

Care homes with nursing in the adult social care sector

2022/23

Source: Skills for Care adult social care workforce estimates 2022/23

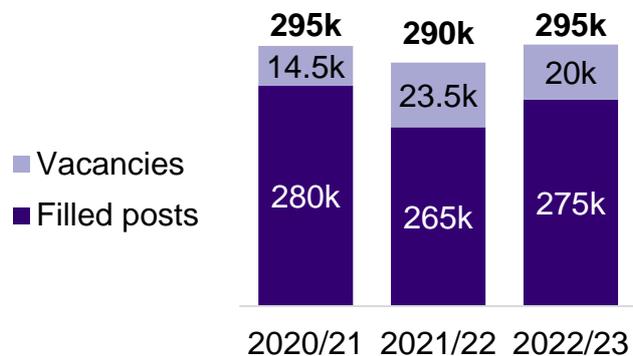
Recent trends – Workforce supply and demand

Across the whole adult social care sector, we estimate there were 1.68 million filled posts in 2020/21. The number of filled posts decreased to 1.615 million in 2021/22, a decrease of 4% (60,000 filled posts), but has increased to 1.635 million in 2022/23, an increase of 1% (20,000 filled posts). During this period, the number of vacant posts increased from 109,000 to 164,000 between 2020/21 and 2021/22, reaching a peak vacancy rate of 10.6%, however the vacancy rate fell in 2022/23 to 9.9% (152,000 vacant posts).

Care homes with nursing in the independent sector had a decrease of 15,000 filled posts between 2020/21 and 2021/22, a decrease of 6%, and the number of vacant posts increased by 9,000 (62%). Between 2021/22 and 2022/23, the number of filled posts increased by 10,000 (3%) and the number of vacant posts decreased by 3,500 (-16%). Therefore, the total number of posts in independent sector care homes with nursing has remained stable in recent periods, but the amount of these posts which are vacant has increased greatly.

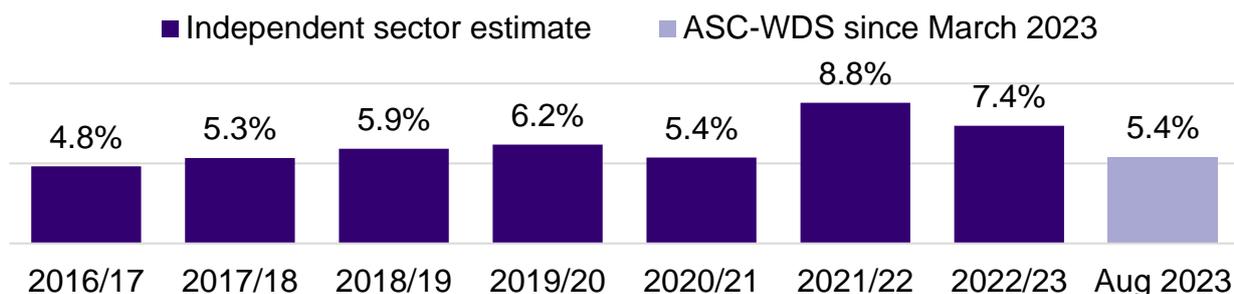
Care homes with nursing owned by local authorities saw a decrease in filled posts but the same number of vacant posts between 2021/22 and 2022/23, however the majority of care homes with nursing are in the independent sector.

Estimated filled and vacant posts in independent sector care home with nursing



In 2022/23, the vacancy rate of independent sector care homes with nursing was 7.4%, equivalent to 20,000 vacant posts. Monthly tracking of data¹ from the ASC-WDS has shown that the vacancy rate decreased to 5.4% by August 2023, and has therefore returned to pre-pandemic levels.

Independent sector vacancy rate trend from 2016/17 to August 2023



¹ Note that monthly tracking is based on unweighted data and may change throughout the year as more data is submitted to ASC-WDS

An increase in international recruitment is playing a part in these recent trends. Care workers were added to the Shortage Occupation List in February 2022 and this opened a route for people to immigrate into the UK into this role, given that they meet the points-based criteria.

We estimate that the number of people starting direct care providing roles in the independent sector having arrived in the UK during the year has increased from 10,000 in 2020/21 to 70,000 in 2022/23 across all services. It is estimated that around 20,000 of these starters in 2022/23 were in care homes with nursing.

Data from the ASC-WDS has shown that international recruits were less likely to leave their role with a turnover rate of 16.5% compared to 30.7% from domestically recruited workers.

