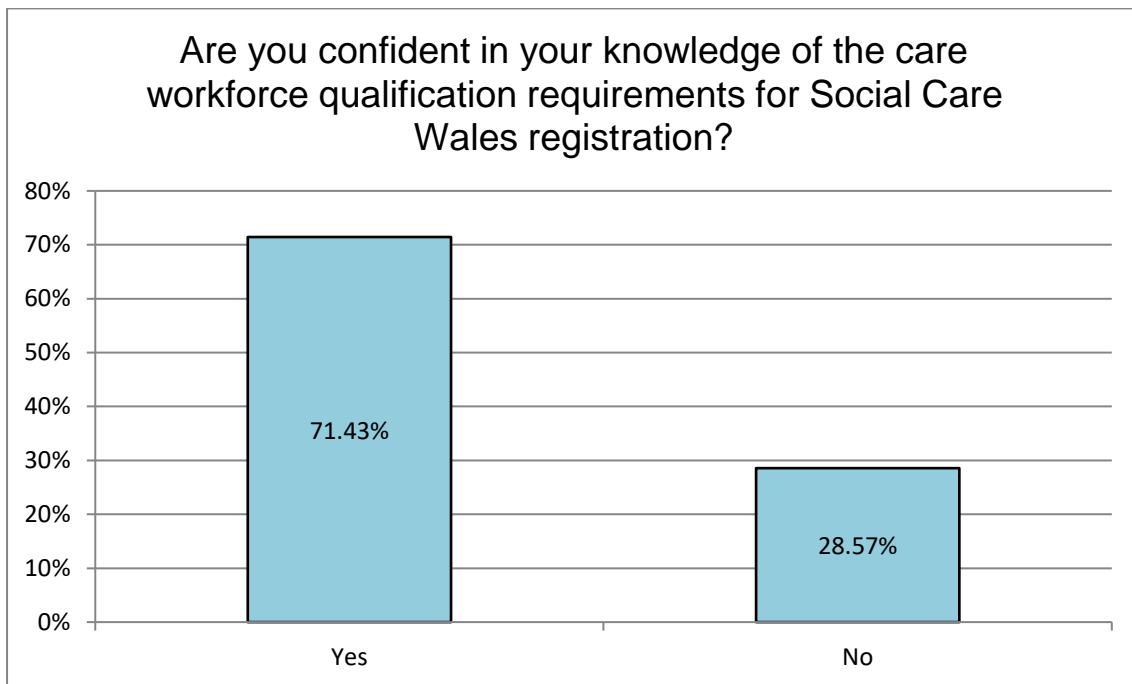
**Q12. Have any of your care workforce registered with Social Care Wales?**



**Q13. Do all of your care workers intend to register?**



**Q14. Are you confident in your knowledge of the care workforce qualification requirements for Social Care Wales registration?**

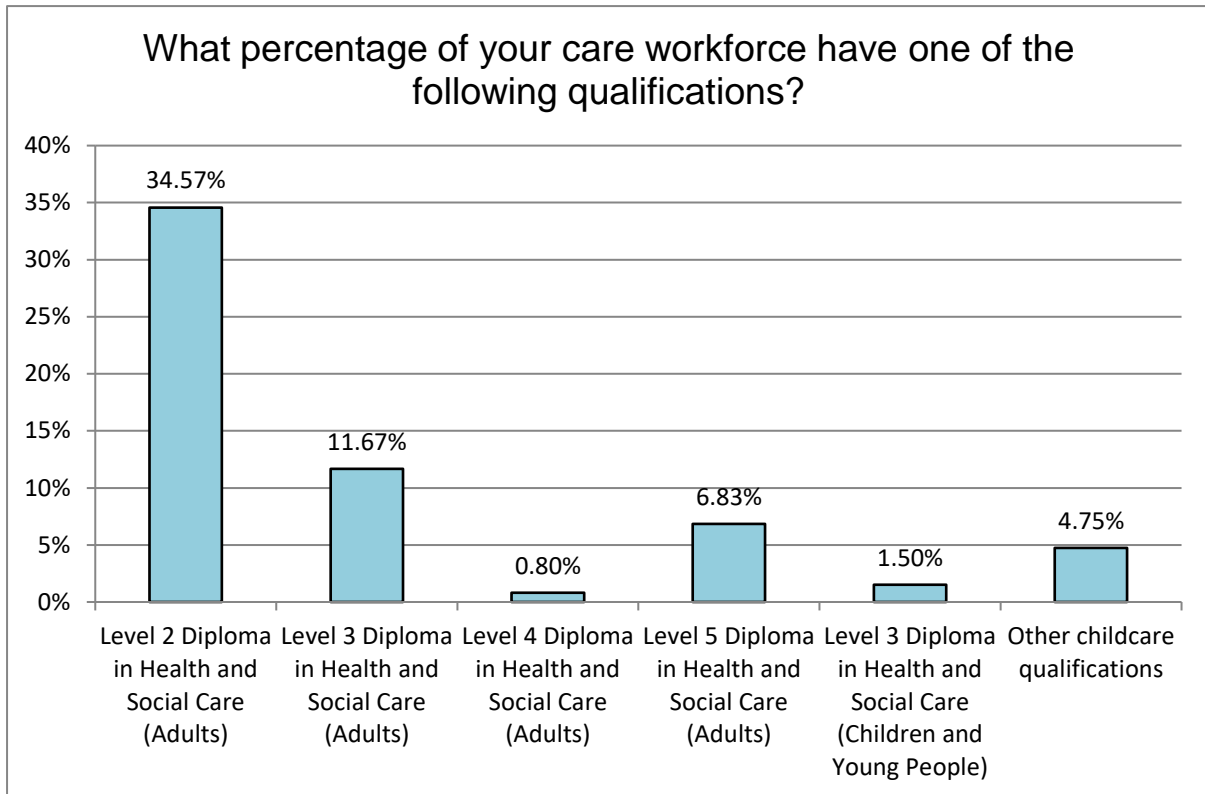


**Q15. What percentage of your care workforce do you believe will not meet the current criteria for registration?**

The average reported ineligibility from the providers who answered this question was **25%**.

**Q17. What percentage of your care workforce have one of the following qualifications?**

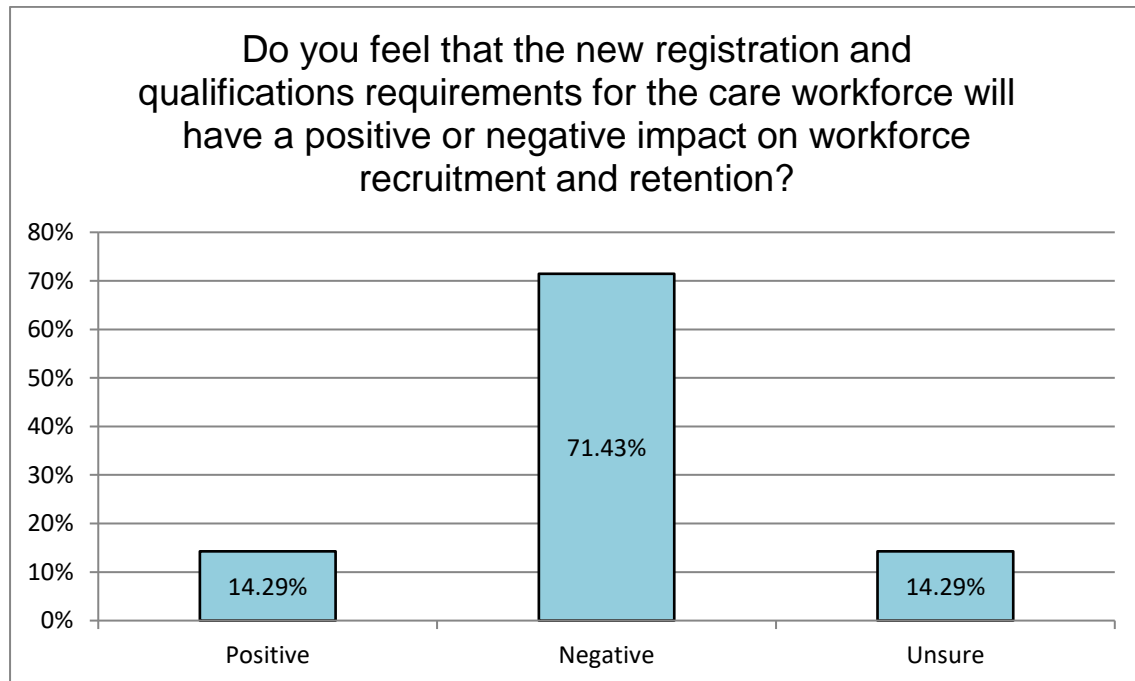
The results displayed show the average reported responses against the question profile.





**Q19. Do you feel that the new registration and qualifications requirements for the care workforce will have a positive or negative impact on workforce recruitment and retention?**

The results displayed show the average reported responses against the question profile.



