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Real Living Wage for social care workers: impact evaluation (survey technical annex)

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Real Living Wage for social care workers: impact evaluation
(survey technical annex)

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Glossary

Real Living Wage (RLW)

The RLW is an hourly rate of pay calculated by an independent body, called the Living Wage Commission. It is based on the cost of living and is paid voluntarily by employers.

The RLW is updated annually and there is an expectation that employers who commit to it should implement the new hourly rate within six months of the annual announcement. The RLW was increased to £10.90 in September 2022 and raised again to £12.00 in October 2023 (excluding London, which has a higher rate) (Table 1).

Table 1 Real Living Wage and National Living Wage since April 2022 [note1]

Financial Year	National Living Wage	Real Living Wage
2022-2023	£9.50	£9.90
2023-2024	£10.42	£10.90
2024-2025	£11.44	£12.00
2025-2026	£12.21	£12.60

[Note 1] The NLW and RLW are listed as correct at 1st April, the start of each financial year. The RLW is updated, typically around October, midway through the financial year. However, most care providers reported that they do not update their salary structure until April 1st when the next financial year begins.

Introduction

This annex provides further detail on the workforce survey included in the main impact evaluation report.

Survey purpose

An online survey was designed and distributed to the workforce, to understand the impact of RLW on social care workers and PAs. The survey questions asked social care workers and PAs about:

- details of their role, type of services they work with, the local authority they work in, and whether they are registered with Social Care Wales
- details of whether they are receiving the RLW and since when (and if they have received it in the past), and any associated change in employment terms and conditions
- satisfaction with pay and career, including satisfaction with current level of pay, and financial management, pay as a fair reflection of their role and responsibilities, intention to stay in their role and social care sector, whether they feel valued by their employer and wider society
- demographic details, including details of age, gender identity, and ethnic group.

The survey was distributed via email to all those who are registered with Social Care Wales as a social care worker. The survey was also distributed to the social care workers and PAs directly or indirectly (via providers) by 18 of the 22 local authorities, Care Forum Wales, Homecare Association, Cymorth Cymru, and Care Inspectorate Wales.

Email and telephone support was available from the evaluation team for those needing assistance to complete the survey.

The survey was administered via SmartSurvey and could be completed in either Welsh or English, and included multiple-choice and open-ended questions, allowing respondents to provide additional details for certain questions.

The survey was open from 4 December 2024 until 28 January 2025.

The total number of responses at the end of data collection was 2,433. The raw data was cleaned by removing incomplete responses, duplicates, and entries from individuals who were not in relevant roles (e.g. managerial staff not directly providing care).

The final number of responses after data cleaning was 2,364.

This appendix provides demographic information and characteristics of respondents, examines whether they were receiving the RLW, satisfaction with pay and career, and compares responses across demographic groups.

Demographic information and characteristics of respondents

Data was collected on whether respondents were registered with Social Care Wales, what their role is, the types of service(s) they work in, their age, gender, ethnicity and which local authority and region of Wales they work in.

Age

Table 2 shows the age breakdown of survey respondents. The largest proportion of respondents were aged 55 to 59, followed by those aged 50 to 54 and 35 to 39. This was a similar age profile to the most recent [Social Care Wales workforce survey](#) from 2024, where the most common age group was also those aged 55-59.

Table 2: Survey respondents' ages (n=2,364)

Age	Percentage (n)
Under 25	6.6% (n=156)
25 to 29	9.4% (n=223)
30 to 34	10.6% (n=251)
35 to 39	11.8% (n=279)
40 to 44	11.4% (n=270)
45 to 49	9.7% (n=229)
50 to 54	11.8% (n=278)
55 to 59	13.2% (n=312)
60 to 64	10.5% (n=249)
65 or older	3.8% (n=89)
Preferred not to say	1.1% (n=28)

Gender

Table 3 shows the gender breakdown of survey respondents. Our sample closely mirrors the 2024 [Social Care Wales workforce survey](#), with 77% of respondents identifying as female and 22% as male.

Table 3: Survey respondents' gender (n=2,364) compared to the Social Care Wales workforce survey from 2024 [note 1]

Gender	Percentages from Impact Evaluation survey	Percentages from Social Care Wales workforce survey (2024)
Female	77.1% (n=1822)	78%
Male	21.7% (n=512)	21%
Other and preferred not to say	1.2% (n=30)	N/A

[note 1] Other includes non-binary.