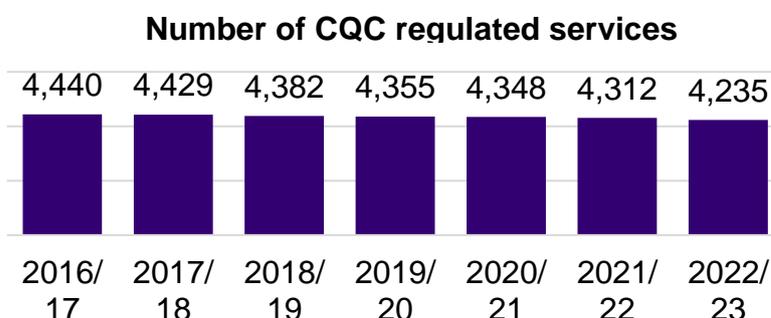
Key findings



This report provides a summary of the adult social care workforce within care homes with nursing and includes Skills for Care’s workforce estimates. Across England there were 4,235 care homes with nursing registered with CQC as at March 2023. These care providing locations had an estimated workforce of 275,000. Around 275,000 of these roles were within the independent sector and 2,900 were employed by local authorities.

The chart below shows that between 2016/17 and 2022/23 the number of CQC regulated care homes with nursing decreased from 4,440 to 4,235, a decrease of 5%.

During this same period, the number of CQC care homes without nursing decreased by 11% and the number of CQC domiciliary care services increased by 48%.



Staffing overview

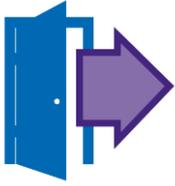


There were an estimated 165,000 direct care providing filled posts in care homes with nursing, 9,200 managerial filled posts, 32,000 regulated professionals and 70,000 other filled posts including ancillary non-care-providing roles.

Over half of staff in care homes with nursing were employed on a full-time basis (64%) and 36% were employed part-time.

Around 9% of the workforce in care homes with nursing were employed on zero-hours contracts. This proportion has decreased by two percentage points since 2016/17. Across all services, 22% of the workforce were employed on zero-hours contracts.

Recruitment and retention

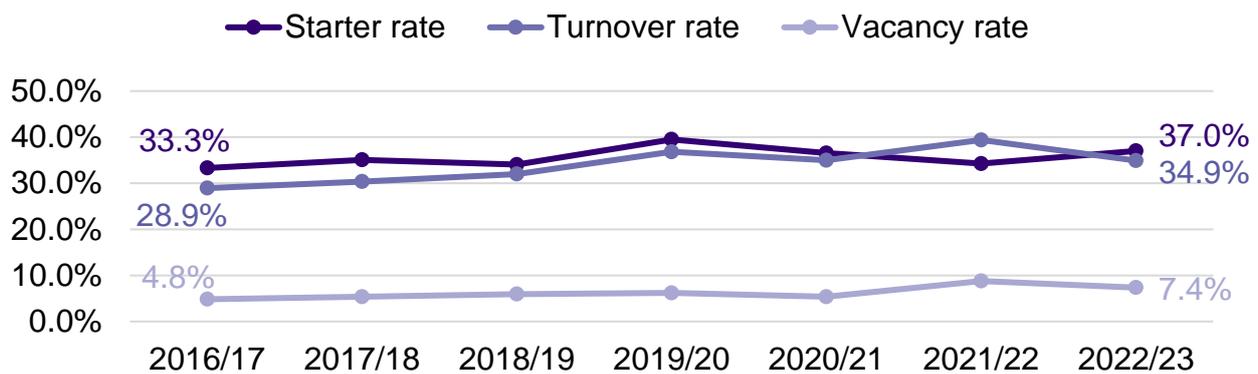


The turnover rate for care homes with nursing was 34.9%, which was higher than that of care homes without nursing (27.4%) and higher than domiciliary care services (30.6%). This equates to an estimated 88,000 workers leaving their role in the previous 12 months. Care workers had a turnover rate of 40.7%, which equates to an estimated 50,000 leavers. It should be noted that around a third of leavers leave the sector altogether.

The turnover rate has tended to increase between 2016/17 and 2020/21, but the starter rate was always slightly higher, which replenished the workforce. This pattern changed in 2021/22 when the turnover rate reached a peak of 39.4%, and the starter rate fell to 34.3%, indicating a decrease in the workforce. At this time, the vacancy rate reached a peak of 8.8%. In 2022/23, the starter rate climbed above the turnover rate again, indicating the workforce increased and the vacancy rate decreased to 7.4%.²

Data from the ASC-WDS shows that vacancy rates in care homes with nursing have continued to decrease into August 2023 and the rate was now below its pre-pandemic level (5.4% in August 2023 compared to 6.2% in 2019/20).