**Q20. Sustainability of the sector is a major concern for providers, commissioners and government strategic planning. What factors impact most on the sustainability of your service? (Tick all that apply)**

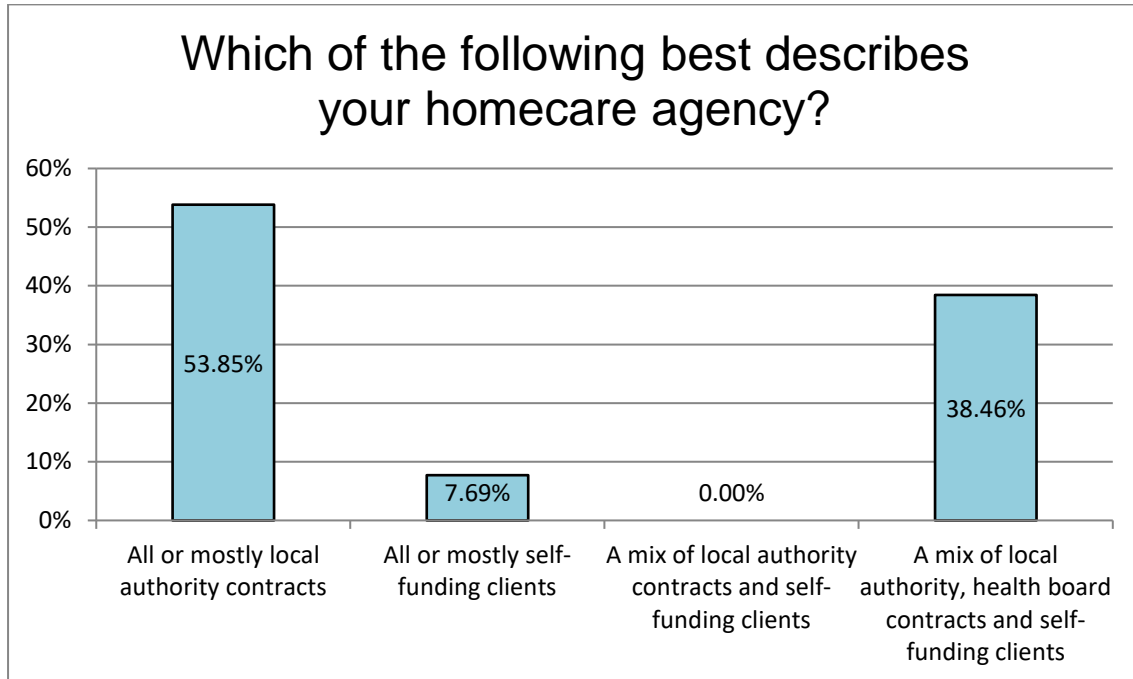
Answer Choices	Responses
Underfunding generally	80.00%
Additional unexpected costs such as registration fees, training etc	80.00%
Restrictive commissioning practices	20.00%
Unacceptable contracting processes	20.00%
Issues arising from Regulation and Inspection	20.00%
Uncertainties about future tendering opportunities	20.00%
Uncertainties about future availability of workforce	100.00%
Other comments	20.00%

**Q21. How can these risks best be addressed? (Tick all that apply)**

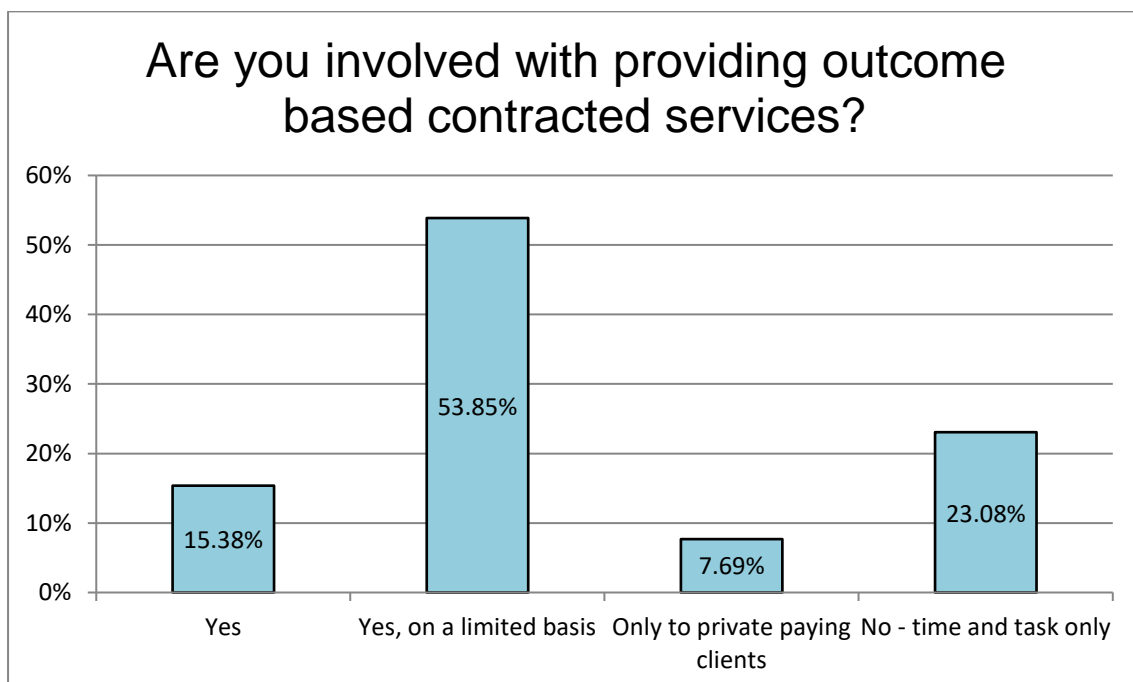
Answer Choices	Responses
By Welsh government listening and working with providers/representative organisations at all Wales level	80.00%
By commissioner representatives listening and working with providers/representative organisations at all Wales level	60.00%
By regulatory organisations listening and working with providers/representative organisations at all Wales level	80.00%
By Joint Regional Boards listening and working with providers/representatives at all Wales level	60.00%
By L/A working more closely with the domiciliary care sector	60.00%
All of the above	80.00%
Other comments	0.00%

## Gwent Region

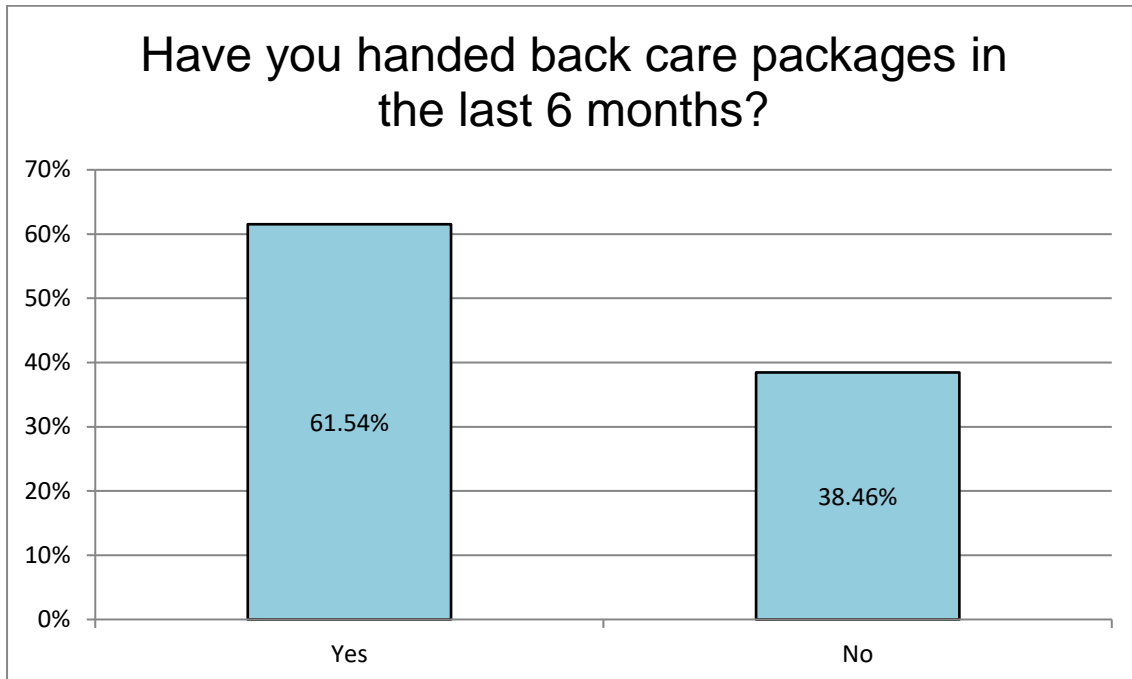
### Q1. Which of the following best describes your homecare agency?



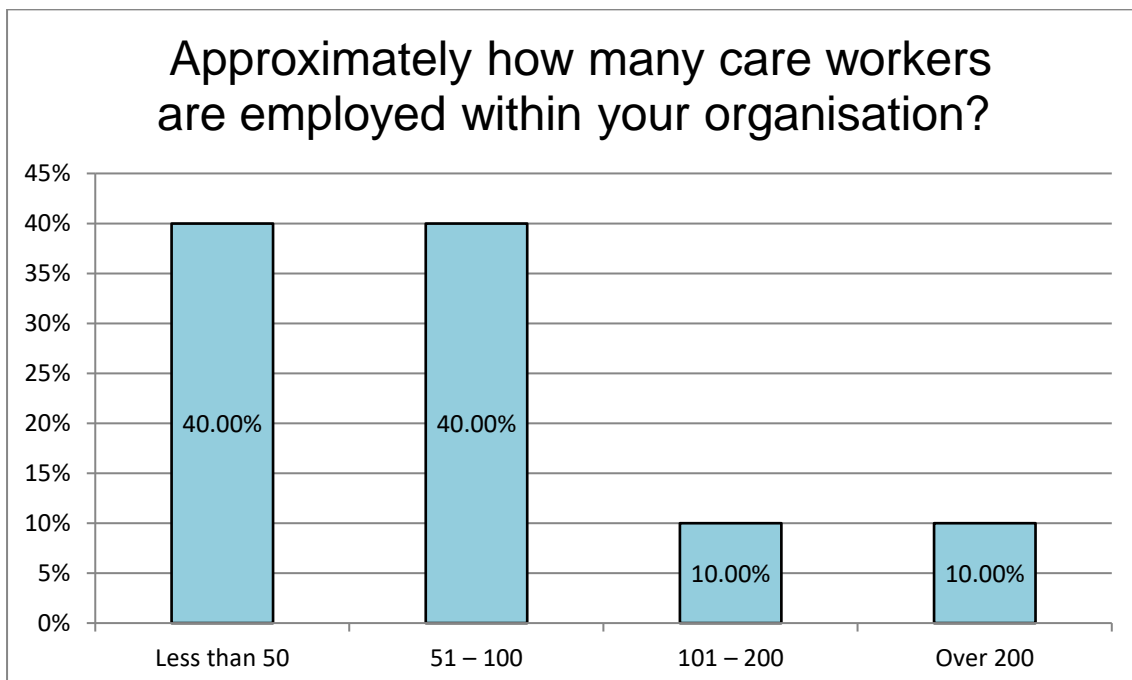
### Q3. Are you involved with providing outcome based contracted services?



