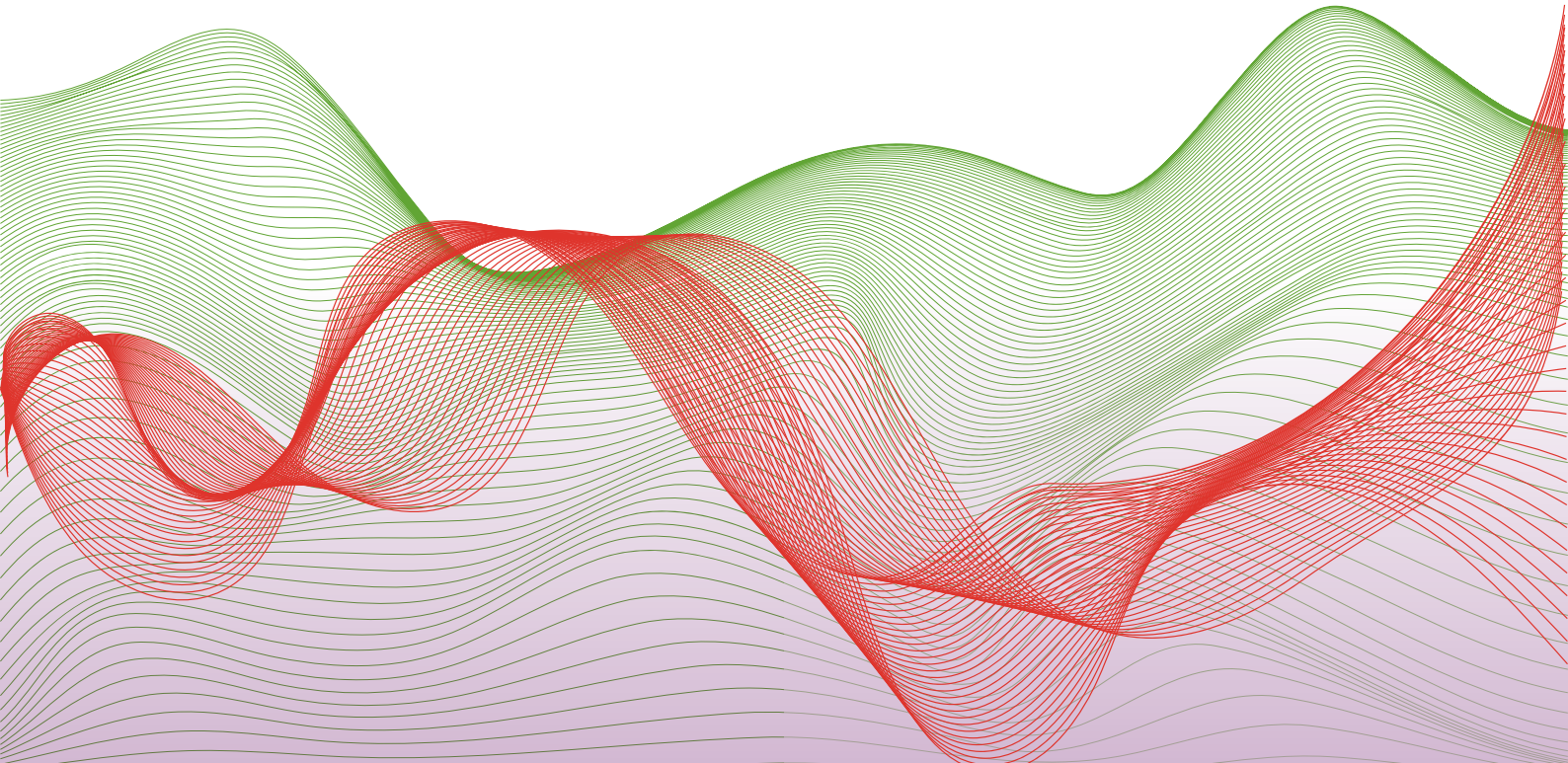
Care Policy Scorecard for Wales

Summary Report

June 2025



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Methodology

The Care Policy Scorecard (CPS) for Wales was developed using the framework created by Oxfam. Carers Wales and the Bevan Foundation led the implementation of the Scorecard in Wales, with support from Oxfam Cymru.