Ethnicity

Table 4 shows the ethnicity breakdown of the survey respondents. Most identified as White (83%), which is slightly higher than the proportion reported in the 2024 [Social Care Wales workforce survey](#) (75%). Respondents from Black ethnic groups accounted for 8% (compared to 13% in the Social Care Wales survey), and those from Asian backgrounds made up 5% (7% in the Social Care Wales survey). A small proportion identified with Mixed, Multiple or Other ethnic groups.

Table 4: Survey respondents' ethnic backgrounds (n=2,362) compared to the Social Care Wales workforce survey from 2024

Ethnicity	Percentages from Impact Evaluation survey	Percentages from Social Care Wales workforce survey (2024)
White	82.7% (n=1,955)	75%
Black, Black Welsh, Black British, Caribbean, or African	8.4% (n=199)	13%
Asian, Asian Welsh, or Asian British	5.3% (n=124)	7%
Preferred not to say	2.0% (n=47)	N/A
Mixed, Multiple or Other ethnic groups	1.6% (n=37)	N/A

Local authority

All 2364 respondents were asked which local authority they worked in, as shown in Table 5. They could select multiple local authorities, and therefore the percentages reported here total greater than 100%.

Table 5: Local authorities survey respondents worked in (n=2,364) [note 1]

Local authority	Percentage (n)
Blaenau Gwent County Borough Council	5.8% (n=137)
Bridgend County Borough Council	7.7% (n=182)
Caerphilly County Borough Council	5.9% (n=139)
Cardiff Council	9.1% (n=214)
Carmarthenshire County Council	7.9% (n=186)
Ceredigion County Council	2.8% (n=66)
Conwy County Borough Council	4.0% (n=95)
Denbighshire County Council	4.0% (n=94)
Flintshire County Council	3.6% (n=86)
Gwynedd Council	4.2% (n=100)
Isle of Anglesey County Council	2.3% (n=54)
Merthyr Tydfil County Borough Council	2.2% (n=52)
Monmouthshire County Council	2.8% (n=65)
Neath Port Talbot County Borough Council	5.2% (n=123)
Newport City Council	4.1% (n=96)
Pembrokeshire County Council	3.2% (n=75)
Powys County Council	3.8% (n=89)
Rhondda Cynon Taf County Borough Council	6.4% (n=151)
City and County of Swansea	7.6% (n=179)
Vale of Glamorgan County Borough Council	4.1% (n=98)

Local authority	Percentage (n)
Torfaen County Borough Council	3.0% (n=70)
Wrexham County Borough Council	3.2% (n=76)
Preferred not to say	7.4% (n=176)

[note 1] Respondents could select multiple options for the local authorities that they work in.

Region

Table 6 shows the regional breakdown of the respondents into the corresponding regions of Wales from the data collected on local authority. Table 6 shows that the highest proportion of respondents were based in South East Wales (46%), broadly reflecting the population distribution and workforce concentration across the country.

Table 6: Regions survey respondents worked in (n=2,364)

Region	Percentage (n)
Mid Wales	6.2% (n=146)
North Wales	18.5% (n=438)
South East Wales	45.9% (n=1,086)
South West Wales	21.9% (n=518)
Preferred not to say	7.5% (n=176)

Service type

Table 7 presents the types of services respondents worked in, using the same categories as the [Social Care Wales workforce survey](#). Respondents could select multiple service types. Overall, the distribution is broadly similar to the 2024 Social Care Wales workforce survey. The most common service areas were Vulnerable Adults (57%), Older Persons (51%), and Learning Disability (47%) services. These proportions were generally higher than those reported by SCW, possibly reflecting the voluntary, opt-in nature of our survey.

Table 7: Types of services survey respondents worked in (n=2,358) compared to the Social Care Wales workforce survey from 2024 [note 1]

Service type	Percentage from Impact Evaluation survey (n)	Percentage from Social Care Wales workforce survey (2024)
Disability (Learning) services	46.5% (n=1,100)	37%

Service type	Percentage from Impact Evaluation survey (n)	Percentage from Social Care Wales workforce survey (2024)
Disability (Mental Health) services	38.8% (n=917)	36%
Older Persons services	50.9% (n=1,203)	49%
Reablement services	6.6% (n=156)	7%
Vulnerable Adults services	57.1% (n=1,349)	42%
Substance Misuse services	5.3% (n=124)	6%
Homelessness services	1.1% (n=27)	2%
Neurodiversity services	8.0% (n=189)	5%
Prison services and Youth Offending	1.8% (n=43)	2%
Domestic Violence services	1.3% (n=30)	3%
Family Support services	5.6% (n=133)	7%
Fostering and Adoption services	1.1% (n=25)	3%
Child Protection services	3.6% (n=86)	8%

[note 1] Respondents could select multiple options for the type(s) of service(s) that they work in.