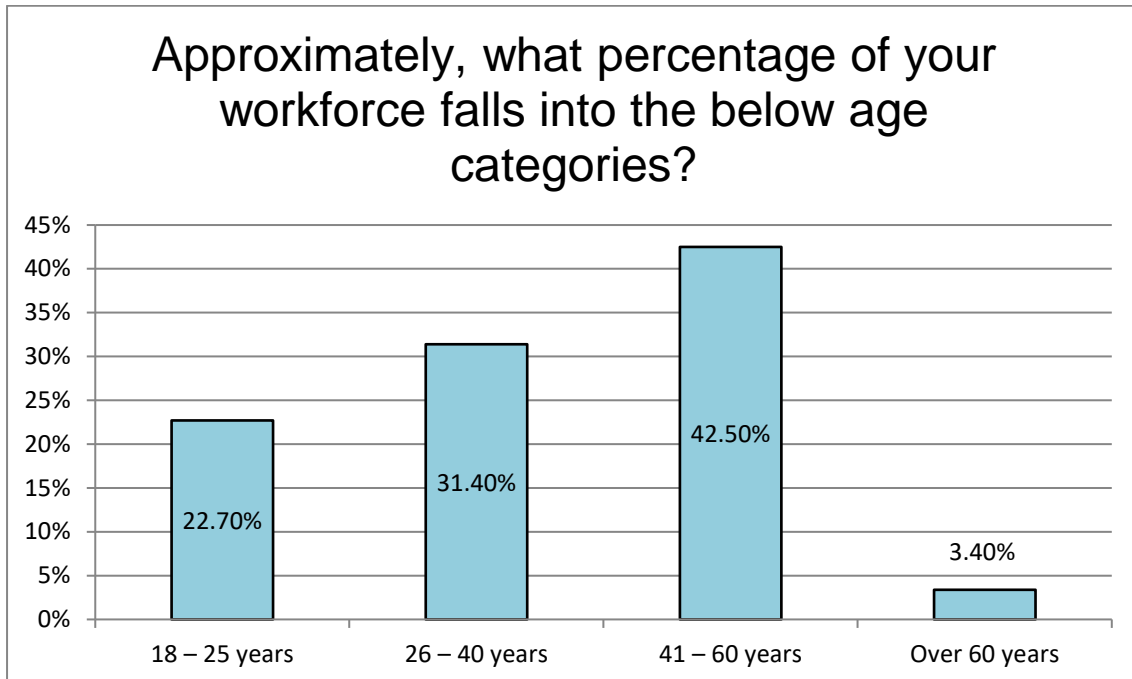
**Q4. Have you handed back care packages in the last 6 months?**



**Q5. Approximately how many care workers are employed within your organisation?**

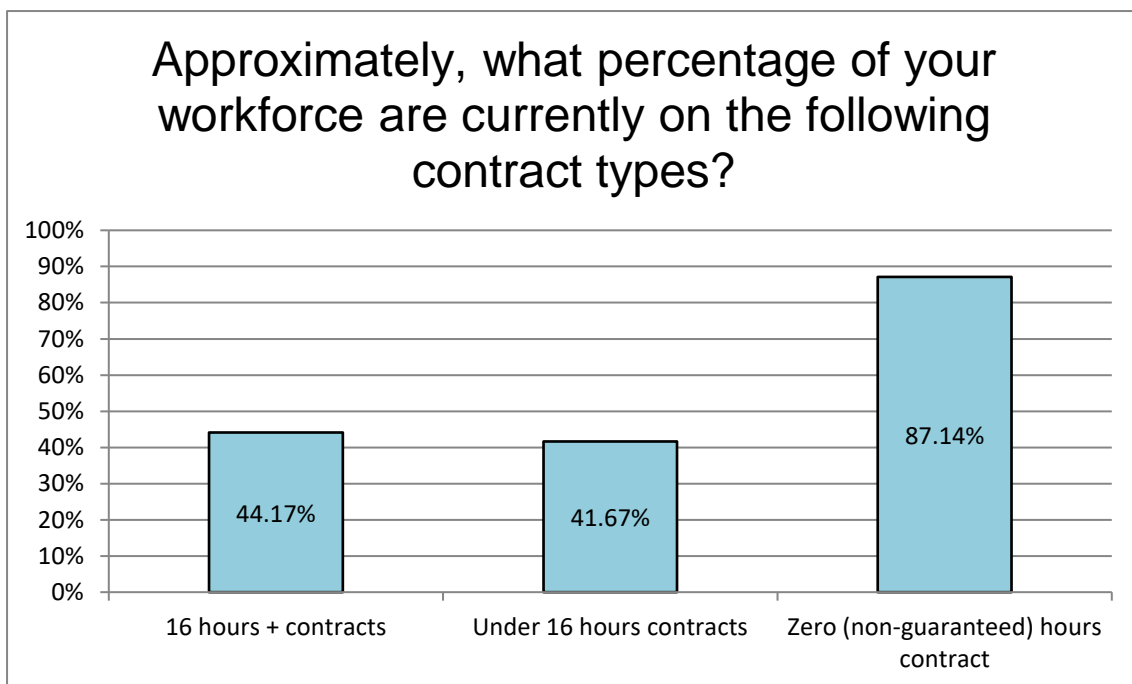


**Q6. Approximately, what percentage of your workforce falls into the below age categories?**

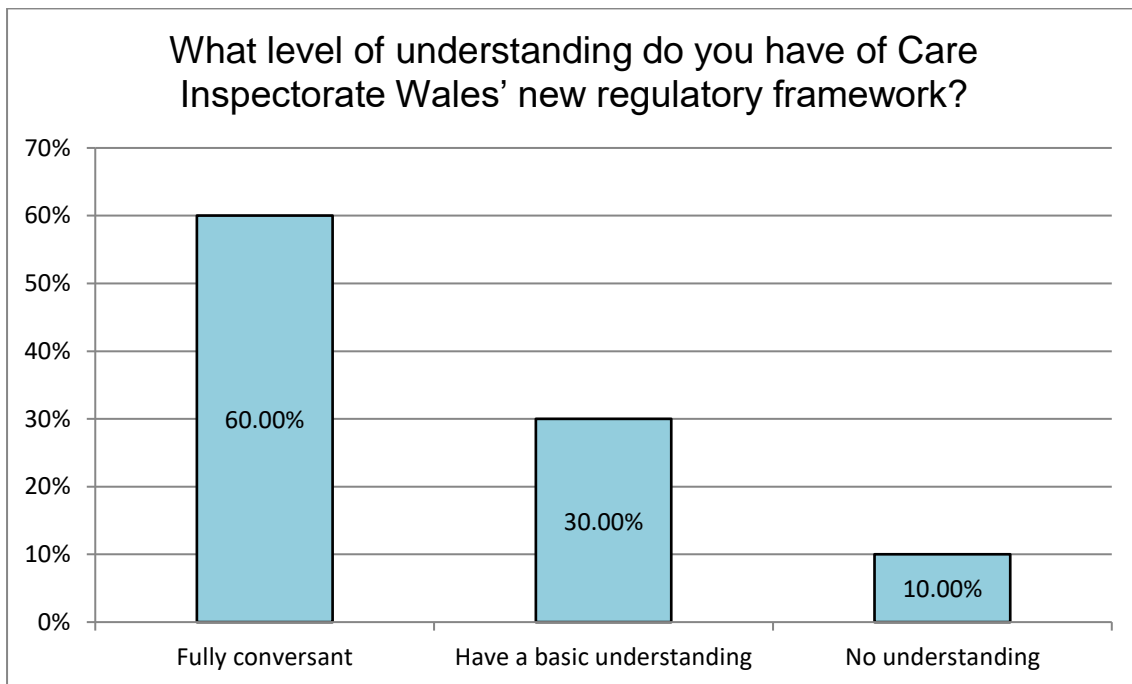


**Q7. Approximately, what percentage of your workforce are currently on the following contract types?**

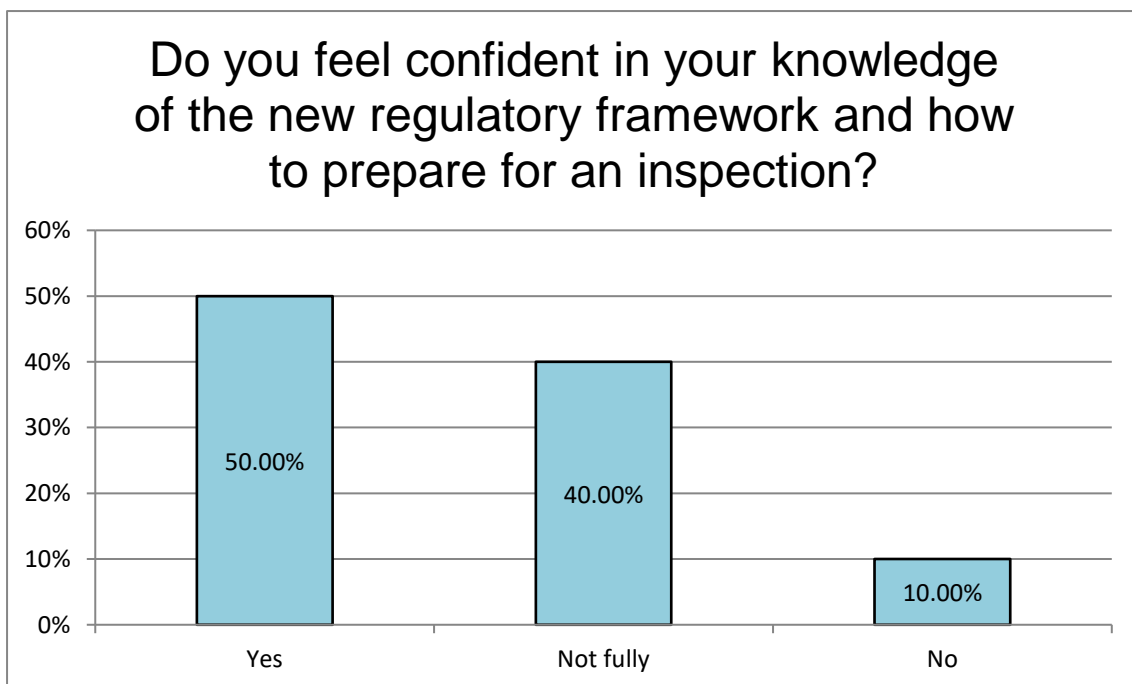
The results displayed show the average reported responses against the question profile.



