

*Welsh Government: Paying for Care
March 2019 Wales Omnibus Study
Research findings*



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Welsh Government

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This research was undertaken in accordance with ISO 20252



1. Introduction and objectives

The Welsh Government has already taken steps to establish a fairer, more sustainable system for paying for social care. This includes:

- The introduction of a limit on the amount local authorities can charge a person for the care they receive at home or within the community (currently £90 a week but due to rise to £100 a week by the end of this Assembly in 2021);
- Enabling people in Wales to keep up to £50,000 of their money before they need to self-fund the full cost of their residential care;
- Giving people more say over their care and support through the Social Services and Well-being (Wales) Act 2014.

Paying for social care in future is a challenge across all UK nations, and is an issue the Welsh Government is working to address. As the government shapes potential solutions, which may include a social care levy or tax, it is important that people's understanding of social care is improved. Without first understanding what the system provides, expecting people to contribute towards it (when they may never need the care themselves) will be challenging.

2. Methodology

The survey was conducted on the Beaufort Wales Omnibus survey using face-to-face interviewing via CAPI (Computer Aided Personal Interviewing). The Wales Omnibus survey interviews a representative sample of 1,000 adults across Wales in their own home each wave.

Omnibus surveys are a well-established method of conducting market and social research. As their name implies, they enable a group of users to share the same survey vehicle, achieving the benefit of lower costs. Subscribers to an omnibus service buy in on the basis of how many questions they wish to ask of the sample and the type of questions. In effect, therefore, each subscriber shares the cost of interviewing and other overheads with fellow clients.

The survey is based upon a representative quota sample, consisting of a minimum of 1,000 adults aged 16+ who are resident in Wales:

- Interviewing is spread across 68 separate locations throughout Wales. The primary sampling unit is Lower Level Super Output Areas (LLSOA). Sampling points are selected with probability proportionate to resident adult population after stratification within region;
- Within each sampling location, there are interlocking quota controls on age and social class within sex, and working status. Quotas are set to reflect the known demographic profile of Welsh residents according to the latest 2011 Census and no more than one person per household is interviewed;
- All interviews are conducted face to face in the homes of respondents using CAPI (Computer Aided Personal Interviewing) technology. Beaufort's experienced fieldworkers are used with postal and telephone back-checking in accordance with ISO 20252 – the international quality standard for market research services;
- At the analysis stage, the data is weighted by age group within gender within Local Authority grouping to make the achieved sample representative of the Wales population derived from the results of the 2011 Census.

The questionnaire for the Paying for Care survey comprised a series of questions covering personal experience of social care in Wales, knowledge of the social care system, concerns and expectations of the type of care that might be required in older age, knowledge of the current funding situation, awareness of any changes being considered to the Welsh Government's policies on funding social care and

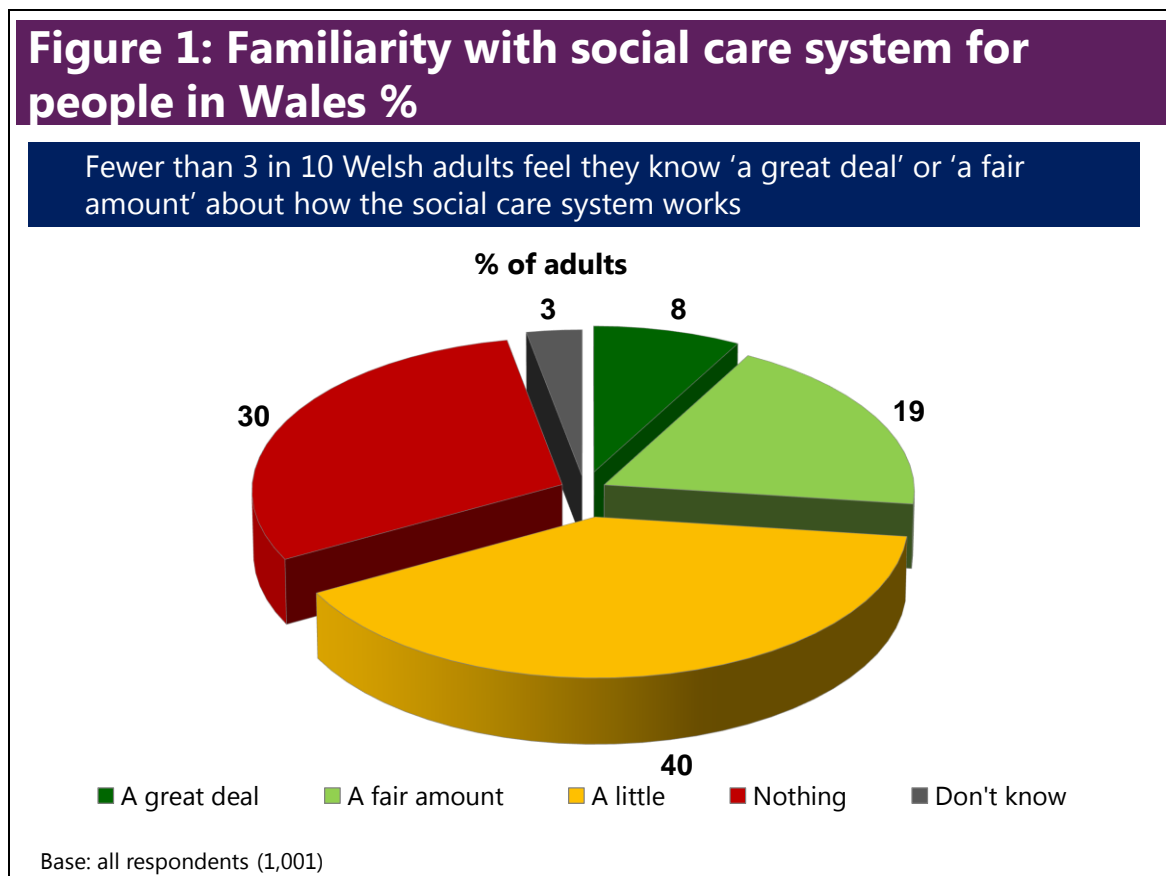
preferences for generating additional funding. Demographic questions are also included as standard in the Wales Omnibus survey. The questionnaire was available in English or Welsh at the participant’s choice.

