Case Studies Report
for
Scottish Government and COSLA

February 2020

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

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1 Introduction

1.1 The development of social care in Scotland is at a crucial stage, and the future workforce must be well planned and evidence based to ensure efficiency and quality. 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 a lack of substantial data around the recruitment and retention of these workers, and their movement within the sector or wider economy.

1.2 Part Two of the National Health and Social Care Workforce Plan (NWP) 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 areas[1]. A key challenge for the delivery of social care are the particular factors that may be operating in different types of localities. For instance, in urban areas, there is likely to be 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 1.1.

Table 1.1: Case study areas

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

1.3 Each of the case study areas were discussed and agreed at an early stage with the Research Advisory Group (RAG)[2]. They are not necessarily representative of the wider social care sector, but aim to illustrate or reinforce some of the challenges faced. To verify and informally sense-check the findings for each area, this case studies report was circulated to colleagues within the four local authority areas. Two responses were provided, and they broadly recognised that the area reports reflect their experience and the feedback they receive from local social care

[1] Categorised 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.

[2] The function of the RAG was to inform and support the research. The RAG members reflected a wide range of interests and remits relating to social care across the public, independent and third sectors.

employers and employees. One local authority reported that their key issues are the recruitment and retention of staff in the sector and the difficulty in attracting young people into the sector. Lack of career progression routes was also identified by both local authorities as a challenge, as was the perception of what working in care actually is – both points reflecting the anecdotal but persistent opinion that there is a lack of career progression opportunities in social care and that it provides 'just a job' rather than a 'career'.

1.4 Sitting within the broader social service sector, which includes social work services (including all local authority social work services)[3], 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 B. The scope of the study extends to Early Learning and Childcare (ELC) which covers Daycare of children and childminding, 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. It does not include social workers working for any type of employer.

1.5 This report is intended to accompany the main social care[4] and Early Learning and Childcare[5] (ELC) reports. These reports provide insights into the way local and national labour markets impact on the social care workforce, how different parts of the social care sector interact, and what these interactions mean for workforce planning locally and nationally, and were based on the survey responses from social care workers and employers[6] across the third, independent and public sectors[7]. It is important to bear in mind that the figures in this and subsequent sections are based

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

[4] 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).

[5] The ELC sector is a sub-part of the Day Care of Children (DCC) service type, 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.

[6] NB Social workers were not included as part of this research.

[7] 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.

on relatively small numbers of responses. However, these figures – combined with data from other sources such as SSSC and Care Inspectorate data – can provide useful insights into the challenges in these four areas.

1.6 For this purposes of this report, the employee survey feedback has been analysed by service type (that is broken down into ELC, adult social care services and children' social care services) in order to compare the findings for each. However, it must be noted that the employer responses have not been disaggregated in the same way as the overall numbers are too low, and it would be difficult to guarantee the robustness and reliability of the data, or whether it is representative of the region. There is also the danger that reporting small numbers of employers may be too disclosive or identifying for participants.

1.7 The sample sizes for each area are set out in Table 1.2. These samples are small in absolute terms and whilst for the purpose of the report they are presented empirically, they are not statistically significant and so are designed to provide insights in to local labour markets that can be built on going forward to plan more detailed local research and work planning. As context, we have set some of the findings against the Scottish picture, but given the small numbers at local level, this should be regarded as providing insights and a flavour of the local position in relation to the national as opposed to being hard, and statistically significant data.

Table 1.2: Sample sizes

Local authority	Employee survey	Employer survey
Aberdeen City	286 responses	75 responses
Argyll and Bute	151 responses	35 responses
Dumfries and Galloway	186 responses	49 responses
South Lanarkshire	431 responses	84 responses

1.8 In each case study we discuss Location Quotients (LQs). These measure the concentration of employment in a particular sector in a particular geography (such as a local authority area) compared to the national average[8]. 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.

[8] Understanding Location Quotient - https://www.economicmodeling.com/2011/10/14/understanding-location-quotient-2/

1.9 When measuring the LQ of social care workers in Aberdeen for example, we are considering the share of all jobs in Aberdeen 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.

2 Aberdeen City Case Study

Overview

2.1 Aberdeen City is the third largest city in Scotland and the eighth largest local authority in terms of population size. It is recognised as being in the 'Larger Cities' RESAS category of rurality[9]. Despite the relative economic success of the North East, there are considerable levels of deprivation in Aberdeen City. There are 22 out of 283 (8%) Scottish Indices of Multiple Deprivation (SIMD) datazones in Aberdeen City that have been identified as being in the top 20% most deprived datazones in Scotland[10]. With a large population size and compact geographical area, Aberdeen City's population density is high at over 1,200 people per km^2. The economic downturn associated with activity in the oil and gas sector in the area has impacted on other sectors within the local economy[11]. Though there are signs that the oil and gas industry is picking up again, there have nevertheless been negative implications for the wider economy of the North East.

Socio-Economic Profile

2.2 The population of Aberdeen City was 227,600 in 2018, an overall increase of 5% since 2008, but estimates suggest a slight decrease in the last three years. The population is slightly younger than Scotland as a whole – Aberdeen City has historically benefitted from large numbers of students living in the area bolstering this population, but also as a place for young professionals as is the case in many large cities. Net out-migration from Aberdeen City in 2016-17 saw over 1,400 residents leave the area, 46% more than the previous year.