Registration as a care worker

Respondents were asked if they were registered as a social care worker with Social Care Wales, in the process of registering with Social Care Wales, or were a PA. Of a total of 2,360 respondents:

- 94.2% (n=2,224) were registered social care workers with Social Care Wales
- 3.6% (n=84) were PAs
- 2.2% (n=52) were in the process of registering as care workers with Social Care Wales.

Role

Table 8 shows the roles that survey respondents held. The 'other' category included roles such as support workers and those working in supported living.

Table 8: Role of survey respondents (n=2,364)

Response	Percentage (n)
Adult care home workers	47.5% (n=1,122)
Domiciliary care workers	31.8% (n=751)
Other	12.9% (n=304)
Residential care home workers	4.2% (n=98)
PAs	3.4% (n=81)
Preferred not to say	0.3% (n=8)

Payment of the Real Living Wage

Current payment of the Real Living Wage

Survey participants were asked whether they are currently paid the RLW. Of the 2,364 participants:

- 84.4% (n=1,995) responded 'Yes'
- 15.5% (n=366) responded 'No'
- Less than 5 participants did not respond. The percentage is not provided if fewer than five respondents provided a response.

We compared the payment of RLW by those registered as social care workers with Social Care Wales, those in the process of registering with Social Care Wales, and Personal assistants.

Table 9 indicates that 84.4% of those being paid the RLW are registered with Social Care Wales, and 83.33% of those that are not being paid the RLW are personal assistants.

Table 9: Comparisons of payment of RLW with registration with Social Care Wales (n=2357)

Group	Paid RLW	Not being paid RLW
Registered with Social Care Wales	84.4% (n=1,877)	15.5% (n=344)
In process of registering with Social Care Wales	84.6% (n=44)	15.4% (n=8)
Personal assistants	83.3% (n=70)	16.7% (n=14)

Duration of payment of the Real Living Wage

Based on responses to previous questions, we asked survey respondents how long they've been receiving the RLW. Based on the survey logic, 1,995 respondents were presented with this question. Table 10 shows duration of payment of RLW, and indicates that most care workers started being paid the RLW after April 2022.

Table 10: Duration of payment of RLW (n=1,990)

Response	Percentage (n)
Paid any time after April 2022	53.4% (n=1,065)
Paid since before April 2022	15.8% (n=315)
Did not know	26.4% (n=527)
Preferred not to say	4.2% (n=83)

Changes in work hours

Survey respondents were asked if they opted for any changes to working hours since the implementation of the RLW policy. Based on the survey logic, 1,065 participants were presented with this question:

- 80.7% (n=859) stated their work schedule remained the same
- 16.3% (n=174) stated it encouraged them to seek more hours
- 3.0% (n=32) stated they chose to reduce their hours.

Change in employment terms and conditions

Respondents were asked if there were changes to employment terms and conditions (such as working hours, responsibilities, leave or benefits) since receiving the RLW. Based on the survey logic, 1,065 respondents were presented with this question, of which 1,064 responded. Table 11 shows that most respondents had not experienced any changes in their employment terms and conditions.

Table 11: Change in employment terms and conditions since receiving the RLW (n=1,064)

Response	Percentage (n)
No changes	68.5% (n=730)
Did not know	16.4% (n=175)
Had changes	13.6% (n=145)

Response	Percentage (n)
Preferred not to say	1.3% (n=14)

Of those who stated they had changes, 122 discussed what those changes were, ranging from:

- increased duties and admin responsibilities
- reduced enhancements and mileage allowances
- TUPE (Transfer of Undertakings - Protection of Employment) related changes affecting pay.

Payment of RLW in previous years

Survey participants that stated they are not currently paid the RLW (n=366) were asked if they were ever paid the RLW as a social care worker or PA, as shown in Table 12.