For the March Wales Omnibus survey, 1,001 adults were interviewed between 25 February and 10 March 2019. Full data tabulations from the survey have been provided to the Welsh Government in a separate technical report.

3. Research findings

3.1 Familiarity with the social care system in Wales

Fewer than three in ten Welsh adults (27%) feel they know a great deal or a fair amount about how the social care system for people in Wales works. Another four in ten feel they know a little about it, while three in ten say they know nothing (see figure 1 below).



Although familiarity is generally low, women are more knowledgeable than men - 33% of women say they know ‘a great deal’ or ‘a fair amount’ about how social care for people in Wales works compared with 21% of men. Older people are more knowledgeable than younger people about the topic – 37% of those aged 55+ feel

they know 'a great deal' or 'a fair amount' about social care, compared with 19% of those aged 16-34 years.

Those with some personal experience of social care themselves are the most knowledgeable overall, with the following proportions saying they know at least a fair amount:

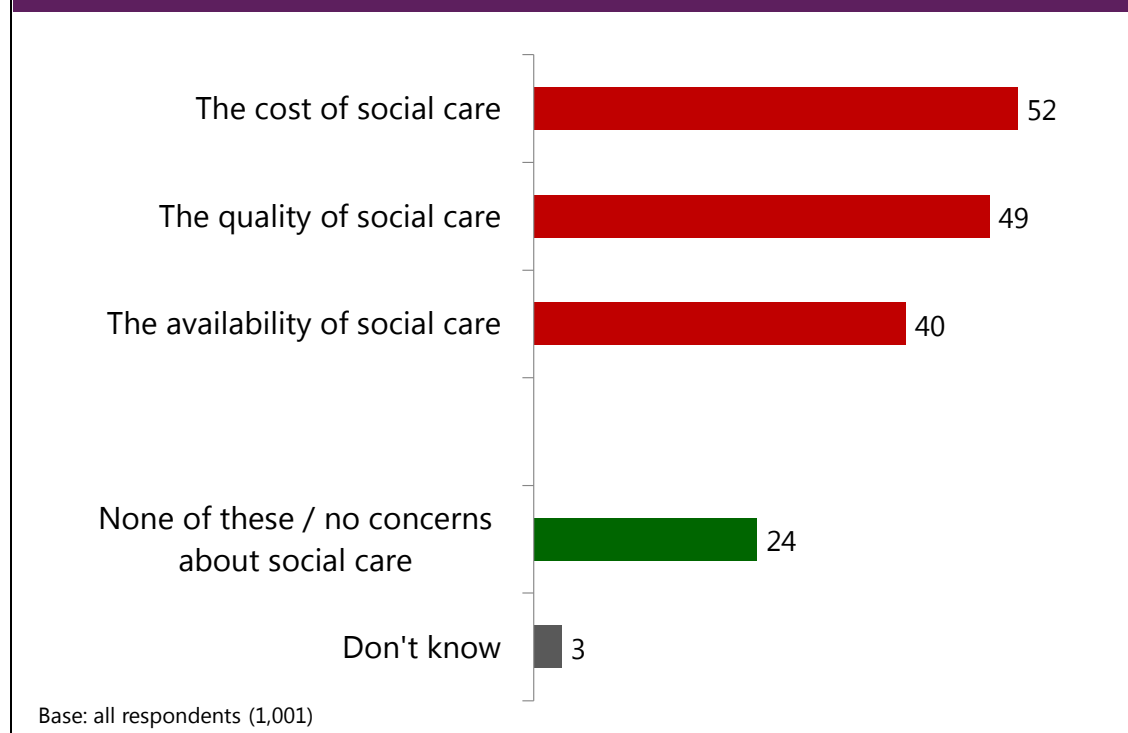
- 68% of those working in the social care sector
- 63% of those who are caring for someone who needs their support
- 55% of those currently receiving social care services
- 46% of those who know somebody who receives or uses social care services.

