

**The Implications of National and Local Labour
Markets for the Social Care Workforce:
Final Report
for
Scottish Government and COSLA**

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This report is based on independent research and analysis carried out by ekosgen.

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Executive Summary

Key Findings

The aim of this study is to better understand the influences that national and local labour markets have on the social care sector, how different parts of the social care sector interact and the implications for workforce planning.

The methodology comprised five main stages. We conducted a detailed review of literature and data and to supplement this, primary research with added depth and detail. The primary research comprised consultations with key stakeholders, online surveys of social care employers and people working in social care (with the exception of social workers). A total of 1,553 employers and 8,055 employees responded to the surveys.

Perceptions of Social Care

- The desire to do a job that makes a difference is the main reason why people are motivated to take up a career in social care and this is particularly true for people working in children's services.
- The fact that it is a practical job, and that the sector offers flexibility in working hours are also important motivators.
- The perception is that the main reason why people leave the workforce is for better terms and conditions, particularly pay levels and another driver is to do a less demanding job for similar or better rates of pay.
- Employment opportunities in social care are reported as being good, rated more highly by respondents than career progression opportunities.

Recruitment and retention

- Social care employers face difficulties in recruiting and retaining staff, particularly staff that provide direct care and support.
- Almost two-thirds of employers in the study were recruiting at the time of the research and around a third of these reported having hard-to-fill vacancies.
- Half of employers who expect to recruit in the next year report that they will do so to expand their workforce and 71% expect to recruit to replace staff who might leave.
- Replacing staff is expected to be more common in more urban settings and remote island communities, while workforce expansion plans are greater in larger cities.
- Around half of all employers responding to the survey anticipate recruitment challenges going forward.

- Oxford Economics employment forecasts (commissioned by Skills Development Scotland) suggest that the social care workforce will grow by 5%, or 8,000 jobs, between 2019 and 2029¹.

Social Care workforce movement

- SSSC analysis indicates that the stability index within registered social care employees is around 71% meaning that the majority of people remained in the same position between 2016 and 2017.
- Of those who did move, some can be accounted for by movement within the sector (including career progression) meaning that the sector has retained the skills and experience of these workers.
- The research shows that people who change jobs within the social care sector tend to join a similar service type. The SSSC analysis of movement also suggests there is a strong tendency for people to remain in the same type of service, for example adult or children's service.
- The survey analysis points to a slightly greater propensity for staff to move from adult to children's services, but it is still more likely that adult services social care staff will remain in this sub-sector.
- The main exchange of social care employees is with the business services and health and education sectors. The latter reflects the synergies between these sectors in terms of skills and experience needed by the workforce.
- Social care competes for staff with health, hospitality, retail, education and cleaning
- One in ten social care employees indicate they would like to leave the sector in the future. This is mainly due to the stress and workload of their current job.
- The sector faces competition from the health, hospitality, retail, education and cleaning sectors, reflecting that people appear to be attracted to work opportunities in what they consider to be less demanding jobs for the same or a better rate of pay.

The aim of the study is to better understand the influences that local labour markets have on the social care sector, how different parts of the social care sector interact, and the implications for workforce planning.

¹ Oxford Economics, Skills Development Scotland (2019) Oxford Economics definition of social care is based on Standard Industrial Classification codes, and therefore differs to SSSC's social service sector definition. The value of this data is therefore limited but it does help to illustrate where social services fits in the wider Scottish economy.

Contributing £3.5bn to the economy, social care is a very important sector for Scotland. It provides employment and acts as a driver for research and innovation, and a purchaser of goods and services. It enables participation in the workforce by supporting the health and well-being of the population and providing care that enables parents to work and participate in training and education.

Sitting within the broader social service sector, which includes social work services (including all local authority social work services)², social care covers a number of subsectors – including Early Learning and Childcare (ELC), adult day care, adult residential care, and care at home. Across the sector there are a wide range of settings, roles and occupations. A detailed definition of the subsectors and service types are detailed in Appendix A of the main report. The scope of the study extends to Early Learning and Childcare (ELC) reflecting the significant level of investment that has been committed to the sector and the increase of funded entitlement to 1,140 hours per year from August 2020. The scope of the study does not include social workers working for any type of employer.

There have been significant changes in the context and delivery of Health and Social Care and a number of drivers are impacting on the skills required to provide social care. Scotland's ageing population and lengthening life expectancy (although this has stalled recently) has implications, particularly as healthy life expectancy has not been increasing at the same rate. The integration of Health and Social Care requires staff to work in different ways and, along with Self-Directed Support, provides the opportunity and expectation for reforming how social care for adults is delivered.

The Scottish Government and COSLA have been working with people who use social care support, unpaid carers, the social services sector, local and national organisations and Health and Social Care partnerships to develop a national programme to support local reform of adult social care. In 2017 and 2018 the Scottish Government published a series of national health and social care workforce plans (NWP) for Health and Social Care as part of a new process for improving planning. Parts 1 and 3 focus on health and primary care respectively^{3 4}. In December 2017, the Scottish Government and COSLA jointly published the 'National Health and Social Care Workforce Plan Part 2: a framework for improving workforce

² Appendix A provides clarification around the definition of social care services and the types of service provided.

³ National Health and Social Care Workforce Plan: Part 1 – Scottish Government (June 2017) <https://www.gov.scot/publications/national-health-social-care-workforce-plan-part-1-framework-improving/>

⁴ National Health and Social Care Workforce: Part 3 – Scottish Government (April 2018) <https://www.gov.scot/publications/national-health-social-care-workforce-plan-part-3-improving-workforce/>

planning for social care in Scotland⁵ which relates to the social care workforce. It sets out a number of recommendations and actions to address key priorities which include recruitment, retention and improved opportunities for career progression. The second recommendation in Part 2 focuses on the need to develop an improved understanding around national and local labour markets for social care and this work was commissioned to deliver the recommendation.

Although it is one of the largest, this is not the first piece of research into the social care workforce or the first survey of the sector. Research has been undertaken and continues to be undertaken by a range of organisations including the Scottish Social Services Council (SSSC), the Care Inspectorate (CI), Scottish Care, Skills Development Scotland (SDS), the Institute for Research and Innovation in Social Services (IRISS), the Coalition of Care and Support Providers in Scotland (CCSP), the National Day Nurseries Association (NDNA) and the Scottish Childminding Association (SCMA).

The methodology comprised five main stages. The primary research stage was undertaken in order to supplement the data and literature review, and add depth and detail to the evidence. This included a programme of consultations with key stakeholders, and an online survey of social care employers and the social care workforce (with the exception of social workers). Table 1 sets out the details of the primary research and the number of responses.

Table 1: Primary research

Stakeholder Group	Approach	Number of Responses
Social care employers ⁶	Online survey	1,553 responses ⁷
Social care employees	Online survey	8,055 responses ⁸
PA employers	Online survey	20 responses
PAs	Online survey	76 responses ⁹
Key stakeholders	Telephone consultations	23 qualitative consultations

⁵ National Health and Social Care Workforce: Part 2 – Scottish Government (December 2017) <https://www.gov.scot/publications/national-health-social-care-workforce-plan-part-2-framework-improving/>

⁶ A definition of children’s and adult social care services is provided in Table A2 in Appendix A.

⁷ 73% completion rate

⁸ 84% completion rate

⁹ NB: 20 responses came directly from the online PA survey, a further 56 were those who responded to the main employee survey who identified as PAs. Two surveys were used as previous experience suggests a lower response rate from workers in this area.

Alongside the main report, the following have been produced:

- a report focusing on ELC, reflecting the over-representation of ELC services in the survey responses
- a report on the implications for workforce planning; and
- a case study report that explores key local labour market characteristics and issues around recruiting into the social care sector in four areas with different characteristics: Aberdeen, Dumfries and Galloway, Argyll and Bute, and South Lanarkshire.

Working in Social Care

The research drew on published data from official sources about the current composition of the workforce, the forecast workforce requirements and the pipeline of skills. The SSSC is the regulator of the social service workforce and, with the Care Inspectorate, undertakes research and collects data on the Scottish workforce. Based on this it produces an annual data-driven workforce report. At the time of our research, the most recent report was published in August 2018 comprising data collected in December 2017.¹⁰ It shows that there were over 202,000 people employed in over 13,000 active registered services. The report indicates that, on average, employers in the public and voluntary sector are larger than those in the private sector. Childminders account for around 40% of active registered services, many of whom do not employ any staff, so excluding childminders gives just under 8,000 social service providers in Scotland.

The social service workforce comprises 18 different subsectors as defined by the SSSC¹¹. By far the largest of these in employment terms is housing support/care at home, which employs almost 71,000 people (35% of the total workforce), care homes for adults, which employs over 52,000 people (26%) and Day Care of Children which employs over 34,000 people (17%). A Scottish Government report indicates that in

¹⁰ The SSSC will publish the 2019 report on 22 November 2019.

¹¹ These are: adoption services, adult day care, adult placement services, care homes for adults, central and strategic staff, childcare agency, childminding, DCC, fieldwork services (adults), fieldwork services (children), fieldwork services (generic), fieldwork services (offenders), fostering services, housing support/care at home, nurse agency, offender accommodation service, residential childcare, and school care accommodation. Please note that this categorisation will exclude some workers such as personal assistants and childminding assistants. See the SSSC's Annual Workforce Data Report for further information.

2018 non-UK EU nationals accounted for 5.6% of people employed in adult social care and childcare, which equates to around 9,830 staff¹².

The social care workforce has some characteristics that set it apart from other sectors in Scotland and the economy as a whole. It has a much higher proportion of female workers than the economy as a whole¹³; it is, on average, slightly older than the overall workforce in Scotland¹⁴; there are a greater number of social care jobs relative to other sectors in more rural and remote areas of Scotland, and they are less concentrated in cities and more urban areas¹⁵. There is also a much higher prevalence of part-time working in social care than across the Scottish economy¹⁶; and a substantially higher vacancy rate¹⁷ in social care than other sectors¹⁸.

Workforce movement within the Social Care sector

The average staff turnover rate in the UK economy is around 15%¹⁹. The SSSC publishes stability index figures for the social service workforce which measures the proportion of staff who have been retained in the same post since the previous year. In December 2017 the stability index for social services was 77.1%.

In 2018, SSSC undertook a survey of around 1,000 people who had left the SSSC register²⁰. Just over half indicated that they were still working in the social service

¹² EU workers in Scotland's social care workforce: contribution assessment – Scottish Government (July 2018) <https://www.gov.scot/publications/contribution-non-uk-eu-workers-social-care-workforce-scotland/>

¹³ Scottish Social Service Sector: Report on 2017 Workforce Data – SSSC (August 2018) <https://data.sssc.uk.com/images/WDR/WDR2017.pdf> and [Annual Population Survey \(2017\) https://www.nomisweb.co.uk/default.asp](https://www.nomisweb.co.uk/default.asp)

¹⁴ Ibid.

¹⁵ Ibid.

¹⁶ Ibid.

¹⁷ 'Vacancy rate' refers to levels of staff vacancies in Scotland – this is based on the rate of whole time equivalent vacancies (Page 6 'Staff Vacancies in Care Services 2017 Report – SSSC (January 2019) <https://data.sssc.uk.com/images/StaffVacancies/Staff-vacancies-in-care-services-2017.pdf>)

¹⁸ Staff vacancies in care services 2017 – Care Inspectorate/SSSC (January 2019) <https://www.careinspectorate.com/index.php/news/4767-staff-vacancies-in-care-services-2017> and [Employer Skills Survey \(2017\) https://www.gov.uk/government/publications/employer-skills-survey-2017-scotland-toolkit](https://www.gov.uk/government/publications/employer-skills-survey-2017-scotland-toolkit)

¹⁹ Turnover rate reaches new high – Beckett Frith, HR Magazine (October 2017) <https://www.hrmagazine.co.uk/article-details/turnover-rate-reaches-new-high>

²⁰ The SSSC Register was set up under the Regulation of Care (Scotland) Act 2001 to regulate social service workers and to promote their education and training.

sector despite leaving the register, meaning they were likely in roles that do not require registration, or people who have taken up a new post but have not yet registered. Just over half of those who were no longer working in the sector had taken up a job in a different sector.

The research shows that people who change jobs within the social care sector tend to join a similar service type, and the SSSC analysis supports this by suggesting that there is a strong tendency for people to remain in the same type of service, for example adult or children's service. The research data shows that people who work in adult services are very likely to remain working in adult services, and move around within it. In children's services, the research evidence shows more movement from adult to children's services but it is still more likely that people move within children's services, rather than from adult services to children's services. Where people do move from one to the other, it is more likely to be from adult to children's rather than the other way round.

Going forward the key will be for workforce planners and employers to attract new people into the social care sector instead of relying on moving people around within it.

Competition from other sectors

The research explored what motivates people to join the social care workforce, and also the reasons why they leave. For adult and children's services the main motivator is the desire to do a job that makes a difference to people's lives, followed by having a passion for the job. The factors that employees believe encourage people to leave the workforce are to move into a job with higher rates of pay, because of caring responsibilities, and to progress their career. Employers in the survey are less likely than employees to perceive that people might leave to care for dependent children or adults. In the research there was a cohort of 418 employees who reported that they intend to leave the sector and so we asked them to indicate why. The overriding reason was that the work is too stressful, workloads are unmanageable and there is a lot of pressure. This was followed by wanting to achieve a better work-life balance, and then because they are looking for better terms and conditions.

The research explored the reasons why, once people enter the workforce, they choose to remain. These factors largely mirror the motivations for joining in the first

Registration is a major part of the drive for higher standards in the social service sector and is bringing the social service workforce in line with other professional colleagues. Registration of social service workers has an important role in improving safeguards for people using services and increasing public confidence in the social service workforce.

place. Having said that, people are more likely to identify with, and care for their service users once they are actually working with them.

Just over half of people working in adult services responding to the survey report that the desire to make a difference to people's lives motivates staff to stay in the workforce. The corresponding proportion for people working in children's services is three quarters which is a substantial difference. A sense of pride and job satisfaction was also identified as a key motivator to remain, as is identifying with service users, including children. The working environment was found to have an important role to play in motivating some people to join and remain the sector. It is a practical job with variety rather than being routine or desk-based and this is perceived as being attractive.

The SSSC research²¹ of c.1,000 people who had left the register shows that people who leave the register and take up a job in a different sector most commonly move into education, retail or health. In the research undertaken for this report employers suggested that the top sectors competing for social care staff are health and education, in that order. Retail and hotels and hospitality are also important competitors. The extent to which social care competes with these sectors varies by area, largely driven by the sector profile in each locality, for example hotels and hospitality are considered more important as a competitor in rural areas.

Recruitment and retention

The research evidence shows that social care employers have found it difficult to retain staff in recent times, particularly care staff that provide direct care and support. Retaining managerial and supervisory staff is reported as less of an issue. At the time of the research around two-thirds of social care employers responding the study were recruiting and it was highest amongst independent sector employers. Understandably the evidence shows that recruitment and retention can be particularly difficult in tight labour markets and where there are people who have more, and more varied employment options.

Around one-third of employers in the study report having hard-to-fill vacancies, again, most noticeably amongst independent employers. Employers are finding it hard to find staff with the skills and experience to deal with complex conditions, and people who have the required digital literacy and technology skills. Reflecting a recent expansion in the housing support/care at home sector, employers here are particularly concerned about recruitment challenges.

²¹ Survey of leavers from the SSSC register – SSSC (December 2018)

Social care employers in the research anticipate facing challenges in recruitment and retention in the next 12 months, particularly in islands and remote areas, and again most acutely in the independent sector.

Given the high levels of expansion and replacement demand for skills in the social care sector reported in the study, a higher proportion of employers plan to recruit in the next year to replace staff that might leave (72%) and to expand their workforce (50%). Replacing staff is expected to be more common in more urban settings and remote island communities, while expansion plans are greater in larger cities.

Skills Development Scotland (SDS) commissioned Oxford Economics to prepare employment forecasts for key sectors in the Scottish economy. These forecasts suggest that the social care sector (which includes child day care activities) will grow by 5%, or 8,000 jobs, between 2019 and 2029²², covering expansion demand (demand for jobs due to a growth in the sector) and replacement demand (demand for jobs due to the existing workforce leaving/retiring). This means that by 2029 approximately 42,500 workers will be required to replace those leaving and to fill new posts.

Workforce planning

The sector requires a strategic approach to planning the workforce that takes account of current and emerging policy and key drivers of change. Data and intelligence should be available at national level, but could also inform work at local authority, integration authority and locality levels. To ensure the sustainability of the social care workforce, planners must use data from a range of sources. They must have robust information to understand the current profile of the workforce, gaps and shortages, the requirements of the sector and the subsectors, and the anticipated future needs. Overarching this, an understanding of the labour market context is important as are the implications of different labour market conditions for recruitment and retention.

There is a wealth of data available, providing very useful information and intelligence for example from the Scottish Government, the Scottish Social Services Council (SSSC), the Care Inspectorate, Scottish Care and the Coalition of Care and Support Providers in Scotland (CCPS). There are some areas which published data does not currently explore in depth or regularly, such as detail about vacancies within different parts of the sector, where the social care sector recruits from, and the sectors staff

²² Oxford Economics, Skills Development Scotland (2019) Oxford Economics definition of social care is based on Standard Industrial Classification codes, and therefore differs to SSSC's social service sector definition. The value of this data is therefore limited but it does help to illustrate where social services fits in the wider Scottish economy.

move on to. Sources such as 'Burning Glass²³' may help to give workforce planners real-time job market analysis, for example of vacancies in social care. Also through SDS, Oxford Economics data provides workforce projections for key sectors, including social care. This is only one source of intelligence for understanding future demand but it is helpful for workforce planning because it also shows the projected needs of other sectors that may be competing for staff.

The Workforce Planning report that accompanies this report sets out data limitations and gaps that, if addressed, would help workforce planners to better understand and respond to the labour market conditions and the social care workforce demand and supply. These gaps should be prioritised in order to plan how available resources are best used. Addressing them may require adjusting existing research methods and tools or undertaking additional primary research, for example with employers, staff and potentially people who have left the register. A number of these activities could be considered as part of the ongoing work under the development of the National Workforce Plan for Health and Social Care.

Alongside this, it would be good practice to have in place an agreed set of outcomes and performance indicators to monitor, manage and drive performance. It will require co-production and partnership working, and organisations must be willing to make adjustments to how they might do things currently. It will require budget as well as time commitment to plan, implement and manage a refreshed approach to workforce planning.

²³ Burning Glass Technologies <https://www.burning-glass.com/>

1 Introduction

- 1.1 This report presents the findings of a research study to better understand the influences of labour markets on the social care workforce, for both adult social care and for early years and childcare, and to support planning at local and national levels.

A vital sector

- 1.2 The social service sector makes significant direct and indirect contributions to the Scottish economy, as a major employer, a driver for research and innovation and as a key purchaser of goods and services.²⁴ It has an important part to play in enabling participation in the workforce by supporting the health and wellbeing of the population. It also enables parents and carers to take part in training, education and work. The adult social care sector contributes £3.4 billion to the Scottish economy.²⁵ The sector covers a number of sub-sectors - including Early Learning and Childcare (ELC), adult day care, adult residential care, and care at home. There are a wide range of settings, roles and occupations within the sector overall. Social care sits within the broader social service sector, which also includes social work services (covering all local authority social work services)²⁶.
- 1.3 According to the most recent Scottish Social Services Council (SSSC) workforce data report²⁷ the social service workforce employs around 202,090 staff as of December 2017, an increase of 0.7% (headcount) overall since 2016. This is the highest level since the SSSC began publishing this data. The wider Scottish economy grew by 0.3% during this period.²⁸ The past decade has seen significant changes in the numbers of workers within individual sub-sectors. For example, the number of care home for adult staff (headcount) decreased by 2.8% between 2008 and 2017. The numbers of care at home and housing

²⁴ The Economic Value of Social Care – SSSC (June 2018)
<https://data.sssc.uk.com/data-publications/196-the-economic-value-of-adult-social-care>

²⁵ Ibid

²⁶ Appendix A provides clarification around the definition of social care services and the types of service provided.

²⁷ SSSC Report on 2017 Workforce Data - SSSC (August 2018)
<https://data.sssc.uk.com/data-publications/22-workforce-data-report/178-scottish-social-service-sector-report-on-2017-workforce-data>

²⁸ Source: Business Register and Employment Survey (BRES)

support staff increased by 12.3% during the same period²⁹, an increase which is least partly due to the drive to shift the balance of care out of hospitals and into homes or homely settings. The social service sector is a critical part of Scotland's economy.

- 1.4 There are significant challenges for Scotland's social service sector. The number of people living in Scotland of pension age and over and is projected to rise by 25.1% by 2041, while Scotland's dependency ratio³⁰ is expected to reach 43.07 by 2041³¹ (compared to 41.96 for the UK as a whole) and will place additional pressure on Scotland's social care services and workforce. Demographic pressures – coupled with a driver to provide new models of care and to re-design services – will have a range of implications for the health and social care workforce.
- 1.5 Within the last decade, there has been a considerable policy focus on health improvement, tackling inequalities in health and moving towards increased preventative and anticipatory care in Scotland. Significant changes have been made in the context and delivery of Health and Social Care. Integration of Health and Social Care is a principal strand of the Scottish Government's public sector reform agenda and has a key focus on the role of the workforce.³²

A National Workforce Plan for health and social care

- 1.6 The key challenges for the social care workforce are well documented. For example, in 2017 Audit Scotland made a number of recommendations for the Scottish Government and COSLA, which included addressing the challenges of recruitment and retention in the social care workforce³³. Working Collaboratively for a Better

²⁹ SSSC Report on 2017 Workforce Data - SSSC (August 2018)

<https://data.sssc.uk.com/data-publications/22-workforce-data-report/178-scottish-social-service-sector-report-on-2017-workforce-data>

³⁰ The difference between people of working age and people not of working age. There are implications for the tax receipts paid to the Exchequer by the working age population and the pressure on the public purse generated by the needs of people not of working age, including pensioners.

³¹ Fraser of Allander research (<https://fraserofallander.org/scottish-economy/fiscal-policy/how-serious-is-scotlands-demographic-challenge/>)

³² Integration of Health and Social Care – Scottish Government

<http://www.gov.scot/Topics/Health/Policy/Adult-Health-SocialCare-Integration>

³³ Self-Directed Support: 2017 Progress Report – Audit Scotland (August 2017)

<https://www.audit-scotland.gov.uk/report/self-directed-support-2017-progress-report>

Scotland³⁴ identifies health and social care as having critical skills shortages. It also sets out a commitment to ensuring that Scotland has a demand-led skills system underpinned by evidence of employer need and using predictive analytics of future skills needs. In 2017 and 2018 the Scottish Government began publishing a series of national health and social workforce plans (NWP) for health and social care. The plans are the beginning of a new process to improve planning across these sectors. Parts 1 and 3 focus on health and primary care respectively^{35 36}.

- 1.7 In December 2017, the Scottish Government and COSLA jointly published the 'National Health and Social Care Workforce Plan Part 2: a framework for improving workforce planning for social care in Scotland'³⁷ which relates to the social care workforce. The second part of the NWP sets out a number of recommendations and actions to address key priorities which include recruitment, retention and improved opportunities for career progression. The second recommendation in part 2 is on the need to develop an improved understanding around national and local labour markets for social care. This is the background to our report.
- 1.8 There are a number of drivers impacting on the skills required to provide social care. One of the factors driving change is Scotland's ageing population and lengthening life expectancy (although this has stalled recently) but with healthy life expectancy not increasing at the same rate. Two factors to consider are the integration of health and social care and Self-Directed Support, which together provide the opportunity and expectation for reforming how social care for adults is delivered. The uncertainty created by the impact of Brexit is also likely to increase competition for staff from other sectors. Not only does the

³⁴ Working Collaboratively for a Better Scotland – Enterprise and Skills Strategic Board (October 2018) <https://www.gov.scot/publications/working-collaboratively-better-scotland/>

³⁵ National Health and Social Care Workforce Plan: Part 1 – Scottish Government (June 2017) <https://www.gov.scot/publications/national-health-social-care-workforce-plan-part-1-framework-improving/>

³⁶ National Health and Social Care Workforce: Part 3 – Scottish Government (April 2018) <https://www.gov.scot/publications/national-health-social-care-workforce-plan-part-3-improving-workforce/>

³⁷ National Health and Social Care Workforce: Part 2 – Scottish Government (December 2017) <https://www.gov.scot/publications/national-health-social-care-workforce-plan-part-2-framework-improving/>

sector employ staff from the wider European Economic Area, it competes with other sectors such as food and drink, and tourism and hospitality that also employ substantial numbers of staff from out with the UK.³⁸ Meanwhile rural areas in Scotland face particular challenges, such as a restricted number of service providers and geographic remoteness.

- 1.9 These factors all have significant implications for the social care workforce both for now and in the future; implications not only for workforce numbers but also for the roles, skill sets and career pathways across the health and social care workforce. The future workforce must be well planned and evidence-based to ensure the delivery of high-quality, person centred care. There is significant data on the numbers of people using social care services, the profile of the sector's workforce and the training they receive in their role. However, there is an ongoing need for substantial data around the recruitment and retention of these workers, and their movement within the sector and the wider economy. There is a particular lack of data around the movement of workers between social care and related sectors such as health and education. Drivers such as the integration of health and social care are impacting on the way services are delivered and the way people work. An improvement understanding of workforce movements in the sector and between sectors is likely to be of value to workforce planners in considering future workforce needs.

Study aims and objectives

- 1.10 The objectives of the study were to provide insights into the way local and national labour markets impact on the social care workforce (including ELC staff), how different parts of the social care sector interact, and what these interactions mean for workforce planning locally and nationally.
- 1.11 The social care sector in Scotland covers a range of service providers and types of services. These sub-sectors and service types, are detailed in Appendix A, and are drawn from SSSC definitions. Our report is based on the survey responses from social care workers and

³⁸ The contribution of EEA citizens to Scotland: response to the Migration Advisory Committee call for evidence – Scottish Government (November 2017)
<https://www.gov.scot/publications/contribution-eea-citizens-scotland-scottish-governments-response-migration-advisory-committee-9781788514057/pages/1/>

employers across the third, independent and public sectors³⁹. This study does not include social work.

- 1.12 The study's remit was also extended to incorporate the ELC sector. The Scottish Government and local authorities have committed to making a significant level of investment in ELC through the near doubling of the funded entitlement to 1,140 hours per year from August 2020 for all three and four year olds, and eligible two year olds.⁴⁰ This expanded entitlement creates challenges for ELC providers, not least in recruiting and retaining an adequate workforce. Recognising this, the Scottish Government has set out the Delivery Support Plan⁴¹ for ELC providers, which will support workforce recruitment and training. Extending the remit to include ELC has meant that this study can explore the movement of workers across social care and ELC. The surveys asked similar questions for staff in social care and ELC.
- 1.13 The Social Care (Self-Directed Support) Act 2013 places a duty on local authority social work departments to offer people who are eligible for social care a range of choices over how they receive their support. Self-Directed Support includes the following four options: a direct cash payment; funding allocated to a provider of the individual's choice; the council arranging services for the individual; or a mix of these options⁴². For those who consider the first option, direct payment, they may decide to employ a Personal Assistant (PA). This offers flexibility in how and when the support is given. The roles and responsibilities of PAs include supporting an employer at work, education or in social activities, providing personal care and sometimes working as part of a team of PAs⁴³. Our report also draws on survey responses from PAs and employers of PAs, and aims to improve our understanding of any differences between PAs and other social care workers.

³⁹ The SSSC typically uses the terms 'public, private and voluntary sector' in their workforce data reports. This study generally uses third, independent and public sectors, but uses the SSSC's preferred terminology where relevant.