The Scorecard evaluates policies across three key areas: unpaid care, paid care, and childcare. Each policy area was assessed using specific indicators outlined in the CPS framework.

Foreword

Care is the backbone of Welsh society—essential yet often invisible. It supports our health, nurtures our children, sustains communities, and powers the economy. Whether provided by unpaid carers, childcare workers, or social care professionals, care is vital.

Yet care continues to be undervalued in practice and overlooked in policy. This neglect affects not only those who give and receive care but undermines gender equality, deepens poverty, and weakens our ability to build a wellbeing economy.

Wales stands at a crossroads. With increasing pressures—from an ageing population to a stretched workforce—our care systems face serious challenges. But this is also a moment to act differently. That's why Oxfam Cymru, Carers Wales, and the Bevan Foundation have come together to launch the Care Policy Scorecard (CPS): a practical tool to assess how care policies are adopted, funded, and implemented—and whether they deliver for both paid and unpaid carers.

As the first UK nation to use this approach, Wales is uniquely placed to lead. Our small size and connected civic sector allow for joined-up thinking and bold, integrated solutions. The Scorecard assesses three linked areas of care policy, revealing not only gaps and barriers but also where progress in one area can drive improvement in others.

This Scorecard does not just highlight problems—it's a call to action. It shows where we're making progress and where further effort is needed. It offers a roadmap for future governments to prioritise care as a social infrastructure, recognise unpaid care, embed care mainstreaming across policymaking, and invest in building a caring economy.

Everyone in society experiences care at some point in our lives, it is the human infrastructure of a wellbeing society. With the right policies, properly implemented and fully resourced, care can become a shared opportunity—laying the foundation for a more equal, inclusive, and compassionate Wales.

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Introduction

Care underpins society, providing essential support across families and communities. In Wales and the other UK nations, millions provide care—paid and unpaid—yet care remains undervalued and underfunded. Most care work is performed by women, especially unpaid care, which is largely unrecognised in GDP calculations despite its massive economic value and the positive impact it has on people's lives. Paid care jobs are often precarious, poorly compensated, and lack protections.

To shift toward a more supportive system, care must be acknowledged as a public good and supported through strong public policy.

Oxfam Cymru initiated the Care Policy Scorecard (CPS) to assess Wales' progress across paid care, unpaid care, and childcare, identifying strengths and gaps in policy frameworks, and worked in partnership with Carers Wales and the Bevan Foundation to create the first CPS for Wales and the first report of its type in the UK. The model is based on an internationally recognised framework which has been applied to other countries around the world, such as the USA, Canada and Kenya. The Welsh scorecard also provides a first, in that it was co-produced with unpaid carers, ensuring it is rooted in their lived experience of care policy.

A Snapshot of Care in Wales

According to the 2021 Census, 310,000 people in Wales provide unpaid care; nearly 60% are women, and around 30% are disabled themselves. Carers' experience of poverty is severe—100,000 carers live in poverty, with a poverty rate 30% higher than the general population. Women are disproportionately classed as economically inactive (not in paid work) due to care duties, especially between ages 25-34, despite care work being a critical form of labour that underpins the entire economy.

Around 85,000 people work in the paid social care sector and 16,000 people in the childcare and play sector in Wales, the vast majority of whom are women. Among social care workers, only 57% of workers report feeling satisfied with their jobs and over a quarter (26%) plan to leave within a year due to low pay and overwork.

Childcare in Wales is primarily supported by the Welsh Government's Flying Start scheme for two to three-year-olds and the 30-hour funded Childcare Offer for three to four-year-olds; however, there is currently no government-funded childcare support for children under the age of two. Wales has the highest average cost of part-time nursery care for under-twos in Great Britain. 91% of nurseries in Wales expect to make a loss or break even. Given that many nurseries in Wales are small businesses run locally, the impact of their closure would be significant for local economies.

