

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

Recent trends – Workforce supply and demand

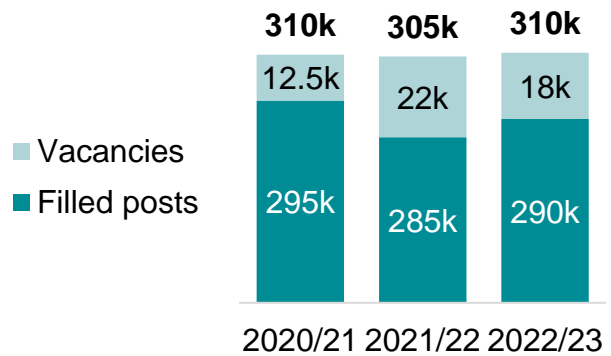
Across the whole adult social care sector, we estimate there were 1.68 million filled posts in 2020/21. The number of filled posts decreased to 1.615 million in 2021/22, a decrease of 4% (60,000 filled posts), but has increased to 1.635 million in 2022/23, an increase of 1% (20,000 filled posts). During 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 without nursing in the independent sector had a decrease of 12,500 filled posts between 2020/21 and 2021/22, a decrease of 4%, and the number of vacant posts increased by 9,300 (73%). Between 2021/22 and 2022/23, there was an increase of around 8,400 filled posts and a decrease of around 4,100 vacant posts (a 19% decrease). Therefore, the total number of posts in independent sector care homes without nursing has remained stable in recent periods, but the amount of these posts which are vacant has increased greatly.

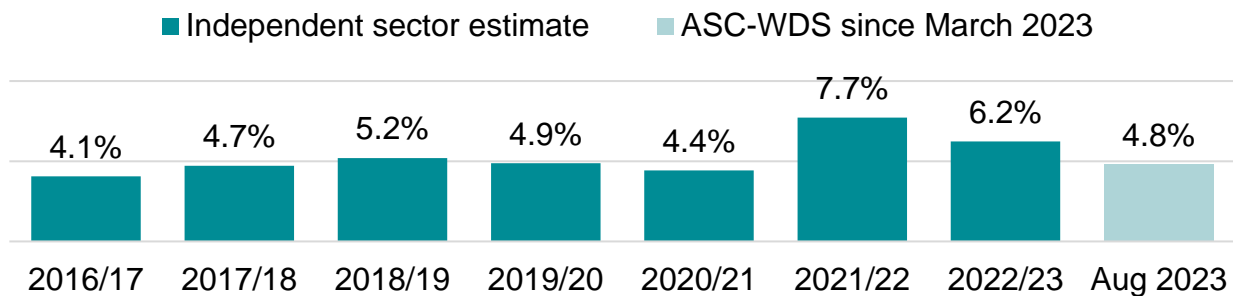
Care homes without nursing owned by local authorities saw a decrease in filled posts but the same number of vacant posts between 2021/22 and 2022/23, however the majority of care homes without nursing are in the independent sector.

In 2022/23, the vacancy rate of independent sector care homes without nursing was 6.2%, equivalent to 18,000 vacant posts. Monthly tracking of data¹ from the ASC-WDS has shown that the vacancy rate decreased to 4.8% by August 2023, and has therefore returned to pre-pandemic levels.

Estimated filled and vacant posts in independent sector care homes without nursing



Independent sector care homes without nursing vacancy rate trend from 2016/17 to August 2023



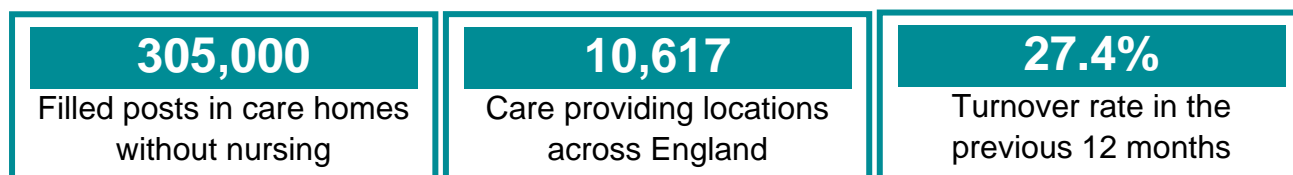
¹ Note that monthly tracking is based on unweighted data and may change throughout the year as more data is submitted to ASC-WDS

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 10,000 of these starters in 2022/23 were in care homes without 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.