⁴⁰ <https://www.gov.scot/policies/early-education-and-care/early-learning-and-childcare/>

⁴¹ Early Learning and Childcare Providers: Delivery Support Plan (December 2018) <https://www.gov.scot/publications/delivery-support-plan-early-learning-childcare-providers/pages/2/>

⁴² Self-Directed Support – Self Directed Support Scotland <http://www.selfdirectedsupportscotland.org.uk/self-directed-support>

⁴³ Personal Assistant Employer's Handbook – Scottish Government (April 2014) <https://www.gov.scot/publications/personal-assistant-employers-handbook/#res-1>

1.14 This is not the first piece of research into the social care workforce, or the first survey of the sector. There have been a number of studies, for example:

- The SSSC recently published a report which analysed registration data over a 12 month period, in order to understand the flow of workers into the social care sector, between different parts of the social care sector and the career progression within the sector. The report examines a range of similar themes to this study and will be updated annually⁴⁴
- The Fair Work Convention has highlighted the role of fair work in tackling recruitment and retention issues in social care⁴⁵
- Scottish Care's Voices from the Front Line report⁴⁶ which explores many of the factors that motivate and engage people in their work
- Reports by the Coalition of Care and Support Providers (CCPS) and the Voluntary Sector HR Forum examine the impact of commissioning, contracting, and handing back contracts, including the impact of TUPE transfers⁴⁷
- The Institute for Research and Innovation in Social Services (IRISS)⁴⁸ carried out a survey in 2015 to understand what motivates and challenges the social care workforce in their day-to-day job. The survey⁴⁹ elicited almost 2,000 responses although 32% were from social workers and care staff were underrepresented.
- Studies of the ELC workforce are undertaken by a range of bodies including the Scottish Childminding Association and the National Day Nurseries Association.

1.15 In addition, these surveys and studies typically – but do not exclusively – focus on the views of part of the sector such as the membership of that body, and provide a range of specific insights into the sector. This report does not attempt to include a comprehensive review of their

⁴⁴ Between 1 August 2016 and 31 July 2017.

⁴⁵ Fair Work in Scotland's Social Care Sector 2019 – Fair Work Convention (Feb 2019) https://unison-scotland.org/library/PUBLICATION-Social-care-report-01-FINAL-VERSION-sent-to-APS_revised-on...-1.pdf

⁴⁶ Voices from the Front Line: Exploring Recruitment & Retention of Social Care Support Workers – Scottish Care (January 2016) <http://www.scottishcare.org/wp-content/uploads/2016/06/Voices-from-the-Front-Line.pdf>

⁴⁷ CCPS releases report on Handing Back Contracts – CCPS Scotland (May 2019) <http://www.ccpscotland.org/news/7056/>

⁴⁸ Iriss <https://www.iriss.org.uk/>

⁴⁹ The View From Here – Iriss (2015) <https://blogs.iriss.org.uk/viewfromhere/workforce-2015/>

findings as our focus is primarily on a new survey of employers and employees in this sector. However, there are a limited number of references to these studies throughout our report.

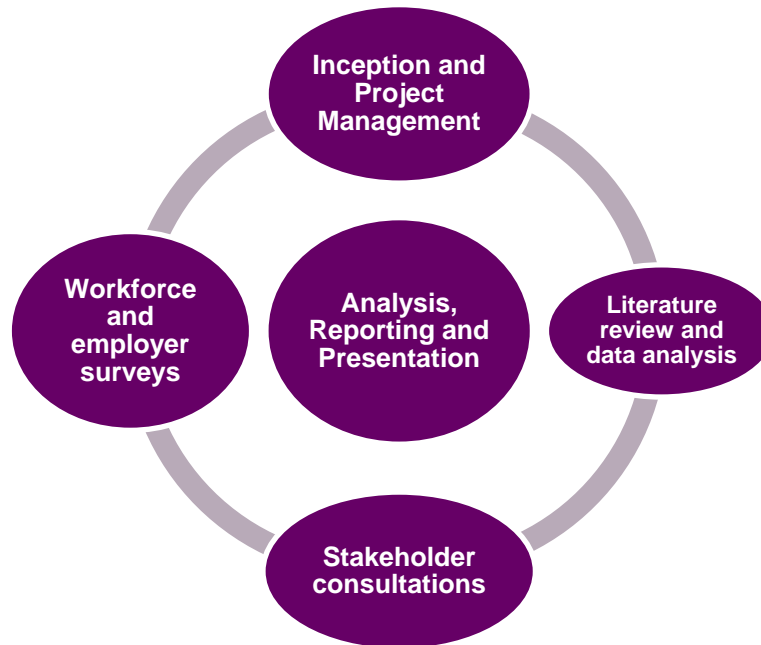
Study methodology

- 1.16 The methodology comprised five main stages as illustrated in Figure 1.1. The primary research stage was undertaken in order to supplement the data and literature review, and add depth and detail to the evidence. This included a programme of consultations with key stakeholders, and an online survey of social care employers and the social care workforce (with the exception of social workers). The social care workforce sits within the wider 'social service sector', which itself contains two sub-groups: 'care services' which is all registered care services and 'social work services'- that is, all local authority social work services. This study did not include social workers working with any employer. The social care workforce includes both adult services (i.e. adult day care, adult placement services, care homes, housing support/care at home for adults, nurse agencies, offender accommodation services, and fieldwork services) and children's services (i.e. adoption services, fostering services, residential childcare and fieldwork services).
- 1.17 Daycare of Children (DCC) is a social care service which includes nursery classes, crèches, after school clubs and play groups. ELC is a sub-sector of DCC, and refers to those DCC services which are funded by Government to provide the free pre-school offer of 600 hours currently and soon to become 1140. Our surveys focused on adult and children's social care and ELC (with the ELC findings presented in a separate report), and the need to develop a better understanding of the impact of the expansion of funded ELC on recruitment and retention across both sectors⁵⁰. It is worth noting that that many of the questions asked in the surveys are complementary, and it is possible to compare findings across both social care and ELC sectors. A separate survey was developed for PAs and the people who employ them.
- 1.18 The work was supported by a wide range of stakeholder organisations who helped to promote and disseminate the surveys. The research was also informed and supported by a Research Advisory Group (RAG), whose members reflected a wide range of interests and remits

⁵⁰ Appendix A provides clarification around the sub-sectors of the social care workforce.

relating to social care and ELC across the public, independent and third sectors. The main roles undertaken by the RAG included an initial meeting to discuss the research scope and process; a meeting during the project to review progress and challenges and responding to research queries during the study.

Figure 1.1: Study methodology



1.19 A breakdown of the primary research undertaken is provided in Table 1.1, and shows that almost 10,000 social care employees and employers participated in the research. This is believed to be the largest or one of the largest surveys of its type in the social care and ELC sectors in Scotland to date. The survey typically examines the findings under three groups, namely adult social care, children’s social care and Early Learning and Childcare. It must be noted however, that survey respondents could choose more than one sub-sector in their response, and where this crosses more than one group (for example, children’s and adult social care) their response was necessarily counted in both. However, there were very few instances of this occurring⁵¹.

1.20 As Table 1.1 illustrates, there was an over-representation of ELC services (i.e. childminding and daycare of children) in the survey responses. To reflect this, a separate report solely focussing on the

⁵¹ NB There were fewer than 100 survey responses from people who selected more than one sub-sector

ELC sector has been produced, which complements and aligns with this report.

1.21 The profile of the survey sample and its alignment with the Scottish Social Care workforce is provided in Appendix B.

Table 1.1: Primary research

Stakeholder Group	Approach	Number of Responses
Social care employers ⁵²	Online survey	1,553 responses ⁵³ comprising: Children’s services: 106 Adult’s services: 626 ELC: 764
Social care employees	Online survey	8,055 responses ⁵⁴⁵⁵ comprising: Children’s services: 509 Adult’s services: 2,917 ELC: 3,585
PA employers	Online survey	20 responses
PAs	Online survey	76 responses ⁵⁶
Key stakeholders	Telephone consultations	23 consultations

Report structure

1.22 The remainder of the report is structured as follows:

- **Chapter 2** presents a brief discussion of the social care policy environment and key drivers;
- **Chapter 3** provides an overview of Scotland’s social care workforce, drawing largely on published data from official sources;

⁵² A definition of children’s and adult’s social care services is provided in Table A2 in Appendix A.

⁵³ 73% completion rate

⁵⁴ 84% completion rate

⁵⁵ Total does not sum to 8,055 as some respondents did not or could not indicate a sector covered by the survey for example some fieldwork services

⁵⁶ NB: 20 responses came directly from the online PA survey, a further 56 were those who responded to the main employee survey who identified as PAs. Two surveys were used as previous experience suggests a lower response rate from workers in this area.

- **Chapter 4** discusses the perceptions related to working in the social care sector, particularly in relation to the factors that attract people to the sector, and the factors that make them stay or leave;
- **Chapter 5** discusses recruitment and retention issues;
- **Chapter 6** looks at the extent that the social care workforce moves between parts of the social care sector and between this sector and other sectors; and
- **Chapter 7** presents our overall conclusions and recommendations.

1.23 The following information is appended:

- **Appendix A** – SSSC Definition of Social Service Sectors in Scotland
- **Appendix B** – Alignment of survey sample with the Social Care Workforce
- **Appendix C** – Comparison of Social Care Workforce and Scottish Workforce
- **Appendix D** – Clarification of Wage Rates
- **Appendix E** – Stakeholder Organisations Consulted

Accompanying Reports

1.24 Three additional products accompany this main report.

- **ELC Workforce Report**

Given the particular issues facing ELC as a result of expansion, our companion report draws out the key messages for the sub-sector. That report is designed to complement this report and there is some read-across in relation to data on the movement of workers between social care and ELC.

- **Report on the Implications for Workforce Planning**

Drawing on all research sources (brief literature review, workforce data, the survey and the qualitative consultations) our report contains an initial appraisal of existing datasets for the sector; considers data gaps and limitations; and makes recommendations for future workforce planning in particular how best to respond to recruitment and retention challenges.

- **Case Study Report**

Part 2 of the National Health and Social Care Workforce Plan acknowledges some of the distinct challenges for workforce planning in the social care sector. These include the complexity of service provision and commissioning, the ramifications of the dominant market dynamic, and the distinct challenges within rural and urban areas⁵⁷. For instance, a key challenge for the delivery of

⁵⁷ Categorized using the Scottish Government 2-fold urban rural classification. Urban areas – settlements of 3,000 or more people; Rural areas – settlements of less than 3,000 people.

social care in urban areas in Scotland is the competition for labour by other industry sectors, particularly when the area is experiencing high employment levels.

This case study report explores key local labour market characteristics and issues around recruiting into the social care sector in four different areas as illustrated in Table 1.2.

Table 1.2: Case study areas

Local authority	Features
Aberdeen	Urban area with high employment
Dumfries & Galloway	Remote rural area: ageing population and challenges in retaining and attracting young people
Argyll & Bute	Rural mixed economy with a high level of seasonal employment e.g. in the tourism sector
South Lanarkshire	Mixed urban and rural with a wide travel to work area

- 1.25 Each of the areas were discussed and agreed at an early stage with the RAG, however it should be noted that these are not necessarily representative of the wider social care sector, but aim to illustrate or reinforce some of the challenges faced.
- 1.26 The study methods have generated a substantial data set. Our report draws out the main findings from the survey and the qualitative consultations.

2 Policy Context

Introduction

- 2.1 This chapter considers the changing context for the social care sector in terms of the demand for services, the way services are organised and delivered, and changes in the policy environment.

Policy drivers

- 2.2 Table 2.1 includes examples of key policies and strategic drivers that influence social care in terms of the demand for services and the way services are organised and delivered.
- 2.3 Key policy drivers broadly include the integration of Health and Social Care, personalisation of care⁵⁸ and expansion of ELC⁵⁹. Due to ongoing financial pressures, Audit Scotland notes that most new service initiatives have been funded using additional financial support from the Scottish Government, rather than through the re-distribution of health and social care resources⁶⁰.

Table 2.1: Key policy drivers for workforce development

Policies, programmes and reports	Details
Integration of Health and Social Care	
Integration of Health and Social Care	Integration of Health and Social Care is a principal strand of the Scottish Government's public sector reform agenda and includes a key focus on the skills of the workforce. It is focussed primarily although not exclusively on meeting the challenges of Scotland's ageing population by shifting the necessary resources to community-based and preventative care at home, or in a homely setting, to ensure that the right care is received at any point in the care journey. ⁶¹
National Health and Wellbeing Outcomes	These provide a strategic framework for the planning and delivery of health and social care services. This suite of outcomes, together, focus on improving the experiences and quality of services for people using those services, carers and

⁵⁸ Personalisation means that people become more involved in how services are designed and they receive support that is most suited to them.

⁵⁹ ELC provision expanding to 1,140 hours for all three and four year olds and eligible two year olds by August 2020

⁶⁰ Health and social care integration: update on progress – Audit Scotland (November 2018) https://www.audit-scotland.gov.uk/uploads/docs/report/2018/nr_181115_health_socialcare_update.pdf

⁶¹ Integration of Health and Social Care – Scottish Government <http://www.gov.scot/Topics/Health/Policy/Adult-Health-SocialCare-Integration>

	their families. They focus on improving how services are provided, as well as the difference that integrated health and social care services should make, for individuals.
Workforce Plans	
National Health and Social Care Workforce Plan (NWP) ^{62 63 64}	The NWP aims to enable local and national planning to support improvements in service delivery and design. It is designed to take a whole system approach to workforce planning and acknowledges the interdependencies across all parts of the system. It is currently in three parts covering workforce planning in the NHS, Social Care and Primary Care. The current reports have a set of recommendations which include: the need for an integrated workforce data platform to support workforce planning; national and local labour market workforce analysis; and improving career pathways including career pathways between and within Health and Social Care. An Integrated Workforce Plan for health and social care is expected in late 2019.
Reform of Adult Social Care ⁶⁵	The aim of the reform programme is to support the changes needed to achieve the vision of adult social care support and overcome challenges that are preventing it. This will consider workforce issues and new models of care and support.
Workforce Regulation	
The Care Inspectorate ⁶⁶	<p>The Care Inspectorate is the national regulator for care services in Scotland. They inspect services and evaluate the quality of care they deliver, and support improvement in individual services and across the care sector nationally. Care services in Scotland must be registered with the Care Inspectorate and a broad range of the individuals who work in those services must be registered with the Scottish Social Services Council (SSSC).</p> <p>The SSSC is the regulator for the social service workforce in Scotland. The SSSC:</p>

⁶² National Health and Social Care Workforce Plan: Part 1 – Scottish Government (June 2017) <https://www.gov.scot/publications/national-health-social-care-workforce-plan-part-1-framework-improving/>

⁶³ National Health and Social Care Workforce Plan: Part 2 – Scottish Government (December 2017) <https://www.gov.scot/publications/national-health-social-care-workforce-plan-part-2-framework-improving/>

⁶⁴ National Health and Social Care Workforce Plan: Part 3 – Scottish Government (April 2018) <https://www.gov.scot/publications/national-health-social-care-workforce-plan-part-3-improving-workforce/>

⁶⁵ Social care support reform: vision – Scottish Government (June 2019) <https://www.gov.scot/publications/social-care-support-investment-scotlands-people-society-economy-shared-vision-adult-social-care-support-including-support-carers-partnership-programme-support-local-reform-adult-social-care/>

⁶⁶ The Care Inspectorate <https://www.careinspectorate.com/index.php/member-of-the-public/4555-who-we-are-and-what-we-do>

<p>Registration with the SSSC⁶⁷</p>	<ul style="list-style-type: none"> • publish the national codes of practice for people working in the social service workforce and their employers • register people working in the social service sector and make sure they adhere to the SSSC Codes of Practice • promote and regulate the learning and development of the social service workforce • are the national lead for workforce development and planning for the social service sector in Scotland <p>As of June 2019 over 130,000 people⁶⁸ have registered with the SSSC, some in more than one category. The final phase of registration within current policy is for workers in care at home and housing support who must register by September 2020.</p>
<p>Self-Directed Support</p>	
<p>Social Care (Self-Directed Support) (Scotland) Act⁶⁹</p>	<p>In 2013 The Scottish Parliament passed a new law on social care support, the Social Care (Self-Directed Support) (Scotland) Act 2013. The Act gives people a range of options for how their social care is delivered, beyond just direct payments, empowering people to decide how much ongoing control and responsibility they want over their own support arrangements.</p>
<p>Expansion of ELC</p>	
<p>Children and Young People (Scotland) Act (2014)⁷⁰</p>	<p>The increase in funded childcare hours builds on the Scottish Government's Early Years Framework, which has, at its core, early intervention to make sure that every child in Scotland has the best start in life.</p>
<p>A Blueprint for 2020: The Expansion of Early Learning and Childcare in Scotland: Quality Action Plan</p>	
<p>Early Learning and Childcare Providers: Delivery Support Plan⁷¹</p>	
<p>Getting It Right for Every Child (GIRFEC)</p>	

⁶⁷ Scottish Social Services Council <https://www.sssc.uk.com/registration/>

⁶⁸ Registration data – Scottish Social Services Council (September 2019) <https://data.sssc.uk.com/registration-data>

⁶⁹ Social Care (Self-directed Support) (Scotland) Act 2013 <http://www.legislation.gov.uk/asp/2013/1/contents/enacted>

⁷⁰ Children and Young People (Scotland) Act 2014 <http://www.legislation.gov.uk/asp/2014/8/contents/enacted>

⁷¹ Early learning and childcare providers: delivery support plan – Scottish Government (December 2018) <https://www.gov.scot/publications/delivery-support-plan-early-learning-childcare-providers/>

GIRFEC ⁷²	GIRFEC is the national policy framework aimed at supporting the wellbeing of children and young people in Scotland. GIRFEC is central to all government policies which support children, young people and their families and is delivered through services and people who work with families. GIRFEC is based on children's right and its principles reflect the United Nations Convention on the Rights of the Child.
Fair Work Practices	
Fair Work in Scotland's social care sector ⁷³	Scotland's aspiration is to be a leading fair work nation, which means that workers are paid and treated fairly, with opportunities to progress, learn and have a voice on what matters to them. The growing importance of fair work is recognised by the Scottish Government, and it is central to Scotland's Economic Strategy and is underpinned by measurable indicators in the National Performance Framework. The Fair Work Convention advises the Scottish Government on fair work and advocates for fair work in Scotland, creating benefits for individuals and their families, businesses and society.
Real Living Wage ⁷⁴	<p>In February 2019 the Fair Work Convention published its report Fair Work in Scotland's Social Care Sector 2019. The report calls for urgent interventions by policy makers, commissioners and leaders in the social care sector to improve the quality of work and employment for the sector.</p> <p>Research suggests that the introduction of the Real Living Wage for adult Social Care workers represented a significant progressive effort by the Scottish Government to improve the working conditions and living standards of front-line staff in the sector⁷⁵. The Scottish Government has committed to supporting the implementation of the Real Living Wage for ELC staff.⁷⁶</p>

⁷² Getting It Right For Every Child <https://www.gov.scot/policies/girfec/>

⁷³ Fair Work in Scotland's Social Care Sector 2019 – Fair Work Convention (February 2019) <https://www.fairworkconvention.scot/our-report-on-fair-work-in-social-care/>

⁷⁴ Living Wage Scotland <https://scottishlivingwage.org/>

⁷⁵ Implementing the Scottish Living Wage in adult Social Care: An evaluation of the experiences of Social Care partners, and usefulness of Joint Guidance – CCPS (2018)

⁷⁶ Protecting Scotland's Future: the Government's Programme for Scotland 2019-2020 – Scottish Government (September 2019) <https://www.gov.scot/publications/protecting-scotlands-future-governments-programme-scotland-2019-20/>

3 Scotland's Social care workforce

Introduction

3.1 This chapter reviews the available data relating to Scotland's social care workforce which covers a range of service providers and types of services. These are detailed in Appendix A, and are drawn from Scottish Social Services Council (SSSC) definitions. This chapter draws largely on published data from official sources about the current composition of the workforce, as well as the forecast workforce requirements and the pipeline of skills relating to the social care sector.

3.2 As discussed briefly in chapter 1, social care sits within the broader social service sector, which also includes social work services. Social services (excluding social work services) cover three main categories:

- Adult social care (incorporating adult day care, adult placement services, care home for adults, housing support/ care at home services, nursing agencies, offender accommodation services and fieldwork services);
- Children's social care (including adoption and fostering services, residential children's care services and fieldwork services); and
- ELC (which refers to daycare of children and childminding services which are financed by Government to provide funded pre-school offer of 600 hours currently and soon to become 1,140). The ELC workforce is not covered in this analysis, but instead is discussed fully in a separate report.

The social service workforce

3.3 The Scottish Social Services Council (SSSC) is the regulator of the social service workforce. It conducts research and collects data on the Scottish workforce annually. Based on this, SSSC produces an annual data-driven workforce report which provides a snapshot of the composition of the sector. The data is collected by SSSC and the Care Inspectorate each December and the reports are typically published in the following August. The most recent report was published in August 2018 comprising data collected in December 2017.⁷⁷ The workforce reports include a breakdown of employment by geography, sub-sector, employer type and personal characteristics (e.g. gender and age). Rather than duplicating the data in the most recent report, this chapter draws out the key messages. It is worth noting that SSSC data around ethnicity and disability has a high proportion of unknown responses.

⁷⁷ The SSSC will publish the 2019 report on 22 November 2019.

Table 3.1: Social services overview⁷⁸

Number of active services registered with the Care Inspectorate (December 2017)			
Childminding	5,257	Care home for adults	1,125
Daycare of children	3,682	Adult day care	479
Housing support/care at home	2,064	Residential childcare	332
Other (Adoption services, Adult placement services, Child care agencies, Fostering services, Nurse agencies, Offender accommodation services, School care accommodation)			272
Headcount of the Scottish social service workforce (December 2017)			
Housing support/care at home	70,900	Adult day care	7,800
Care home for adults	52,470	Fieldwork services (children)	5,740
Daycare of children	34,020	Fieldwork services (adults)	5,340
Residential childcare	7,920	Childminding	5,260
Other (Adoption services, Adult placement services, Child care agencies, Fieldwork service (generic), Fieldwork service (offenders), Fostering services, Nurse agencies, Offender accommodation services, School care accommodation)			9,980
Workforce age			
Overall median		44	
Highest	Adult placement services	51	
	Adoption services Fieldwork services (generic)	49	
Lowest	Child care agencies	33	
	Daycare of children	36	
Gender		Ethnicity	Disability
85% (female)	15% (male)	3% ethnic minority	0-4% across all sub sectors

3.4 The SSSC report published in August 2018 shows that there were over 202,000 people employed in over 13,000 active registered services in Scotland in December 2017. Table 3.2 sets out the breakdown of services by type of employer, and employment. It suggests that, on

⁷⁸ Scottish Social Service Sector: Report on 2017 Workforce Data – SSSC (August 2018) <https://data.sssc.uk.com/images/WDR/WDR2017.pdf>

average, employers in the public and voluntary sector are larger than those in the private sector. It is also worth highlighting that childminders account for around 40% of active registered services, many of whom do not employ any staff. Excluding childminders gives just under 8,000 social service providers in Scotland in December 2017.

Table 3.2: Services and employment by employer type, 2017

Employer type	Services		Employment	
	Number	%	Number	%
Private sector	7,920	60%	83,150	41%
Voluntary sector	2,661	20%	56,020	28%
Public sector	2,630	20%	62,890	31%
Total	13,211	100%	202,090	100%

Source: SSSC Workforce Data, 2017

3.5 The social service workforce comprises 18 different sub-sectors as defined by the SSSC⁷⁹. By far the largest of these in employment terms are housing support/care at home, which employs almost 71,000 people (35% of the total workforce), care homes for adults, which employs over 52,000 people (26%) and DCC which employs over 34,000 people (17%). Together these three sub-sectors account for nearly eight in every 10 social care jobs in Scotland.

3.6 A report for the Scottish Government indicates that in 2018 non-UK EU nationals accounted for 5.6% of people employed in adult social care and childcare, which equates to around 9,830 staff⁸⁰. The sectors with the most (in absolute terms) of non-UK EU staff were care at home for adults (3,150), housing support/care at home (2,850), and Day Care of Children (2,290)

⁷⁹ These are: adoption services, adult day care, adult placement services, care homes for adults, central and strategic staff, childcare agency, childminding, DCC, fieldwork services (adults), fieldwork services (children), fieldwork services (generic), fieldwork services (offenders), fostering services, housing support/care at home, nurse agency, offender accommodation service, residential childcare, and school care accommodation. Please note that this categorisation will exclude some workers such as personal assistants and childminding assistants. See the SSSC's Annual Workforce Data Report for further information.

⁸⁰ EU workers in Scotland's social care workforce: contribution assessment – Scottish Government (July 2018) <https://www.gov.scot/publications/contribution-non-uk-eu-workers-social-care-workforce-scotland/>

Fit of social care with the wider economy

3.7 The social care workforce has some characteristics that set it apart from other sectors in Scotland and the economy as a whole, illustrated at Figure 3.1. The key points to note are:

- Social care has a much higher proportion of female workers than the economy as a whole⁸¹;
- The social care workforce, on average, is slightly older than the overall workforce in Scotland⁸²;
- There are a greater number of social care jobs relative to other sectors in more rural and remote areas of Scotland (when compared to the national average), and less concentrated in cities and more urban areas⁸³;
- There is a much higher prevalence of part-time working in social care than across the economy⁸⁴; and
- There is a much greater vacancy rate⁸⁵ in social care than other sectors in Scotland⁸⁶.

⁸¹ Scottish Social Service Sector: Report on 2017 Workforce Data – SSSC (August 2018) <https://data.sssc.uk.com/images/WDR/WDR2017.pdf> and Annual Population Survey (2017) <https://www.nomisweb.co.uk/default.asp>

⁸² Ibid.

⁸³ Ibid.

⁸⁴ Ibid.

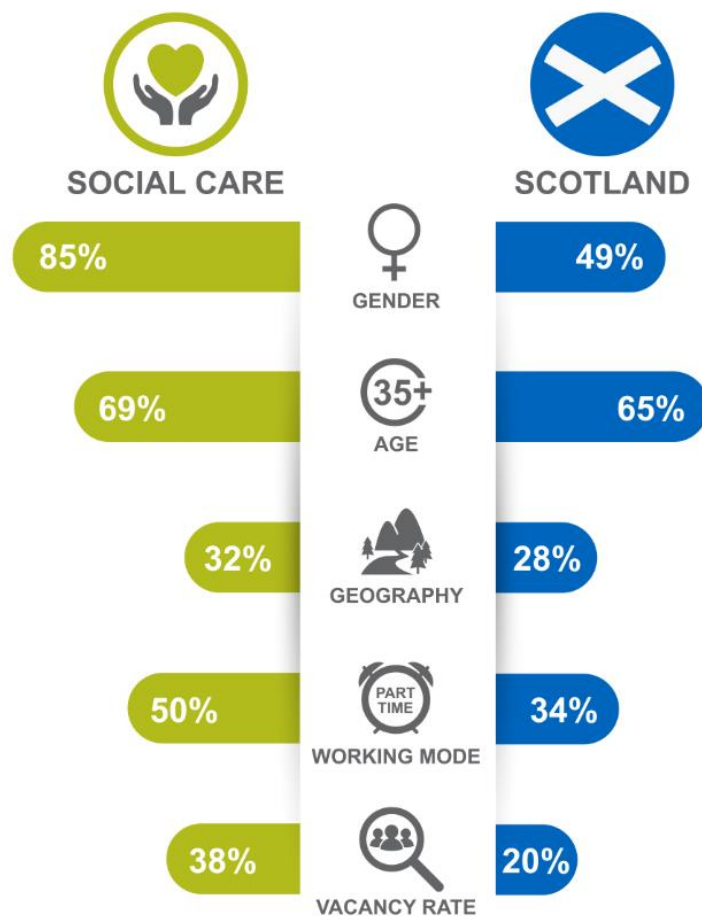
⁸⁵ 'Vacancy rate' refers to levels of staff vacancies in Scotland - this is based the on rate of whole time equivalent vacancies (Page 6 'Staff Vacancies in Care Services 2017 Report – SSSC (January 2019)

<https://data.sssc.uk.com/images/StaffVacancies/Staff-vacancies-in-care-services-2017.pdf>)

⁸⁶ Staff vacancies in care services 2017 – Care Inspectorate/SSSC (January 2019) <https://www.careinspectorate.com/index.php/news/4767-staff-vacancies-in-care-services-2017> and Employer Skills Survey (2017)

<https://www.gov.uk/government/publications/employer-skills-survey-2017-scotland-toolkit>

Figure 3.1: Comparison of social care workforce and the Scottish workforce⁸⁷



3.8 By geography, the largest numbers of social service employees are in Glasgow City (13%), City of Edinburgh (10%), Fife and North Lanarkshire (both 6%), which is to be expected given the size of the populations in these areas⁸⁸. However, in terms of staff densities⁸⁹, the highest levels are in the island and rural communities of Shetland, Orkney, Na h-Eileanan Siar, East Ayrshire and Inverclyde. This may be partly related to the higher proportions of part-time working in more rural areas. SSSC noted in the study that an issue in assessing density is that a service can be registered in one local authority area but operating in another, which of course is less likely to happen in island authorities. In contrast, the lowest staff density levels are in

⁸⁷ NB 'Working rurally' is a reference to the proportion of staff working in a rural area. The 'Vacancy rate' refers to levels of staff vacancies in Scotland - the social care figure reflects the SSSC findings from its 'Staff Vacancies in Care Services 2017 Report (January 2019) <https://data.sssc.uk.com/images/StaffVacancies/Staff-vacancies-in-care-services-2017.pdf>

⁸⁸ Scottish Social Service Sector: Report on 2017 Workforce Data – SSSC (August 2018) <https://data.sssc.uk.com/images/WDR/WDR2017.pdf>

⁸⁹ Staff densities are defined as the number of social care staff per 10,000 population

West Lothian, South Lanarkshire, East Renfrewshire and Falkirk, which tend to be relatively urban areas outside of Scotland's main cities.