Policy that impacts on paid care, unpaid care and childcare in Wales is fragmented across departments, creating accountability challenges. Welsh Government departments involved include Health and Social Care, Social Justice, Finance, Local Government and Education.

Better cross-governmental coordination and care mainstreaming are essential to ensure cohesive policymaking and to tackle the complex, systemic challenges facing the care sector—by embedding care as a priority across all relevant portfolios.

Paid Care

Paid social care in Wales employs approximately 85,000 people and contributes £4.6 billion annually. Workers face low wages, poor working conditions, and job insecurity. Only 57% report job satisfaction, while 26% plan to leave within a year due to pay and workload issues. The average salary is £24,124—below the living wage. Many workers face out-of-pocket costs and lack sufficient sick or family leave.

Key Score Indicators

- **Minimum Wage:** Wales pays the Real Living Wage (£12.60/hour in 2024), exceeding the UK minimum, but lacks enforcement power. Funding often does not reach all workers, and compliance is inconsistent.
- **Gender Wage Gap:** Women represent 82% of the workforce. While the Welsh Government aims to eliminate pay gaps by 2050, there is insufficient data specific to social care, and pay gap monitoring lacks enforcement.
- **Social Security:** Care workers are eligible for standard UK benefits, but the UK's system is described as punitive, disproportionately impacting low-paid care workers. Wales' Benefits Charter aims to improve access but lacks specific provisions for social care workers.
- **Workplace Safety and Harassment:** Legislation like the VAWDASV Act (2015) promotes workplace protections, but doesn't directly address social care workers. Monitoring of the impact of this legislation is inconsistent.
- **Migrant Care Workers:** While modern slavery policies exist, enforcement remains reserved to the UK Government, and risk is higher in the social care sector than many equivalent sectors in the UK.
- **Union Rights:** Wales supports collective bargaining and unionisation. Initiatives like the Social Care Workforce Partnership are steps forward, but union membership is still low (31%). This is for a variety of reasons, such as pay prioritisation, perceived lack of value of unions and a lack of stable employment meaning staff skip unionisation. The impact is that less staff are then involved with collective bargaining efforts led by unions.

Recommendations

- Strengthen monitoring, data collection and enforcement to ensure all eligible care workers are receiving the Real Living Wage, with transparent public reporting of progress.
- Provide an enhanced rate of the Real Living Wage to care workers to meaningfully tackle recruitment and retention.
- Consider establishing a dedicated process or service to monitor and enforce employment rights in Wales.
- Collect and publish data on the gender pay gap amongst the paid care workforce in Wales.
- Review gender-based discrimination and harassment guidance to embed appropriate content and provisions to protect paid care workers and adopt ILO Convention 189 to give this review focus and guidance.

Degree of Transformation

Unpaid Care

Between 310,000-480,000 individuals in Wales provide unpaid care—an economic value of over £10 billion annually. Despite legal rights via the Social Services and Well-being (Wales) Act 2014, support is uneven and under-resourced. Many carers face significant challenges to their own health and wellbeing, experiencing poverty as a direct result of their caring role, as well as additional barriers to remaining in paid work. This reflects a lack of adequate support and recognition for the vital role they play in sustaining families, communities, and public services.