Comparison of starter, turnover and vacancy rate trend from 2016/17 to 2022/23



Not all turnover results in workers leaving the sector. Over half of the workforce were recruited from within adult social care (54%). This means that although the high turnover rate results in employers going through the recruitment process, with its associated costs, the skills and experience of many workers are retained by the sector.

The workforce had an average of 9.8 years of experience working in social care. This was similar to the average for workers from care homes without nursing (10 years) but slightly higher than workers from domiciliary care services (8.6 years).

The average length of time in current role was 4.9 years, which was slightly lower than the average of those working in care homes without nursing (5.4 years) but slightly higher than those working in domiciliary care services (4.5 years).

Demographics

Around 82% of workers in care homes with nursing identified as female and the average worker was 43.9 years old. These demographic breakdowns broadly match those seen in the rest of the adult social care workforce.

² Please note that the turnover rate only includes services which were active in March during each period, and leavers from services that closed down are not included, therefore the total number of leavers may be higher.



The nationality of the workforce in care homes with nursing was 71% British, 10% EU and 19% non-EU. This was more diverse than the average across all services (81% British, 6% EU and 13% non-EU). This difference was influenced by a large proportion of registered nurses working in these service providers; 42% of registered nurses in care homes with nursing identified as non-British.

The proportion of registered nurses with a British nationality decreased from 63% in 2016/17 to 58% in 2022/23. Over the same period, the proportion of registered nurses with an EU nationality also decreased from 17% to 15%, whereas the proportion with a non-EU nationality increased from 20% to 27%.

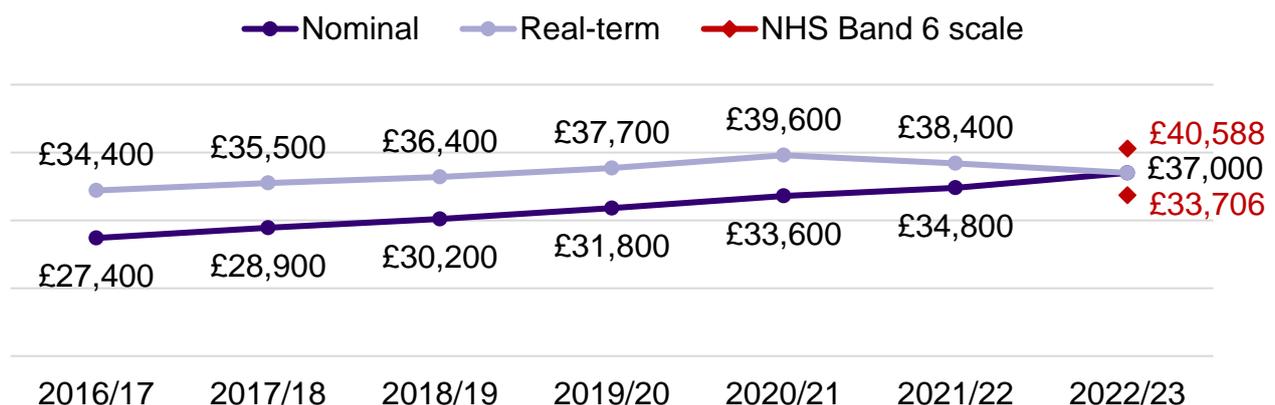
Pay

The chart below shows the mean annual full-time equivalent salary trend of registered nurses at care homes with nursing in the independent sector, in both nominal and real-term amounts.

Nominal pay rates are not adjusted for inflation and present the rates as they were in each year. 'Real terms' means that pay rates have been adjusted to take inflation into account and have been calculated using the Consumers Price Index (CPI) (the official measure of inflation of consumer prices in the UK) and expressed in prices as at March 2023. As an example, a worker's wage may have increased by 2% in a year. However, if inflation also rises by 2% then the worker will be no better off as a result of the pay rise; the nominal pay rise was 2%, but in real terms, the 'rise' would have been zero.

The mean nominal salary of registered nurses increased every year since 2016/17, from £27,400 to £37,000, an increase of 35%. Their real-term pay also increased every year up to 2020/21, therefore the nominal increases were usually above the change in inflation. However, their real-term pay has decreased by 7% between 2020/21 and 2022/23, which means registered nurses are paid relatively less now compared to three years ago.

Nominal and real-term registered nurse FTE salary from 2016/13 to 2022/23



Further information

For more information about the adult social care sector and workforce in England please see www.skillsforcare.org.uk/stateof.

For bespoke analysis of workforce information or to answer any specific questions you have about the adult social care workforce please contact us using the email below.