3.9 People are more likely to work part-time in the social service sector than in the Scottish economy as a whole. In 2017, 50% of the social service workforce worked part-time, compared to 34% across all sectors in Scotland⁹⁰. In the social service sector, part-time working is unsurprisingly most prevalent in agency work – in the childcare agency (92%) and nurse agency (74%) sub-sectors. The expansion of ELC may increase the opportunities for childcare agency work. In sub-sectors with a permanent workforce, part-time work is higher in housing support/care at home (60%) and adult day care (54%). Full-time working is most common in the fieldwork services sub-sectors, particularly with offenders (77%), children (76%) and adults (73%).

3.10 The profile of the social service workforce is not in line with the broader Scottish workforce. In 2017, the overwhelming majority of the social service workforce was female (85%), far exceeding the proportion in Scotland's workforce as a whole, which is 49%⁹¹. At 31%, almost one third of the social service workforce was aged under 35 years, 46% were aged 35 to 54 years and 23% were aged over 54 years. This was slightly older than Scotland's overall workforce, where 35% were aged under 35 years.

3.11 However, there are significant differences in the profile within sub-sectors. For example, the ELC workforce has a younger profile – almost half (46%) of the Day Care of Children workforce were aged under 35 years. Those employed in the adult day care sub-sector tend to be older than social care as a whole, with almost one third (30%) aged over 54 years. By gender, the vast majority of staff in ELC (97%), fostering (88%) and adoption (87%) services are female, whereas males have a better representation in school care accommodation (39%) and fieldwork services, particularly with offenders (33%). A more comprehensive comparison of the social care workforce and the overall Scottish workforce is set out at Appendix C.

3.12 The SSSC recently published a report⁹² which analysed registration data over a 12 month period. This helped them to understand the flow of workers into the social service sector, between different parts of the sector and the career progression within the sector. There were two main limitations to this analysis:

⁹⁰ Business Register and Employment Survey (2017) <https://www.nomisweb.co.uk/default.asp>

⁹¹ Annual Population Survey (2017) <https://www.nomisweb.co.uk/default.asp>

⁹² Using SSSC registration data to examine workforce movements, (May 2019) <https://www.sssc.uk.com/knowledgebase/article/KA-02680/en-us> .

- The analysis was only able to consider a proportion of those working in the sector, making it very difficult to indicate what proportion of staff left the sector entirely, or examine the movement of people between different social care sub-sectors (for example, someone may have left the SSSC register and moved to a part of the social care sector that does not require registration, so the SSSC wouldn't be able to identify them as someone who has remained with the sector); and
- There is a wider issue around identifying those workers who move to different jobs within the social care sector, as people have up to 6 months to re-register with the SSSC after changing jobs.

3.13 This was the first time that registration data has been used to explore the movement of the social service workforce, although not all service types were included in this analysis for the following reasons:

- The main omission is around care at home and housing support as many of these workers have still to register with the SSSC. Workers in these sectors are required to register by 2020;
- In addition, the movement of workers between employer types (such as the public, independent and third sector) has not been analysed. The SSSC will examine movement between these areas in future reports; and
- There are limitations to the analysis, as current registration data doesn't capture why people leave the workforce, or where they go.

3.14 The SSSC's intention is that over the next few years as registration encompasses around 80% of the workforce, a more comprehensive analysis of workforce movement should be possible.

3.15 There were several key findings from the SSSC's first study of the Register and workforce movement. These messages can be summarised as follows:

- An estimated 40% of new registrations are from people who previously worked in the sector;
- There were a significant number of new registrations (more than 25,000), although some of this can be accounted for by the introduction of mandatory registration for some staff groups;
- The median age of new registrations was generally younger compared to the median age for the whole workforce;
- There is a strong tendency for people to remain in the same type of service such as children's or adult services; and
- There is evidence of career progression (for instance from care home supervisors to managers, or ELC support workers to practitioners).

Stability of the workforce

- 3.16 The SSSC analysis shows that 80% of registered staff did not change post in 2017, which suggests that around 8,400 people moved to a different job during the analysis period. This reflects the findings around staff stability from the SSSC annual workforce data collection for the wider social service sector (which was 77.1% in 2017).
- 3.17 Research undertaken by XpertHR indicates that the average staff turnover rate in the wider UK economy is around 15%⁹³. The SSSC publishes stability index figures for the social service workforce which measure the proportion of staff who have been retained from the previous year. In December 2017 the stability index for social services was 77.1%. This means that just over three quarters of the staff who were in post in December 2016 were still in the same post as of December 2017. While it is not possible at present to obtain accurate figures for turnover in the social service sector in Scotland, it is possible to conclude from the stability index data that this would be less than 22.9%. In 2018/19, the turnover rate⁹⁴ in adult social care in England was 30.8%, equivalent to around 440,000 people leaving their jobs over the course of the year⁹⁵.
- 3.18 A significant number of social care providers in Scotland have expressed concern about the challenges in recruiting and retaining staff, particularly affecting the independent sector. This is specifically in relation to care homes, care at home, housing support and day care services for adults. In response to this, Scottish Care developed and ran a survey of their member organisations as part of a number of approaches to help begin to understand the nature and extent of these challenges and to inform national policy and local action in addressing the issues. They found that turnover rates for social care staff working

⁹³ Turnover rate reaches new high – Beckett Frith, HR Magazine (October 2017) <https://www.hrmagazine.co.uk/article-details/turnover-rate-reaches-new-high>

⁹⁴ NB –turnover rate covers not just with those in post at the beginning of a period but also those who come into post during the period and have left before the end of the period.

⁹⁵ The State of the Adult Social Care Sector and Workforce in England – Skills for Care (2019) <https://www.skillsforcare.org.uk/adult-social-care-workforce-data/Workforce-intelligence/documents/State-of-the-adult-social-care-sector/State-of-Report-2019.pdf>

in independent and third sector provider organisations were around 22%, rising to 30% in care at home staff.⁹⁶

3.19 The SSSC study identifies several key messages which are of interest in terms of career development. For instance, there is a strong tendency for people to remain in the same type of service (for example adult or children's services), and re-registrations in some cases indicate promotion and upward progression within the sector. For example, in DCC, 82% of new registrations as a manager had previously been practitioners. Therefore, it is important to explore in more detail the degree to which staff are moving within the sector (and whether they are moving to different sub-sectors or staying in the same field) and how many are moving to completely different jobs, and what these are.

Vacancies in social care

3.20 The social care sector reports significant challenges in relation to vacancies and hard-to-fill vacancies. Research commissioned by the Scottish Government identified that almost 45% of employers have found recruiting care staff/practitioners had become more difficult in the 12 months to February 2018⁹⁷. Interestingly, the study found that retention was less of an issue than recruitment and had not changed much over the 12 month period. Where employers reported that it had become more difficult to retain staff, it was again, care staff/practitioners. Interestingly, there was very little change in ability to retain non-UK EU staff and no change in the number of non-UK EU applicants.

3.21 The SSSC and the Care Inspectorate published a report on vacancies in the Care Sector in 2017⁹⁸ based on the Care Inspectorate annual returns from service providers. Over one third (38%) of social care services reported having one or more vacancies at 31st December 2017. This rate had increased from 2016 when it was 36% and from 2015 when it was 35%. Although the increase is not steep, it may point to an emerging trend⁹⁹. This is much greater than 20% of all Scottish employers

⁹⁶ In the Front Line – Social Care Providers Survey Report on Recruitment and Retention (2015) <http://www.scottishcare.org/wp-content/uploads/2016/06/Scottish-Care-In-the-Front-Line-Report.pdf>

⁹⁷ EU workers in Scotland's social care workforce: contribution assessment – Scottish Government (July 2018) <https://www.gov.scot/publications/contribution-non-uk-eu-workers-social-care-workforce-scotland/>

⁹⁸ Staff Vacancies in Care Services – SSSC and the Care Inspectorate 2017 (January 2019) <https://www.careinspectorate.com/index.php/news/4767-staff-vacancies-in-care-services-2017>

⁹⁹ Please note, data does not go back beyond 2015

that report having at least one vacancy¹⁰⁰ and 8% have at least one hard-to-fill vacancy¹⁰¹. Of interest to social care workforce planning, education employers can also find it difficult to sustain their workforce, with 39% reporting having at least one vacancy and 12% saying they have at least one hard-to-fill vacancy. Public administration is similar, at 35% and 7% respectively and the figures for hotels and restaurants are 29% and 12%¹⁰².

3.22 The proportions of services reporting one or more vacancies were highest in housing support/care at home services (62% of services), care homes for older people (59%), housing support services (59%) and care homes for adults (53%)¹⁰³. These are all well above the total proportion of social care services with one or more vacancies, which is 38%. DCC has a relatively low proportion of services with vacancies at 23%, although the expansion of ELC may result in large numbers of vacancies over the next year or two, so this figure is very likely to go up, albeit temporarily.

3.23 By geography, North Lanarkshire, Aberdeen, Dundee and East Dunbartonshire had the highest proportion of providers with one or more vacancies. The proportion of services with vacancies was lowest in the more rural areas of Angus, Na h-Eileanan Siar and Highland.

3.24 Of those services reporting vacancies, almost half (45%) reported having problems filling them, and this is also a small increase from the previous year, when 44% reported difficulties. This is more in line with the Scottish average of 42% of vacancies being hard-to-fill¹⁰⁴. The most common reasons given by social care services for vacancies being hard-to-fill are:

- Applicants having a lack of experience

¹⁰⁰ Employer Skills Survey, Scotland slidepack – Department for Education (2017) https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/733755/Employer_Skills_Survey_2017-Scotland_slide_pack.pdf

¹⁰¹ NB The Care Inspectorate does not provide a definition of the term 'hard-to-fill' in relation to job vacancies.

¹⁰² Employer Skills Survey 2017 Research Report – Department for Education (August 2018) https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/746493/ESS_2017_UK_Report_Controlled_v06.00.pdf

¹⁰³ Staff Vacancies in Care Services – SSSC and the Care Inspectorate 2017 (January 2019) <https://www.careinspectorate.com/index.php/news/4767-staff-vacancies-in-care-services-2017>

¹⁰⁴ Employer Skills Survey, Scotland slidepack – Department for Education (2017) https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/733755/Employer_Skills_Survey_2017-Scotland_slide_pack.pdf

- Not enough applicants in general
- A lack of qualified applicants.

Leaving the social care workforce

3.25 In 2018, SSSC undertook a survey of people who had left the SSSC register¹⁰⁵, gathering responses from around 1,000 individuals. Just over half (51%) of respondents indicated that they were still working in the social service sector, despite leaving the register, meaning they were possibly in roles that do not require registration, such as non-managerial staff in adult day care and PAs. It could also include people who have left their post in the period of the research and taken up a new post, but have not yet registered in the new post as they have up to six months to register. Of the 49% who were no longer working in the sector, just over half (51%) had taken up a job in a different sector. This suggests that a quarter of the respondents who had left the SSSC register were economically inactive, retired or still seeking employment. In the 2018 CCPS Benchmarking Report, 88% of responding organisations (24 in total) undertook exit interviews and the four most commonly cited reasons for staff leaving were career progression, pay, personal reasons and getting a new job¹⁰⁶.

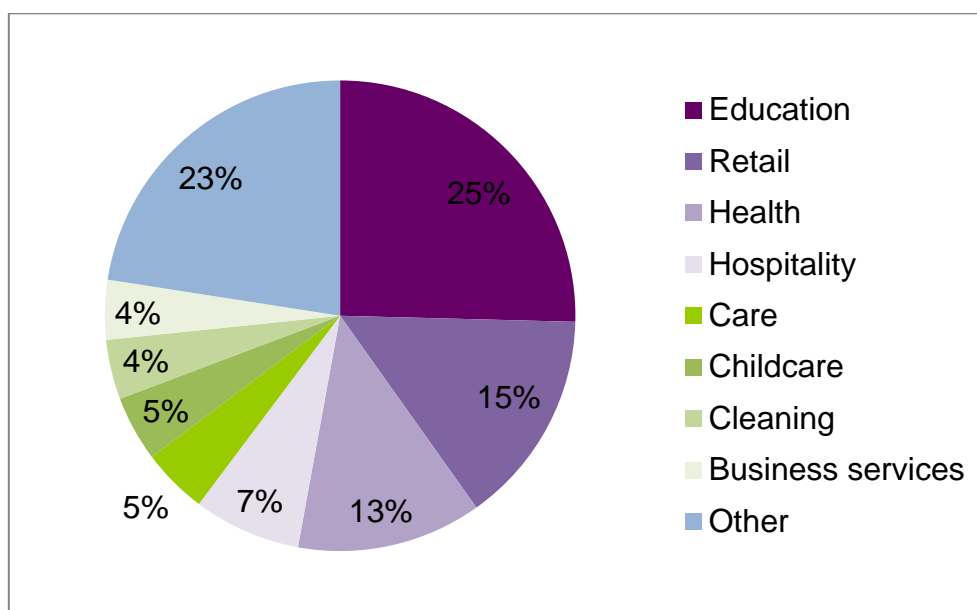
3.26 The evidence from the SSSC analysis¹⁰⁷ shows that people who leave the SSSC register and take up a job in a different sector most commonly move into education, retail or the health sector. These three account for over half of SSSC register leavers who have moved in to employment, as shown at Figure 3.2.

¹⁰⁵ The SSSC Register was set up under the Regulation of Care (Scotland) Act 2001 to regulate social service workers and to promote their education and training. Registration is a major part of the drive for higher standards in the social service sector and is bringing the social service workforce in line with other professional colleagues. Registration of social service workers has an important role in improving safeguards for people using services and increasing public confidence in the social service workforce.

¹⁰⁶ 2018 Benchmarking Report for HR Voluntary Sector Network and CCPS – CCPS (May 2019) <http://www.ccpsscotland.org/resources/2018-benchmarking-report-hr-voluntary-sector-forum-executive-summary-2019/>

¹⁰⁷ Survey of leavers from the SSSC register – SSSC (December 2018)

Figure 3.2: Destinations of SSSC register leavers by sector



Source: SSSC workforce movement report (May 2019)¹⁰⁸

3.27 In the SSSC survey, around 5% of register leavers who had moved into employment in another sector stated that they have moved into jobs in childcare. They did not provide more specific detail.

Anticipated requirements for the social care sector

3.28 Skills Development Scotland (SDS) commissioned Oxford Economics to prepare employment forecasts for key sectors in the Scottish economy. The forecasts give the anticipated number of jobs by sector over the period to 2029, using 2019 as the baseline year. It should be noted that the Oxford Economics definition of social care is based on Standard Industrial Classification codes, and therefore differs to SSSC's social service sector definition. The value of this data is therefore limited but it does help to illustrate where social services fits in the wider Scottish economy.

3.29 The forecasts suggest that the social care sector (which includes child day-care activities) is expected to grow by 5%, or 8,000 jobs, between 2019 and 2029¹⁰⁹. The forecasts include both expansion demand (demand for jobs due to a growth in the sector) and replacement demand (demand for jobs due to the existing workforce leaving/retiring). They suggest that by 2029 approximately 42,500 workers will be required to replace those leaving the existing workforce. They also suggest that an additional 8,000 workers will be required due to expansion of the workforce. In total

¹⁰⁸ Using SSSC registration data to examine workforce movements – SSSC (May 2019) <https://www.sssc.uk.com/knowledgebase/article/KA-02680/en-us>

¹⁰⁹ Oxford Economics, Skills Development Scotland (2019)

this indicates that the sector will have to recruit approximately 5,000 people each year to 2029.

3.30 The Oxford Economics projections indicate that the child daycare activities category¹¹⁰ (a sub-set of social care) is expected to grow steeply by 11,200 jobs from 2019 to 2029, a 37% growth. Given the expansion of ELC by 2020, this is likely to be particularly steep at the start of the period to 2020/21. These projections appear to indicate that although ELC staff number will rise, other parts of the sector will see a decline of 3,200 employees to 2029 which seems unlikely. It may reflect the specific methodology used by Oxford Economics which we do not have access to.

3.31 Table 3.3 shows the Oxford Economic projections for some key sectors that social care compete with for staff. It sets out Tourism as a separate sector, as well as it being included in Accommodation and food services. The data demonstrates the expectation that there will be growth across all of these sectors so employers across the economy will be competing for more staff.

Table 3.3 Estimated employment growth by sector (2019-2029)

Sector	Job growth	% change
Administrative and support service	32,900	16.2
Financial and business services	21,000	8.7
Tourism	13,300	6.5
Arts, entertainment and recreation	10,000	12.5
Accommodation and food service	9,400	4.8
Social care	8,000	4.8
Wholesale and retail trade	8,000	2.1
Education	4,700	2.2
Information and communication	2,200	2.7

Source: Oxford Economics, Skills Development Scotland

3.32 Some data sources may be able provide relevant data which can further inform workforce planning. For example, Skills Development Scotland can access Burning Glass¹¹¹ data subject to request. Burning Glass provides real time, custom job market analysis for example of vacancies within sectors based on recruitment information from multiple sources e.g. job advertisements in a range of media. Whilst Burning Glass was not accessed for this report, it could be a useful source of information for workforce planning

¹¹⁰ Please note this includes the following SIC codes: 85.1 Pre-primary education, 88.91 Child day-care activities.

¹¹¹ Burning Glass Technologies <https://www.burning-glass.com/>

Sectors competing with social care

3.33 Location Quotients (LQs) measure the concentration of employment in a particular sector in a particular geography (such as a local authority area) compared to the national average¹¹². An LQ is a simple ratio that is traditionally used to compare an industry's share of regional employment, although it can also be used for other economic measures (such as value add, imports or exports). An LQ can be more revealing than simply considering job numbers or job growth in an industry sector, as it can indicate the size of an industry sector (such as social care) in an area relative to the national average.

3.34 When measuring the LQ of social care workers in Glasgow for example, we are considering the share of all jobs in Glasgow that are social care jobs, **compared to the same figure for Scotland**. An LQ of greater than 1 indicates a greater degree of concentration in the social care sector in that particular area compared to the national workforce. The higher the score, the greater the relative concentration. Similarly, an LQ of less than 1 indicates a lower degree of concentration, or under-representation, when compared to nationally.

3.35 The local authorities in Scotland with the *largest* and *smallest* concentrations of social care workers, when compared to the Scottish average, are shown in Table 3.4.

Table 3.4: Largest and smallest concentration of social care workers (2017)

Largest concentration of social care workers		Smallest concentration of social care workers	
Local authority	LQ	Local authority	LQ
East Dunbartonshire	1.75	Aberdeen City	0.59
East Renfrewshire	1.74	City of Edinburgh	0.76
Clackmannanshire	1.73	Glasgow City	0.79
East Ayrshire	1.71	West Lothian	0.80
North Ayrshire	1.67	Stirling	0.86

Source: SSSC Workforce data (2017) and Business Register and Employment Survey (2017)

3.36 There is a clear trend here. Typically, the larger cities and urban areas are under-represented in the relative concentration of their social care workforce compared to the Scottish social care workforce average, while more rural areas are over-represented. This is unsurprising given that large urban areas and cities are more compact and likely to benefit from economies of scale in their workforce i.e.

¹¹² Understanding Location Quotient - <https://www.economicmodeling.com/2011/10/14/understanding-location-quotient-2/>

fewer social care workers per population due to a smaller number of sites/settings and a more concentrated geography.

3.37 Evidence from previous research, stakeholder consultations and the survey results shows that social care tends to compete most closely with the health, retail, education, hotels and hospitality and cleaning sectors when recruiting and retaining workers¹¹³. The following analysis shows the highest LQs of competing sectors, for each of the local authorities with the smallest concentration of social care workers.

Table 3.5: Competing sectors in areas of low social care worker concentration (2017)

Local authority	Competing sectors with highest LQs
Aberdeen City	Human health (1.23) Food and drink (1.05)
City of Edinburgh	Food and drink (1.30) Education (1.26) Accommodation (1.10)
Glasgow City	Office admin/support (1.38) Human health (1.35)
West Lothian	Retail (1.21)
Stirling	Accommodation (1.67) Education (1.25) Food and drink (1.15)

Source: Business Register and Employment Survey (2017)

3.38 Tables 3.4 and 3.5 reflect the local economies and illustrate the importance of different sectors to different areas. The analysis suggests for example, that the social care sectors in Edinburgh and Stirling may be competing with the strong tourism (accommodation/food and drink) sectors. However, in Glasgow, the business services (office work) sector is more prevalent and therefore might compete with social care, whilst in West Lothian, the retail sector is stronger – probably due to a high proportion of retail relative to other town centres, reflecting the presence of The Centre and Livingston Designer Outlet in Livingston.

3.39 When looking at other local authorities, there is a clear trend of concentrated employment in the tourism industry in more rural areas. This is shown by very high

¹¹³ Chapter 6 considers the dynamics of the wider labour market in Scotland. Figure 6.3 outlines the industry sectors identified by social care employers as being the biggest source of competition for employers in Scotland: health (73%); retail(22%); education - other (18%); education – classroom assistants (17%); hotels and hospitality (17%); cleaning (16%)

LQs for the accommodation sectors in Argyll and Bute (3.15), South Ayrshire (2.86), Highland (2.77) and Perth and Kinross (2.72). Tourism may therefore be competing more prominently with social care jobs in more rural parts of Scotland. Elsewhere, business services jobs are particularly prevalent in North Ayrshire (2.67), East Ayrshire (2.63) and Inverclyde (2.16), which are areas closer to larger urban hubs.

Provision of social care education and training

3.40 There are a number of education and training routes for those looking to move into, or already working in, the social care sector in Scotland. Some of these are set out at Table 3.6, with numbers for the most recent year. These include nearly 11,000 Scottish Vocational Qualifications (SVQs) registrations, the majority of which were for Social Services and Healthcare SVQs at SCQF Levels 6 and 7, c.4,000 Modern and Foundation Apprenticeship starts relating to social service sector frameworks, the majority of which were by female apprentices, and over 13,000 enrolments on relevant courses at FE Colleges.

Table 3.6: Social care education and training provision in Scotland

Education/training	Date	Number	Other information
SVQ provision	2017/18	10,775 registrations	7,996 certifications
Modern Apprenticeships	2018/19	3,318 starts	90% female 10% male 73% achievements
Foundation Apprenticeships	2018/20 ¹¹⁴	684 starts	90% female 10% male
College provision	2016/17	13,219 enrolments	Most enrolments for national awards e.g. SVQs, NCs, HNCs and NQs

Sources: SQA Annual Update Report; Skills Development Scotland; Exploring education and training to improve our understanding of social service career pathways (SSSC, 2019)

¹¹⁴ NB The Foundation Apprenticeship data covers 2 years.

4 Perceptions of Working in Social Care

Key Findings

- The desire to make a difference to people's lives is the main reason why people join the social care workforce. However, people in rural areas appear to be more likely to be influenced by the availability of job opportunities in their local area.
- There are key differences between adult and children's services¹¹⁵ - workers in children's services are more strongly motivated to make a difference to people's lives when choosing this career than adult services workers, and the job flexibility and availability of job roles in the local area were also stronger motivators, particularly for staff with no previous work experience.
- The working environment also has an important role to play in motivating some people to join the sector. The fact that social care is a practical job with variety rather than being routine or desk-based is perceived as being attractive to potential recruits.
- People working in adult services are more likely to report being motivated by doing a job that others may not be able or willing to do, perhaps reflecting the perception that some of the tasks associated with working with older people may discourage people from considering a career in this sub-sector.
- There are key variations between different service providers, particularly in terms of access to career, progression and training opportunities, and flexibility.
- The main reason why people leave the workforce is to enhance their income. This supports previous research showing that levels of pay in the social care sector is the main reason why employers can face challenges in recruiting and retaining key workers. This is particularly significant in the independent and third sectors where the differentials in pay and conditions suggests that staff appear to move from independent and third sector to the public sector.
- People are also likely to leave the social care sector where there are opportunities to work in what they consider to be less demanding jobs for the same or a better rate of pay. This is not necessarily for career progression.
- Most employees think that the employment opportunities in the sector are good, and they tend to rate these more highly than career progression opportunities. This suggests there is work to be done in communicating better career progression pathways so that the sector is seen as not just one that provides employment, but as one that supports staff to develop and progress.
- In remote and rural areas, there are implications for social care workers in terms of travel to work and service delivery. Their working environment, and choice of jobs, can therefore be quite different to their counterparts in more urban areas, and employees in more rural areas are more likely to report that opportunities to develop their career are very or quite poor.

Introduction

- 4.1 The social care workforce sits within the wider social service sector, including all registered care services and 'social work services' and

local authority social work services. The social services workforce includes both children's services (i.e. adoption services, fostering services, residential childcare and fieldwork services) and adult services (i.e. adult day care, adult placement services, care homes, housing support/care at home for adults, nurse agencies, offender accommodation services, and fieldwork services).

- 4.2 This chapter considers the drivers and influences in the social care¹¹⁶ workforce that impact on people's decision to undertake a career in social care, and encourage them to either stay in or leave the sector. It is important to understand these factors in order to inform workforce planning and enhance recruitment and retention for example, through a major national recruitment campaign which is currently being planned. The findings in this section are largely based on the survey of social care employees and employers, with additional input from stakeholders.
- 4.3 The evidence set out in this chapter (and also in chapters 5 and 6), is drawn largely from the employer survey responses and consultations. Public sector employers will undoubtedly face challenges but they find it easier than equivalent providers in the third and independent sectors due to the perception that the public sector has significant advantages such as the conditions that they can offer.