3.2 Preparations for older age and expectations of social care support that might be required

A majority of the population (seven in ten) have some concerns about social care support they may need in future. When prompted with some possible concerns, around half said they were concerned about the cost of social care (52%) and the quality of social care services (49%), while four in ten were concerned about the availability of social care (see figure 2 below).

Only around one in four (24%) of the population said they had no concerns about any social care they may need in future. This rose to 40% of those who admitted they know nothing about how the social care system in Wales works.

Figure 2: Concerns about any social care may need in future %

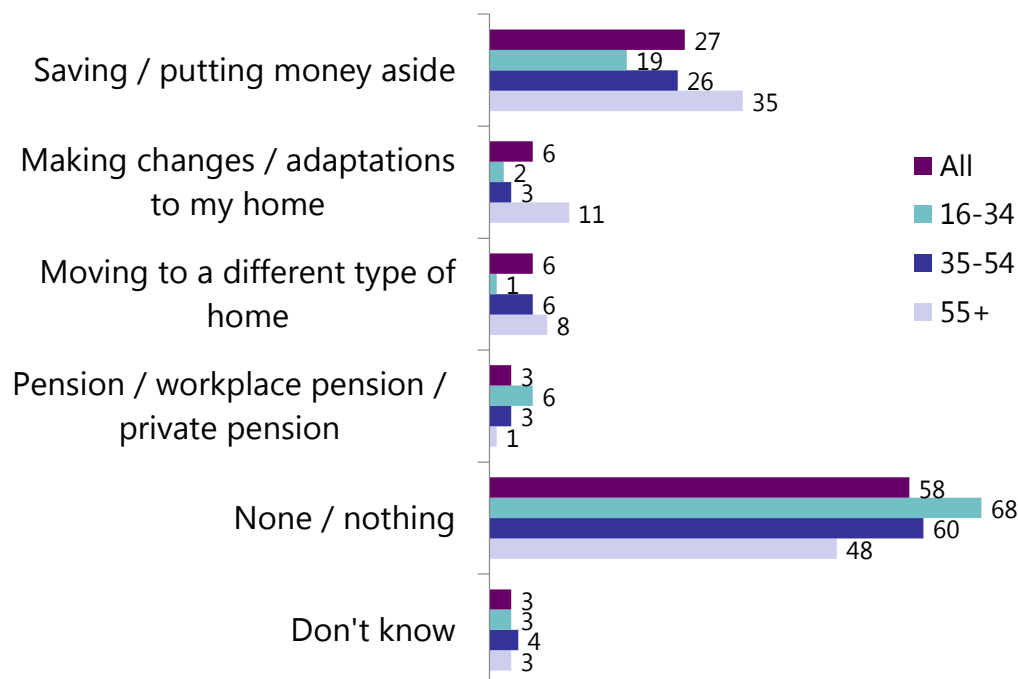


Women are more likely to be concerned about the cost, quality and availability of social care than men, and older people (aged 55+) are more likely to be concerned about each dimension than other age groups. Concern about each was particularly high among those who had direct personal experience of the social care system.

Despite the relatively high level of concerns voiced, most of those interviewed (58%) say they are not making any preparations for their old age. Where people are taking some action, the most common action mentioned spontaneously is saving / putting money aside (mentioned by 27% of those interviewed in total). Other preparations such as making changes / adaptations to their home and moving to a different type of home were mentioned by much smaller proportions of people (at 6% each).

Those aged 55 and over are more likely than other age groups to be making some preparations for their old age, but even among this age group nearly half (48%) say they are not doing anything (see figure 3 below).

Figure 3: What preparations, if any, are being made for old age %



Base: all respondents (1,001)

More affluent people in the ABC1 socioeconomic groups¹ are more likely to be making some preparations for older age than those in the C2DE socioeconomic groups, but even so a high proportion of this group are not taking any action (47% of the former said they were doing nothing, compared with 68% of the latter).

When shown a list and asked what sort of social care support they felt they personally might need in old age to help them maintain their independence and stay in their own home, almost four in ten (39%) feel they might need adaptations around their home to make it easier to live there. Around one in four feel they might need technology to help them live independently, while the same proportion think they might need physiotherapy or assistance to help them keep active. Just under one in five feel they might need assistance to wash, dress, eat or go to the toilet.