Table 12: Payment of RLW in previous years (n=366)

Response	Percentage (n)
No, I have never been paid the RLW	63.4% (n=232)
I don't know	19.7% (n=72)
Yes, I have been paid the RLW previously with my current employer	8.2% (n=30)
Yes, I have been paid the RLW previously with a different employer	6.8% (n=25)
Preferred not to say	1.9% (n=7)

Respondents that stated they were previously paid the RLW (n=55), either with their current or a different employer, were asked when they were last paid the RLW, as shown in Table 13.

Table 13: When payment of RLW occurred in previous years (n=55)

Response	Percentage (n)
Paid RLW between April 2023 and March 2024	50.9% (n=28)

Response	Percentage (n)
Unaware as to when they were last paid RLW	16.4% (n=9)
Paid RLW before April 2022	12.7% (n=7)
Preferred not to say	12.7% (n=7)
Paid RLW between April 2022 and March 2023	n<5*

* The percentage is not provided if fewer than five respondents provided a response.

Satisfaction with pay and career

All 2,364 participants were asked the question: 'to what extent are you satisfied or dissatisfied with your current level of pay?' Overall, more participants were generally dissatisfied with the level of pay they were currently receiving, as shown in Table 14.

Table 14: Satisfaction with current level of pay (n=2,364)

Response	Percentage (n)
Very satisfied	3.6% (n=86)
Fairly satisfied	15.7% (n=372)
Neither satisfied nor dissatisfied	16.8% (n=398)
Fairly dissatisfied	26.2% (n=619)
Very dissatisfied	36.1% (n=853)
Preferred not to say	1.5% (n=36)

Differences in satisfaction with pay by payment of RLW demographics

Age

Table 15 shows satisfaction with pay by age group. Workers aged 30 to 59 were most likely to report being 'very dissatisfied' (36.9%), while the youngest group (under 25 to 29) had the highest proportion of 'fairly dissatisfied' responses (29.3%). Overall satisfaction levels were similar amongst age groups.

Table 15: Satisfaction with pay by age group (n=2,336)

Responses	Under 30 (n)	30 to 59 (n)	60+ (n)
Very satisfied	2.6% (n=10)	3.6% (n=59)	4.4% (n=15)
Fairly satisfied	13.5% (n=51)	16.4% (n=265)	16.3% (n=55)
Neither satisfied nor dissatisfied	20.3% (n=77)	16.4% (n=266)	15.7% (n=53)
Fairly dissatisfied	29.3% (n=111)	25.1% (n=407)	27.5% (n=93)
Very dissatisfied	33.3% (n=126)	36.9% (n=598)	34.3% (n=116)
Preferred not to say	n<5*	1.5% (n=24)	1.8% (n=6)

* The percentage is not provided if fewer than five respondents provided a response.

Gender

Table 16 presents satisfaction with pay by gender. Overall dissatisfaction levels ('fairly' and 'very dissatisfied') were similarly high among both males and females.

Table 16: Satisfaction with pay by gender (n=2,334)

Responses	Male (n)	Female (n)
Very satisfied	4.5% (n=23)	3.4% (n=62)
Fairly satisfied	14.5% (n=74)	16.1% (n=294)
Neither satisfied nor dissatisfied	15.6% (n=80)	17.3% (n=316)
Fairly dissatisfied	27.2% (n=139)	25.8% (n=470)
Very dissatisfied	36.9% (n=189)	35.7% (n=651)
Preferred not to say	1.4% (n=7)	1.6% (n=29)

Ethnicity

Table 17 presents satisfaction with pay by ethnicity. Levels of dissatisfaction were highest among respondents from Mixed ethnic groups (37.8%) and White respondents (37.2%).

Table 17: Satisfaction with pay by ethnicity (n=2,315)

Responses	Asian, Asian Welsh or Asian British (n)	Black, Black Welsh, Black British, Caribbean, or African (n)	Mixed, Multiple or Other ethnic groups (n)	White (n)
Very satisfied	6.5% (n=8)	7.5% (n=15)	n<5*	3.1% (n=60)
Fairly satisfied	21.0% (n=26)	28.1% (n=56)	24.3% (n=9)	14.3% (n=280)
Neither satisfied nor dissatisfied	27.4% (n=34)	16.1% (n=32)	13.5% (n=5)	16.2% (n=317)
Fairly dissatisfied	12.1% (n=15)	20.6% (n=41)	16.2% (n=6)	28.0% (n=548)
Very dissatisfied	29.8% (n=37)	24.1% (n=48)	37.8% (n=14)	37.2% (n=728)
Preferred not to say	n<5*	3.5% (n=7)	n<5*	1.1% (n=22)

* The percentage is not provided if fewer than five respondents provided a response.