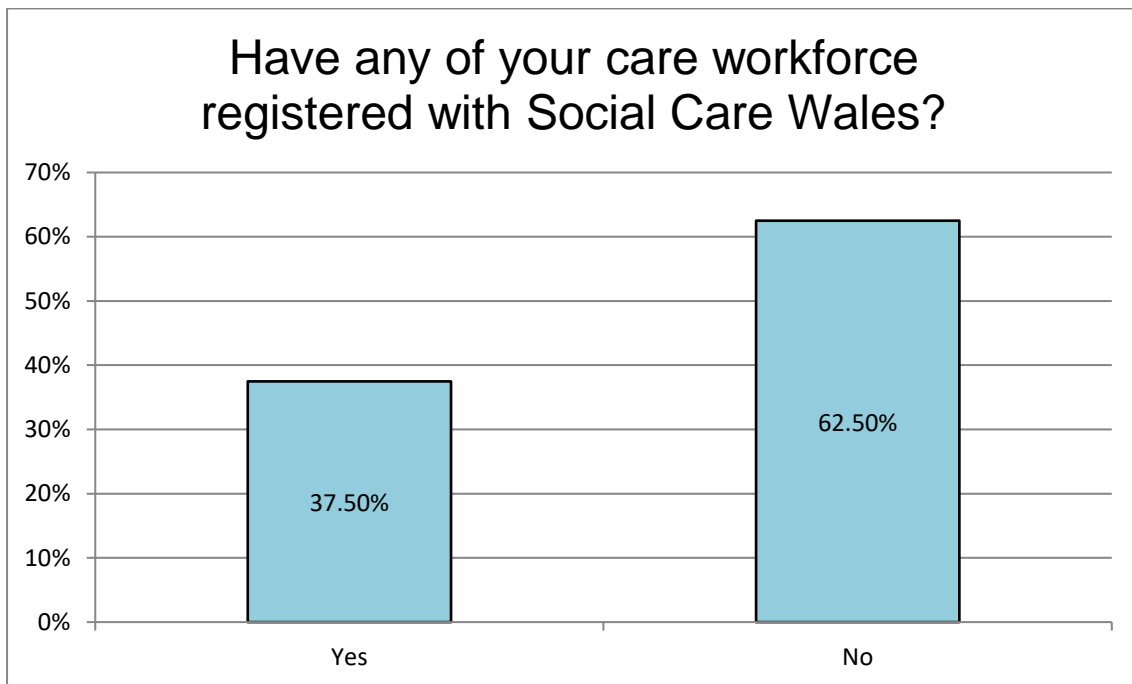
**Q8. What level of understanding do you have of Care Inspectorate Wales' new regulatory framework?**



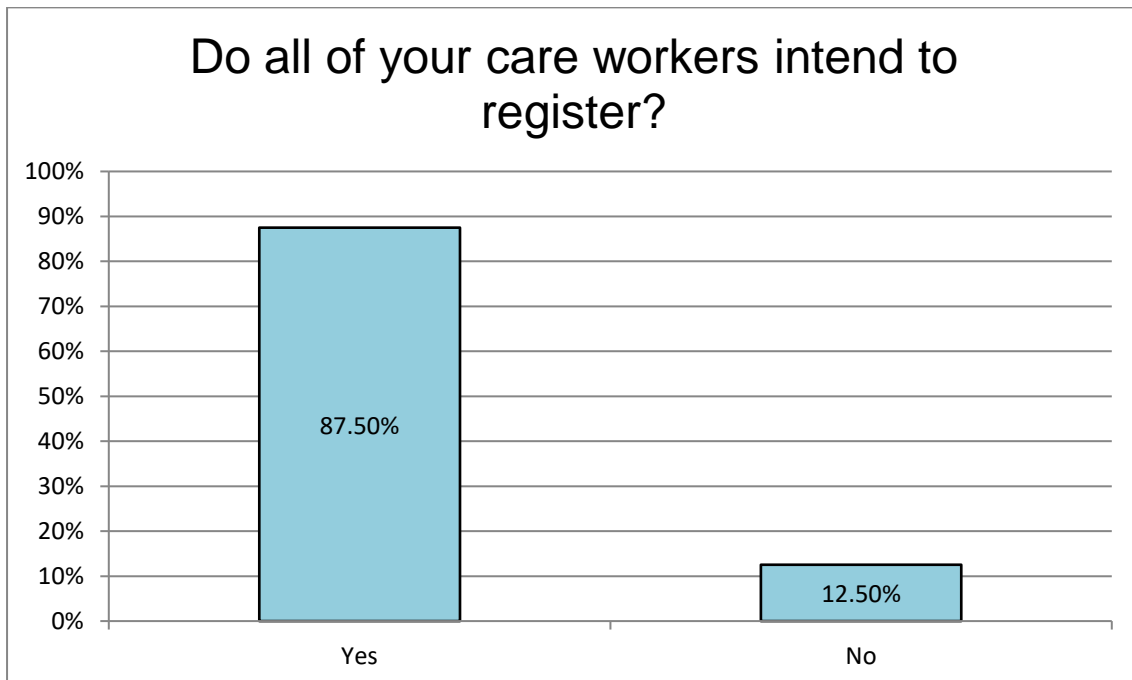
**Q9. Do you feel confident in your knowledge of the new regulatory framework and how to prepare for an inspection?**



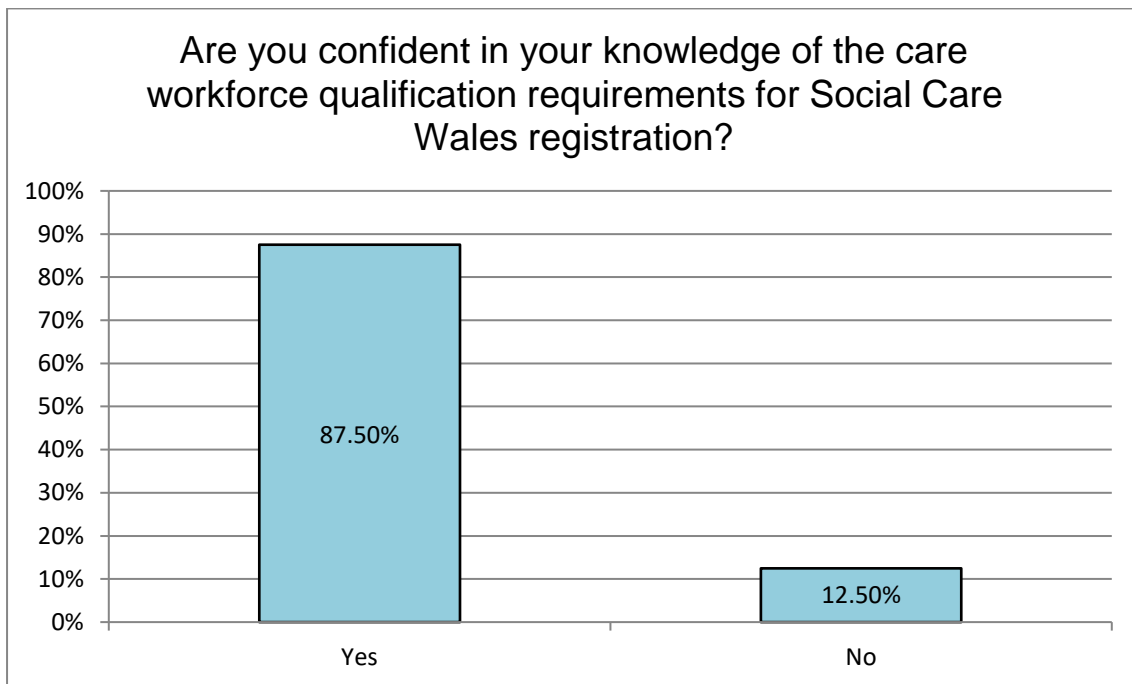
**Q12. Have any of your care workforce registered with Social Care Wales?**



**Q13. Do all of your care workers intend to register?**



**Q14. Are you confident in your knowledge of the care workforce qualification requirements for Social Care Wales registration?**



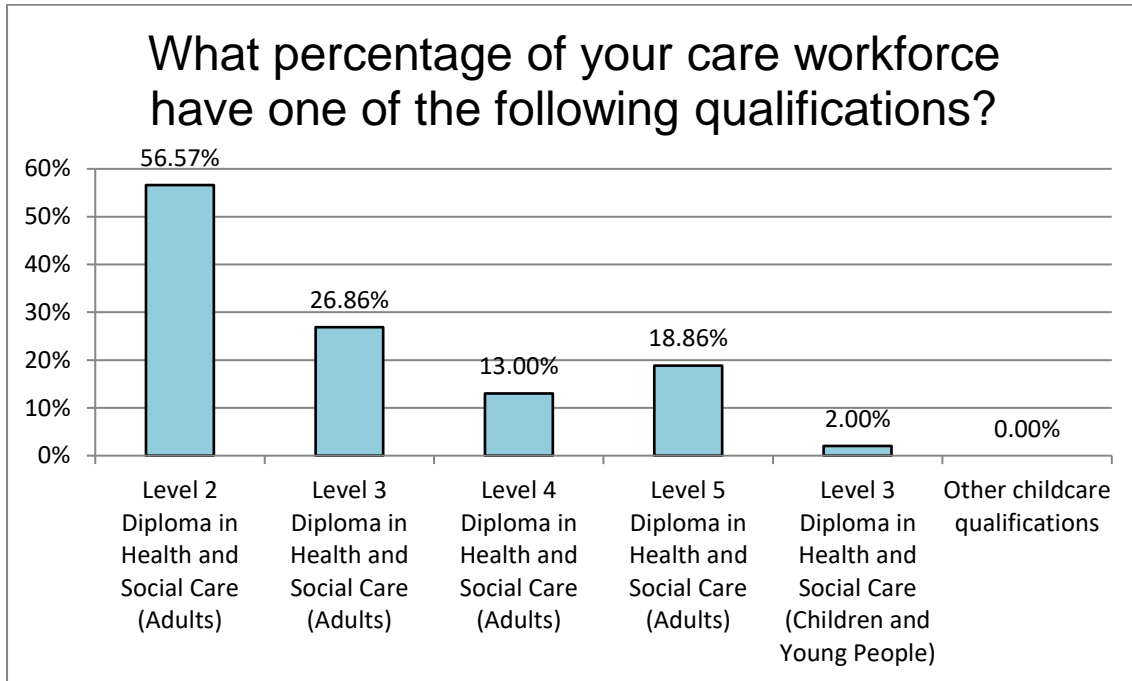
**Q15. What percentage of your care workforce do you believe will not meet the current criteria for registration?**