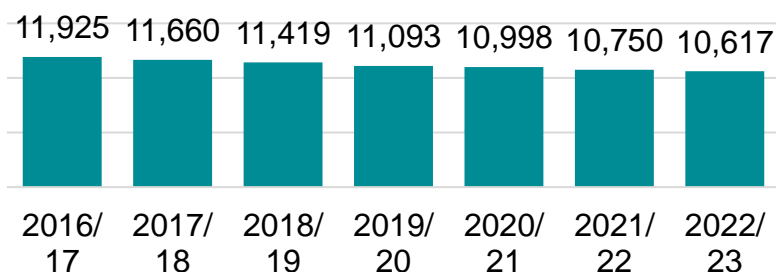
Key findings



This report provides a summary of the adult social care workforce within care homes without nursing and includes Skills for Care’s workforce estimates. Across England there were 10,617 care homes without nursing registered with CQC as at March 2023. These care providing locations had an estimated workforce of 305,000 posts. Around 290,000 of these roles were within the independent sector, with 13,300 in local authorities.

The number CQC regulated in care homes without nursing decreased from 11,925 to 10,617 between 2016/17 and 2022/23, a decrease of 11%. In the same period, the number of CQC regulated care homes with nursing decreased by 5% and the number of CQC domiciliary care services increased by 48%.

Estimated number of CQC regulated care homes without nursing



Staffing overview

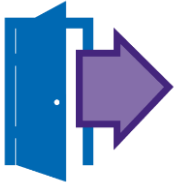


There were an estimated 221,000 direct care providing filled posts in care homes without nursing, 27,000 managerial filled posts, 550 regulated professionals and 57,000 other filled posts including ancillary non-care providing roles.

Over half of staff in care homes without nursing were employed on a full-time basis (55%) and 45% employed part-time.

Around 9% of the workforce in care homes without nursing were employed on zero-hours contracts. This proportion has remained stable, increasing one percentage point since 2016/17. Across all services, 22% of the workforce were employed on zero-hours contracts.

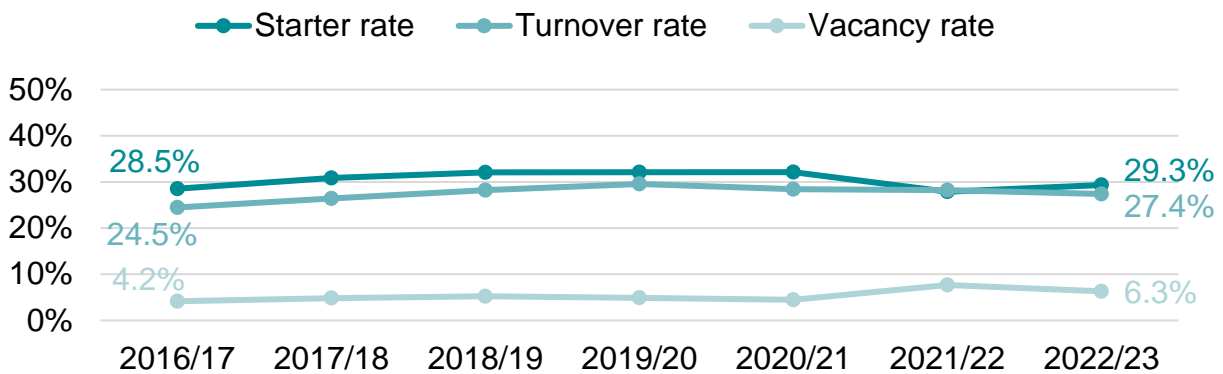
Recruitment and retention



The turnover rate for care homes without nursing was 27.4%, which was lower than care homes with nursing (34.9%). This equates to an estimated 77,000 workers leaving their role in the previous 12 months. Care workers had a turnover rate of 32.9%, which equates to an estimated 54,000 leavers. It should be noted that around a third of leavers leave the sector altogether.²