Choosing a career in social care

- 4.4 This section examines what influences and motivates people to join the social care workforce. The following tables are – in common with much of the evidence in section 5 and 6 – taken from employer and employee surveys undertaken as part of this research. The survey reported that the most significant factors are making a difference to people's lives, and a passion for the profession, as illustrated in Figure 4.1. This demonstrates the importance to people in the workforce of having a sense that they are undertaking a worthwhile job and is a

¹¹⁵ Table A.2 in Appendix A provides clarification between children's and adult social care services

¹¹⁶ The social care workforce sits within the wider 'social service sector'. The social service sector refers to two sub-groups: 'care services' which is all registered care services and 'social work services' - that is, all local authority social work services. The social care workforce includes both children's services (i.e. adoption services, fostering services, residential childcare and fieldwork services) and adult services (i.e. adult day care, adult placement services, care homes, housing support/care at home for adults, nurse agencies, offender accommodation services, and fieldwork services).

useful message to communicate to potential recruits and also, to encourage people to remain in the workforce and progress their career. This point is reinforced by some of the comments made by employees around what could be done to encourage people to join the social care workforce, including the following:

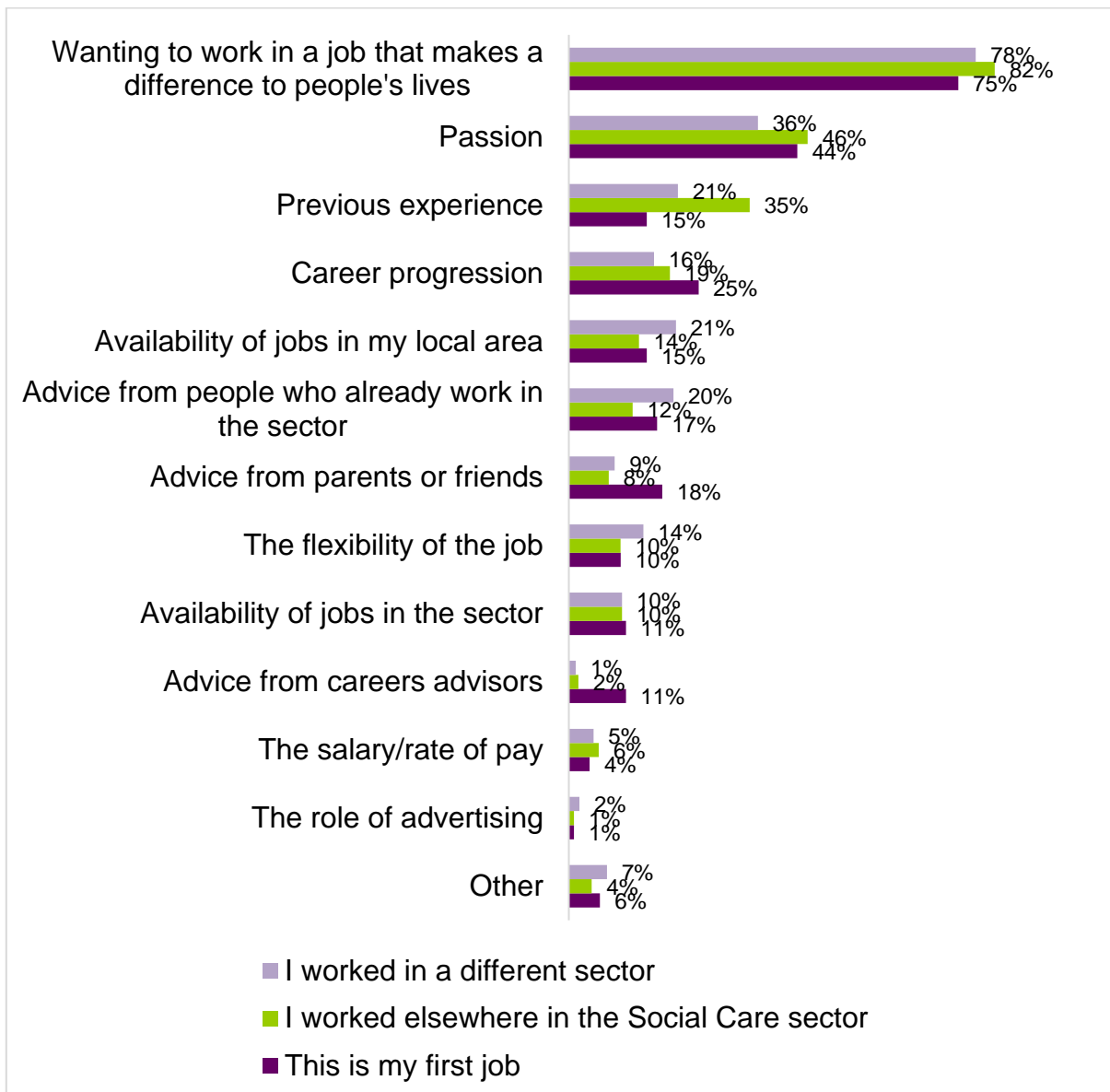
“Better promotion of the benefits - particularly the difference you can make to the quality of someone's life” (public sector, urban/rural housing support/ care at home employee)

“Ensure that there is clear advertising that this is a career that is secure, varied and rewarding” (third sector, urban/rural housing support/ care at home employee)

“[Promotion of] the difference that you can make to an individual/family life” (public sector, urban adoption and fostering services employee)

- 4.5 Survey respondents who had joined the adult service social care workforce from another sector (and those with no previous work experience) were more likely than those with previous experience to be attracted by the flexibility of the job and by the availability of jobs in their local area. As Figure 4.1 shows, people with no previous work experience were most likely to be attracted by the career progression opportunities in adult social care and least motivated by financial rewards.

Figure 4.1: Factors influencing the decision to choose a social care career in adult services, by job type

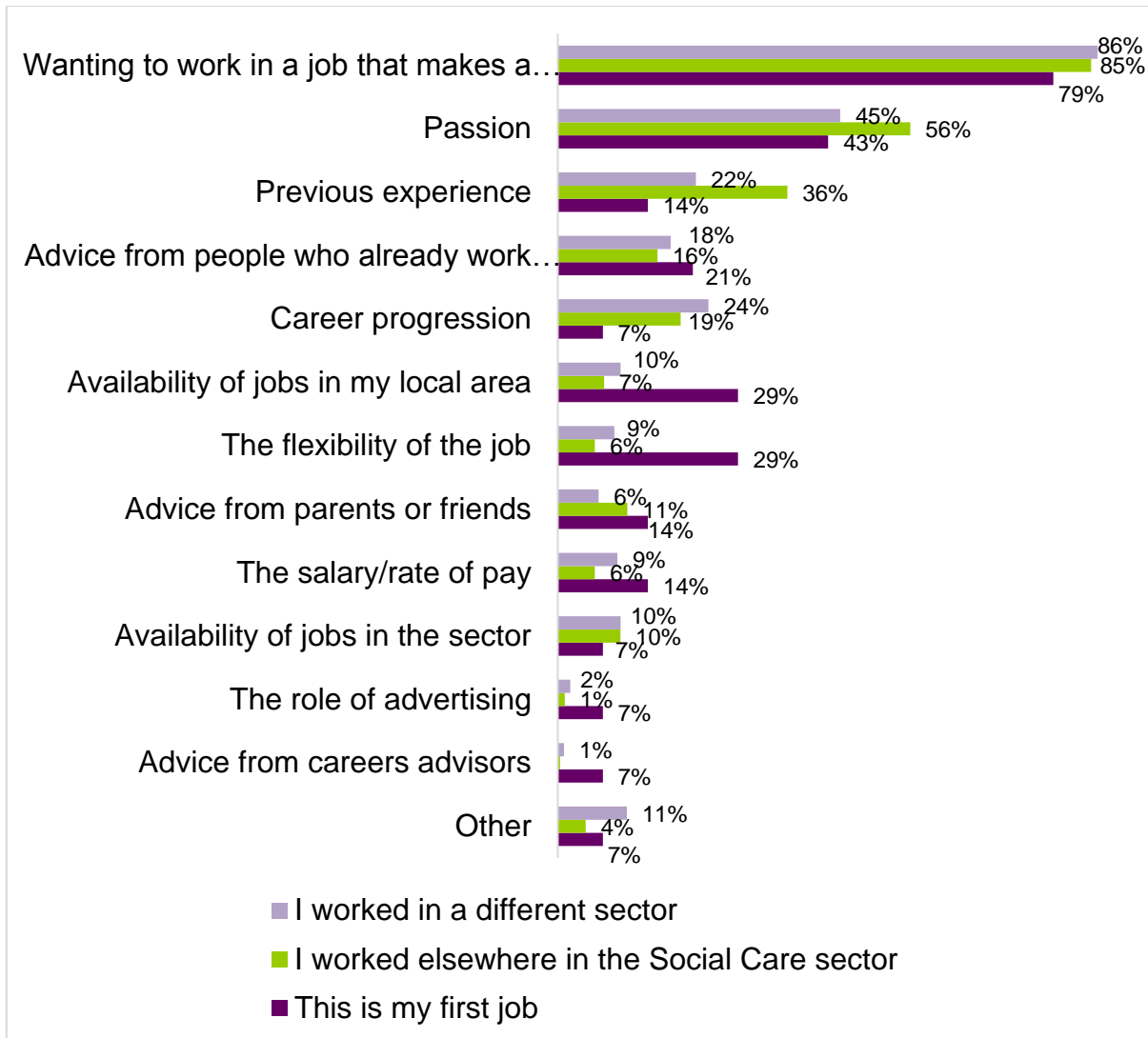


Source: *ekosgen employee survey, n=2,804*

4.6 When comparing these findings to those illustrated in Figure 4.2, it appears that the desire to make a difference to people’s lives is a slightly stronger motivating factor when choosing a career in children’s social care services than in adult services. The flexibility of the job, and the availability of jobs in the local area were slightly greater motivating factors to those choosing a career in adult’s social care services. However people with no previous work experience were far more likely to choose a social care career in children’s services based on the job flexibility and availability of jobs in their local area.

4.7 Interestingly, the financial rewards are also perceived to be more attractive when people are motivated to join the social care workforce in a children’s services role although this is not significant.

Figure 4.2: Factors influencing the decision to choose a social care career in children’s services, by job type

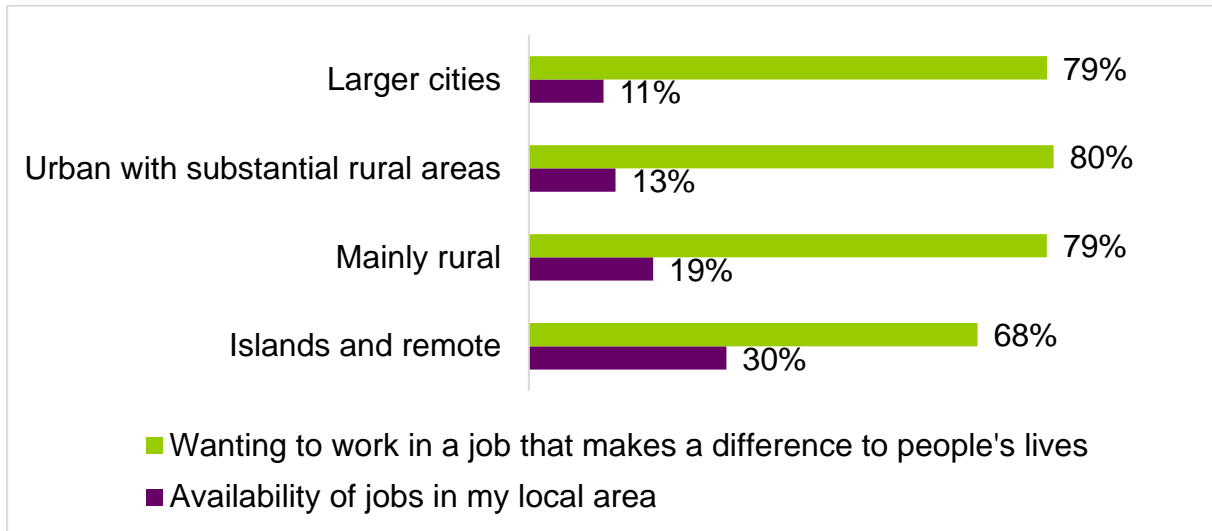


Source: ekosgen employee survey, n=489

4.8 The type of area that social care employees live in has a significant impact on their reasons for joining the workforce. As Figure 4.3 shows, workers in all types of areas are mainly motivated by doing a job that makes a difference to people’s lives. However, in rural areas, people are also more likely to be influenced by the availability of employment opportunities in their local area, probably reflecting that in rural parts of

Scotland, job opportunities may be more limited than in predominantly urban areas¹¹⁷.

Figure 4.3: Influencing factors for overall social care workforce by area type



Source: *ekosgen employee survey, n=4,406*

- 4.9 The survey looked at the main drivers that encourage people to join the social care workforce. As before, the majority of employees are motivated by a sense of job satisfaction and by a desire to make a difference to people's lives. Added to this, more than two in five employees (41%) said that they identify with their service users as shown in Figure 4.4. The figure shows interesting differences between the views of employees and employers.
- 4.10 The working environment also has an important role to play in motivating some people to join the sector. Just under a fifth of employees (18%) identified the fact that it is a practical job rather than being desk-based, and over a quarter (27%) were motivated by the job variety.
- 4.11 Reflecting the anecdotal but persistent perception that there is a lack of career progression opportunities in social care and that it provides 'just a job' rather than a 'career', only 14% said that career and progression opportunities were motivating factors in joining the workforce. We must of course recognise that some workers may not aspire to or be interested in progressing in their career for a variety of reasons.

¹¹⁷ Larger cities and urban areas with substantial rural areas.

4.12 However this perception varies by area, with people living in larger cities being almost twice as likely as those in islands and remote areas to be motivated by career and progression opportunities (15% compared to 8%). Whilst we cannot be sure of the reasons, it may be that in urban areas there are more opportunities to progress in the sector either within their current employer, which may be larger than in rural areas, or by moving to a new employer or to a job in a different sector.

4.13 There are some differences between employee responses in the public, independent and third sectors. Desire to make a difference was slightly less of a motivator for independent and public sector employees at 56% and 57% compared to 63% for third sector employees. Third sector employees are more likely to be motivated because they identify with service users but less likely to be motivated by training opportunities than their counterparts in the independent and public sectors. Perhaps not surprisingly public sector employees are more likely to report that a perception of job security motivated them.

Figure 4.4: Motivations for joining the social care workforce, employee and employer perceptions



Source: ekosgen surveys, employee n=3,988, employer n=614

- 4.14 Generally employers are more likely to report a broader range of motivating factors than employees. Interestingly, at 47%, employers were more likely than staff to report training opportunities as a motivating factor for people choosing to work in social care. This may point to a lack of awareness amongst employees of the opportunities, or an over-optimistic view on the part of employers. Either way, there is clearly a mismatch which is an important consideration in future workforce planning and development. This suggests that employers should be doing more to help potential and current workers to learn about social care roles, for example, highlighting the value of training, or the potential for job variety within the sector.
- 4.15 The survey's findings suggests that employers believe that the opportunity to work part-time is a key motivation for joining the workforce. The SSSC workforce data indicates that just under half (49%) of the workforce are classed as part-time employees, and the median weekly hours for staff is 31.5¹¹⁸. A key overriding is that work patterns are driven by a need to deliver personalised and high-quality services but need to be balanced alongside the needs of employers and their workforce. Future studies could explore the implications of these competing priorities and the implications for service delivery and recruitment.
- 4.16 Eleven per cent of the social care workforce work part are on zero hours contracts¹¹⁹. However, there is a concern that whilst zero hours contracts can offer flexibility, they can be driven by the preference of employers rather than what would best suit employees. There is widespread recognition that zero hour contracts can make financial planning and home life more challenging for employees¹²⁰. The flexible working arrangements - including the availability of shift patterns and the ability to work part-time - are greater motivating factors for people who had joined the social care workforce from a different sector. This is an important message for future national recruitment campaigns and workforce planning.

¹¹⁸ Scottish Social Service Sector: Report on 2017 Workforce Data – SSSC (August 2018) <https://data.sssc.uk.com/images/WDR/WDR2017.pdf>

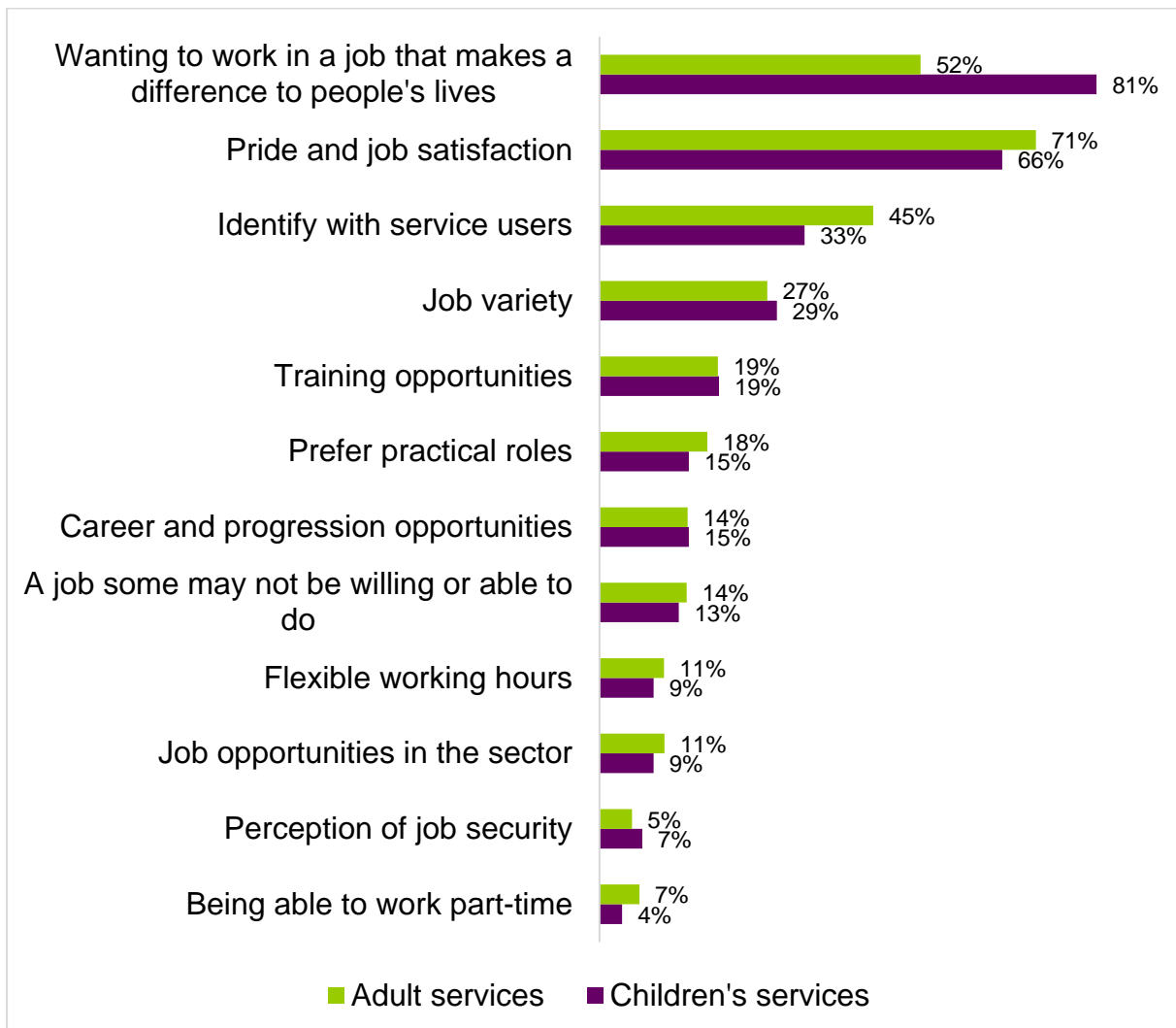
¹¹⁹ Scottish Social Service Sector: Report on 2017 Workforce Data – SSSC (August 2018) <https://data.sssc.uk.com/images/WDR/WDR2017.pdf>

¹²⁰ Fair Work in Scotland's Social Care Sector 2019 – Fair Work Convention (February 2019) <https://www.fairworkconvention.scot/our-report-on-fair-work-in-social-care/>

- 4.17 Figure 4.5 shows that the extent of the range of types of employee motivations can vary widely between children's and adult services. Whilst more than four in five people (81%) working in children's services report that the desire to make a difference to people's lives is the most significant motivation for joining the workforce, the corresponding figure for staff in adult services is 52%. However, Figure 4.1 looks at this point in a slightly different way, asking respondents what influenced them. It shows that wanting to make a difference was more influential, as reported by employees in adult social care. In both cases, respondents were asked to select the top three reasons and the options provided were slightly different, reflecting the difference between influence (which includes advice from influencers such as parents and careers advisers, and job advertisements) and motivation which is more about job content and context.
- 4.18 Figure 4.5 also shows a marked difference between staff working in adult and children's social care services when it comes to identifying with service users (45% compared to 33%). People working in adult services are also more likely to report being motivated by doing a job that others may not be able or willing to do.
- 4.19 The findings are similar to the personal assistant (PA) research, where the most common reasons for respondents becoming a PA were pride and satisfaction in the job and wanting to make a difference to someone's life (both reported by 67% of PAs). The PA workforce is a key part of the social care sector, but is quite distinct from it in some ways. To reflect this, a separate survey was undertaken with PAs and their employers. Twenty PAs completed the dedicated PA survey while a further 56 completed the main survey. Where possible we have merged the results and covered them separately within this report where relevant.¹²¹ Although these are quite small samples, they still present interesting findings to build on.
- 4.20 The job variety and flexible working hours were also motivators for PAs, while job security, employment opportunities and progression opportunities were not motivators for PAs, similar to the wider social care workforce.

¹²¹ As these two surveys were different, not all the findings could be combined.

Figure 4.5: Motivations for joining the social care workforce, by children's and adult services



Source: *ekosgen employee survey*, Adult services n=2,796, Children's services n=488¹²²

Workforce retention

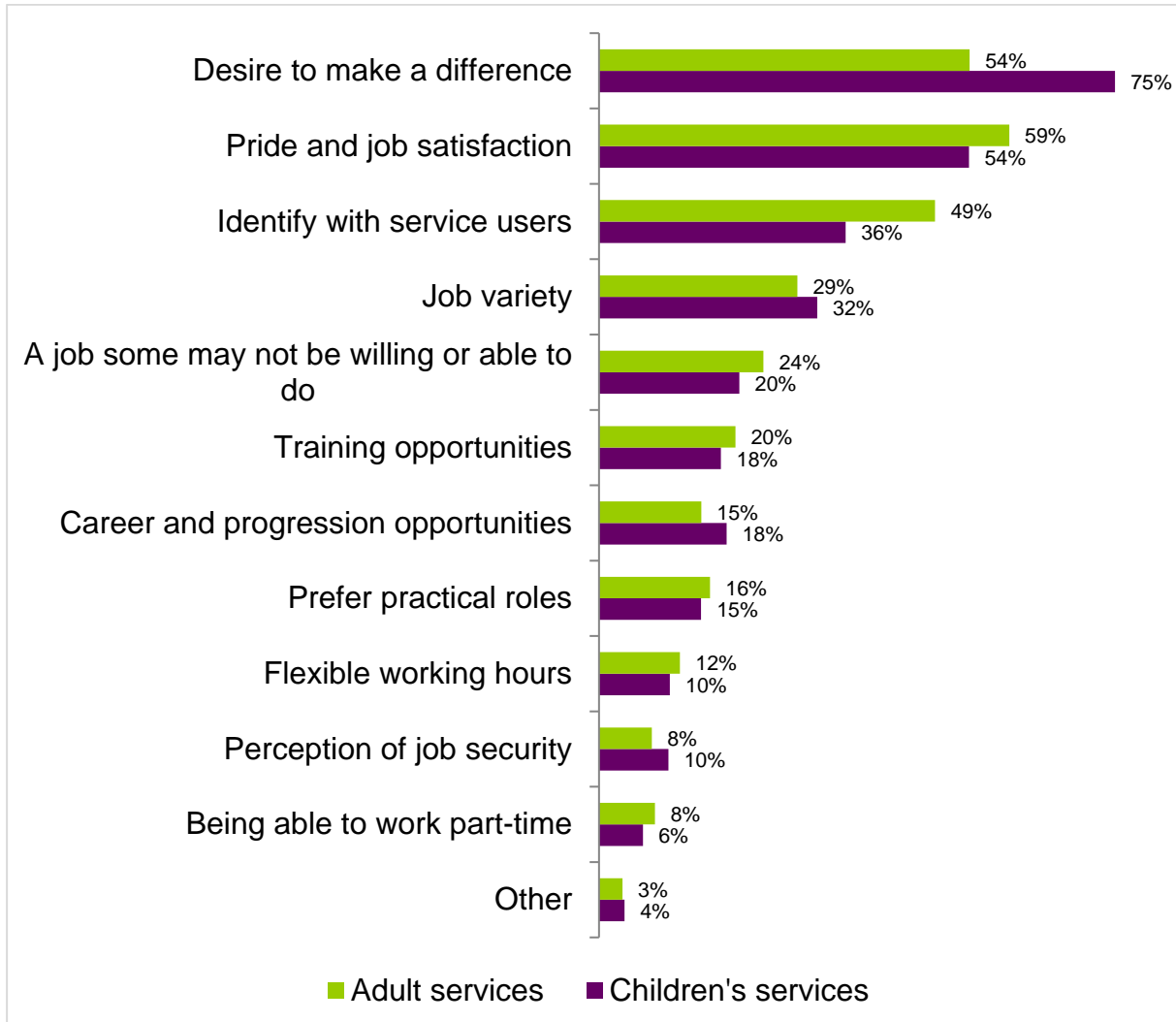
4.21 The research explored the reasons why, once people enter the workforce, they choose to remain. As Figure 4.6 illustrates, these factors largely mirror the motivations for joining in the first place. Having said that, people are more likely to identify with and care for their service users once they are actually working with them.

4.22 Just over half (54%) of people working in adult services report that the desire to make a difference to people's lives motivates staff to stay in

¹²² See Table A.2 in Appendix A for definitions of adult and children's services

the workforce. The corresponding proportion for people working in children’s services is 75%, which is a substantial difference.

Figure 4.6: Factors that encourage people to remain in the social care workforce, by adult and children’s services



Source: *ekosgen employee survey, Adult services n=2,788, Children’s services n=487*¹²³

4.23 People working in adult services (24%) were slightly more likely than those working in children’s services (20%) to identify that the enjoyment of doing a job that other people may not be willing or able to do is a reason why people stay in the workforce. These proportions are slightly higher than the proportion of all social care employees (18%) reporting this reason as a motivation for people to join the workforce.

¹²³ See Table A.2 in Appendix A for definitions of adult and children’s services

- 4.24 It is worth noting that people working in adult services are more likely to perceive that their job may be less attractive to other people (doing a job that others may not be able or willing to do) than people working in children's services. Careful consideration of this point could help to inform future recruitment and retention that successfully reaches in to a wider pool of people.
- 4.25 There are other minor variations between services. People working in adult services (15%) were less likely to rate career and progression opportunities as drivers to stay in the workforce than those working in children's services (18%), which may reflect the fact that people are less aware of career and progression opportunities.
- 4.26 Many social care workers are required to have a suitable qualification, or be working towards one. Evidence from stakeholder consultations undertaken as part of the research points to a degree of concern that some experienced workers who do not currently have a qualification, particularly those near retirement age, might choose to leave the sector rather than undertake a qualification. Whilst the drive towards achieving and recognising formal education and training is seen as a positive one, Scottish Care have reported that many employers would value more flexibility and scope to acknowledge and develop skills and attributes in other ways¹²⁴. They suggest that a review of the SVQ structure could be considered, in order that its strengths can be retained and built upon whilst ensuring learning opportunities will prepare people for the demanding, varied and complex job of providing care.
- 4.27 Whilst career progression opportunities are not seen as a significant driver for staff to remain working in social care, public sector employees rate career progression more highly as a motivator which may reflect the fact that public sector bodies are generally much larger than independent and third sector providers and so there are more opportunities for progression and more varied job roles within the public sector. This may, in turn, attract those interested in greater career opportunities. As illustrated in the SSSC's first analysis of workforce movement, there is evidence of career progression in the

¹²⁴ The 4 Rs: The open doors of recruitment and retention in social care – Scottish Care

sector (for instance from care home supervisors to managers, or ELC support workers to practitioners)¹²⁵.