The average reported ineligibility from the providers who answered this question was **16.75%**

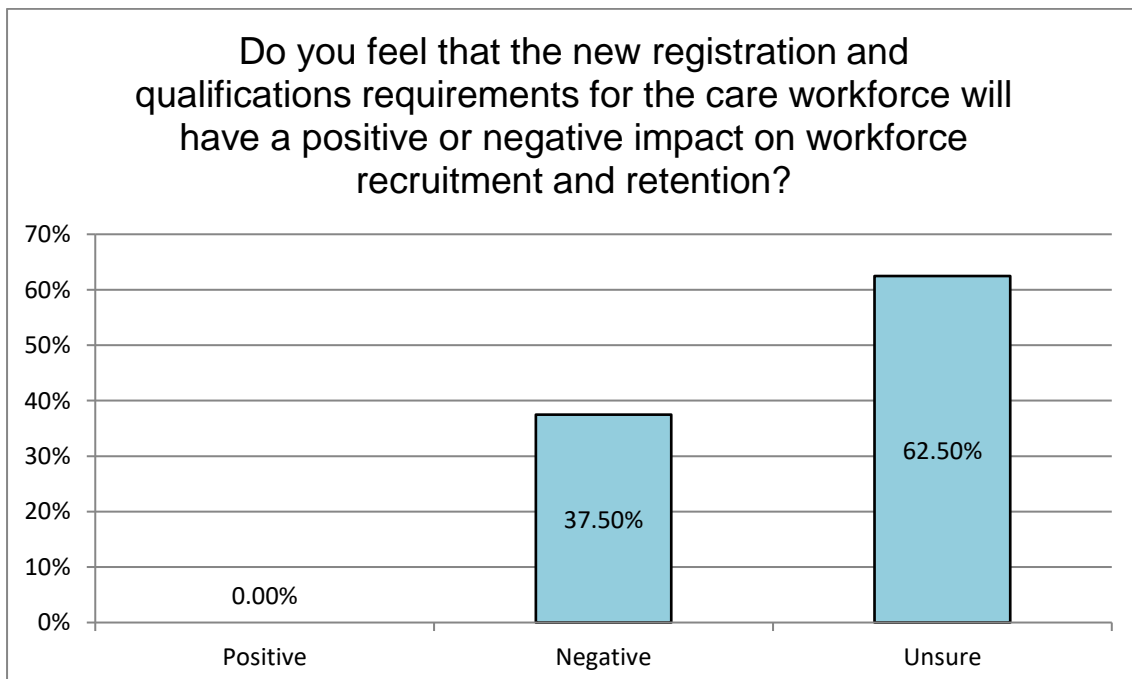


**Q17. What percentage of your care workforce have one of the following qualifications?**

The results displayed show the average reported responses against the question profile.



**Q19. Do you feel that the new registration and qualifications requirements for the care workforce will have a positive or negative impact on workforce recruitment and retention?**



**Q20. Sustainability of the sector is a major concern for providers, commissioners and government strategic planning. What factors impact most on the sustainability of your service? (Tick all that apply)**

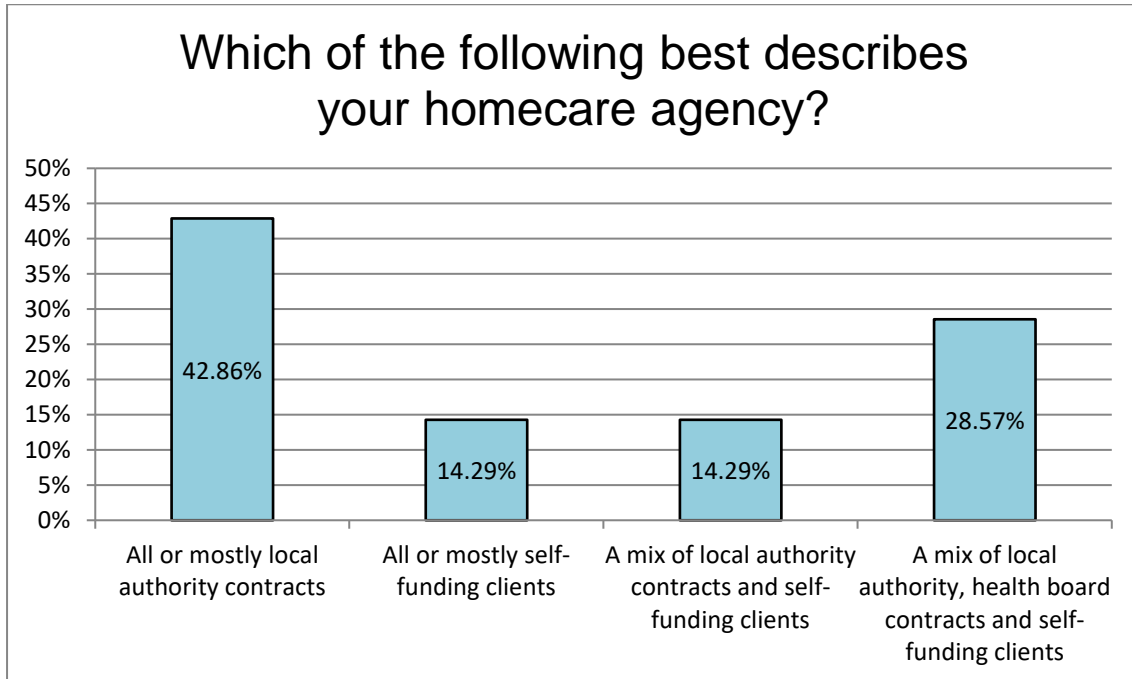
Answer Choices	Responses
Underfunding generally	87.50%
Additional unexpected costs such as registration fees, training etc	100.00%
Restrictive commissioning practices	25.00%
Unacceptable contracting processes	25.00%
Issues arising from Regulation and Inspection	37.50%
Uncertainties about future tendering opportunities	62.50%
Uncertainties about future availability of workforce	75.00%
Other comments	25.00%

**Q21. How can these risks best be addressed? (Tick all that apply)**

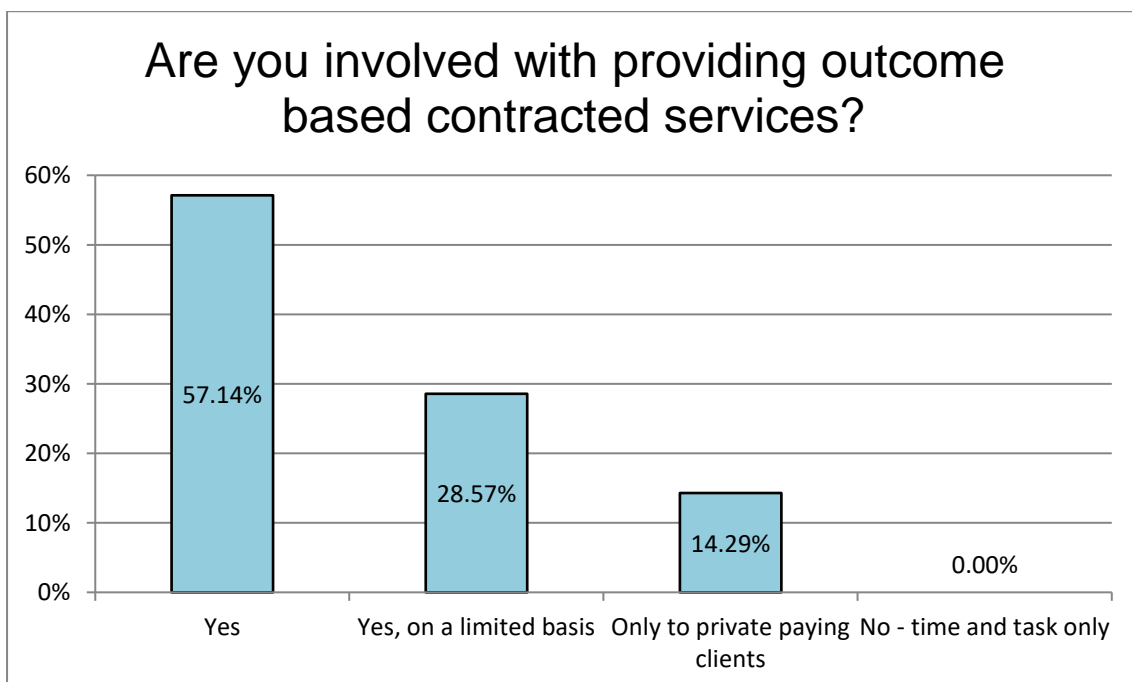
Answer Choices	Responses
By Welsh government listening and working with providers/representative organisations at all Wales level	87.50%
By commissioner representatives listening and working with providers/representative organisations at all Wales level	75.00%
By regulatory organisations listening and working with providers/representative organisations at all Wales level	87.50%
By Joint Regional Boards listening and working with providers/representatives at all Wales level	87.50%
By L/A working more closely with the domiciliary care sector	75.00%
All of the above	75.00%
Other comments	12.50%