The turnover rate in care homes without nursing has tended to increase between 2016/17 and 2019/20, but the starter rate was always slightly higher, which replenished the workforce. This pattern changed in 2021/22 when the turnover rate reached 28.2%, and the starter rate fell to 27.9%, indicating a decrease in the workforce. At this time, the vacancy rate reached a peak of 7.7%. In 2022/23, the starter rate climbed above the turnover rate again, indicating the workforce increased and the vacancy rate decreased to 6.3%. Data from the ASC-WDS shows that vacancy rates in care homes without nursing have continued to decrease into August 2023 and the rate was now back to its pre-pandemic level.

Comparison of starter, turnover and vacancy rate trend in care homes without nursing from 2016/17 to 2022/23



Not all turnover results in workers leaving the sector. Around two thirds of the workforce in care homes without nursing were recruited from within adult social care (66%). 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 in care homes without nursing had an average of 10.0 years of experience working in social care. This was similar to the average for workers from care homes with nursing (9.8 years) but higher than the average for domiciliary care services (8.6 years).

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

Demographics

Around 83% of workers in care homes without nursing were female, and the average worker was 44 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 without nursing was 83% British, 6% EU (non-British) and 11% non-EU. This was similar to the diversity across all services (81% British, 6% EU (non-British) and 13% non-EU).

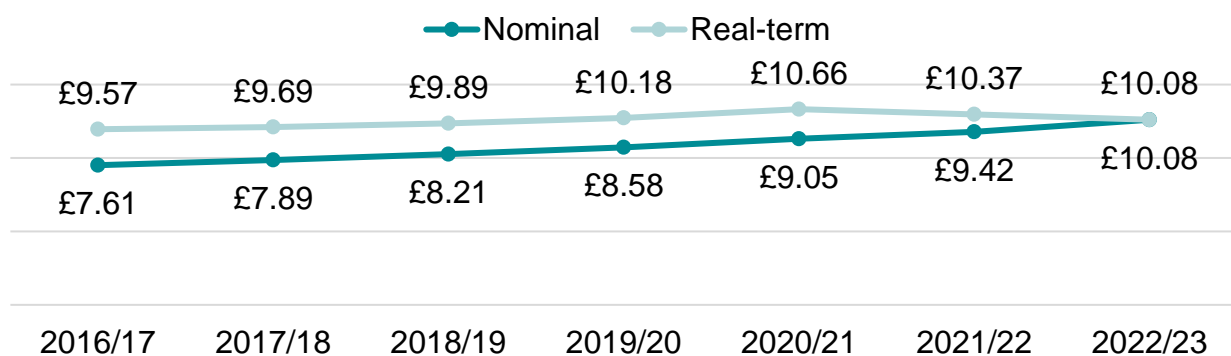
The proportion of workers at care homes without nursing that identified as of an EU nationality has remained stable at around 6% since 2016/17. The proportion identified as of a non-EU nationality had been stable at 8% in the same period, until increasing to 11% in 2022/23.

Pay

The chart below shows the mean hourly pay trend of care workers at care homes without 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 hourly rate of care workers has increased every year from £7.61 in 2016/17 to £10.08 in 2022/23, an increase of 33% over the whole period. Their real-term pay also increased every year up to 2020/21, meaning the nominal increases were usually above the change in inflation. However, real-term pay decreased by 5% between 2020/21 and 2022/22, meaning care workers are paid relatively less now compared to three years ago.

Nominal and real-term care worker mean hourly rate in care homes without nursing from 2016/17 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.