¹ Socio-economic classification is determined by establishing an individual's job title and position and social grades are defined as follows:

AB: Higher and intermediate managerial, administrative and professional occupations

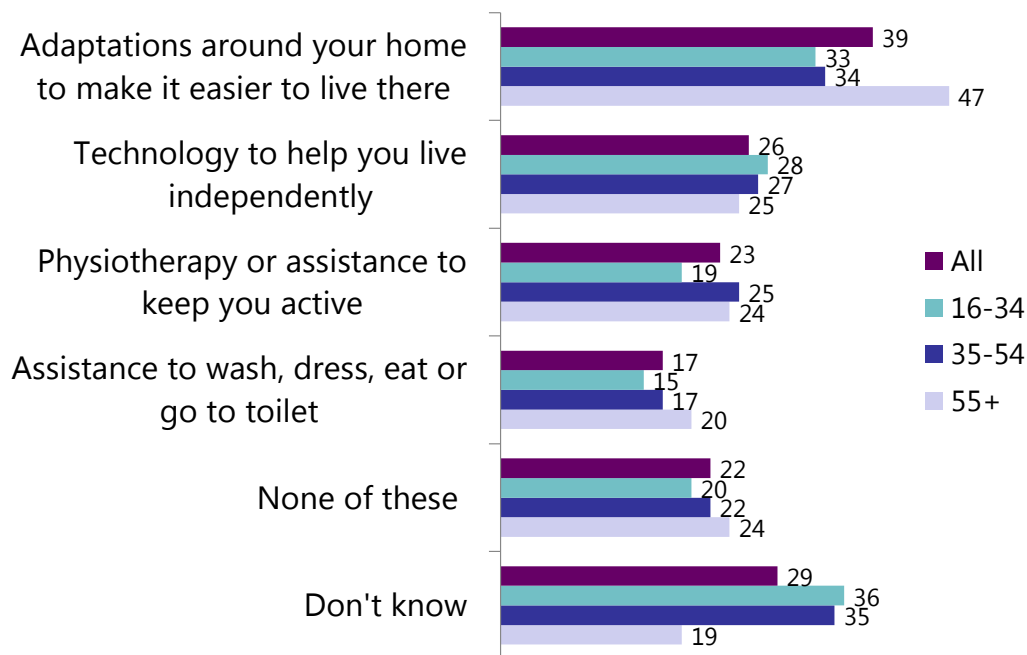
C1: Supervisory, clerical and junior managerial, administrative and professional occupations

C2: Skilled manual workers

DE: Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only

Over half of the adults interviewed either answered 'none of these' (22%) or 'don't know' (29%) to this question, however.

Figure 4: What sort of social care support people think they might need in older age to help maintain their independence and stay in their own home %



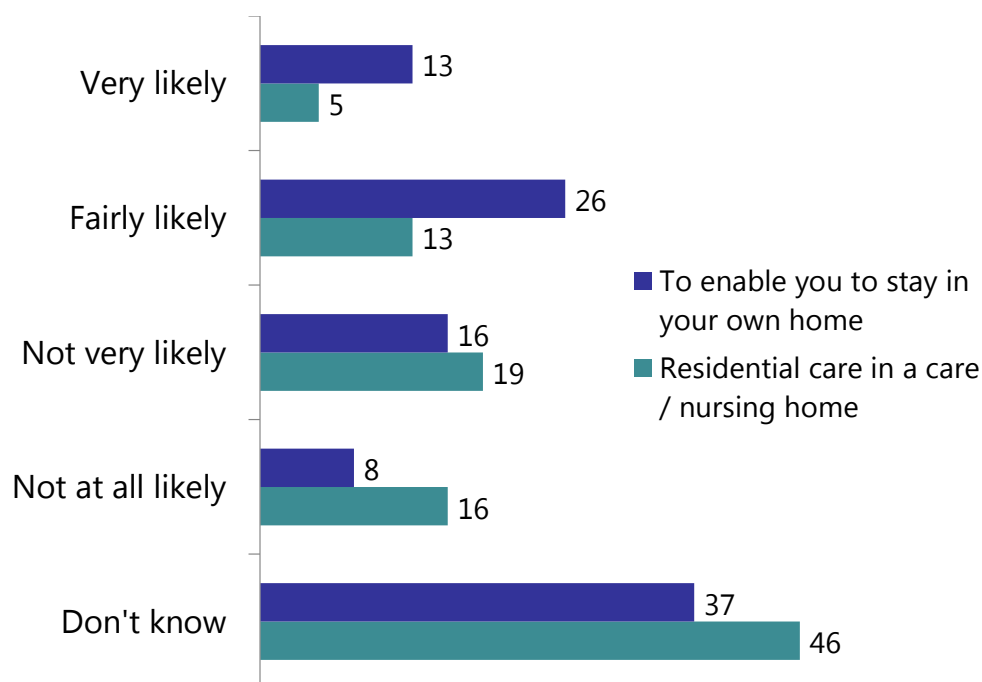
Base: all respondents (1,001)

Differences in opinion were again displayed by gender and age – for instance, women and over 55s are more likely than the population overall to feel they may need adaptations around their home to help them maintain their independence and stay in their own home (with 46% and 47% of each group respectively saying this compared with 39% overall). Also, those with a long term illness or disability are much more likely to think they will need each of these types of social care support in older age than is the case overall.