## West Wales Region

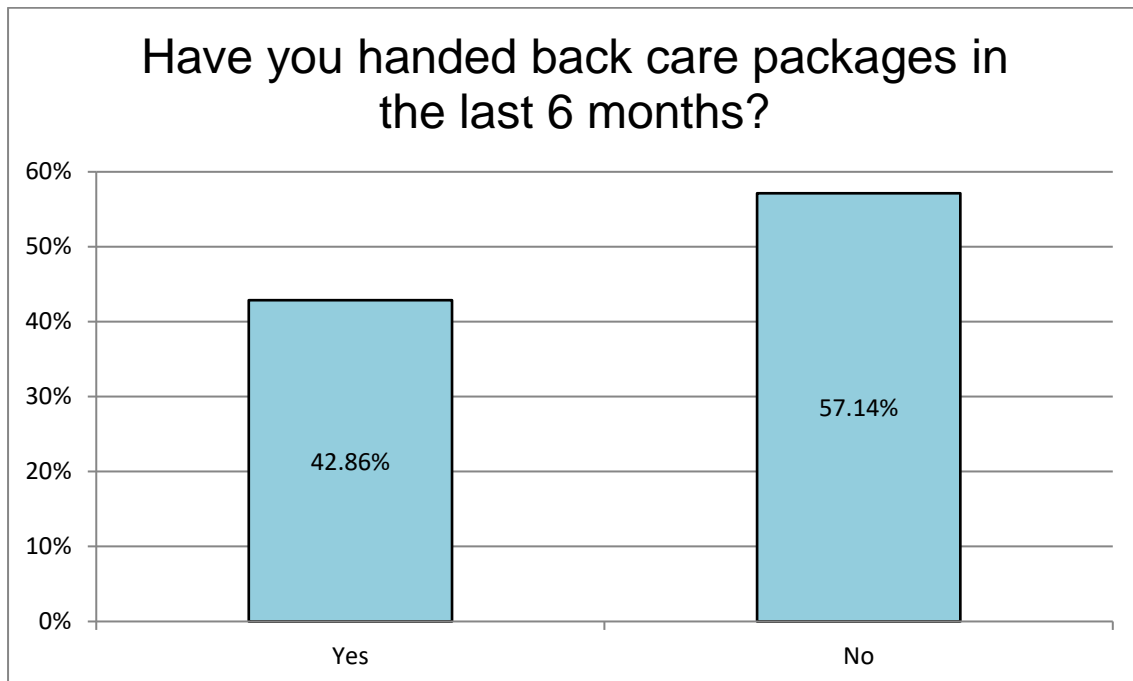
**Q1. Which of the following best describes your homecare agency?**



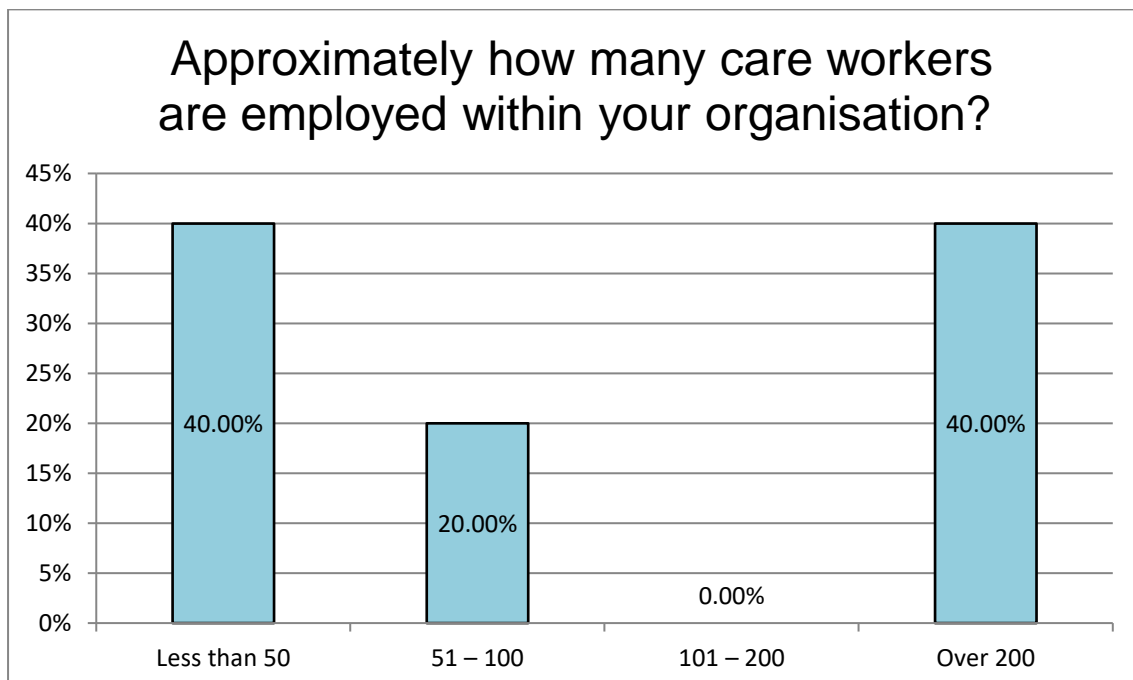
**Q3. Are you involved with providing outcome based contracted services?**



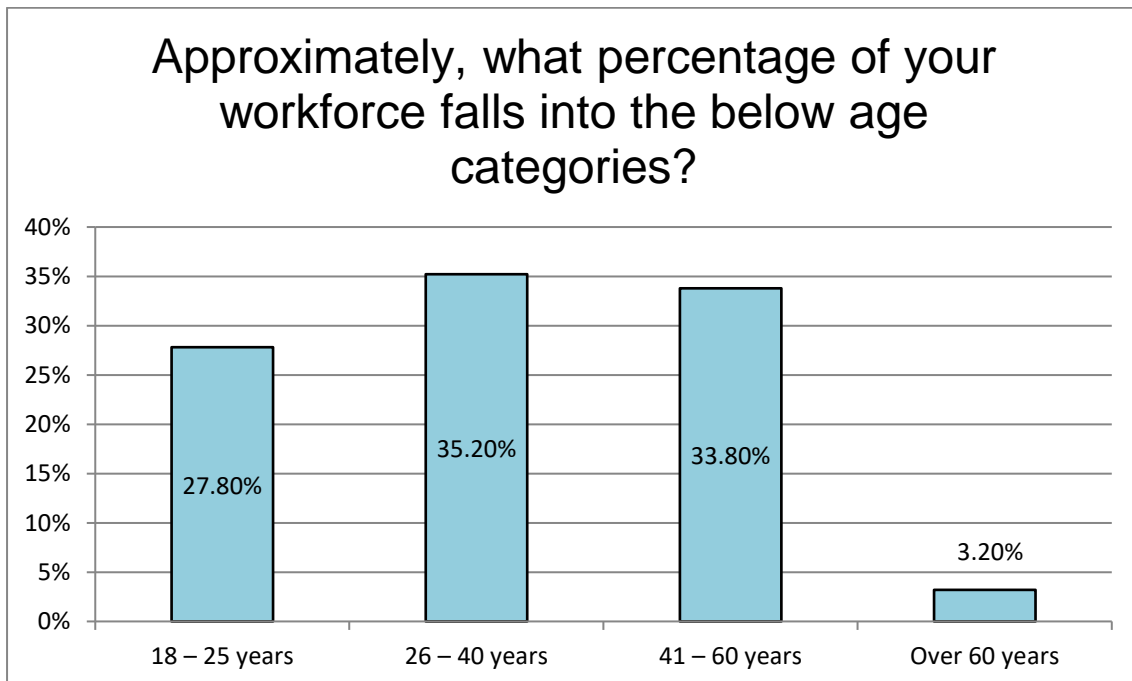
**Q4. Have you handed back care packages in the last 6 months?**