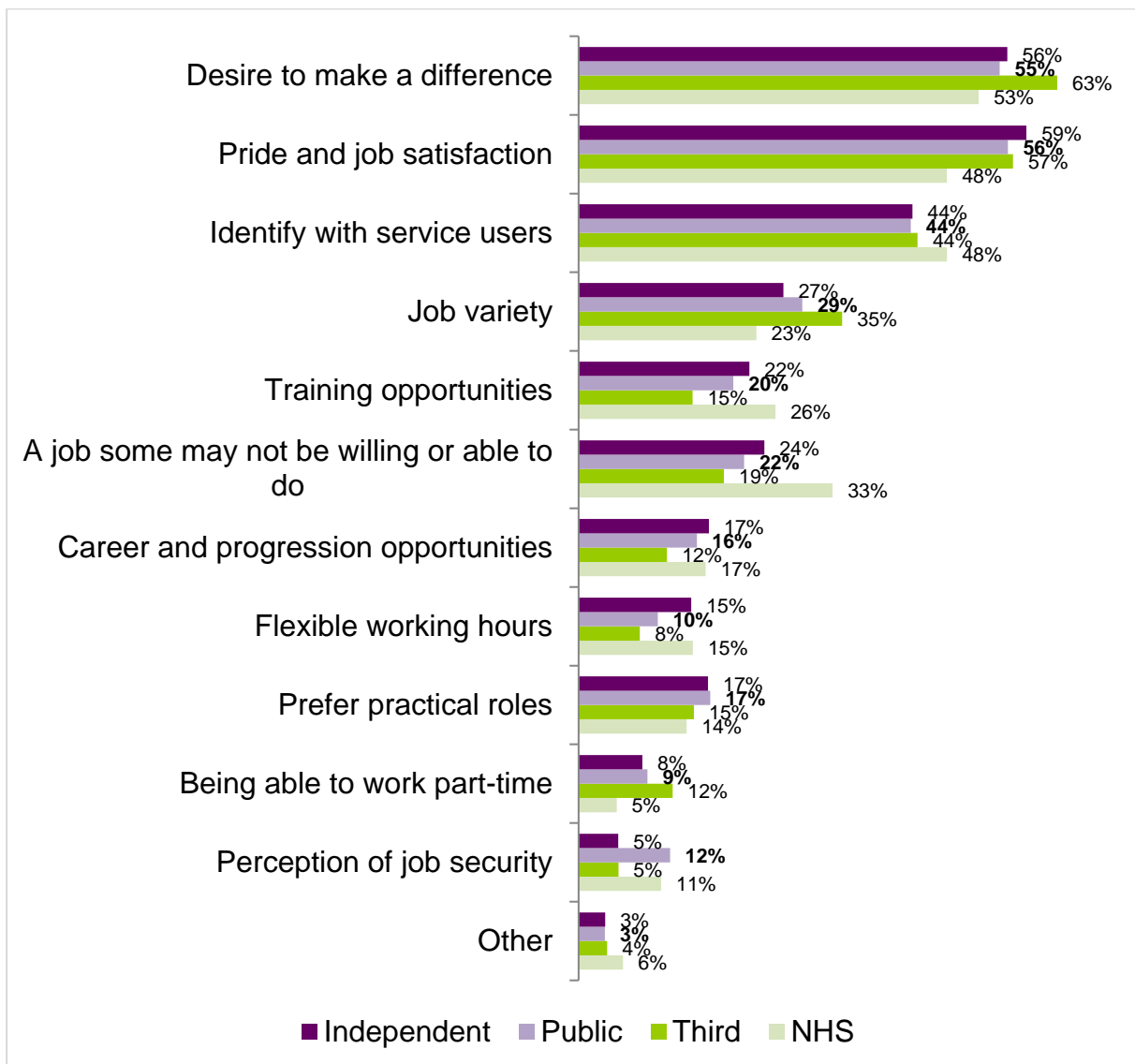
- 4.28 Figure 4.7 illustrates that 17% of both independent and NHS employees (and 16% of public sector employees) identified career progression as a motivator to remain in social care, compared to 12% of third sector employees. This perhaps reflects that progression opportunities are, or are perceived to be, more readily available, pathways clearer and there is a wider variety of roles in these sectors. The point about lack of career progression is exacerbated by the fact that job security is seen to be less of a motivator amongst independent sector employees and third sector employees (both 5%) compared to public sector employees (12%). The recent Benchmarking Survey for the CCPS identified that third sector providers face issues around loss of contracts, for example through services being retendered and budget cuts. Illustrating the challenges, four providers reported that they had handed back contracts to local authorities as they couldn't deliver them¹²⁶. Scottish Care research¹²⁷ found that 86% of services are concerned about their sustainability, with nearly a quarter saying that they are extremely concerned and the challenge of recruiting and retaining staff is the main reason why services feel they may not be able to sustain care delivery. Naturally this lack of confidence amongst employers can give employees and potential employees a sense that jobs in the third and independent sectors are less secure.

¹²⁵ Using SSSC registration data to examine workforce movements – SSSC (May 2019) <https://www.sssc.uk.com/knowledgebase/article/KA-02680/en-us>

¹²⁶ Benchmarking Survey: HR Forum for Voluntary Sector – CCPS (April 2019) <http://www.ccp Scotl and.org/resources/2018-benchmarking-report-hr-voluntary-sector-forum-executive-summary-2019/>

¹²⁷ Care at Home Contracts and Sustainability Report – Scottish Care (2018) <http://www.scottishcare.org/wp-content/uploads/2018/01/SC-Care-at-Home-Sustainability-report-2017.pdf>

Figure 4.7: Motives for staying in social care, by employer type



Source: *ekosgen employee survey*. Independent n=1,637, Public n=1,482, Third n=535, NHS n=120¹²⁸

Reasons for leaving social care

4.29 Formal registration (with the SSSC) and qualifications are now expected within the social care workforce, and roles and tasks are changing and in many cases, becoming more complex. Arguably, levels of pay and rewards have not changed sufficiently to reflect the increasing demands of providing care although the Real Living Wage

¹²⁸ Further clarification is provided in Appendix A. The *ekosgen* survey asked employers and employees to identify as either ‘public’, ‘private’ or ‘voluntary’ sector. However, these are referred to throughout our report as ‘public’, ‘independent’ and ‘third’ sector in line with the definitions used in Part Two of the National Health and Social Care Workforce Plan

has undoubtedly had a positive impact on pay in adult social care¹²⁹. The implementation of the Real Living Wage has, anecdotally, put pressure on some providers. For some employees, the issue of low rates of pay has been compounded by the fact that travel time to see service users in their homes is not always paid.¹³⁰

4.30 Figure 4.8 sets out employee perspectives on the reasons why people leave the social care sector, as reported by all survey respondents. It shows that the main reason is to enhance their income, and this is particularly the case in the independent and third sectors. There is a need for a better understanding of the movement of workers between the independent, third and public sectors and the SSSC will be examining this as part of their next analysis of the Register. This evidence supports previous research that shows that levels of pay in the social care sector is the main reason why employers can face challenges in recruiting and retaining key workers.¹³¹ It can also work against developing a more diversified social care workforce. The following comment from an employer highlights this issue:

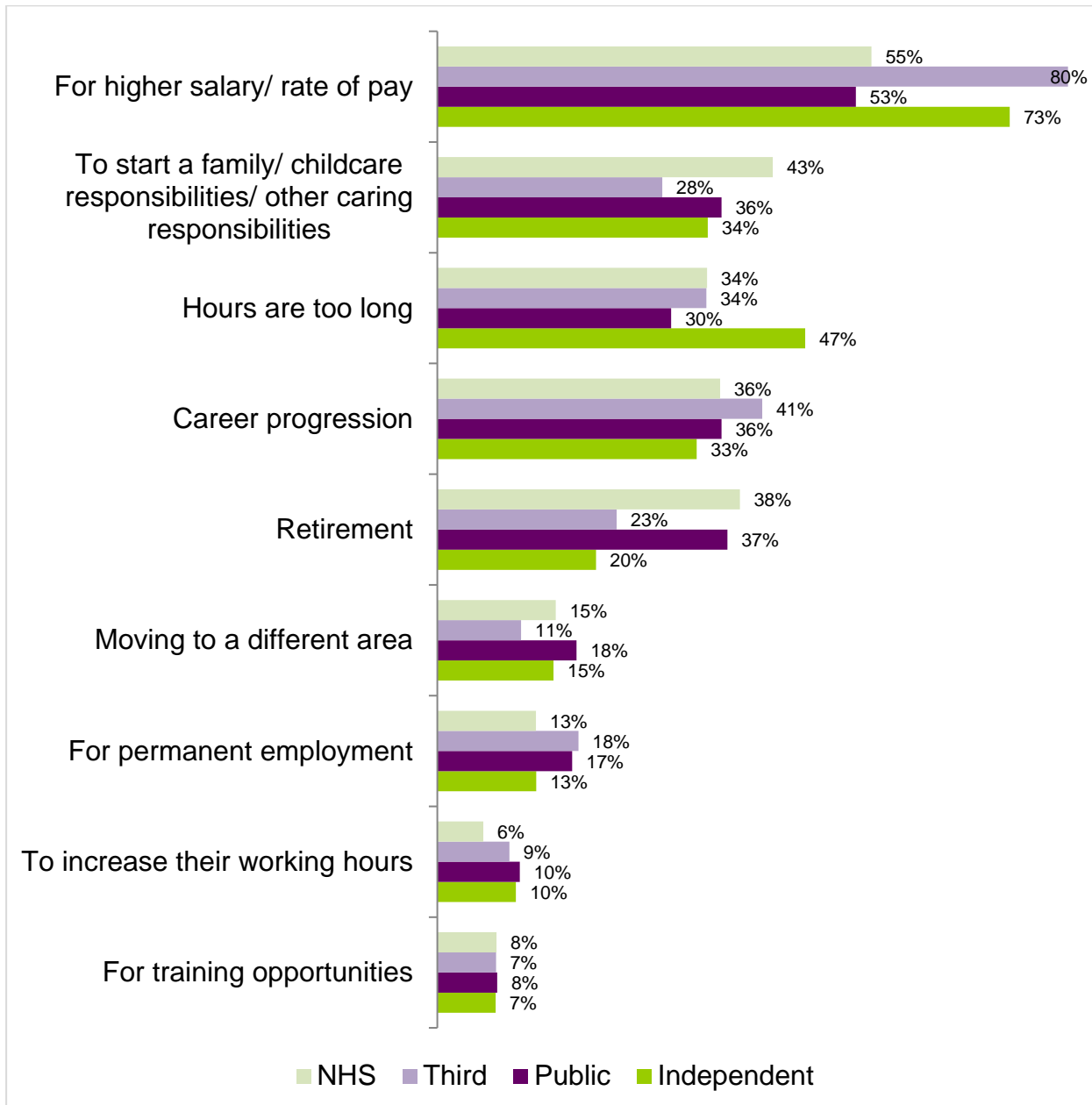
“We are losing staff all the time to go and work for the local authorities. The feedback we receive is that they would choose to work for the council over the private sector because of pay. The private sector just cannot compete” (independent sector, urban/rural child care agency employer)

¹²⁹ Fair Work in Scotland’s Social Care Sector 2019 – Fair Work Convention (2019) https://unison-scotland.org/library/PUBLICATION-Social-care-report-01-FINAL-VERSION-sent-to-APS_revised-on...-1.pdf

¹³⁰ Briefing for care and support providers: Holiday Pay and Overtime Sleepovers and National Minimum Wage – CCPS (March 2015) <http://www.ccpscotland.org/wp-content/uploads/2015/03/CCPSsleepoverbriefing.pdf>

¹³¹ Implementing the Scottish Living Wage in adult social care: An evaluation of the experiences of social care partners, and usefulness of Joint Guidance – CCPS and University of Strathclyde (November 2018) <http://www.ccpscotland.org/wp-content/uploads/2018/11/Univ-of-Strathclyde-Living-Wage-implementation-research-November-2018.pdf>

Figure 4.8: Reasons for leaving the social care workforce, by employer type



Source: *ekosgen employee survey, Independent n=1,637, Public n=1,475, Third n=527, NHS n=120*

4.31 Long working hours was a significant reason for leaving the workforce for those working in the independent sector. Care homes for adults workers (43%) and care at home/housing support workers (40%) were most likely to report that the long hours are likely to encourage people to leave the workforce. Employer’s perceptions were very different to employees, and employers were far less likely to report staff leaving their service due to long working hours. This suggests that a better understanding by employers, and change to working hours, could potentially significantly improve retention.

- 4.32 There are also concerns that some people might leave the social care sector where there are opportunities to work in what they consider to be less demanding jobs for the same or a better rate of pay. The following statement from an employer illustrates this point:

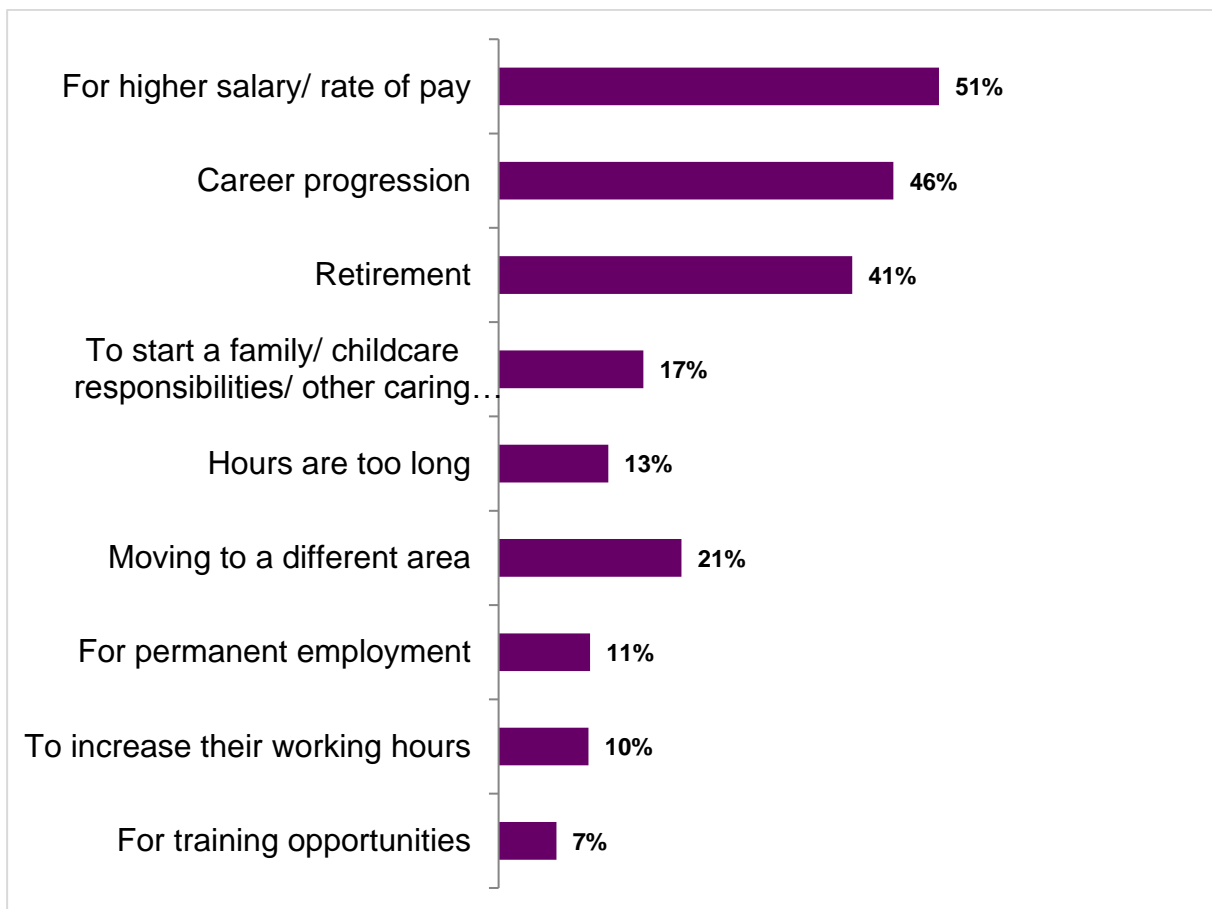
“Few people are drawn to work in this sector in this area - we are competing with employers who offer much better terms and conditions of employment with jobs that carry much less responsibility and much higher status” (independent sector, rural school care accommodation employer)

- 4.33 Reflecting the issues of unattractive terms and conditions, two thirds of all social care respondents identified pay levels as one of the main reasons why they leave the workforce. However as Figure 4.8 shows, there are substantial differences in responses by sector, which is a significant finding. Third sector and independent sector workers are much more likely to identify pay rates as a reason for leaving than workers in the public sector (80% compared to 53%). Research suggests that the introduction of the Real Living Wage has helped to improve the pay levels of workers in some roles and parts of the social care workforce and has had a positive impact on the income levels of some workers¹³². Other benefits included in public sector terms and conditions also contribute to a more attractive overall package. Further clarification about different types of Living Wage is outlined in Appendix D.
- 4.34 The survey asked employers to identify the three main reasons they believe make employees leave the social care workforce and the findings are set out at Figure 4.9. It shows that over half of employers in the survey believe that staff leave to move into jobs with higher rates of pay. As well as discouraging people from joining the social care workforce the perception of limited career progression opportunities can mean that employees are not incentivised to develop their skills as they do not see a clear progression pathway. Almost half (46%) of employers identified lack of career progression as a reason why people leave the social care workforce. Chapter 6 explores the reasons why staff who have ambitions to leave, want to leave.

¹³² Implementing the Scottish Living Wage in adult Social Care: An evaluation of the experiences of Social Care partners, and usefulness of Joint Guidance – CCPS (November 2018) <http://www.ccpscotland.org/wp-content/uploads/2018/11/Univ-of-Strathclyde-Living-Wage-implementation-research-November-2018.pdf>

4.35 Caring responsibilities is also an important reason with 17% of employers identifying that caring for children or other dependents is a factor in their decision. A 2015 study by the Scottish Government indicated that there are an estimated 759,000 carers aged 16+ in Scotland and a further 29,000 young carers¹³³. Recent research from Carers UK suggests that one in seven of the UK workforce care for a dependent, and that almost half a million people in the UK have left their job in the last two years to do so¹³⁴.

Figure 4.9: Main reasons why people leave the social care workforce, employer perspectives



Source: ekosgen employer survey, n=565

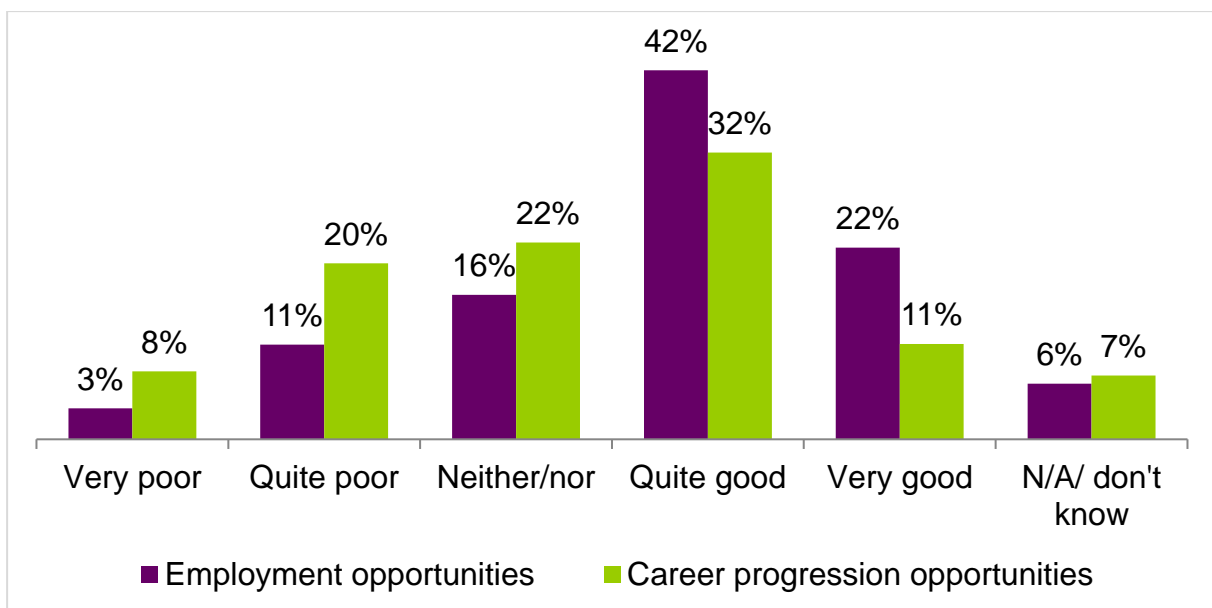
4.36 Part two of the National Health and Social Care Workforce Plan outlines the need to ensure that social care becomes a positive career

¹³³ Scotland's carers – Scottish Government (2015)
<https://www.gov.scot/publications/scotlands-carers/>

¹³⁴ Juggling Work and Unpaid Care: A growing issue – Carers UK (2019)
http://www.carersuk.org/images/News_and_campaigns/Juggling_work_and_unpaid_care_report_final_0119_WEB.pdf

of choice for people at all stages of life¹³⁵. However it recognises that improving career opportunities that acknowledge the variety of responsibilities and skills required in social care roles is a key challenge. As Figure 4.10 demonstrates, at 64%, most social care employees responding to the survey think that the employment opportunities in the sector are good, which is a very positive finding. It also shows that the employment opportunities in social care are rated more highly than career progression opportunities. This may reinforce the point that there is a need to better communicate career progression pathways so that the social care sector is seen as not just one that provides employment, but as one that supports staff to develop and progress. It could also be the case that some members of the workforce do not place a high premium on career progression. During recruitment, it might be useful to ensure that there is clarity about the job and progression opportunities available.

Figure 4.10: Local employment and career progression opportunities in social care



Source: *ekosgen employee survey, Employment opportunities n=3,668, Career progression opportunities n=3,784*

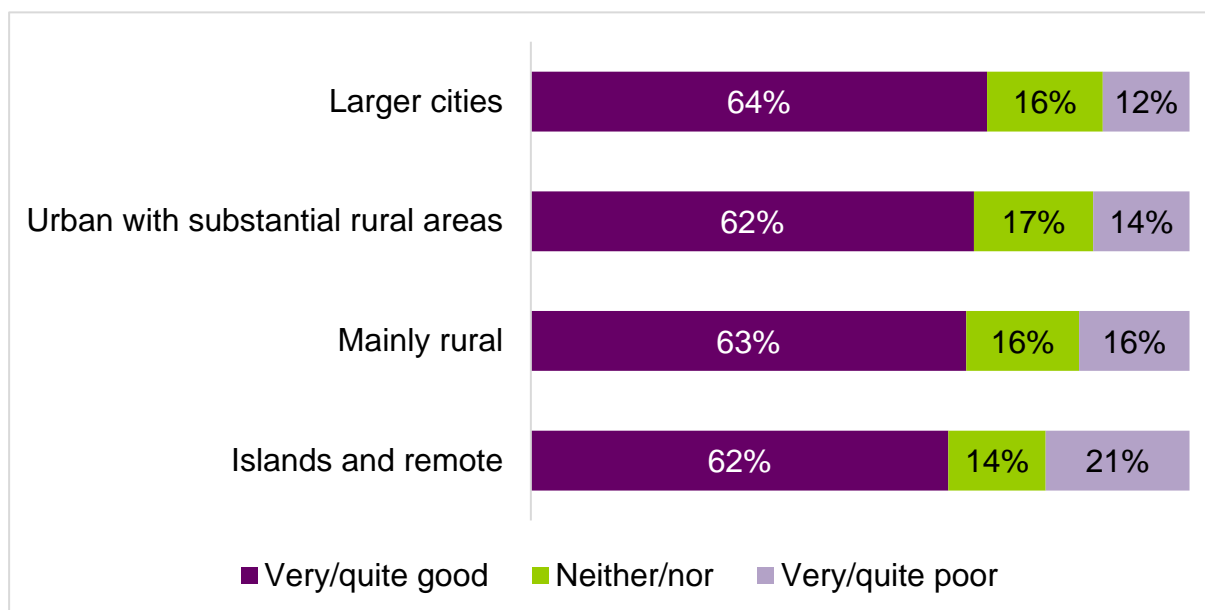
4.37 Underemployment¹³⁶, part-time working and out-migration of working age people are prevalent issues in rural parts of Scotland. As Figure

¹³⁵ National Health and Social Care Workforce Plan: Part 2 – Scottish Government (December 2017) <https://www.gov.scot/publications/national-health-social-care-workforce-plan-part-2-framework-improving/>

¹³⁶ Underemployment can be defined as a situation where people are working fewer hours than they wish, or accept jobs that don't utilise their skills (for instance a graduate working in an entry-level job may be considered to be underemployed)

4.11 indicates, social care employees' perception of employment opportunities in the sector shows some variation by type of area. Whilst the proportion perceiving the opportunities to be very or quite good is fairly consistent, people living in islands and remote areas are more likely to report that opportunities are quite or very poor.

Figure 4.11: Perception of social care employment opportunities, by type of area



Source: *ekosgen employee survey*, Quite/very good $n=2,549$ Neither/nor $n=663$, Quite/very poor $n=570$

4.38 There is no doubt that there is a prevalence of underemployment in rural areas which can mean that skilled staff leave to find a job in which they can better use their skills as opportunities arise. It may in part be a lifestyle choice, but is also a reflection of more limited local opportunities and potentially higher proportions of part time working in rural areas¹³⁷. There are geographic variations for example, the Shetland Islands has very low unemployment but very high underemployment.

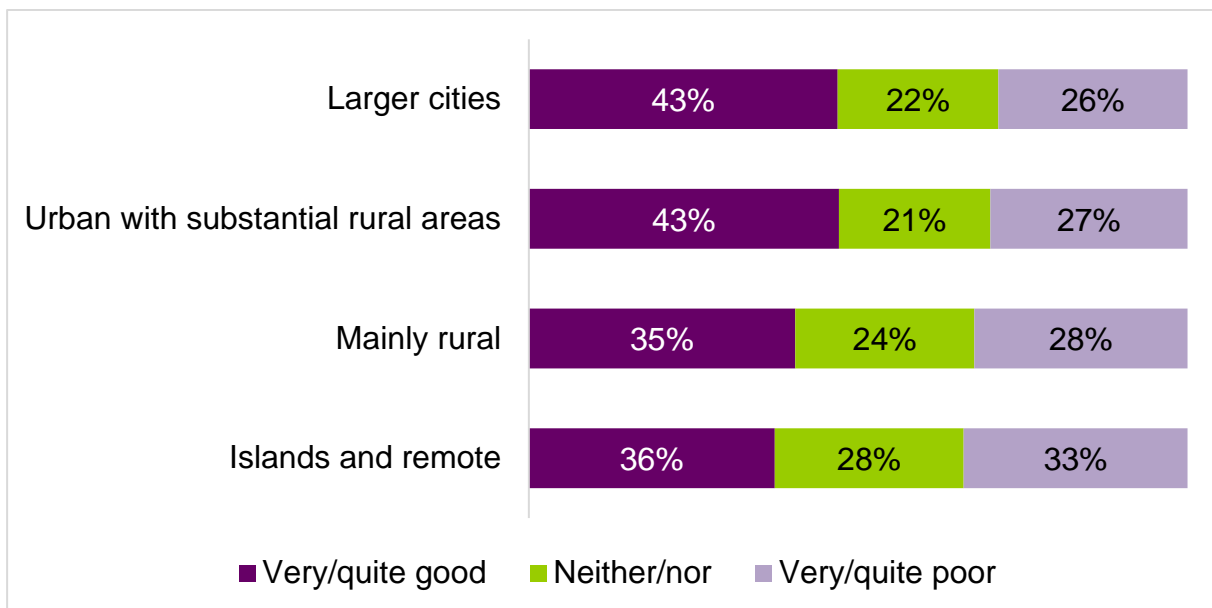
4.39 Whilst the movement of under-employed workers affects all sectors, it will certainly have an impact on social care, particularly in rural areas.