Pay reflections on financial management

All participants were asked the question of 'How well would you say you are managing financially these days?', of which the responses were mixed, as shown in Table 18.

Table 18: Reflections on financial management (n=2,362)

Response	Percentage (n)
Living comfortably	2.2% (n=52)
Doing alright	14.9% (n=352)
Just getting by	37.4% (n=885)
Finding it quite difficult	22.7% (n=537)
Finding it very difficult	20.6% (n=488)
Not sure / did not know	0.3% (n=6)
Preferred not to say	1.8% (n=42)

Pay reflections on responsibility of role and career

Altogether 2,361 participants responded to the extent to which they agreed with the following statement *'I feel my current level of pay reflects the responsibilities of my role'*.

As shown in Table 19, most participants slightly or strongly disagreed with this statement.

Table 19: Pay reflections on responsibility of role and career (n=2,361)

Response	Percentage (n)
Strongly agreed	4.7% (n=111)
Slightly agreed	7.1% (n=168)
Felt neutral	10.2% (n=242)
Slightly disagreed	17.6% (n=417)
Strongly disagreed	57.0% (n=1,347)
Did not know	1.4% (n=34)
Preferred not to say	1.8% (n=42)

Pay and progression in roles

Altogether 2,360 participants responded to the extent to which they agreed with the statement of *'I have no plans to stop working in my current role'*. Overall, most participants slightly or strongly agreed with this statement, as shown in Table 20.

Table 20: Pay and progression in roles – intention to remain in current role (n=2,360)

Response	Percentage (n)
Strongly agreed	32.4% (n=766)
Slightly agreed	14.4% (n=340)
Neutral	20.2% (n=477)
Slightly disagreed	13.4% (n=317)
Strongly disagreed	10.9% (n=257)
Did not know	5.3% (n=125)
Preferred not to say	3.3% (n=78)

Pay and progression in social care

Altogether 2,360 participants responded to the extent to which they agreed with the statement of *'I have no plans to stop working in social care'*. Overall, most people strongly or slightly agreed, as shown in Table 21.

Table 21: Intention to remain in the sector (n=2,360)

Response	Percentage (n)
Strongly agreed	34.0% (n=804)
Slightly agreed	14.6% (n=344)
Neutral	19.0% (n=450)
Slightly disagreed	12.9% (n=304)
Strongly disagreed	11.1% (n=262)
Did not know	5.6% (n=133)
Preferred not to say	2.7% (n=63)

Pay reflections on feeling valued by employer

Altogether 2,362 participants responded to the extent to which they agreed with the following statement of *'I feel valued by my employer for my work'*. Overall, there was a mixed response to this statement, as shown in Table 22.

Table 22: Reflections on feeling valued by employer (n=2,362)

Response	Percentage (n)
Strongly agreed	21.7% (n=512)
Slightly agreed	19.0% (n=448)
Neutral	20.9% (n=494)
Slightly disagreed	14.8% (n=350)
Strongly disagreed	20.0% (n=473)
Did not know	1.4% (n=32)
Preferred not to say	2.2% (n=53)

Pay reflections on feeling valued by society

Altogether 2,363 participants responded to the extent to which they agreed with the following statement of *'I feel valued by society more widely for my work'*. Overall, there was a mixed response to this statement, as shown in Table 23.

Table 23: Reflections on feeling valued by society (n=2,363)

Response	Percentage (n)
Strongly agreed	14.7% (n=348)
Slightly agreed	20.2% (n=477)
Neutral	27.1% (n=641)
Slightly disagreed	15.4% (n=365)
Strongly disagreed	18.1% (n=427)
Did not know	3.2% (n=75)
Preferred not to say	1.3% (n=30)

Reflections on financial incentives to progress to management

Altogether 2,363 participants responded to the extent to which they agreed with the following statement of *'The financial incentives to progress to a manager position make it an attractive role'*. Overall, there was a mixed response to this statement, as shown in Table 24.

Table 24: Reflections on financial incentives to progress to management (n=2,363)

Response	Percentage (n)
Strongly agreed	6.2% (n=147)
Slightly agreed	10.7% (n=252)
Neutral	23.7% (n=561)
Slightly disagreed	12.4% (n=293)
Strongly disagreed	34.4% (n=814)
Did not know	8.9% (n=211)
Preferred not to say	3.6% (n=85)