**Q5. Approximately how many care workers are employed within your organisation?**

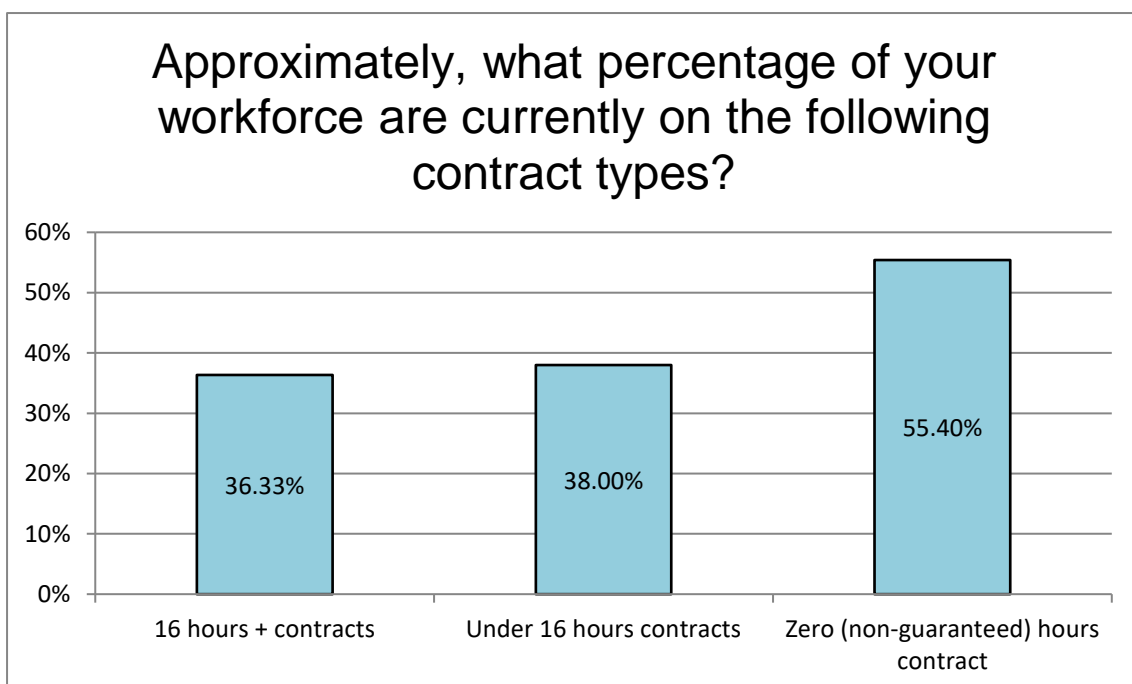


**Q6. Approximately, what percentage of your workforce falls into the below age categories?**

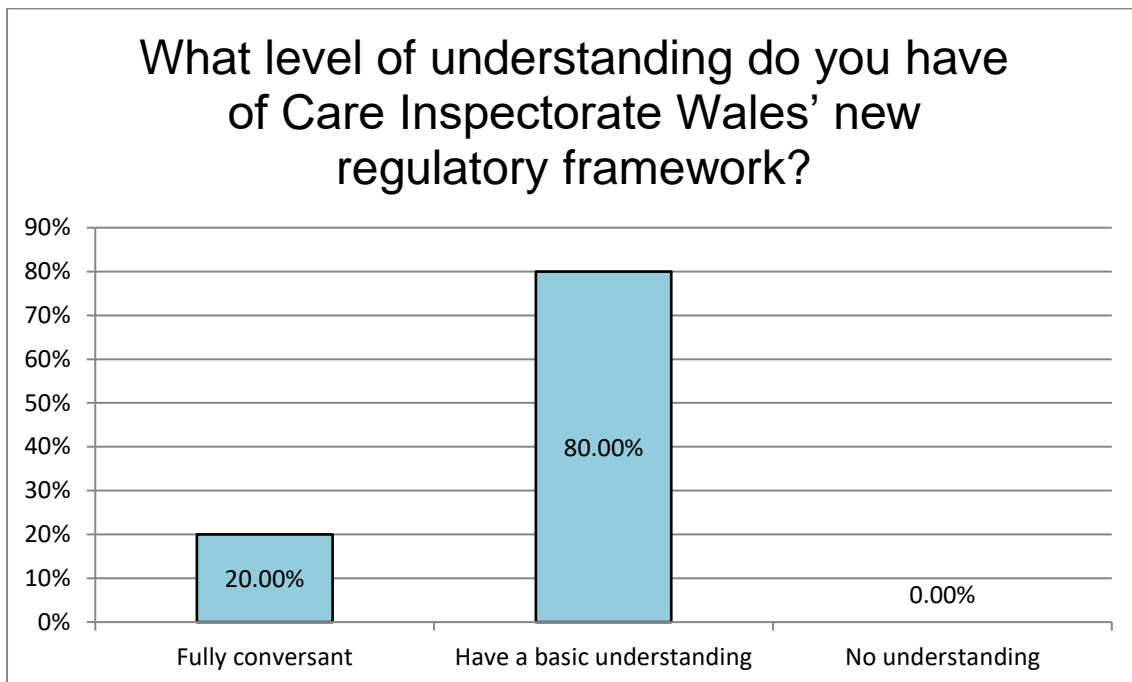


**Q7. Approximately, what percentage of your workforce are currently on the following contract types?**

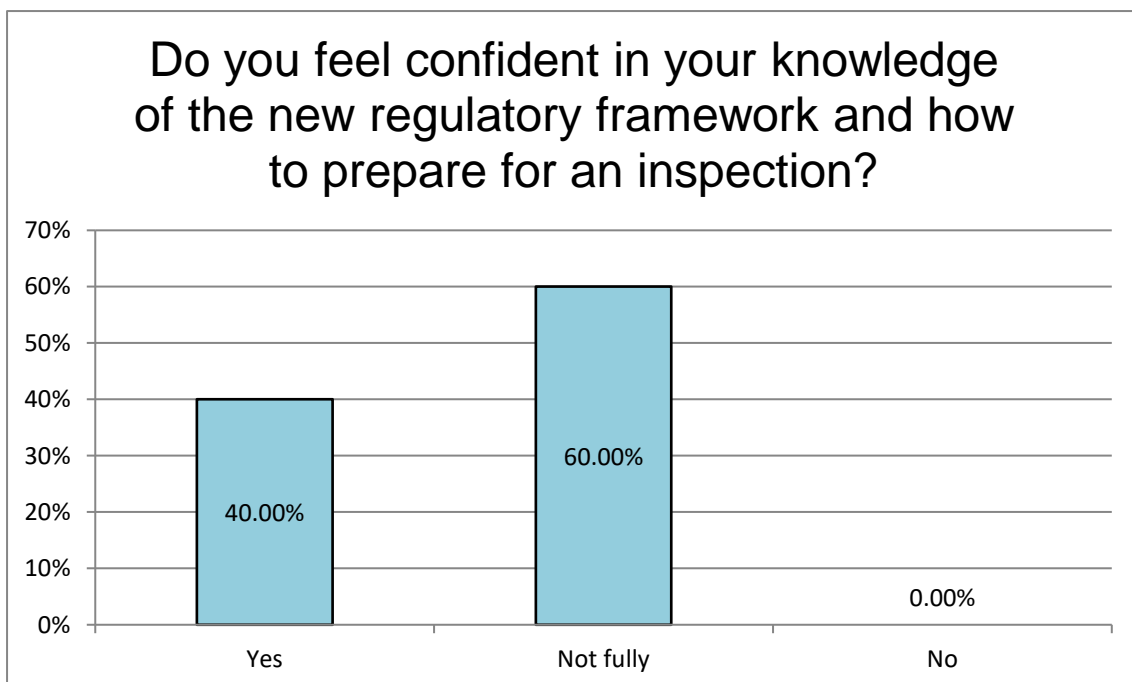
The results displayed show the average reported responses against the question profile.



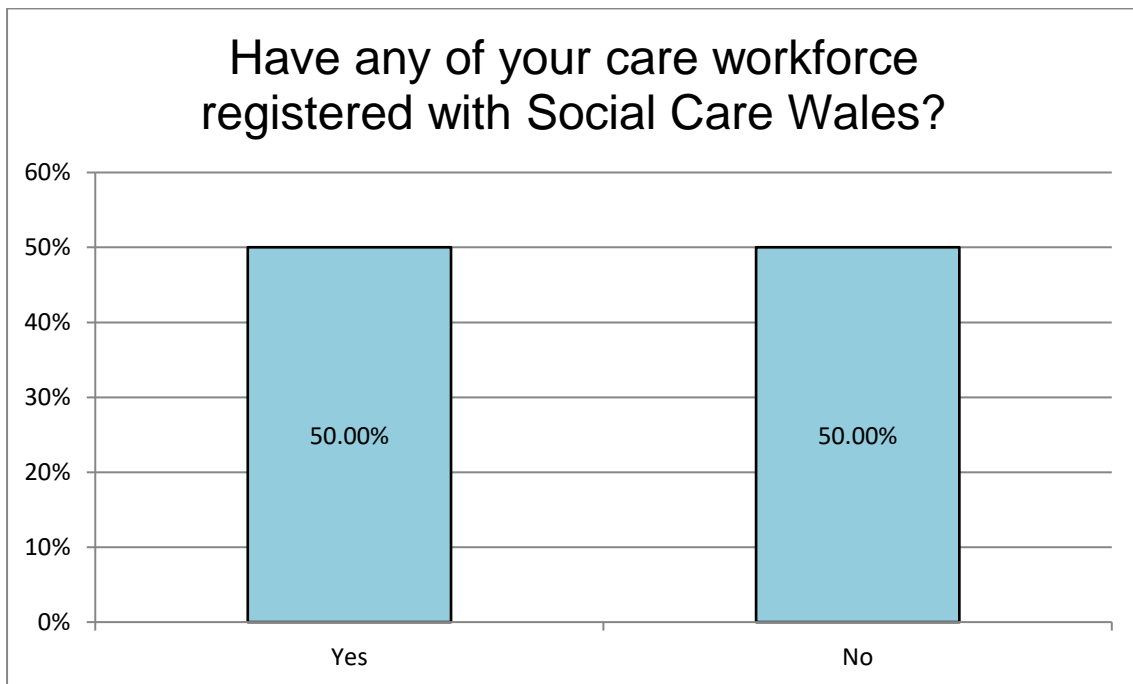
**Q8. What level of understanding do you have of Care Inspectorate Wales' new regulatory framework?**



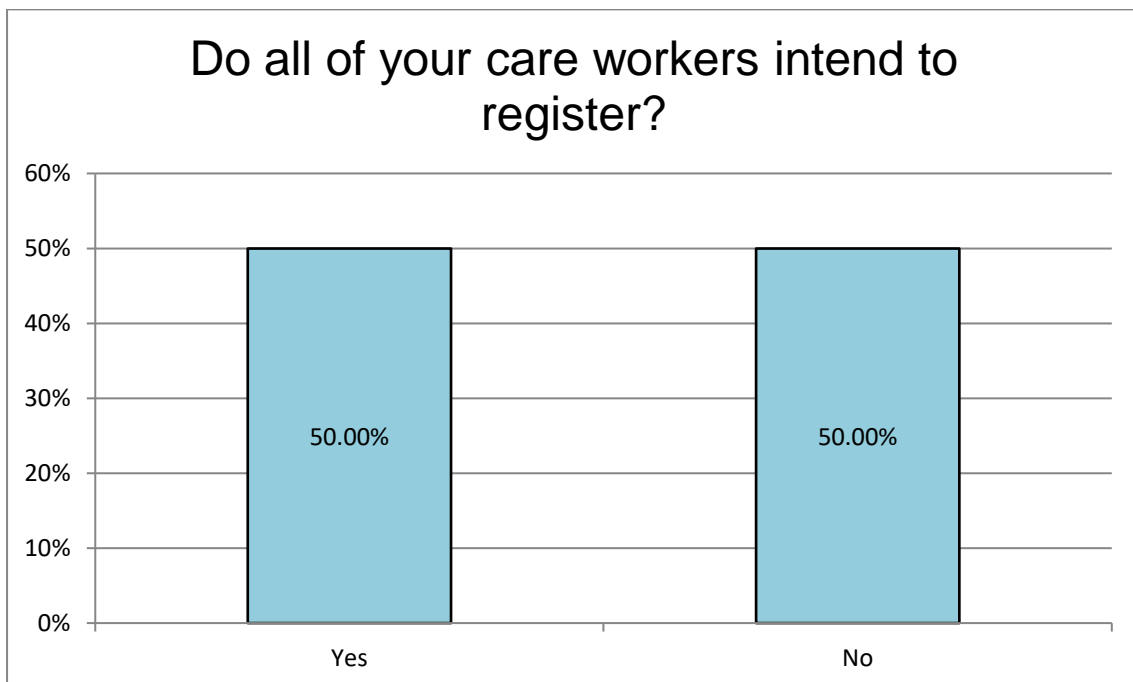
**Q9. Do you feel confident in your knowledge of the new regulatory framework and how to prepare for an inspection?**