¹³⁷ Skills Action Plan for Rural Scotland – Skills Development Scotland (June 2019) <https://www.skillsdevelopmentscotland.co.uk/media/45683/skills-action-plan-for-rural-scotland-summary-report.pdf>

4.40 There are also implications for social care workers in terms of travel to work and service delivery in remote and rural local authority areas (such as Shetland, Argyll and Bute and Na h-Eileanan Siar). They, and the service users, are often geographically dispersed, employees face longer travel times and tend to work in smaller teams and sometimes on their own. Their working environment, and choice of jobs, can therefore be quite different to their counterparts in more urban areas.

4.41 Figure 4.12 indicates that the variations on perceptions around career progression between different types of areas are not as marked as we might expect. However, it is clear that in more urban areas, the greater the perception is that there are good or very good career progression opportunities. Conversely, the more rural an area, the more likely employees are to report that opportunities to develop their career are very or quite poor.

Figure 4.12: Perception of career progression opportunities in social care, by area type



Source: *ekosgen employee survey*, Quite/very good N=1,691, Neither/nor N=938, Quite/very poor N=1,148

5 Recruitment and Retention

Key Findings

- Social care employers have experienced considerable difficulties in retaining staff in recent times - particularly care staff that provide direct care and support - with far less issues faced with the retention of management level staff.
- Almost two thirds of social care employers are currently recruiting, and this is higher amongst independent sector employers, and those in both large urban settings and island communities. Care staff, such as support workers and residential care workers (for the third sector) are currently in high demand amongst social care employers.
- Around a third of employers have hard-to-fill vacancies, particularly prevalent in the independent sector, and these posts tend to be for support workers and care workers or assistants. Employers are also struggling to find skills in dealing with complex conditions and digital skills, as well as providing required training to their staff.
- Around half of social care employers anticipate facing challenges in recruitment over the next year. Again, this is greater amongst independent sector employers and those based in islands and remote areas. These challenges are expected when recruiting for the types of roles employers are currently seeking.
- The housing support/care at home sector has grown substantially in recent years, and this is reflected in the large proportion of employers in this sector who anticipate recruitment challenges in the next year.
- Given the high levels of expansion and replacement demand for skills in the social care sector, a higher proportion of employers plan to recruit in the next year to replace staff that might leave (72%) and to expand their workforce (50%). Replacing staff is expected to be more common in more urban settings and remote island communities, while expansion plans are greater in larger cities.

Introduction

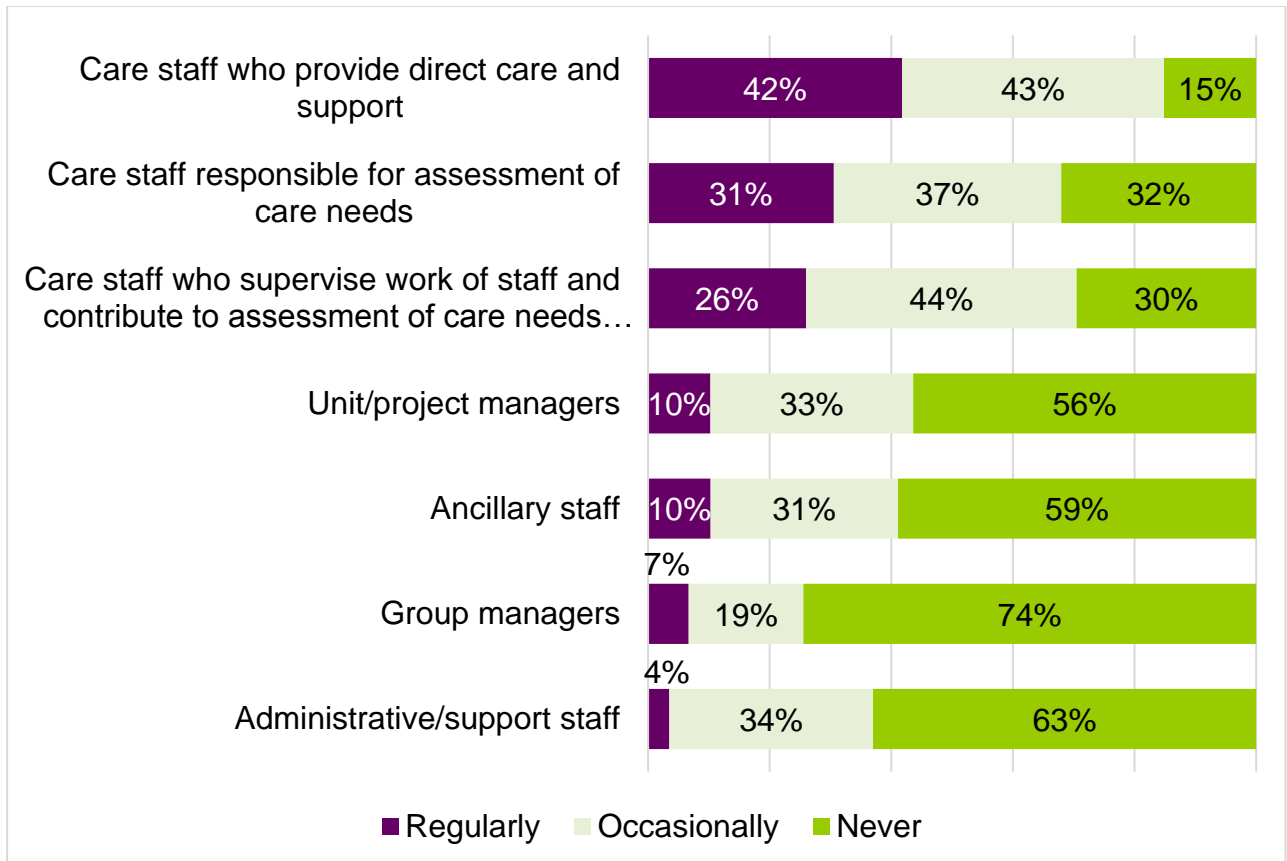
- 5.1 This chapter examines recruitment and retention issues facing the social care sector. It considers, in particular, the skills issues and gaps and recruitment and retention challenges facing employers, their perceptions about the main motivations behind people's decisions to join, stay in or leave the social care sector, and reasons for the existence of vacancies and difficulties in filling vacancies.

Retention issues

- 5.2 Employers have experienced difficulties in retaining social care staff, in particular support workers and other types of care staff. Figure 5.1 sets out how frequently employers have experienced difficulties in retaining different types of staff in the past two years. More than four in five

employers (85%) have encountered retention difficulties with support worker care staff in the past two years (and have faced difficulties with other types of care staff), whilst the retention of management staff is reported as less of an issue.

Figure 5.1: Difficulties in retaining types of staff in the past two years



Source: *ekosgen employer survey, n=337*

5.3 CIPD research published in Summer 2019¹³⁸ indicates that over a quarter (26%) of UK employers say that retaining staff has become more difficult and is highest in retail and administrative support, both at 40%.

Current recruitment needs and challenges

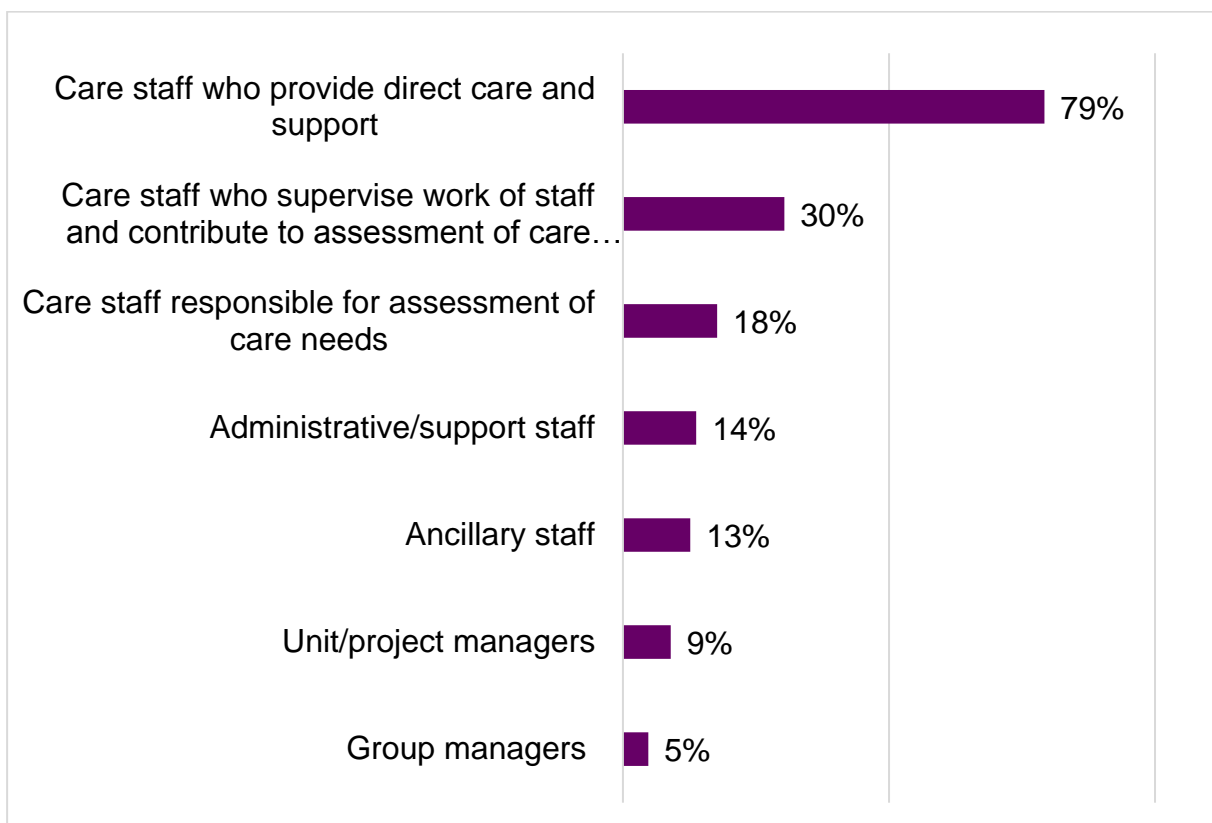
5.4 Sixty-five percent of social care employers who responded to our survey are currently recruiting. At 73%, this proportion is higher for independent sector employers than their counterparts in the third (63%) and public (57%) sectors. Also, employers in larger cities and more urban areas, as well as island communities, are more likely to be

¹³⁸ Labour Market Outlook: Views From Employers – CIPD (Summer 2019) https://www.cipd.co.uk/Images/labour-market-outlook-summer-2019_tcm18-62411.pdf

recruiting than those based in more rural areas. The roles currently being recruited for tend to be care staff (particularly support workers and residential care workers) for social care.

- 5.5 There is no remarkable variation between types of employer. Third sector employers are slightly more likely to be recruiting care staff providing direct care and support at 76% compared to the public sector (75%) and the independent sector (70%). They are also more likely to be recruiting residential care staff.
- 5.6 There are more significant recruitment variations by geographical coverage of employers. Employers working across a mixture of urban and rural areas are more likely to be recruiting care staff, both those providing direct care and support and those supervising the work of staff, than those working in mainly urban or mainly rural areas.

Figure 5.2: Roles currently being recruited for



Source: *ekosgen employer survey, n=356, multiple responses allowed*

- 5.7 Just less than a third (30%) of all social care employers who completed the survey reported having hard-to-fill vacancies. This is a little lower than the 2017 findings of the Care Inspectorate and the

SSSC report¹³⁹ where 37% of care services reported hard-to-fill vacancies¹⁴⁰. It is slightly higher in the independent sector at 33% of employers, than in the third and public sectors (at 31% and 27% respectively)¹⁴¹. As context, a recent CIPD Labour Market Outlook report indicates that 37% of UK employers report that they have at least one vacancy that is proving hard to fill¹⁴².

- 5.8 In social care, the hard-to-fill posts tend to be for support workers and care workers or assistants, and some have been lying vacant for a long time, as demonstrated by the following quotes:

“Support staff working directly in providing care provision in the community. Not enough interest for people in taking up these posts” (independent sector, urban/rural housing support/ care at home employer)

- 5.9 As well as the job roles required, employers are struggling to provide staff with the levels and types of training they need. A lack of digital literacy (54%) and a lack of knowledge and skills to support people with complex conditions such as dementia and severe autism (49%) are significant/moderate skills issues facing their current workforce. Just under half of social care employers who took part in our survey reported not being able to provide necessary training to staff (48%). Benchmarking research undertaken by CCPS shows that almost half of employers surveyed said that their annual training budget, which averages £273,000 doesn't cover all their training costs¹⁴³. The CCPS report indicates that on the whole employers were confident that staff not registered would gain the qualifications they required. It also found that training needs tend to be determined through individual appraisal processes. However, it must be noted that this research only covers the third sector, and is not representative of other sectors.

¹³⁹ Staff vacancies in care services 2017 – Care Inspectorate/SSSC (January 2019) <https://www.careinspectorate.com/index.php/news/4767-staff-vacancies-in-care-services-2017>

¹⁴⁰ Hard-to-fill vacancies are defined as vacancies that have been open for three months or longer.

¹⁴¹ Ekosgen survey responses

¹⁴² Labour Market Outlook: Views From Employers – CIPD (Summer 2019) https://www.cipd.co.uk/Images/labour-market-outlook-summer-2019_tcm18-62411.pdf

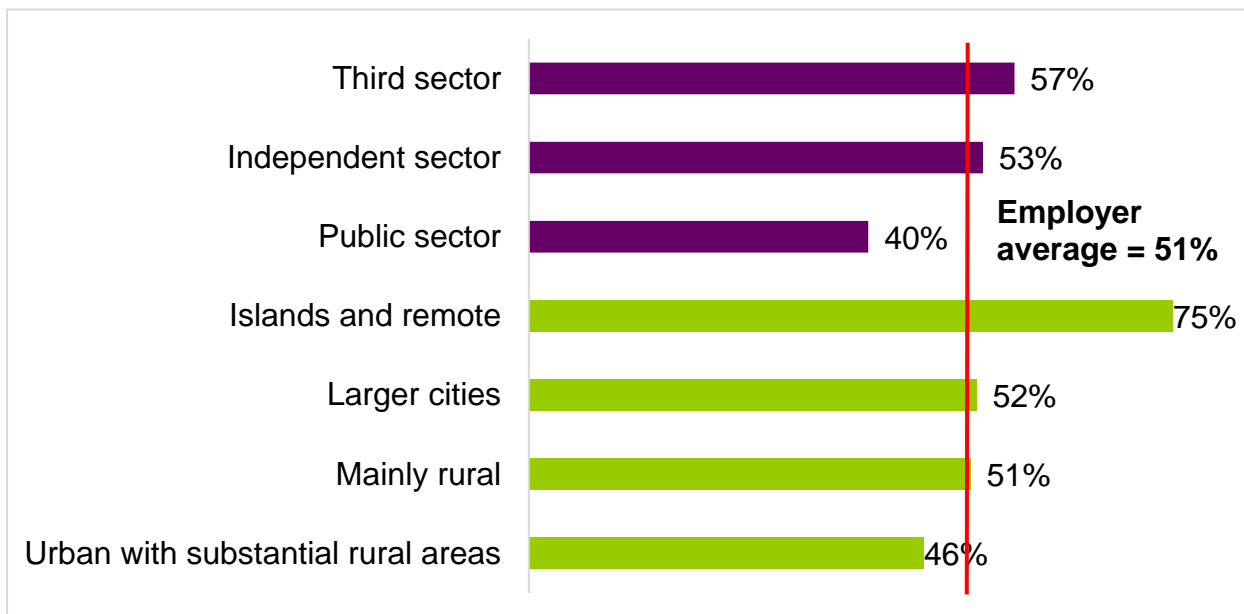
¹⁴³ 2018 Benchmarking Report for HR Voluntary Sector Network and CCPS – CCPS (2018) <http://www.ccpscotland.org/resources/2018-benchmarking-report-hr-voluntary-sector-forum-executive-summary-2019/>

- 5.10 In the survey undertaken for this research, skills issues around managing complex conditions are more prevalent in urban employers than rural employers. Digital skills and providing staff training are greater issues for islands and remote employers, which may reflect a greater dependency on remote working and the use of digital technologies in more rural settings.
- 5.11 Basic skills, such as numeracy and literacy, and managerial skills were not identified as issues/challenges for the majority of employers. This reflects the findings of Figure 5.2 which show that employers are currently far less likely to be recruiting for managerial roles.

Future recruitment needs and challenges

- 5.12 Around half (51%) of social care employers surveyed anticipate facing challenges in recruiting new staff over the next 12 months. This is shown by the red line in Figure 5.3. It varies substantially by type of employer, with independent and third sector employers much more likely to expect recruitment challenges in the next year than their public sector counterparts.

Figure 5.3: Employers anticipating challenges in recruiting new staff over the next 12 months



Source: *ekosgen employer survey, Voluntary/third n=221, Independent n=208, Public n=129, Islands and remote n=28, Larger cities n=163, Mainly rural n=204, Urban with substantial rural areas n=189*

- 5.13 It also varies by geography, with the most remote employers much more likely to anticipate recruitment challenges in the future. Interestingly, employers from larger cities are also expecting recruitment challenges, which may be more to do with competition from other employer types (e.g. public sector) and other sectors (e.g. health and education).
- 5.14 There are also marked variations in terms of the recruitment challenges faced by social care employers depending on service type. As Table 5.1 illustrates, the largest number of employers facing recruitment challenges are housing support/care at home employers (61%, 149 responses). This is likely because the housing support/care at home sector has grown substantially over the past decade, and highlights the additional challenges faced around expansion and replacement demand.

Table 5.1: Employers anticipating challenges in recruiting new staff over the next 12 months, by sub sector

Sub sector	% of employers
Fieldwork service (adults) (n=27)	67%
Fieldwork service (offenders) (n=11)	63%
Housing support/care at home (n=244)	61%
Residential childcare (n=53)	60%
Offender accommodation services (n=5)	60%
Adult day care (n=88)	58%
Fieldwork service (children) (n=12)	58%
Adoption services (n=7)	57%
Care homes for adults (n=181)	54%
Adult placement service (n=20)	50%
Fostering services (n=12)	50%
Nurse agencies (n=12)	50%

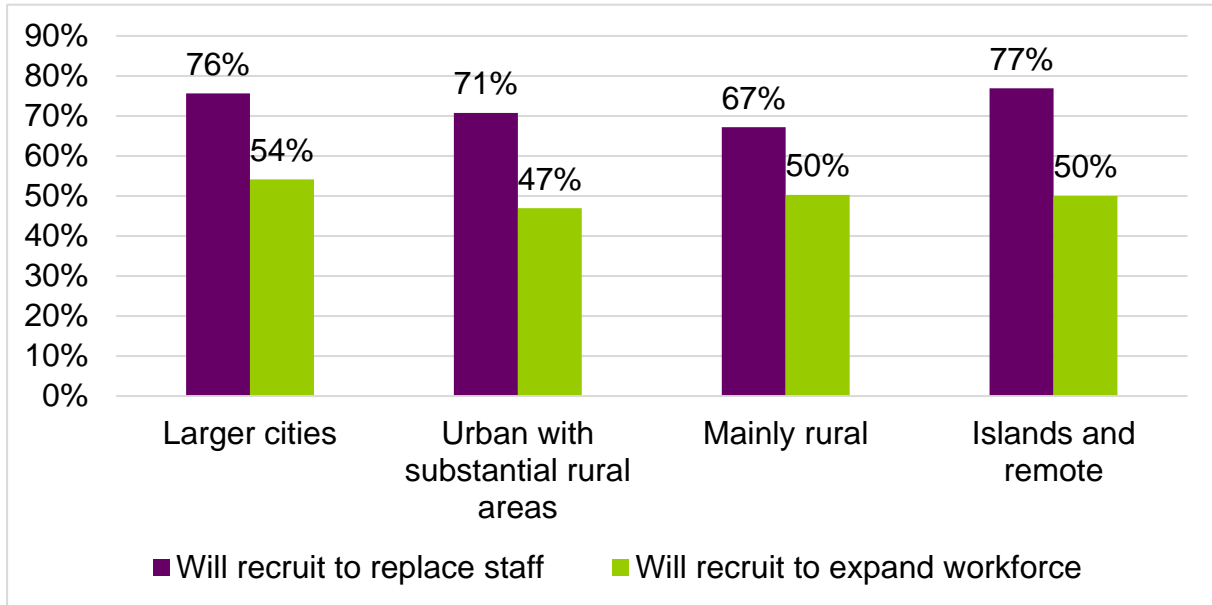
Source: ekosgen employer survey

- 5.15 Where recruitment challenges are expected, these broadly mirror the job roles which employers are currently recruiting for. Employers expect to face recruitment challenges when recruiting for support worker roles in particular. Directors, managerial staff (e.g. unit/project managers, group managers) and administrative staff are much less of a concern for employers.

- 5.16 As with current recruitment, third and independent sector employers (75% and 68% respectively) are more likely to anticipate facing challenges recruiting care staff providing direct care and support than public sector employers (59%).
- 5.17 Employers report that anticipated skills issues over the next 12 months largely mirror the skills issues that they face currently in their workforce. The skills issues expected to present significant/moderate challenges in the future are organisations being unable to provide the required training to their staff (47%), staff not having the right knowledge or skills to support complex conditions (45%), and staff not having the competencies required to meet the changing needs of the sector (43%). A lack of digital literacy is less of a concern for employers in the future than it is now for their current workforce, suggesting that employers expect these skills to improve or that they know where to access digital training for their staff.
- 5.18 There is little variation in the anticipated severity of these skills issues by geography, although staff not having the competencies required to meet the changing needs of the sector are more of a concern for rural employers than urban employers (46% vs 39%).
- 5.19 Again, basic skills (numeracy and literacy), managerial skills and formal qualifications are less of a concern for employers going forward, reflecting little expected change from current workforce skills gaps to those over the next 12 months.
- 5.20 As shown through the employment forecasts in Chapter 3, replacement demand is greater than expansion demand in the social care sector, although both are significant. Almost three quarters (72%) of social care employers plan to recruit staff in the next 12 months to replace staff that might leave, while half (50%) plan to recruit staff to increase the size of their workforce.
- 5.21 The need to replace staff is higher amongst employers in more remote and urban areas, as shown at Figure 5.4. Over three quarters (77%) of employers based in remote areas (and 76% of employers based in larger cities) plan to recruit in the next year to replace staff, suggesting that the turnover of staff is higher in these areas than in other areas.
- 5.22 However, there is little variation in expansion plans by geography. Around half of employers in all areas reported plans to recruit staff to expand their workforce. This could indicate that retention is better in

rural areas, perhaps because of more limited opportunities to change employer.

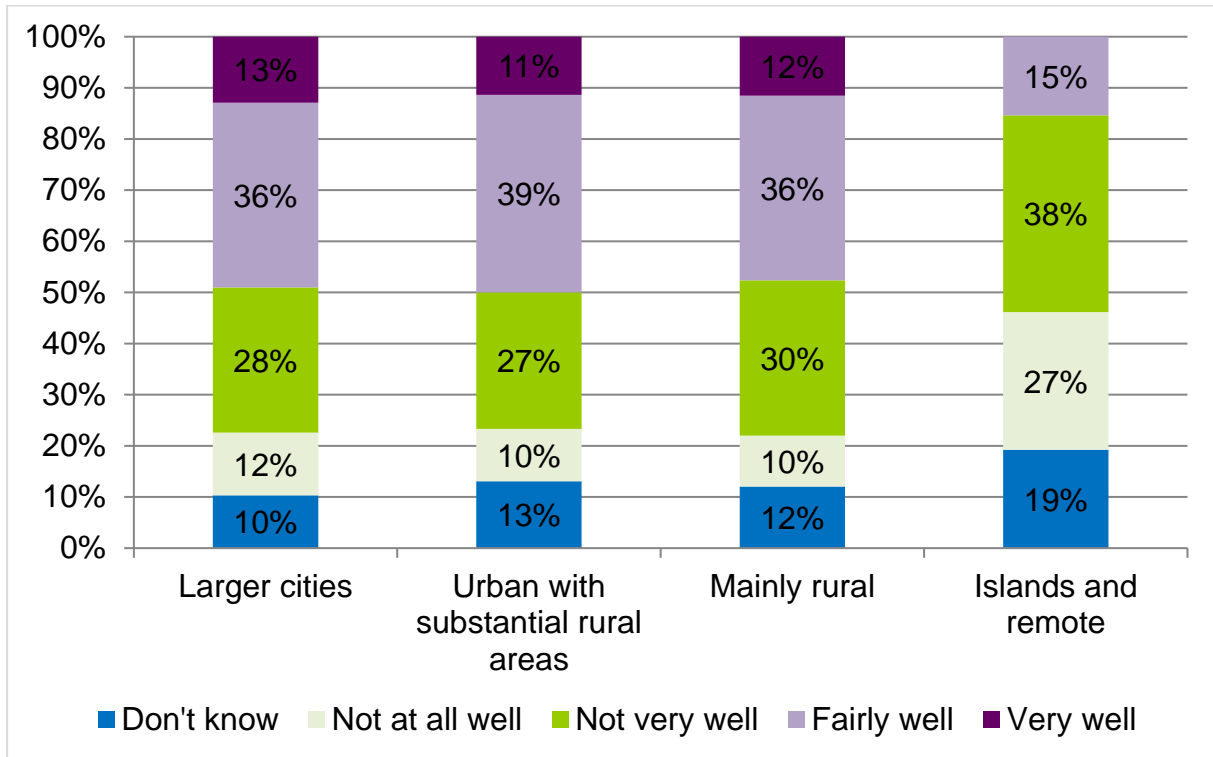
Figure 5.4: Social care employers' plans to recruit staff in the next 12 months



Source: *ekosgen employer survey, Replacement n=555, Expansion n=556*

- 5.23 At 80%, independent sector employers are more likely to report that they will be recruiting social care staff over the next 12 months to replace people who leave. The corresponding figure for third sector employers is 67% and 65% for public sector employers. It points to the fact that the workforce is more stable in the public sector and that there is less need for recruitment to replace staff.
- 5.24 There are also more independent sector social care employers planning to recruit to expand their workforce (58% vs 53% for third sector employers and 31% for public sector employers).
- 5.25 For a significant proportion of employers the flow of people into social care does not meet their needs, and this is particularly felt in the most remote parts of Scotland. In all, almost half (47%) of employers feel the supply of people into the sector meets their needs fairly/very well, while for around four in 10 (41%) it does not meet their needs.
- 5.26 As shown at Figure 5.5, the mismatch between supply and demand of people into social care is greatest in the islands and remote areas of Scotland. The situation is better in larger cities.

Figure 5.5: Extent to which the supply of people meets social care employers' needs



Source: *ekosgen employer survey, n=550*

5.27 As well as geography, this mismatch varies by employer type, with the majority of public sector employers (57%) reporting that the flow of people into social care meets their needs, much higher than for employers in the voluntary and independent (both 44%) sectors.