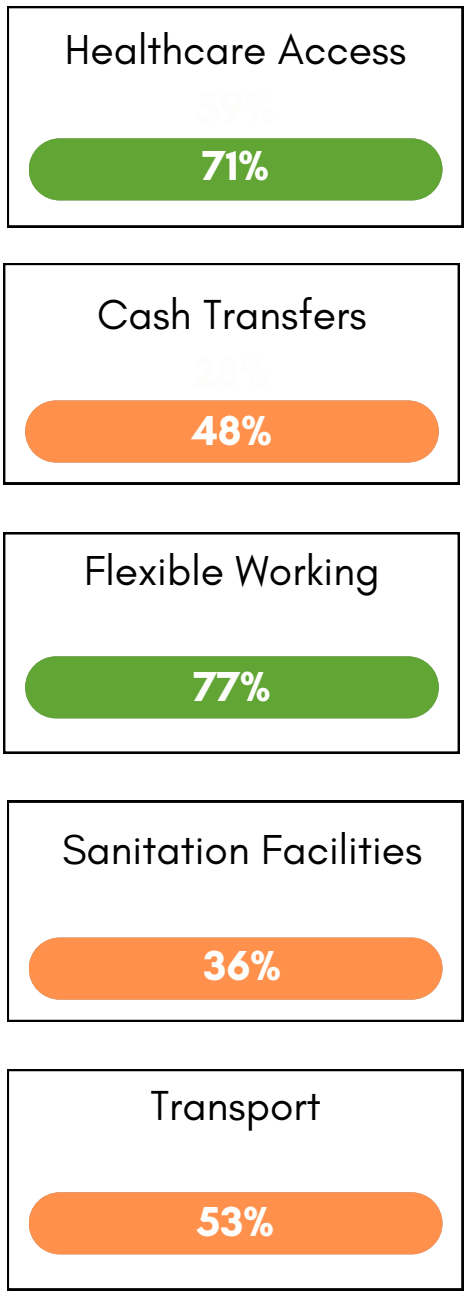
Key Score Indicators

- **Healthcare Access**: NHS Wales provides free care, including free prescriptions. While some integration exists (e.g., NHS Continuing Healthcare), fragmentation between health and social care leaves unpaid carers unsupported.
- **Cash Transfers:** Only 57,000 of 310,000 carers in Wales receive Carer's Allowance. Support like the Welsh Government's Carer Support Fund is not enough to address carer poverty and support at the local level is inconsistently applied —creating a "postcode lottery."
- **Flexible Working:** While employment law is reserved to the UK Government, Wales promotes carer-friendly practices to employers. Yet, most carers report negative impacts on work. The Carer's Leave Act (2023) enables 5 days of unpaid leave but has limited uptake.
- **Sanitation Facilities:** Public and Changing Places toilets are sparse (about 50 Changing Places across Wales), limiting many carers' mobility with the people they provide care for. Funding is local and discretionary, leading to inconsistent provision.
- **Public Transport:** Carers receive little support for independent travel, though some schemes (e.g., companion cards) exist. Transport policies largely exclude carers, despite their heavy dependence on public transit to carry out caring tasks.
- **Care Services for Older People:** Legal duties exist under the 2014 Act, but in reality, support is lacking. Many local authorities under-deliver on duties, hampering carers' ability to provide care. A 2024 report by the Public Service Ombudsman for Wales shows only 1.5% of carers in some areas receive formal support.
- **Care Services for People with Additional Needs:** The 2014 Act sets clear goals but is poorly implemented. In some local authorities, just 2.8% of unpaid carers had a carer's needs assessment despite this being a right in law. Systemic underfunding and poor data transparency persist.

Recommendations

- Introduce a dedicated Action and Implementation Plan to tackle the longstanding and well-documented gap between the rights promised in the **Social Services and Well-being (Wales) Act 2014** and the reality for unpaid carers.
- Provide long-term funding certainty for the Carer Support Fund.
- Use any influence with the UK Government to drive reform to Carer's Allowance and the welfare benefits system for unpaid carers. This should also include the introduction of paid Carer's Leave for all unpaid carers balancing their roles with paid work.
- Commit to public annual reporting of data covering the delivery of key rights contained in the Social Services and Well-being (Wales) Act 2014 for unpaid carers.

Degree of Transformation



Recommendations

- Set out how inconsistencies will be addressed in local authority charging regimes and financial assessments for non-residential care charges.
- Work with local authorities to set a target for each county on the number of public toilets they will seek to deliver to ensure adequate coverage across Wales.
- Amend the Companion pass scheme to enable unpaid carers to travel independently of the person they care for, recognising that carers often travel independently to perform caring tasks.