A high proportion of the survey sample was unable to answer when asked how likely they thought it was that they will need social care support in their old age to enable them to stay in their own home (37%). A similar proportion (of around four in ten – 39%) think that it is likely they will need this sort of help, while around one in four (24%) think it is unlikely (see figure 5 below).

Almost half of those interviewed (46%) were unable to answer when asked how likely it was they will need residential care in a care home or nursing home when they are in their old age. In contrast to the situation with social care support in their own home, however, of those who could answer more think it is unlikely they will need residential care than think this is likely (18% saying it was likely and 35% that it was unlikely).

Figure 5: Likelihood of needing social care support in old age %



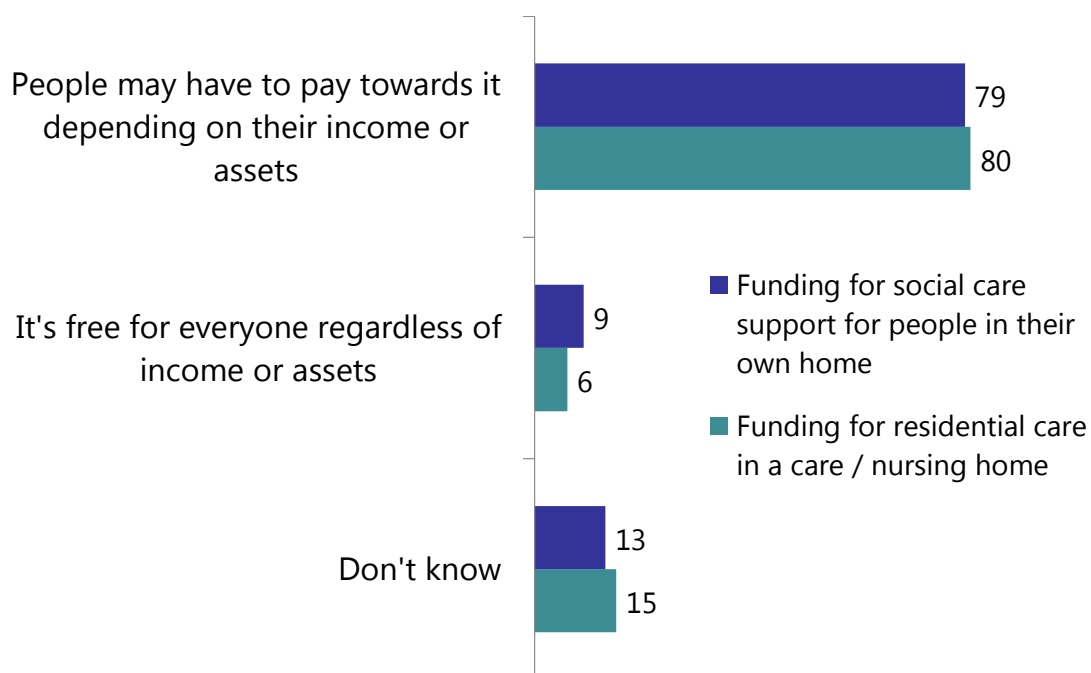
Base: all respondents (1,001)

3.3 Knowledge of current funding of social care in Wales

Turning to familiarity with the funding of social care in Wales, almost eight in ten Welsh adults (78%) think that people may have to pay towards social care support in their own homes, while only 9% think it is free for everyone regardless of income or assets. 13% answered 'don't know'.

The proportion who think that people may have to pay towards residential care in a care home or nursing home is almost identical (80%), with only 6% thinking that it is free for everyone, and 15% answering 'don't know' (see figure 6 below).