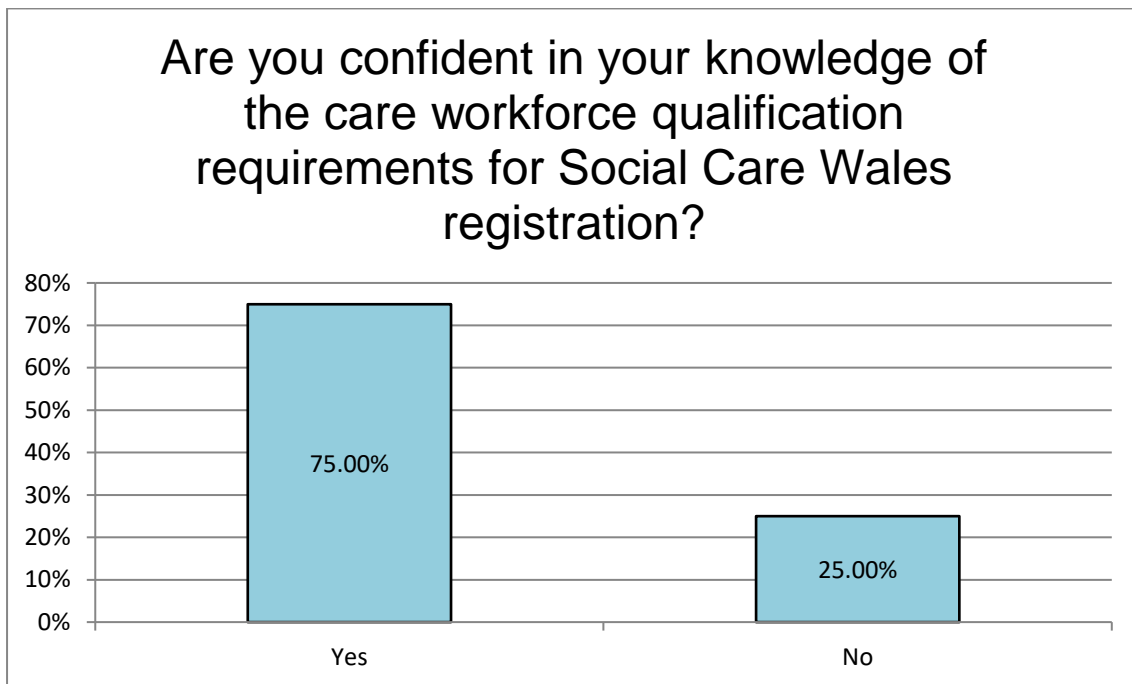
**Q12. Have any of your care workforce registered with Social Care Wales?**



**Q13. Do all of your care workers intend to register?**



**Q14. Are you confident in your knowledge of the care workforce qualification requirements for Social Care Wales registration?**



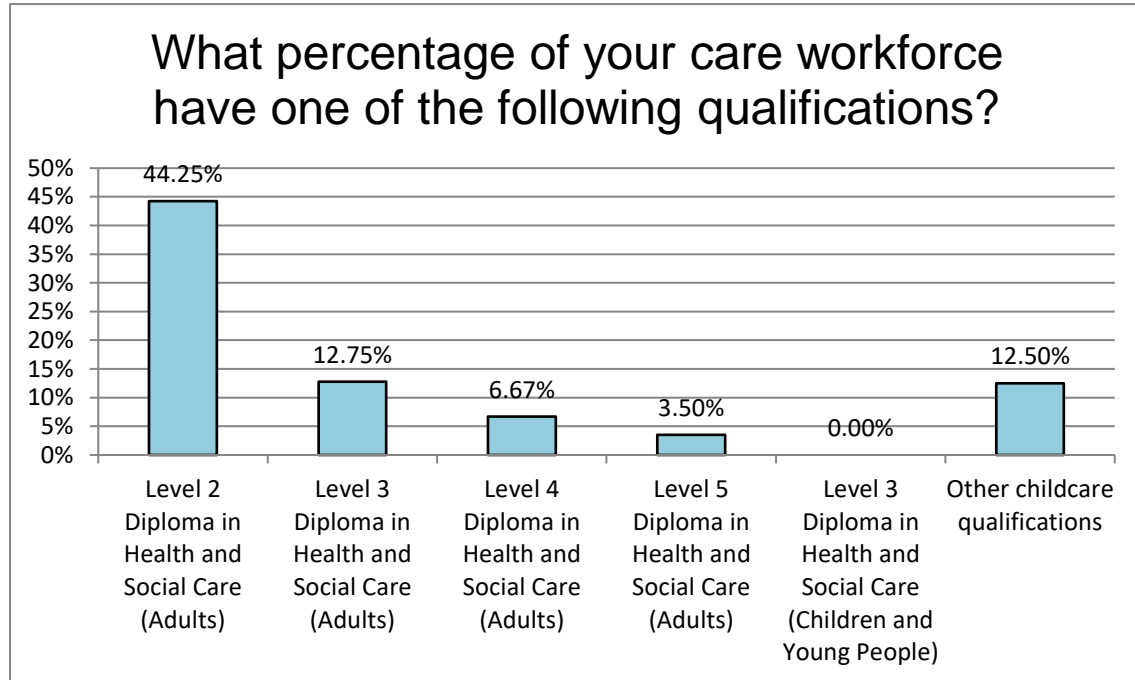
**Q15. What percentage of your care workforce do you believe will not meet the current criteria for registration?**

The average reported ineligibility from the providers who answered this question was **51.25%**

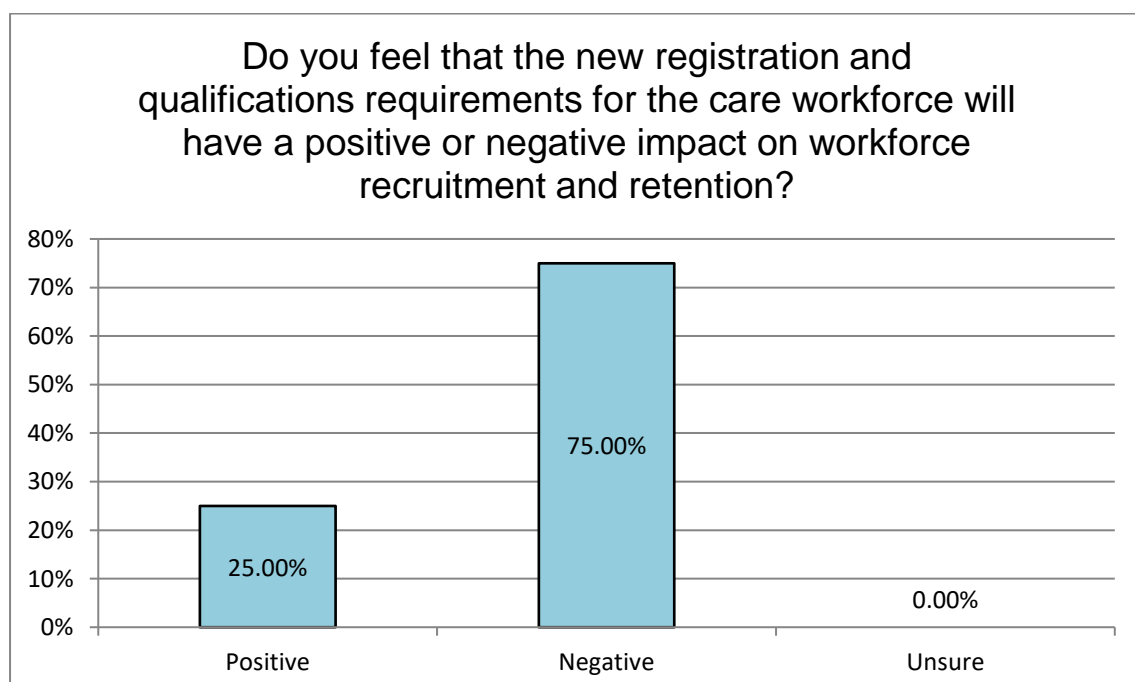


**Q17. What percentage of your care workforce have one of the following qualifications?**

The results displayed show the average reported responses against the question profile.



**Q19. Do you feel that the new registration and qualifications requirements for the care workforce will have a positive or negative impact on workforce recruitment and retention?**



**Q20. Sustainability of the sector is a major concern for providers, commissioners and government strategic planning. What factors impact most on the sustainability of your service? (Tick all that apply)**

Answer Choices	Responses
Underfunding generally	100.00%
Additional unexpected costs such as registration fees, training etc	100.00%
Restrictive commissioning practices	100.00%
Unacceptable contracting processes	66.67%
Issues arising from Regulation and Inspection	33.33%
Uncertainties about future tendering opportunities	66.67%
Uncertainties about future availability of workforce	100.00%
Other comments	33.33%

**Q21. How can these risks best be addressed? (Tick all that apply)**

Answer choices	Responses
By Welsh government listening and working with providers/representative organisations at all Wales level	33.33%
By commissioner representatives listening and working with providers/representative organisations at all Wales level	33.33%
By regulatory organisations listening and working with providers/representative organisations at all Wales level	0.00%
By Joint Regional Boards listening and working with providers/representatives at all Wales level	0.00%
By L/A working more closely with the domiciliary care sector	33.33%
All of the above	66.67%
Other comments	33.33%

## **Western Bay Region, CWM Taf Region, and Powys Region**

Individual data for the above regions is not listed, as too few providers from each of these regions responded to present any meaningful individual data.

Between these three regions as a collective, only 7 providers responded to the survey.

## **Acknowledgements**

UKHCA would like to acknowledge the support of:

Welsh Government  
Social Care Wales  
Care Inspectorate Wales  
North Wales Social Care and Well-Being Services Improvement Collaboration  
National Commissioning Board  
National Provider Forum

And all those that assisted with question development and distribution of the survey.

We are also grateful to all providers who took part in the survey.