Degree of Transformation

Care Services for Older People

74%

Care Services for People with Additional Needs

71%

Childcare

Childcare in Wales is primarily supported through three Welsh Government-funded Early Childhood Care and Education (ECCE) programmes. Flying Start provides 12.5 hours of funded childcare per week for two- to three-year-olds in designated areas; the Childcare Offer provides up to 20 hours per week (increasing to 30 during school holidays) for working parents of three- and four-year-olds; and Foundation Learning offers 2.5 hours of universal early education per day for three- and four-year-olds in maintained school settings.

For eligible families, the Childcare Offer and Foundation Learning are typically accessed together and commonly referred to as the 30-hour funded Childcare Offer. There is no funded provision for children under two, making care unaffordable for many and giving Wales the highest under-two childcare costs in Great Britain.

Despite helping many families, these programmes remain fragmented and inequitable:

- Lack of provision for children under two: Disproportionately affects low-income families and limits women's employment due to unpaid care demands.
- Eligibility restrictions: The Childcare Offer excludes parents working less than 16 hours, in insecure jobs, unemployed and not in paid work. Flying Start's area-based delivery excludes families living outside designated areas.
- Fragmented programme structure and delivery: The three main ECCE programmes operate separately, with different rules and settings, making the system confusing—especially for families with limited access or needing wraparound care.
- Insufficient support for children with additional needs: There are too few inclusive settings for disabled children and those with additional needs.

A national rollout of Flying Start for all two-year-olds is planned by the Welsh Government but without a set timeline, and there are no plans for childcare expansion for under-twos. Despite increased ECCE funding, concerns about adequacy, underspending, affordability, and workforce shortages—especially in Welsh-medium and inclusive settings—persist.

Childcare Workforce Indicators

The childcare workforce (around 16,000 people, 95% women) faces low pay, poor conditions, and staff shortages—especially in Welsh-medium and inclusive settings.

- Minimum wage: Most earn above the National Minimum Wage but below the Real Living Wage. Self-employed childminders (5%) are not fully protected. Welsh Government Real Living Wage guidance does not include childcare workers.
- Working conditions and safety and harassment: Working conditions follow general UK labour laws, but no childcare-specific policy exists. Oversight of worker protections is limited.
- Social security: Employed workers access standard benefits, but self-employed childminders face financial challenges due to the Minimum Income Floor under Universal Credit,which can reduce support.

Degree of Transformation

Early Childhood Care and Education

50%

Flying Start Implementation

53%

Childcare Offer

40%

Foundation Learning

47%

Recommendations

- Create a single application process for all childcare support programmes.
- Provide 30 hours of funded childcare from the end of paid parental leave for all families.
- Expand eligibility to include unemployed parents, part-time workers, and asylum seekers.
- Ensure funding covers the true cost of delivering quality childcare.
- Introduce a sector-wide Real Living Wage with career and wellbeing support.
- Launch targeted recruitment and retention initiatives for the childcare workforce.
- Explore alternative funding models to improve efficiency and sustainability.
- Develop a national plan for inclusive childcare for disabled children and those with additional needs.
- Increase transparency by publishing detailed childcare budget data.

Conclusion

Wales has made notable strides in care policy through well-intentioned legislation and innovative schemes. Yet, major implementation gaps remain across all three policy areas—paid care, unpaid care, and childcare. Fragmentation between devolved and reserved powers complicates policy execution and creates inconsistency across local authorities, coupled with a lack of leadership, quality-assurance and data collection from the Welsh Government.

The Care Policy Scorecard serves as a baseline for future evaluation and offers clear recommendations. If adopted, these changes will help to build a more equitable, sustainable, and effective care infrastructure—valuing the indispensable contribution of care work to Wales' social and economic fabric.