Figure 6: Awareness of current funding situation for social care %

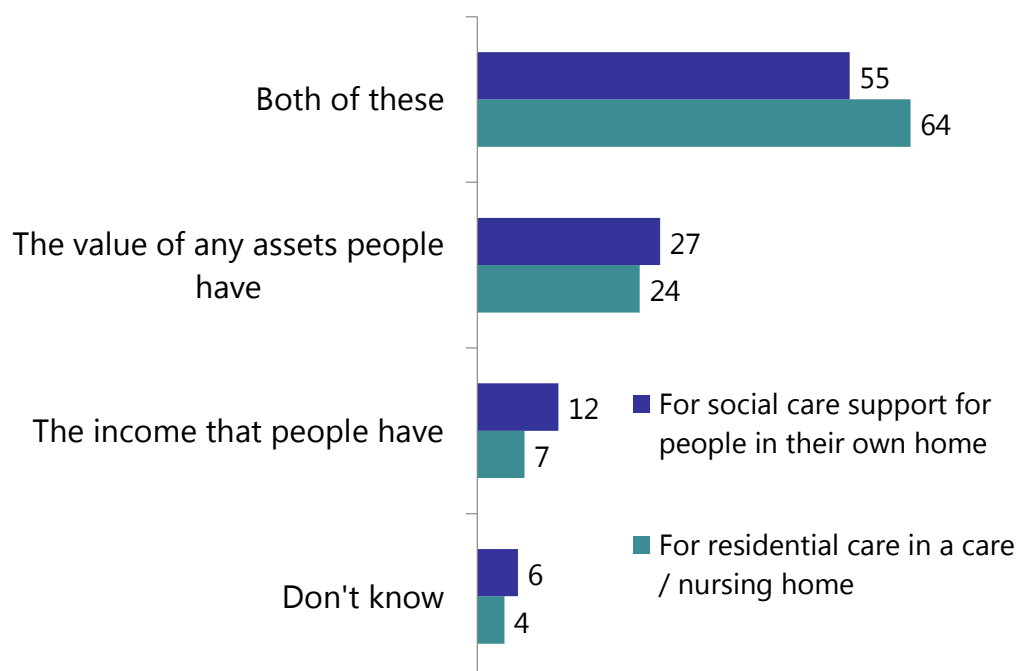


Base: all respondents (1,001)

55% of those who think people may have to pay towards social care support in their own home believe that both the value of any assets they hold and the income that they receive will be taken into account in deciding whether and how much people may have to pay.

A higher proportion of people (64%) believe that both income and assets are taken into account in the case of funding residential care in a care home or nursing home (see figure 7 overleaf).

Figure 7: What is taken into account in deciding whether & how much people may have to pay.... %



Base: those who think people may have to pay towards social care (781 – in-home care; 796 – residential care)

When asked to estimate the maximum amount per week that people may have to pay for social care support in their own home or for residential care, the majority of those who think a financial contribution would be required are unable to answer (with 61% saying 'don't know' for in-home social care support and 55% saying this for residential care).

Where survey respondents were able to provide an estimate, the average maximum weekly amount that it is thought that people may have to pay for in-home social care support is just over £340 (considerably higher than the reality), while the corresponding average maximum weekly amount that people may have to pay for residential care is estimated at more than double this (at almost £740).

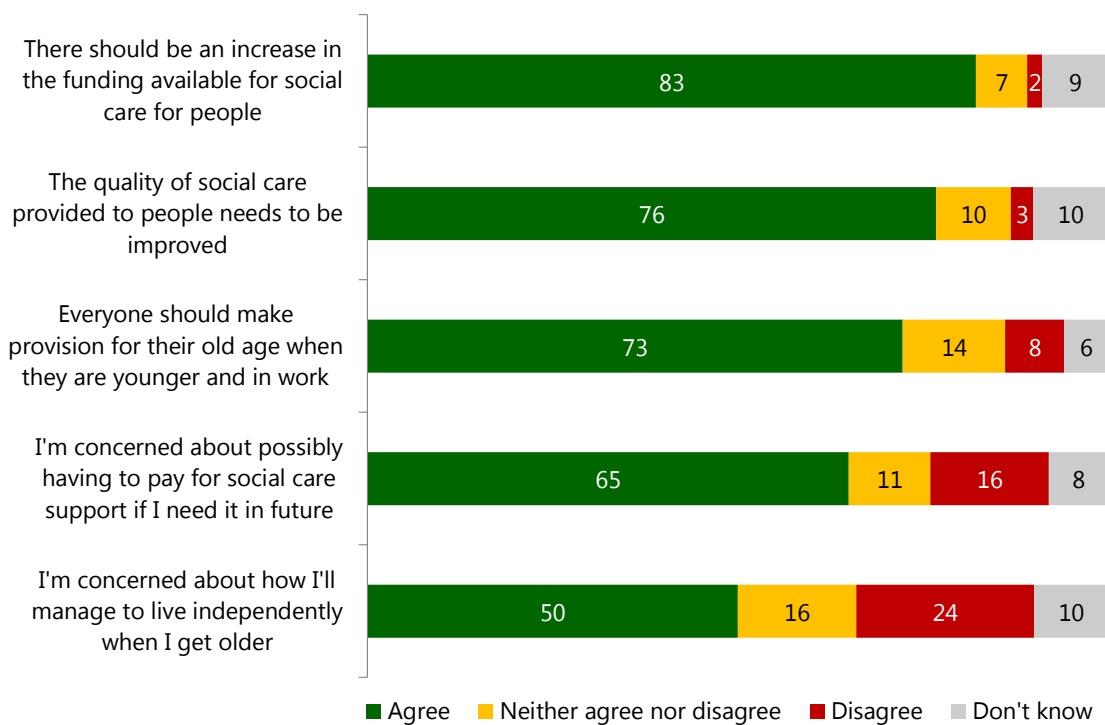
Those in managerial, professional, administrative and other white collar occupations (ABC1s) expect the maximum weekly amount that people may have to pay for social care in both scenarios to be higher than those in manual occupations or who are not working (C2DEs):