6 Social Care Workforce Movement

Key Findings

- SSSC analysis indicates that the stability index within registered social care employees is around 71% meaning that the majority of people remained in the same position between 2016 and 2017.
- Of those who did move, some can be accounted for by movement within the sector (including career progression) meaning that the sector has retained the skills and experience of these workers.
- Some of this can be accounted for by movement within the sector (including career progression) meaning that the sector has retained the skills and experience of these workers.
- People who change jobs within the social care sector tend to join a similar service type, and the SSSC analysis also suggests there is a strong tendency for people to remain in the same type of service, for example adult or children's service. The survey reported a slightly greater propensity for staff to move from adult to children's services, but it is still more likely that adult services social care staff will remain in this sub-sector.
- The main exchange of social care employees is with the business services and health and education sectors. The latter reflects the many synergies between these sectors in terms of skills and experience needed by the workforce.
- One in ten social care employees indicate they would like to leave the sector in the future. This is mainly due to the stress and workload of their current job.
- The sector faces competition from the health, hospitality, retail, education and cleaning sectors, reflecting that people appear to be attracted to work opportunities in what they consider to be less demanding jobs for the same or a better rate of pay.

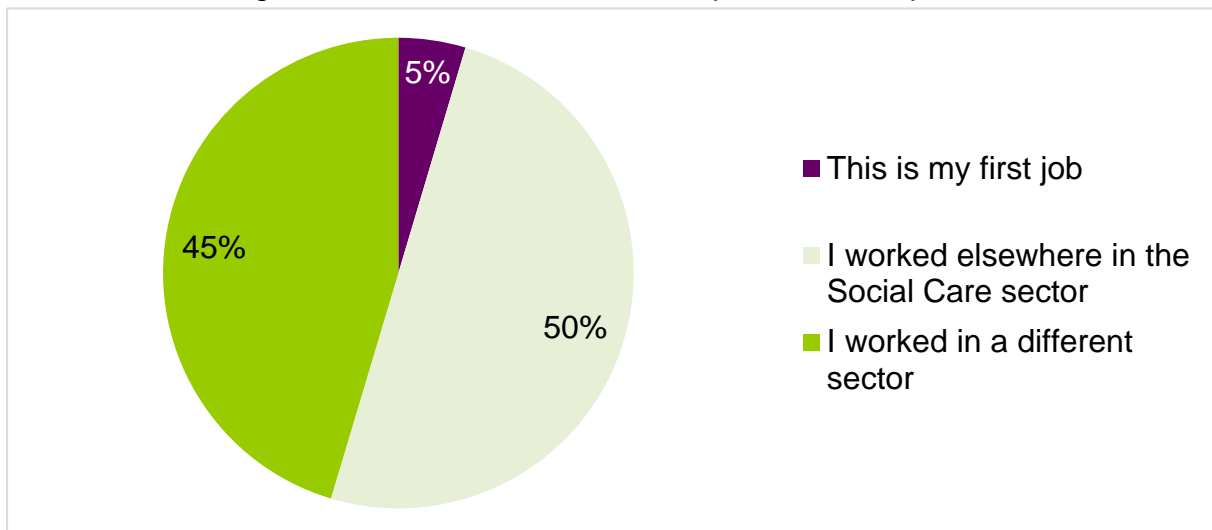
Introduction

- 6.1 This chapter considers the extent to which the social care workforce moves internally (i.e., between different parts of the sector) and externally, which looks at the dynamics of the wider labour market in Scotland. The analysis also sets out the future intentions of both employers and employees working in the social care sector in Scotland. It draws on survey evidence as to what competition the sector is likely to face in the future in terms of other sectors in Scotland. This section also draws upon findings from the Early Learning and Childcare (ELC) section of the survey. Further evidence can be found in the separate paper on the ELC workforce.

Internal workforce movement

- 6.2 As Figure 6.1 illustrates, just under half of social care employees surveyed worked elsewhere in the social care sector before their current job.
- 6.3 This is different to the findings from the PA research, where PAs were less likely to have previous relevant experience. Only 3% of PAs had previously worked as a PA for someone else, and 35% had come from elsewhere in the social care sector. Six in 10 (60%) PAs had come from a completely different job, higher than 47% for the social care sector as a whole. This supports anecdotal evidence from stakeholders that many PA employers tend to ask friends or neighbours to be their PAs.¹⁴⁴

Figure 6.1: Social care workforce, previous occupation



Source: *ekosgen employee survey, n=4,148*

- 6.4 The survey asked employees who had worked in social care before their current job to indicate if their previous job was in adult or children's services. No time limit was applied. This question aimed to establish the flow between the two types. As illustrated in Table 6.1, of those people who currently work in adult services, the vast majority (91%) have moved from another job in adult services, as opposed to coming from children's services (6%) or ELC (3%). This indicates that people who work in adult services are very likely to remain working in adult services, and move around within it.

¹⁴⁴ Personal Assistant Employer's Handbook – Scottish Government (2014) <https://www.gov.scot/publications/personal-assistant-employers-handbook/>

- 6.5 In children’s services, there is evidence of some more movement from adult to children’s services (29%), but it is still more likely that people move within children’s services, rather than from adult services to children’s services – 62% (and 71% if ELC is included). The evidence indicates that where people do move from one to the other, it is more likely to be from adult to children’s rather than the other way round. At 88%, the majority of people working in ELC who had moved into their current role had moved from a previous ELC job.
- 6.6 These findings largely reflect the findings of the SSSC report on workforce movement¹⁴⁵, where the analysis indicated that 94% of workers in adult services who re-registered returned to an adult’s service compared with 90% of children’s workers. However the SSSC analysis did not include care at home and housing support services, which is the largest sub-sector in adult social care. Another point of difference is that the SSSC survey looked at the movement of staff within one year, whilst our survey is not time limited in the same way.

Table 6.1: Previous social care experience

Current job/ previous job	Came from adult services	Came from children’s services	Came from ELC
Currently working in adult services	91%	6%	3%
Currently working in children’s services	29%	62%	9%
Currently working in ELC	8%	4%	88%

Source: ekosgen employee survey. ELC n=1,232, children’s services n=232, adult services n=1,251

- 6.7 The majority (78%) of those intending to move to a role associated with children’s services in the future are leaving a *current* children’s services role. It is interesting to note, however, that 65% of this group currently work in either independent or third sector services, which is higher than their corresponding share of the survey sample (58%). This suggests that children’s services employees may not be wanting to move to take up different types of children’s services roles, but rather are looking to move from the independent or third sector to the

¹⁴⁵ Using SSSC registration data to examine workforce movements – SSSC (May 2019) <https://www.sssc.uk.com/knowledgebase/article/KA-02680/en-us>

public sector for better pay and conditions, or perhaps a more secure job.

The wider labour market

- 6.8 Just under half of social care employees surveyed worked in a completely different sector before their current job, as shown in Figure 6.1. One in five of those worked in office-based roles, with a further 19% previously employed in retail jobs. The survey did not attempt to quantify the number of people who may be working in multiple jobs of which social care may be one.
- 6.9 Social care employers report a small proportion of staff leaving to work in other sectors. Only 11% of employers report that when staff leave to move into another job, more than half will take up completely different jobs. This chimes with a previous finding that suggests approximately half of all people who leave the SSSC Register continue to work in the social service sector. Approximately 23% of all leavers were working in other sectors¹⁴⁶.
- 6.10 Employers identified the health sector as being the most likely competition for staff as illustrated in Figure 6.2. Hotels and hospitality roles were the second biggest source of competition for employers in mainly rural areas. Retail and cleaning jobs were also contenders when it comes to recruiting and retaining staff, and supporting this the SSSC survey of leavers places retail in the top three sectors that social care loses staff to¹⁴⁷. When education sectors (other and classroom assistants) are combined, this also presents significant competition for the social care sector, particularly in mainly rural areas. The following comments from employers illustrate what made these types of roles competitive with the social care sector:

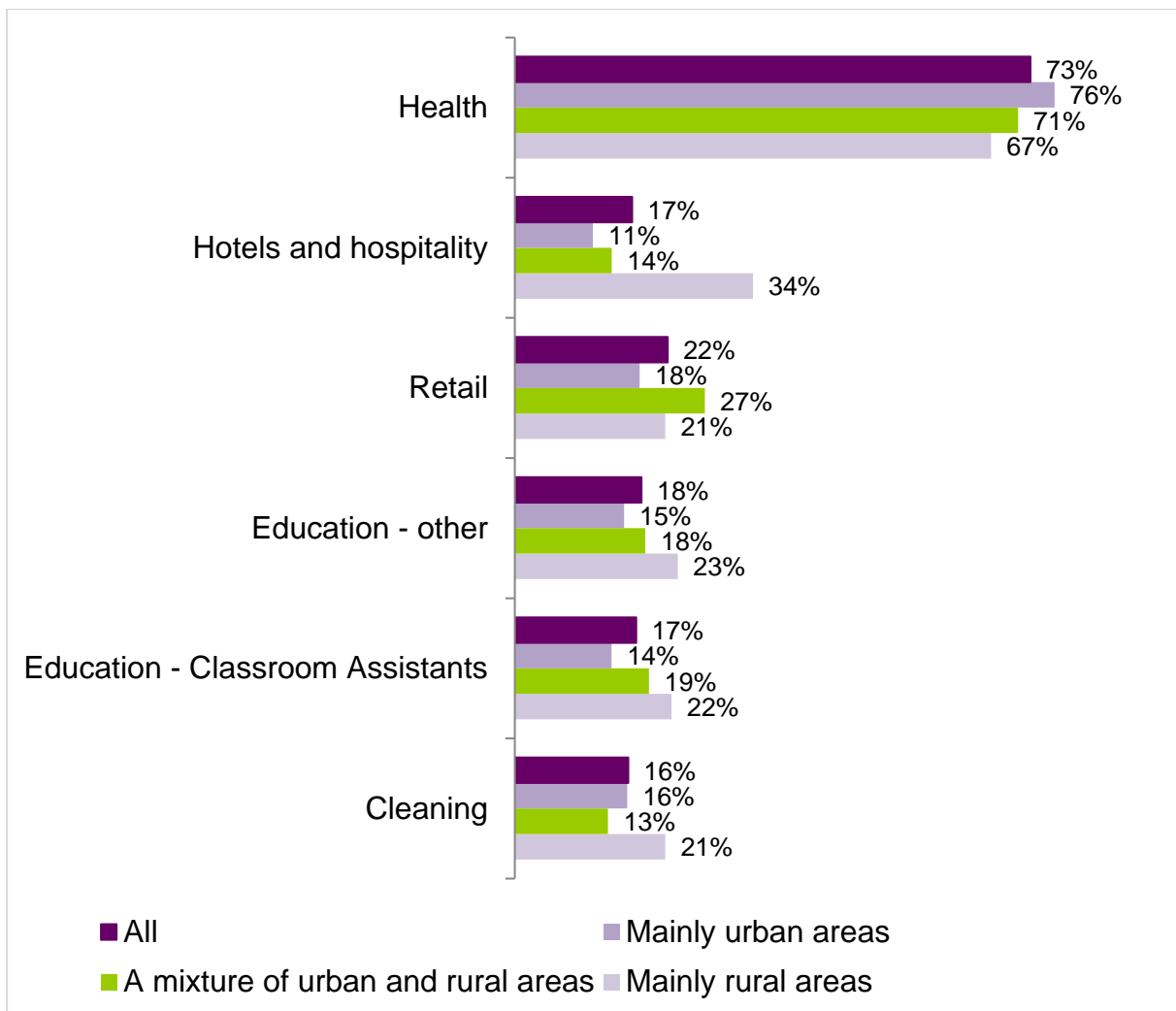
“A range of benefits depending on actual employer, including salary, Local Authorities pay more, no pay increase in Third Sector, flexible working, and job security (we are on a rolling annual contract)” (third sector, urban adult fieldwork service employer)

“Less overall responsibility, the ability to leave work at work, more flexible working patterns, no overnight working / more social working hours, higher salary” (third sector, urban/rural housing support/ care at home employer)

¹⁴⁶ Using SSSC registration data to examine workforce movements – SSSC (May 2019) <https://www.sssc.uk.com/knowledgebase/article/KA-02680/en-us>

¹⁴⁷ Ibid

Figure 6.2: Top sectors competing with social care, by area type¹⁴⁸



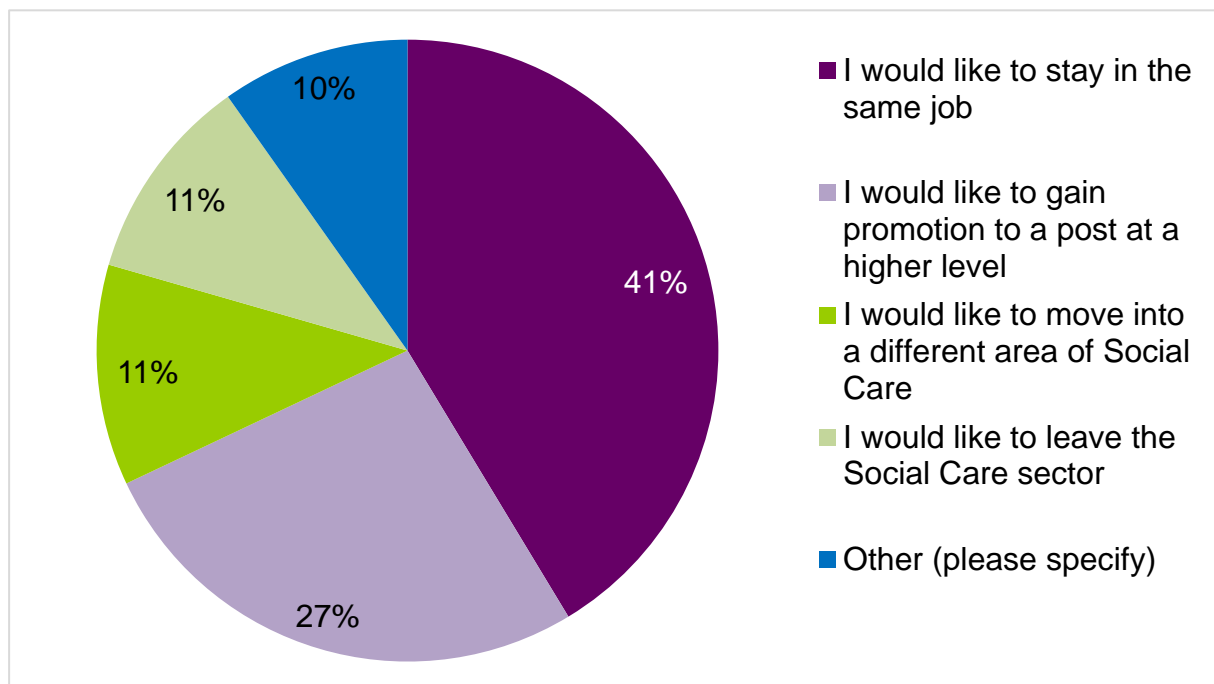
Source: *ekosgen employer survey, multiple responses allowed, All n=537, Mainly urban n=227, Mixture n=190, Mainly rural n=113*

Employee future ambitions

6.11 More than three quarters (79%) of the current social care workforce want to remain working within the sector. As shown in Figure 6.3, of this group, 41% want to remain in the same job, 27% want to gain a promotion in the same service they are currently working in, and 11% wish to move to a different area of social care.

¹⁴⁸ NB – ‘Education – other’ refers to all education jobs excluding classroom assistants.

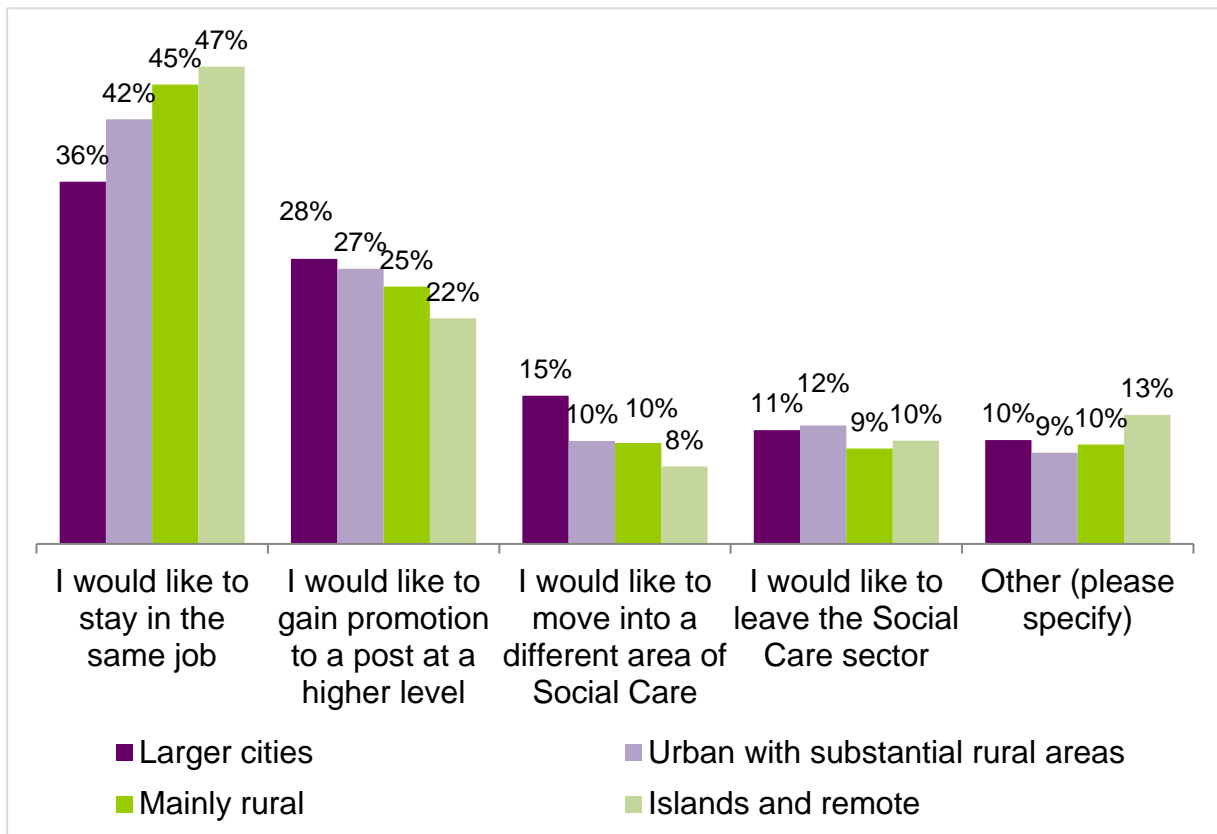
Figure 6.3: Future ambitions of social care employees



Source: *ekosgen employee survey, n=3,908*

6.12 Future intentions differ little by geography of respondent. As shown at Figure 6.4, the key differences are that those working in more rural areas are more likely to want to stay in the same job in the future. Those working in larger cities are less likely to want to do so, at 36% compared to 41% for all employees. This may reflect the greater access to employment opportunities and career progression felt by those in an urban setting, as shown in Chapter 5.

Figure 6.4: Future ambitions of social care employees by geography



Source: *ekosgen employee survey*, Larger cities n=1,325, Urban with rural n=1,564, Mainly rural n=1,263, Islands and remote n=157

Those who want to stay in social care

- 6.13 Employees who moved into social care from a different sector are less likely to state a preference to stay in the sector. Of the overall survey sample, 79% of the social care workforce wants to stay in the sector in the future, and this varies a little by previous experience. Those who previously worked in a different sector are slightly less likely to want to stay in social care in the future (78%) than those who previously worked elsewhere in social care (80%) and those in their first job (85%).
- 6.14 Again there is little difference by sub-sector, although those working in adult services are less likely to want to stay in social care (78%) than employees from children’s services (82%)¹⁴⁹.
- 6.15 One in 10 (11%) of the social care workforce would like to move into a different area of social care in the future from the one they are currently working in. Adult services was more popular, with 82% of this

¹⁴⁹ Definitions of ‘adult’ and ‘children’s’ services are outlined in Appendix A.

group wanting to move to an area of adult services and 48% wanting to move to an area of children's services (respondents could pick more than one service). When looking at the respondent's current area of work, a picture which emerges that adult services employees tend to want to remain in some part of adult services, while children's service workers are much more split. These findings are tentative and this section has already identified a number of caveats. For example, we're not sure about when these workers have switched roles. The key message is that we require a better understanding of the movement of workers across children's and adult service and the dynamics behind that.

- Of those currently working in children's services who want to move to a different area of social care:
 - Over eight in 10 (82%) want to move elsewhere in children's services
 - Two thirds (68%) want to move to an area of adult services
- Of those currently working in adult services who want to move to a different area of social care:
 - Almost all (95%) want to move elsewhere in adult services
 - Under half (44%) want to move to an area of children's services

Those who want to leave social care

6.16 One in 10 (10%) employees would like to leave the social care sector in the future, and for many this is due to the stress and pressure of their current job. Scottish Care has undertaken research that shows that there is significant pressure on the mental health of the workforce employed by their member service providers. Their report suggests that more and more demands are being placed on social care services and the workforce whilst the foundations of support and resilience are being eroded by cuts and the approach to planning and commissioning care. Their report suggests this is creating instability amongst services and in the mental wellbeing of care staff¹⁵⁰.

¹⁵⁰ Fragile Foundations: Exploring the Mental Health of the Social Care Workforce and the People They Support – Scottish Care (2017) <http://www.scottishcare.org/wp-content/uploads/2017/11/Mental-Health-Report-November-2017-.pdf>

6.17 Figure 4.8 reports on the perceptions of all employees in the survey of why people may want to leave the social care workforce. To add more detail to our understanding, the survey identified a cohort of 418 respondents who currently work in social care and intend to leave. It then asked them the reasons why they intend to leave the sector and Figure 6.5 sets out the findings. It shows that work-related pressure and a lack of work-life balance are the main drivers. Scottish Care have previously identified the need to explore how we can better support staff to undertake their role.¹⁵¹ The following comment from our survey of employees reinforces this:

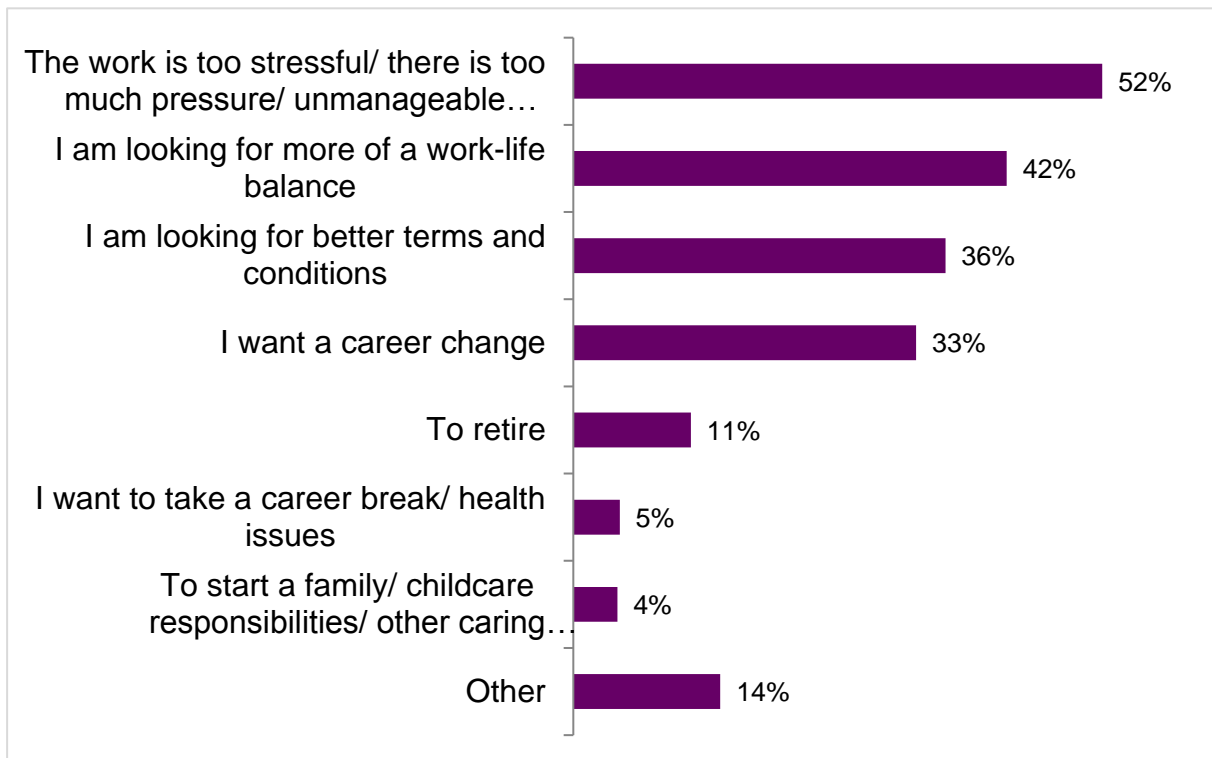
“Most care homes work on twelve hour shift rotas. When you are working with people with advanced dementia, stress levels are increased greatly on long shifts and mistakes are made, due to mental fatigue.” (third sector, urban housing support/ care at home employee)

6.18 The high level of movement within the current care workforce may have an impact on service delivery and continuity of care. Given that almost two thirds (65%) of all social care employers surveyed are currently recruiting (with a quarter reporting hard to fill vacancies), this might indicate that employers are struggling to find, recruit and retain suitable people to the sector.

6.19 Other reasons for wanting to leave included employees not feeling valued enough, not feeling as though there is enough career progression available, and poor leadership.

¹⁵¹ We are the Trees That Bend in the Wind – Scottish Care (February 2017)
<https://scottishcare.org/we-are-the-trees-that-bend-in-the-wind-watch-our-animation/>

Figure 6.5: Reasons for wanting to leave the social care sector



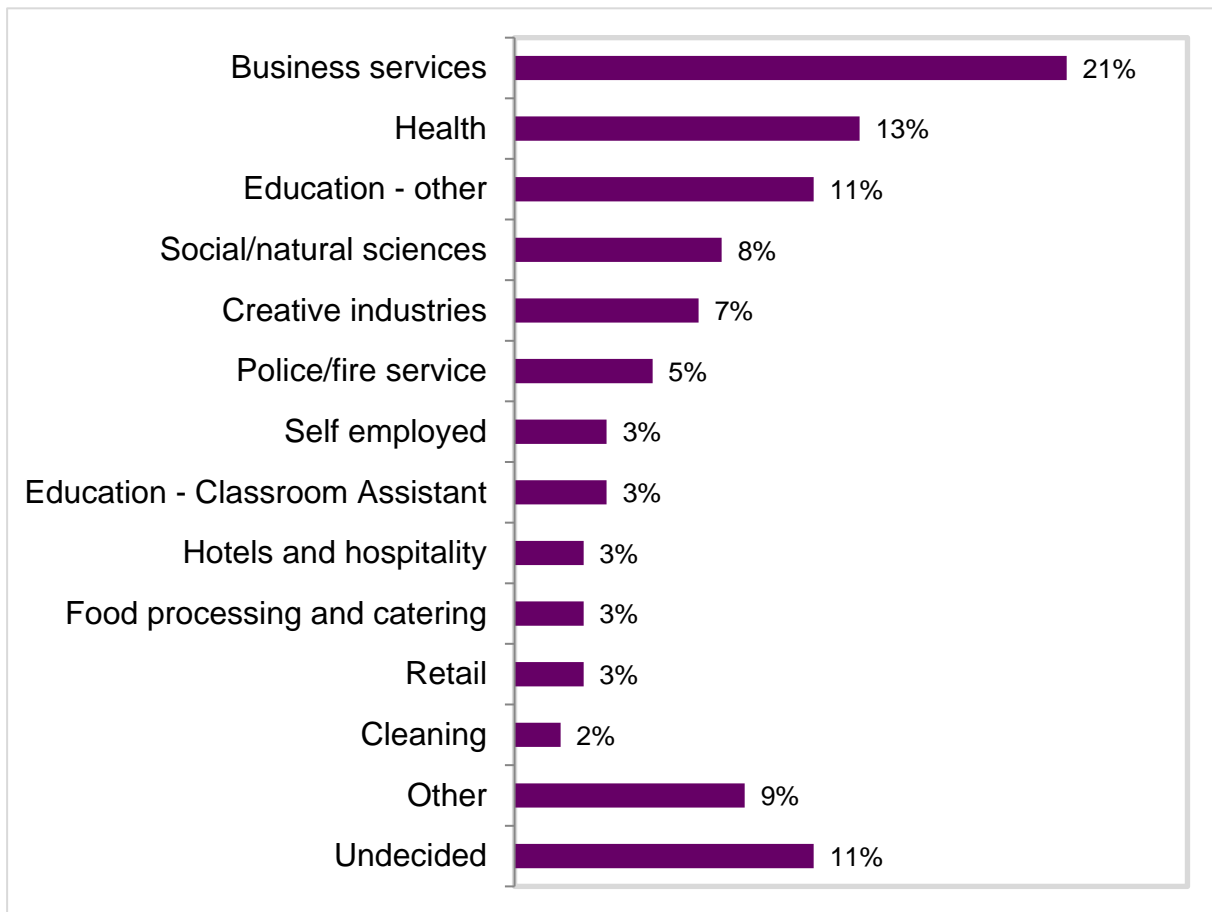
Source: ekosgen employee survey, n=418

6.20 Of those employees who have ambitions to leave the social care sector in the future, they report a wider range of job types of interest. Health, education and business services are the main sectors that attract social care employees who want to leave for a career change. As shown at Figure 6.6, around one in five (21%) of social care workers who want a career change are interested in moving into the business services sector. Smaller proportions of potential career changers would like to move into the health sector (13%), and education sector (11%), although this is more as teachers, rather than classroom assistants (3%). These findings are different to those reported by the SSSC analysis of people who have left the SSSC register¹⁵² where the main destinations were education (25%), retail (15%) and health (15%)¹⁵³.