The full report and the digital scorecard is available to download at carersuk.org/wales/carepolicyscorecard2025

A physical copy can be requested from Carers Wales at info@carerswales.org

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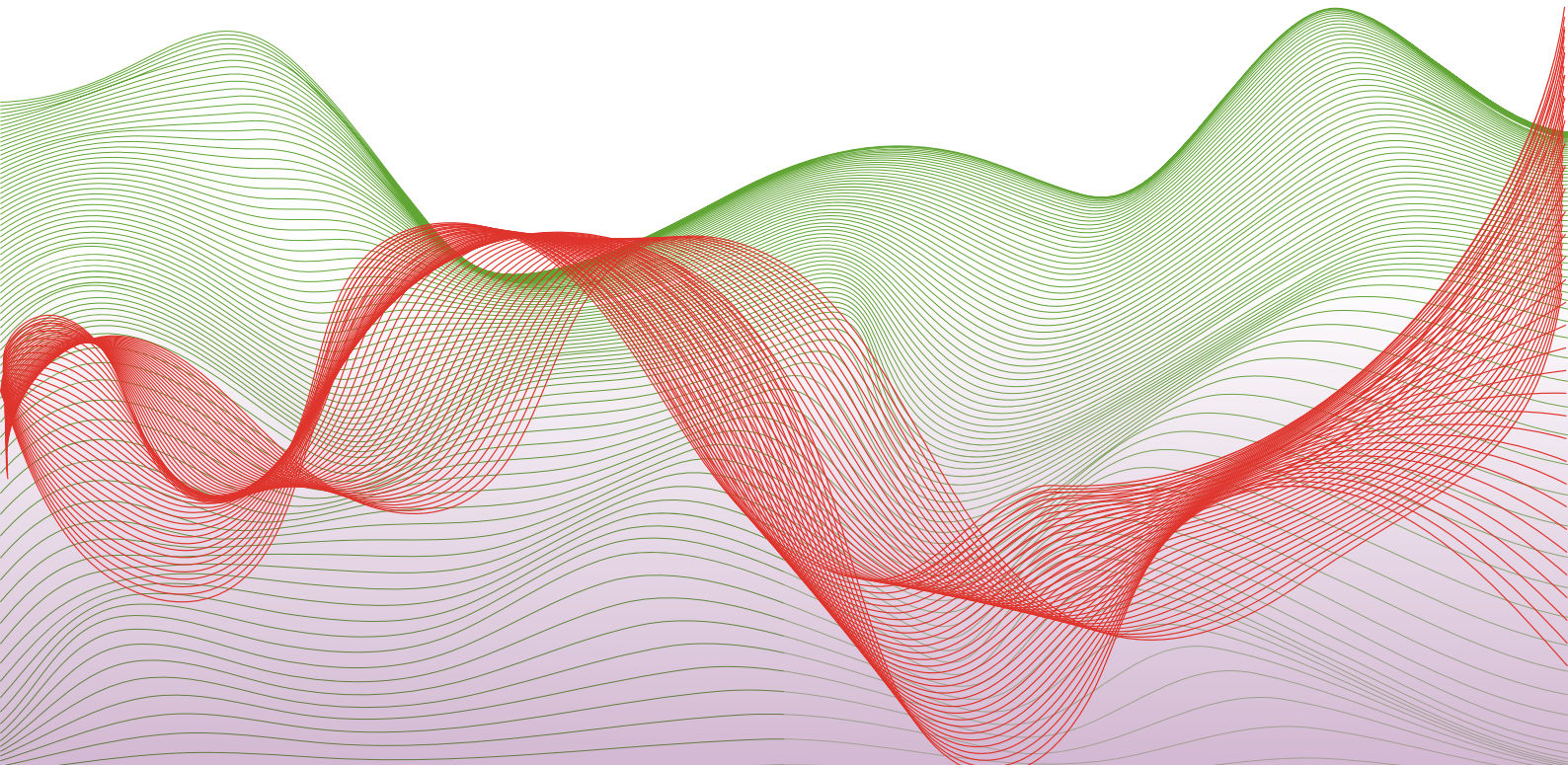
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