- For in-home social care support, ABC1s estimate £404 per week compared with an estimate of £272 per week for C2DEs
- For residential care, ABC1s estimate £878 per week compared with £575 per week for C2DEs

3.4 Attitudes towards social care services and their funding

A series of statements were read out during the interview covering attitudes towards social care services and how they are funded and survey participants were asked to what extent they agreed or disagreed with each. Results are summarised below and in figure 8 overleaf:

- There is strong support for an increase in the funding available for social care for people (with 82% of those interviewed either agreeing strongly or agreeing with this statement). Endorsement is higher still among those with personal experience of the social care sector, those with a long term illness or disability, women and older people.
- There is also strong support for improving the quality of social care, with 76% agreeing that 'the quality of social care provided to people needs to be improved'. This rises to 94% of those currently caring for someone and 88% of those currently working in the social care sector.
- Over seven in ten respondents (73%) believe that 'everyone should make provision for their old age when they are younger and in work' although, as seen above, only a small minority are themselves making any preparations for their old age. No real differences are evident by age on this dimension although those in the more affluent ABC1 socioeconomic groups are more likely to endorse it than those in the C2E socioeconomic groups (with 78% of the former agreeing, compared with 68% of the latter).
- Almost two thirds of Welsh adults (65%) are concerned about possibly having to pay for social care support they may need in future, with the proportion saying this rising to 76% of those with a long-term illness or disability.
- Half of those interviewed (50%) are concerned about how they will manage to live independently in later life. This rises to 64% of those with a long-term illness or disability, 59% among the over 55s and 55% among women.

Figure 8: Public attitudes to social care %

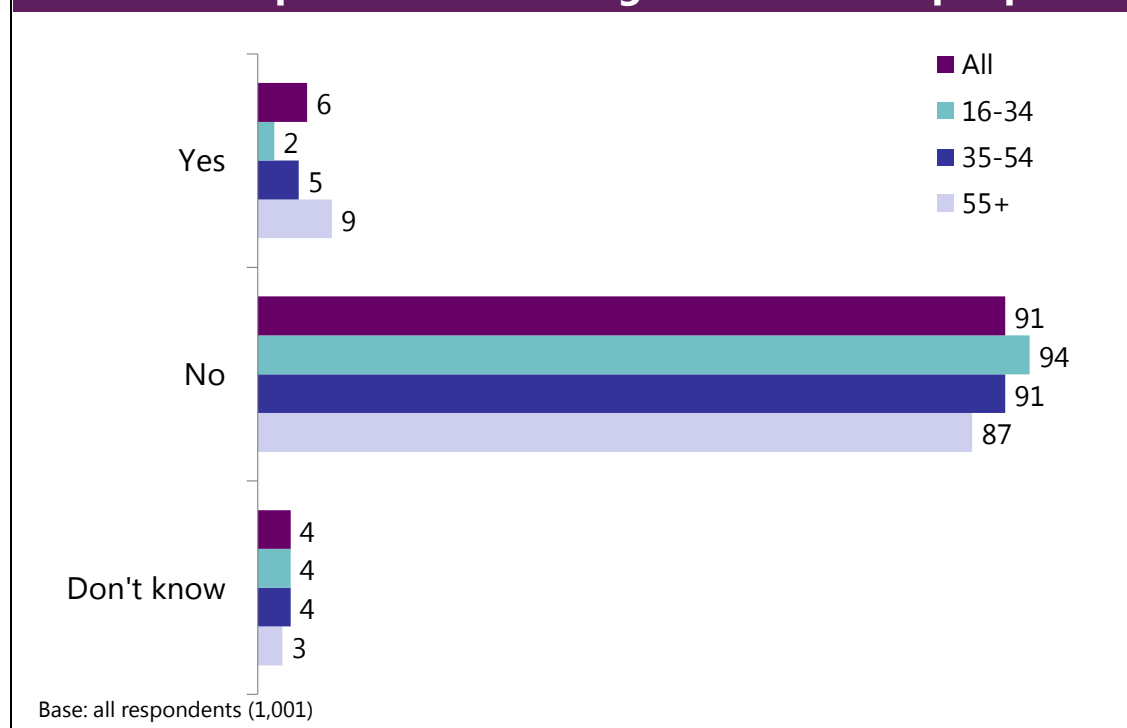
Base: all respondents (1,001)

3.4 Awareness of any changes to Welsh Government policies on funding social care

Only a very small proportion of the population is aware of any changes being considered by the Welsh Government to its policies on funding social care for people (6%) (see figure 9 overleaf).