¹⁵² It is worth noting that the SSSC analysis is based on a smaller cohort of 244 people.

¹⁵³ Using SSSC registration data to examine workforce movements – SSSC (May 2019) <https://www.sssc.uk.com/knowledgebase/article/KA-02680/en-us>

Figure 6.6: Potential destination of career changers, by service type



Source: *ekosgen employee survey. Social care n=117*

7 Conclusions

Introduction

- 7.1 We are at a crucial stage in the development of social care and social services in Scotland. This is coupled with an ageing population and an increasing dependency ratio which place additional pressures on social care. This has to be seen however, alongside a push for 'fair work' in social care; a planned reform of adult social care, and emphasising human rights. Not only has the Scottish population been ageing through increased life expectancy (although this increase has recently stalled), lengthening healthy life expectancy is lagging, meaning that more people are living longer but with more health and support needs¹⁵⁴. The sector is likely to face considerable challenges over the next decade as the workforce seek to recruit additional workers and replace staff as they leave to move onto new roles or for other reasons such as retirement.
- 7.2 It is a fast changing sector, with new ways of working and new ways of delivering services which has meant that roles and tasks undertaken by staff are developing and in many cases becoming increasingly complex. Key policy changes - including the integration of health and social care, and the expansion of the funded ELC entitlement to 1,140 hours per year from August 2020 for all three and four year olds (and eligible two year olds) - have, and will continue to have, significant implications for the workforce. The projected fall in Scotland's working age population, by 4% between 2016 and 2041¹⁵⁵, coupled with the potential impact of EU exit means that competition for staff is likely to increase across the Scottish economy which has implications for all sectors, including social care.
- 7.3 Against this backdrop there is no doubt that there will be continuing and increasing pressure on employers to recruit and retain an adequate and skilled social care workforce to meet need. All of these factors mean that it is critical to have clear sight of the workforce and the skills required to provide high quality care across all of the social care sub-sectors. We must ensure that the mechanisms are in place to

¹⁵⁴ Health of Scotland's population – Life Expectancy – Scottish Government <https://www2.gov.scot/Topics/Statistics/Browse/Health/TrendLifeExpectancy>

¹⁵⁵ Projected Population of Scotland (2016-based) – National Records of Scotland (October 2017) <https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/population-projections-scotland/2016-based>

understand demand and the impact of different types of labour markets in order to equip workforce planners with the evidence-base they need to develop a sustainable workforce for the future.

- 7.4 Local data and intelligence along with an understanding of local labour market dynamics, will be crucial. The workforce requirements and issues need to be understood and planned for at national, regional and local level and appropriate and timely responses must be planned and implemented within an overall strategic approach. “The development of a first Integrated National Workforce Plan for Health and Social Care (in draft at summer 2019) aims to provide a strategic national approach and context to support workforce planning in these sectors. It also provides initial guidance for workforce planning in local integrated settings.” These responses must be evidence based in terms of the likely demand for skills, driving the skills pipeline, and the education and training that will be required. They must also be mindful of wider political drivers.
- 7.5 The sector requires a strategic approach to planning the workforce that takes account of current and emerging policy such as the ongoing integration of health and social care services. The approach also needs to take account of other key drivers such as changing demographics, the development of roles in the sector, the need for qualifications, the debate around ‘fair work’ in social care, and competition from other sectors. To be useful, data and intelligence should be available at national level, but could also inform work at local authority, integration authority and locality levels.
- 7.6 Alongside this workforce planning activity there should be an agreed set of outcomes and performance indicators to monitor, manage and drive performance. This will require co-production and partnership working, and organisations must be willing to make adjustments to how they might do things currently. It will require budget as well as time commitment to plan, implement and manage a refreshed approach to workforce planning and then monitor the difference it is making. Careful consideration will need to be given to this by the range of partners.
- 7.7 This report provides valuable insights in to what motivates people to join and remain working in social care, and the reasons why people may leave the social care workforce. By understanding this, workforce planners can communicate messages more effectively to attract and

retain staff and take appropriate steps to help address the reason why people leave.

Conclusions

Workforce Planning Data

- 7.8 This report brings the evidence together from across the social care sector rather than focusing on particular parts of it, providing a comprehensive picture of the sector and the workforce planning implications. The employee and employer surveys conducted as part of this research study appear to be the largest surveys undertaken of the social care workforce in Scotland to date. The number of responses has ensured that findings are generally representative of the sector's workforce as a whole.
- 7.9 The secondary data sources provide very useful information and intelligence. For example, our report refers to findings from the Scottish Government, the Scottish Social Services Council (SSSC), the Care Inspectorate, Scottish Care and the Coalition of Care and Support Providers in Scotland (CCPS). There are of course some areas which published data doesn't currently explore in depth or regularly, such as detail about vacancies within different parts of the sector, where the social care sector recruits from, and the sectors staff move on to. For example, sources such as 'Burning Glass¹⁵⁶' may help to give workforce planners real-time job market analysis for example of vacancies within the social care sector and in sectors that social care may compete with for workers. Also through Skills Development Scotland, Oxford Economics data provides one source of workforce projections for key sectors, including social care, detailing expansion and replacement demand. This information will be helpful in on-going workforce planning because it also shows the projected needs of other sectors that social care employers may be competing with for staff. Enhancing the data going forward, there will be more comprehensive analysis, for example of workforce movement, as the SSSC Register is extended to cover 80% of the social care workforce.
- 7.10 There is a wealth of data available but more co-ordination and coherence between the various data sets would enhance their strategic value to workforce planning and might reduce the need for large scale survey work of the type carried out for this research. However, the value of this kind of primary research cannot be under-

¹⁵⁶ Burning Glass Technologies <https://www.burning-glass.com/>

estimated in terms of the specific and depth of information it can generate. The ongoing development of a national Integrated Workforce Plan for health and social care, accompanied by local workforce planning guidance for Health and Social Care Partnerships and a national HSC data platform, offer the opportunities for more informed and co-ordinated approaches to workforce planning.

Movement in the workforce

- 7.11 SSSC analysis shows that the stability index within social care employers is around 20%, with one in five social care employees registered with SSSC moving jobs in 2017. Research undertaken by XpertHR indicates that the average staff turnover rate in the wider UK economy is around 15%¹⁵⁷. The SSSC research identified a strong tendency for people to remain in the same type of service, for example adult or children's services, and re-registrations in some cases indicating promotion and upward progression within the sector.
- 7.12 Where staff move within the sector, they tend to join a similar service type but for many, this movement appears to be from independent or third sector services to the public sector. The SSSC will be exploring this area as part of its analysis of the Register. There is a clear perception that there are more training opportunities in the public sector which can encourage people to join, and undoubtedly, where the public sector can offer more attractive pay and conditions, then this is a motivator to move from third and independent sectors.
- 7.13 The research undertaken for this work shows that staff have a tendency to move to jobs within the same services (i.e. from children's services to children's services) meaning that people who work in adult services are very likely to remain working in adult services, and move around within it, and the same is true for children's services. The research shows that where people do move from one to the other, it is more likely to be from adult to children's rather than the other way round.
- 7.14 Whilst this reflects the SSSC findings, its analysis did not include care at home and housing support services, which is the largest sub-sector in adult social care. The expansion of ELC by 2020 is very positive, any flow of workers from adult to children's services may be exacerbated by the steep increase in the need to recruit staff in to

¹⁵⁷ Turnover rate reaches new high – Beckett Frith, HR Magazine (October 2017) <https://www.hr magazine.co.uk/article-details/turnover-rate-reaches-new-high>

ELC. The key will be to attract new people in to the social care sector (including ELC) as required, rather than solely relying on moving people around within it and so displacing and creating pressures within parts of it. That is why it is so important to understand what motivates people to join and stay in the social care sector.

- 7.15 Employees who have ambitions to leave social care are most likely to seek employment in the health and education sectors. In rural areas in particular, the tourism sector is a key competitor for staff, offering a wide range of job opportunities with similar or better pay and more flexible working conditions.
- 7.16 People who are currently working in children's services and have been trained in early learning are more likely to move into the education sector than their counterparts in adult services. It means they can continue to use their skills of working with children but have more flexible working and better pay and conditions. Staff in adult services are more likely to move into jobs in the health sector where they can transfer their skills and potentially gain more attractive terms of employment. This supports anecdotal evidence provided by stakeholders.
- 7.17 Whilst staff move around the sectors, they also join from a range of other parts of the economy, notably office-based roles and retail jobs.

Recruitment and Vacancies

- 7.18 The most substantial recruitment difficulties being experienced by employers are in relation to support workers and other types of care staff. Given the potential for staff to leave the social care sector, it is imperative that employers are able to better understand what motivates their staff and work towards improving those aspects of the work environment and job role that they can influence.
- 7.19 Employers with hard-to-fill vacancies (30% of those who are recruiting) are looking for support workers and residential care workers in particular. Employers anticipate that they will continue to face these recruitment challenges over the next 12 months with more of these being in the third and independent sectors, and in remote or island locations. We anticipate that the Care Inspectorate and SSSC will publish an updated version of their vacancies report in 2020. A report could provide a comprehensive snapshot of vacancies in the sector as of December 2018

7.20 The high levels of both expansion and replacement demand means that the majority of employers are planning to replace staff that are due to retire or are anticipated to leave, and half of employers are expecting to recruit to expand their workforce. There is an increasing body of evidence which includes the findings from this study and evidence from key stakeholders such as the SSSC, Care Inspectorate, Scottish Care and CCPS. The findings are helping to shape our understanding of the sector's workforce and significant challenges such as the challenges around recruiting staff and filling vacancies. There is a need to continue and accelerate progress to tackle these challenges to support the ongoing delivery of these vital services. .

Motivations to stay and leave the sector

7.21 Encouragingly, only one in ten social care employees want to leave the sector. Whilst the varied and practical nature of social care work can be attractive to some people, there are some more challenging aspects that present barriers to entry and progression. Although there are a range of factors influencing people's decision to pursue a career in social care, most people join and stay in the workforce because they are motivated to make a difference to people's lives and because they have a passion for the work. It shows that for many people, social care is more than just a job, it is a vocation. This passion and drive to make a difference is as true for those who at the time of the survey were in their first social care job as it is for those who have joined the workforce from a different sector.

7.22 There is also no discernible difference between those who live in urban areas and their counterparts who live more rurally. It is clear then that job satisfaction is a major attraction for people joining and remaining in social care which is a key message for workforce planners, education and training providers and employers to convey in order to attract people to work in social care. It also demonstrates how important it is that employees can be proud of what they do and are supported to continue to undertake a job that is high quality, valuable and valued. This is a key message for employers and other partners involved in planning a sustainable social care workforce.

7.23 Interestingly employers whilst agreeing that making a difference is a major motivator, also believe that employees are motivated by a broader range of factors including training opportunities and flexible and part-time working. These are less commonly reported by staff which may imply that employers believe staff value these opportunities

more than they do in reality. It may also mean that employers are more aware of the opportunities, or they perceive the opportunities to be more abundant and positive than staff and that employers are over-optimistic about how the workforce feels about working in the sector in terms of pay and conditions.

- 7.24 Employees report that in their view, people who leave the sector are primarily (though not exclusively) driven by a need or a desire for better pay and conditions. Employees also cited other factors such as a lack of recognition of their role and the wider terms and conditions. These factors – particularly pay - supports previous research and is still the main challenge faced by employers, and indeed, by employees. Employers recognise that employees who leave their job with them are often looking for better pay and conditions. Employers also see a key driver for people leaving is that they are looking for opportunities to progress their career, this could be within social care or leaving to move in to other sectors.
- 7.25 In the study, some people noted their current intention to leave the sector and for this group, the key reason was that they wanted a less stressful job. They were also looking for a better work-life balance and the third most important driver was that they were looking for better terms and conditions. It is interesting that stress and work life balance is the reason why people report that they intend to leave, which is slightly different to the overall perception of why people might want to leave. It demonstrates to workforce planners the importance of supporting employees to ensure that the work and the work environment is not too stressful and doesn't put too much pressure on the lives of employees in and outside of work.
- 7.26 Movement of social care staff from the independent and third sectors to the public sector has long been recognised as a particular issue facing providers. However, it is important to recognise that people are also motivated to move out of social care for jobs that are less demanding but may have equal or better rates of pay.
- 7.27 The evidence supports the fact that there are some fundamental structural issues facing the sector and whilst some progress has been made on addressing terms and conditions, the sector will continue to face challenges to meet replacement and expansion demand. These issues are also a barrier to achieving a more diversified social care workforce and make the challenges of recruitment and retention particularly acute in areas where there are a wide range of career

opportunities in other sectors. Improving terms and conditions across all parts of the social care sector can't be addressed by employers alone. It requires a greater understanding of the value and contribution of care.

- 7.28 Given the substantially higher proportion of female workers in the sector it is not surprising that a significant reason for leaving the workforce is childcare or other caring responsibilities. Whilst the part-time nature of the work is perceived as being a motivating factor in joining the social care workforce, it could be the case that part-time hours are determined by service user need, and do not necessarily align with when people are available to work because of their own caring responsibilities. This, compounded by pay levels can mean that working in the sector and paying for care is not a viable option for many people, forcing them to leave rather than find a work life balance solution. It demonstrates the importance of flexible working and innovative initiatives, for example supporting employers to consider how or if they can provide working patterns that are predictable and can fit around domestic responsibilities, ways of helping employees access high quality, affordable care, or looking at formalised career breaks during which workers have the opportunity to keep their skills up to date and plan their return to the workforce. Understanding this, and considering it at an area rather than provider level may help workforce planners to design solutions and take a medium to longer term approach to ensuring there is a local and skilled workforce.

Fair Work

- 7.29 The findings in this study should also be seen alongside the recent report by the Fair Work Convention examining fair work in Scotland's social care sector.¹⁵⁸ The report highlight the undervaluing of care and the fact that these vital services are delivered by a predominantly female workforce. The report sets out five recommendations designed to impact on the drivers of work and employment practices in social care. In summary the recommendations are as follows:
- The Scottish Government should support the establishment of a sector-level body responsible for ensuring that social care workers have an effective voice in the design, development and delivery of services.

¹⁵⁸ Fair Work in Scotland's Social Care Sector 2019 – Fair Work Convention (February 2019) <https://www.fairworkconvention.scot/our-report-on-fair-work-in-social-care/>

- Key stakeholders should develop and agree appropriate minimum contract standards for the provision of publicly- funded social care services. This should cover terms such as pay as well as hours/income stability and appropriate supervision, training and development.
- Commissioning practices in social care should be overhauled to ensure that fair work drives high quality service through minimum contract standards and engagement at sector-level between social care purchasers, providers and deliverers.
- Key stakeholders in the social care sector should apply the Fair Work Framework and commit to improving pay, conditions and opportunities for progression for directly employed care workers and for PAs.
- The Scottish Government should support the preceding recommendations and incorporate them in to the Fair Work Action Plan and Gender Pay Action Plan. It is suggested that there should be a central location in the Scottish Government's Health and Social Care Directorate to co-ordinate across the pertinent policy areas.

7.30 Our labour market study highlights a range of key findings which could support the implementation of the next steps for the Fair Work agenda.

Appendix A: Clarifications of Social Care Services in Scotland

As defined in the Public Sector Reform (Scotland) Act 2010¹⁵⁹, the ‘social service’ sector is a combination of two sub-groups:

- **Care services** - which covers all registered care services; and
- **Social work services** - which is all local authority social work services.

The wider social service workforce includes all those in paid employment in the social service sector, including people working for the public sector providers (for example local authorities), independent sector care providers and third sector care providers. It also includes those employed as PAs under Self-Directed Support. Table A.1 provides more detail on each of these service types. Please note that social work has been excluded from this research study.

Table A.1: Sub-sectors of the social service workforce in Scotland

Sub-sector ¹⁶⁰	Description
Adoption service	A service that makes arrangements in connection with the adoption of children. This does not include services in which the proposed adopter is a relative of the child.
Adult day care	Day care services for adults can be provided from registered premises in a variety of settings.
Adult placement service	Adult placement services provide or arrange accommodation for vulnerable adults, aged 18 or over, in the homes of families or individuals. This can be together with personal care, personal support, counselling or other help provided other than as part of a planned programme of care.
Care at home	A service which delivers assessed and planned personal care and support which enables the person to stay in their own home.
Care homes for adults	Care homes for adults provide care for a range of people and people with particular types of problems; alcohol and drug misuse; learning disabilities; mental health problems; older people; physical and sensory impairment; or respite care and short breaks.
Central and strategic staff	Staff within local authority social work services with a strategic and/or central role including senior management, administrators and support staff.

¹⁵⁹ Public Services Reform (Scotland) Act 2010 – Scottish Government (2010) <https://www.legislation.gov.uk/asp/2010/8/contents>

¹⁶⁰ This term is used interchangeably with the term “service type”. The sub-sector categories are based on; a) the definitions of registered care services (set out in the Regulation of Care (Scotland) Act 2001); and b) the types of services provided by non-registered local authority social work services.

Sub-sector¹⁶⁰	Description
Childcare agency	Childcare agencies supply or introduce to parents a child carer who looks after a child or young person, up to the age of 16, wholly or mainly in the home of that child's parent or parents. They could include for example: nanny agencies, home-based childcare services or sitter services.
Childminders	A childminder is a person that looks after at least one child, up to the age of 16 years, for more than a total of two hours per day. The childminder looks after the child on domestic premises for reward but not in the home of the child's parent or parents. A parent, relative or foster carer of a child cannot be regarded as that child's childminder.
Daycare of children	A service which provides care for children on non-domestic premises for a total of more than two hours per day and on at least six days per year. It includes nursery classes, crèches, after school clubs and play groups. The definition does not include services which are part of school activities or activities where care is not provided such as sports clubs or uniformed activities such as the Scouts or Guides.
LA fieldwork service (adults)	Local authority fieldwork staff usually based in local offices providing services to adults. Staff will include qualified social workers.
LA fieldwork service (children)	Local authority fieldwork staff usually based in local offices providing services to children and families. Staff will include qualified social workers.
LA fieldwork service (generic)	Local authority fieldwork staff in divisional and area offices. Local authority fieldwork staff usually based in local offices providing services to a range of people. Staff will include qualified social workers.
LA fieldwork service (offenders)	Local authority fieldwork staff in divisional and area offices. Local authority fieldwork staff usually based in local offices providing services to the courts and prisons in relation to people who have been convicted of criminal offences. Staff will include qualified social workers.
Fostering service	Fostering agencies may provide substitute care where a child's family is unable to provide care. They may provide complementary care to provide additional opportunities for a child or to give parents a break. These carers are sometimes called respite or family placement carers. The term foster care is used to describe all these situations.
Housing support	A service which provides support, assistance, advice or counselling to enable an individual to maintain their tenancy. Housing support may be provided to people living in ordinary homes, sheltered housing, hostels for the homeless, accommodation for the learning disabled, women's refuges or shared dwellings.

Sub-sector ¹⁶⁰	Description
Nurse agency	Nurse agencies introduce and supply registered nurses to independent and voluntary sector healthcare providers and to the NHS in Scotland.
Offender accommodation service	A service which provides advice, guidance or assistance to people such as ex-offenders, people on probation or those released from prison that have been provided accommodation by a local authority.
Residential childcare	These services are care homes, special school accommodation services and secure accommodation services for children who are looked after away from home.
School care accommodation	This includes boarding schools and school hostels but does not include services for children looked after away from home.

Clarification between Daycare of Children Services and Early Learning and Childcare

The SSSC usually differentiate between social work (as defined by the Public Sector Reform (Scotland) Act 2010), social care and ELC (covering daycare of children (DCC) and childminders).

Social care services therefore can include:

- Adult social care;
- Children’s social care; and
- ELC.

Children’s and Adult Social Care Services

Table A.2 sets out the definition of ‘Children’s social care services’ and ‘Adult social care services’ used in our report, based on the social care sub-sectors described above. ELC (as defined in Table A.3 has also been excluded, as it is covered in a separate report.

Table A.2: Clarification of children’s and adult social care services

Type of service	Categories
Children's services	Adoption service
	Fieldwork services (children)
	Fostering service
	Residential childcare
Adult services	Adult day care
	Adult placement services
	Care homes for adults
	Fieldwork services (adults)
	Fieldwork services (offenders)
	Housing support/care at home
	Nurse agencies
	Offender accommodation services

Table A.3: Clarification of ELC

Type of service	Categories
ELC	Childminding
	Daycare of children (DCC)

Clarification of Sector Types

The SSSC identifies that the social service workforce includes people working for:

- public sector providers (for example local authorities);
- private care providers; and
- voluntary sector care providers.

To reflect these categories, the ekosgen survey asked employers and employees to identify as either ‘public’, ‘private’ or ‘voluntary’ sector. However, these are referred to throughout our report as ‘public’, ‘independent’ and ‘third’ sector in line with the definitions used in Part Two of the National Health and Social Care Workforce Plan.

Appendix B: Alignment of survey sample with the workforce

Table B.1 shows how the profile of the employees responding to the research survey compares to the overall social care workforce in Scotland (as defined through the latest SSSC Workforce Report). The key points to note between the two are:

- The survey sample is generally representative of the overall social care workforce by gender, age and geography;
- The survey is over-represented in terms of children’s services¹⁶¹. This is likely due to the strong survey promotion through ELC routes;
- The survey is over-represented in those of a White ethnic group, although this disparity is likely to be due to the large share of the workforce whose ethnic group is ‘unknown’ (17%);
- The survey is over-represented by full-time workers when compared to the workforce. This may be because full-time workers are likely to have greater access to IT/computers and more opportunities to complete the online survey; and
- It is difficult to compare job roles, given that the survey asks ELC workers to classify their job roles differently (e.g. support worker, practitioner, or lead practitioner).

Table B.1: Comparison of Scottish social care workforce and survey sample

Characteristic	Workforce (n=202,090)	Survey Sample (n=8,055)
Gender		
Female	85%	89%
Male	15%	11%
Age		
Under 25 years	10%	9%
25 to 34 years	19%	17%
35 to 44 years	19%	21%
45 to 54 years	26%	30%
55-64 years	20%	21%
Over 64 years	2%	2%
Not know/prefer not to say	3%	1%
Ethnicity		
White	80%	95%
Mixed	0%	0%
Asian	1%	0%
Black	1%	1%
Other	1%	1%
Unknown	17%	1%
Geography		

¹⁶¹ See Table A.2 in Appendix A for definition of children’s services

Characteristic	Workforce (n=202,090)	Survey Sample (n=8,055)
Larger cities	30%	26%
Urban with substantial rural	32%	36%
Mainly rural	29%	30%
Islands and remote	4%	4%
Service		
Children's service	25%	59%
Adult services	66%	40%
Other	9%	8%
Job role		
Administrative/Support Worker (e.g. clerical, finance, HR)	5%	5%
Ancillary Worker (e.g. catering, domestic, gardening)	7%	0%
Care staff who provide direct care and support (for example support workers in DCC services)	51%	23%
Care staff who may supervise work of staff and contribute to the assessment of care needs and development and implementation of care plans (e.g. senior residential care workers)	20%	
Care staff who are responsible for assessment of care needs (e.g. social workers, occupational therapists, registered nurses)	9%	
Unit/Project Manager – Has responsibility for the management of care and service provision in a discrete service delivery	5%	8%
Group Manager – Has overall responsibility for the management of care and service provision in two or more discrete service delivery areas (e.g. a group of care homes, a care home comprising a number of service delivery units)	1%	5%

Characteristic	Workforce (n=202,090)	Survey Sample (n=8,055)
Director/Chief Executive – Has the highest level of overall responsibility for the management of care and service provision. Staff at this level are on the organisations' governing body	0%	2%
Job Function Not Known	3%	n/a
Lead practice/service manager (ELC only)	n/a	15%
Practitioner (ELC only)	n/a	28%
Support worker (ELC only)	n/a	13%
Mode of working		
Full-time	50%	68%
Part-time	50%	32%
Qualifications		
No qualifications	n/a	4%
Other qualifications		4%
SCQF 1-5 +		92%
SCQF 6 +		75%
SCQF 7 +		55%
SCQF 8 +		28%
SCQF 9 +		15%
SCQF 10-12		6%

Source: SSSC Workforce data (2017) and ekosgen survey data (2019)

Appendix C: Comparison of Social Care Workforce and the Scottish Workforce

Characteristic	Social care	Scotland¹⁶²
Gender		
Female	85%	49%
Male	15%	51%
Age		
Under 25 years	10%	13%
25 to 34 years	19%	22%
35 to 44 years	19%	62% ¹⁶³
45 to 54 years	26%	
55-64 years	20%	
Over 64 years	2%	3%
Not know/prefer not to say	3%	-
Ethnicity		
White	80%	96%
Mixed	0%	<1%
Asian	1%	1%
Black	1%	1%
Other	1%	1%
Unknown	17%	-
Geography		
Larger cities	30%	39%
Urban with substantial rural	32%	33%
Mainly rural	29%	25%
Islands and remote	4%	3%
Mode of working		
Full-time	50%	66%
Part-time	50%	34%
Vacancies		
Vacancy rate	38%	20%
<i>Of which, hard-to-fill vacancy rate</i>	45%	42%

¹⁶² The data for Scotland is sources from the Annual Population Survey (2018), Business Register and Employment Survey (2017) and DfE Employer Skills Survey (2017).

¹⁶³ Please note it is not possible for this age band to be broken down as per the Social care age bands.

Appendix D: Clarification of Wage Rates¹⁶⁴

	The Minimum Wage	National Living Wage	Real Living Wage	Scottish Local Government Living Wage
How much is it?	£7.70/ hour	£8.21/ hour	£9.30 ¹⁶⁵ / hour	£9.07/ hour
Is it the law?	Statutory	Statutory	Voluntary	Statutory
What age group?	21 and older	25 and older	18 and older	
How is it set?	Negotiated settlement based on recommendations from businesses and trade unions	A % of median earnings, currently at 55%, it aims to reach 60% of median earnings by 2020	Calculations made according to the cost of living, based on a basket of household goods and services	All Scottish local authorities have committed to paying the Scottish Local Government Living Wage as a minimum to all employees by 2022

¹⁶⁴ Wages and statements are true at the time of reporting (October 2019). New rates are set to be announced during Living Wage Week in November 2019.

¹⁶⁵ £10.75 in London



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