Awareness of any changes is higher among older people than younger people (at 9% of those aged 55+, compared with a level of 2% among those aged 16-34) and highest overall among those currently working in the social care sector (at 17%).

Figure 9: Awareness of any changes to Welsh Government policies on funding social care for people %



The main channel driving awareness among this group is TV news / programmes (mentioned by 50% of those aware of any changes), followed by word of mouth (mentioned by 26% of this group). At a lower level there were also mentions of newspapers / magazines (14%) and radio news (12%).

3.5 Preference for generating additional funding for social care

Towards the end of the interview it was explained to survey respondents that there is rising demand for social care with people living longer, but a limit in the funding available to pay for it, and therefore the Welsh Government is considering new ways of raising additional funding for social care. They were given two options for generating additional funding for social care:

1. All taxpayers in Wales paying an extra tax to reduce what people pay for social care, or
2. All taxpayers in Wales paying an extra tax to improve the quality of care people receive.

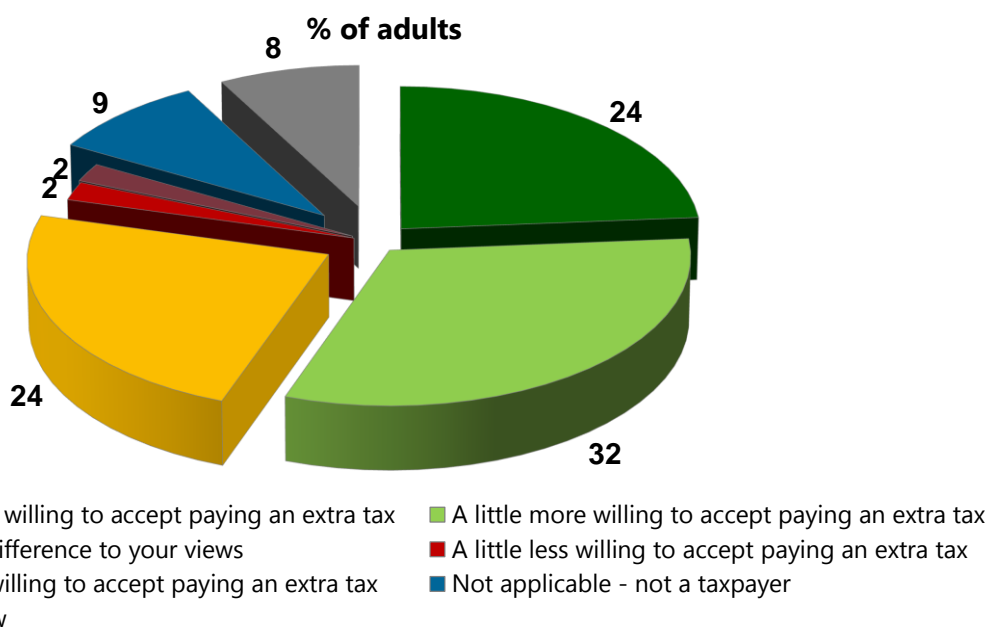
Survey respondents were able to choose one of these options or to answer 'neither'. Where a preference was expressed, it was for improving the quality of care over reducing the amount that people pay:

- Over four in ten (44%) chose ‘all taxpayers in Wales paying an extra tax to improve the quality of care people receive’. Women were more likely than men to select this option (at 49% of women compared with 40% of men).
- Just over two in ten (21%) chose ‘all taxpayers in Wales paying an extra tax to reduce what people pay for social care’. Men were more likely to choose this option than women (at 26% of men compared with 16% of women).
- Another two in ten (22%) said ‘neither’, while just over one in ten (13%) answered ‘don’t know’.

Lastly, survey participants were asked what difference, if any, it would make to their willingness to accept paying an extra tax if it was guaranteed that any money raised from this tax would be ‘ring-fenced’ or only spent on social care. Almost six in ten (56%) said it would make them more willing to accept paying an extra tax if the money were ring-fenced, 24% said it would make no difference to their views and 3% that it would make them less willing to do so (see figure 10 below).

Figure 10: Impact of ‘ring-fencing’ on acceptability of an extra tax %

If it was guaranteed that any money raised from an extra tax would be ‘ring-fenced’ or only spent on social care, would this make you...?



Base: all respondents (1,001)