2.3 Like the rest of the UK and Scotland, Aberdeen City is projected to have an increasingly ageing population in future decades. The number of people living in Scotland of pension age and over is projected to rise by 25.1% – and the Scottish dependency ratio[12] is expected to reach 43.07 (in comparison to 41.96 for the UK as

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[9] The Rural and Environment Science and Analytical Services Division (RESAS) manages the Scottish Government's strategic research in relation to Environment, Climate Change and Land Reform (ECCLR) and Rural Economy and Communities (REC) portfolios. (https://www2.gov.scot/Topics/Research/About/EBAR/research-providers)

[10] Scottish Index of Multiple Deprivation data https://simd.scot/2016/#/simd2016/BTTTFTT/9/-4.0000/55.9000/

[11] Oil and Gas Survey - Aberdeen & Grampian Chamber of Commerce (May 2019) https://www.agcc.co.uk/research-downloads

[12] The difference between people of working age and people not of working age

a whole) – by 2041[13]. In Aberdeen City over the same period, the population increase is projected to be 12.5%. There are two key challenges that this demographic profile brings:

- The demand for health and social care in later life is likely to rise significantly, which has future implications for both the supply of health and social care and the need for social carers in Aberdeen City;
- The growth in the working age population will slow in future years. This will have the potential to act as a drag on future growth prospects unless it can be compensated for by increased participation of those in the older age groups and/or by increased productivity.

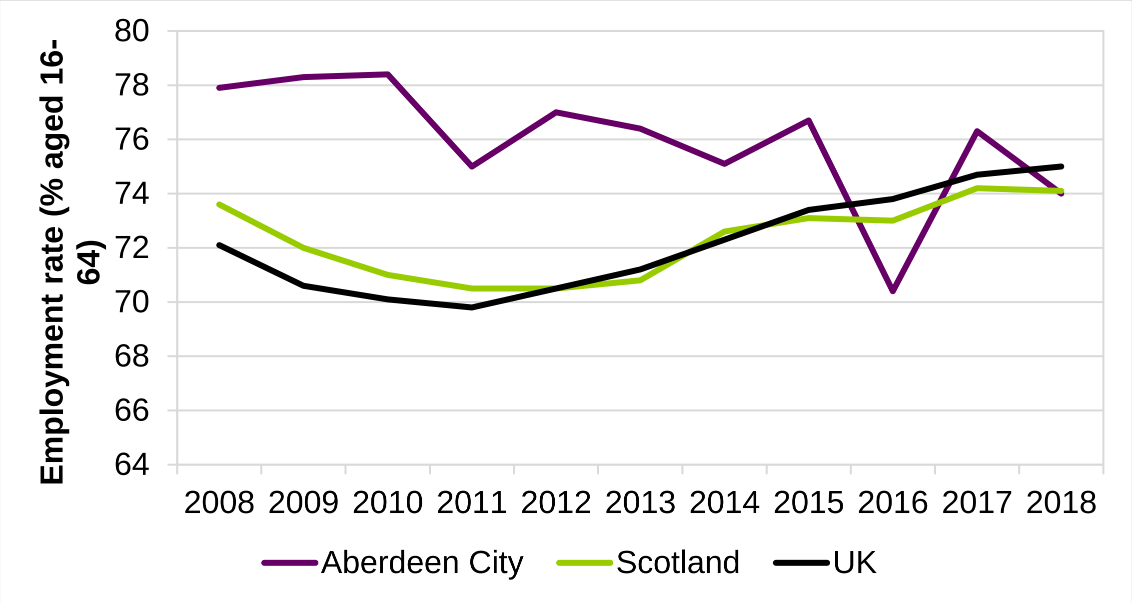
Local Labour Market

2.4 As shown in Figure 2.1, in 2018, the Aberdeen City employment rate was 74% among 16 to 64 year olds, which was in line with the national rate at the time, although it had seen a downward trend over the past decade. The unemployment rate in the city was higher than that of Scotland as a whole (at 7.1% and 4.3% respectively).There has been an increase in the unemployment rate in Aberdeen City over the last five years and a decrease in the national unemployment rate across the same time period[14], reflecting the downturn in the North East oil and gas industry.

[13] How serious is Scotland's demographic challenge? - Fraser of Allander Institute (September 2018) (https://fraserofallander.org/scottish-economy/fiscal-policy/how-serious-is-scotlands-demographic-challenge/)

[14] Office for National Statistics, Annual Population Survey

Figure 2.1: Employment rate (2008-2018)



Source: Office for National Statistics, Annual Population Survey

2.5 There are very high levels of energy industry employment in the area, with approximately ten times the share of employment in this industry than the Scottish average, a Location Quotient (LQ) of 10.0[15]. There was a somewhat higher share of employment in human health in Aberdeen City compared to Scotland as a whole in 2017, with an LQ of 1.2. The share of employment in food and drink services was broadly in line with the national average, whereas employment in accommodation (LQ of 0.79), education (0.76) and retail (0.72) were under-represented in the area when compared to the Scottish averages. The share of employment in office admin/support activities was much smaller in Aberdeen City than Scotland as a whole (LQ of 0.46).

2.6 The economies of Aberdeen City and Aberdeenshire are interlinked as a region. Employers across all sectors in the broader area are more likely to report current vacancies than the Scottish average (24% vs 15%), more hard-to-fill vacancies (12% vs 6%) and skills shortage vacancies (9% vs 4%). Almost a quarter of Aberdeen City and Aberdeenshire employers (24%) reported skills gaps in their current workforce, above the average for Scotland of 19%, with skills gaps most commonly reported in social care, leisure and other services, and in customer service occupations. This is likely to be due to competition with higher salaried oil and gas

[15] Location Quotients (LQs) are a measure of the concentration or degree of specialism of a particular sector in a particular geography compared to the national average. An LQ of greater than 1 indicates a greater degree of specialism in the social care sector in a particular area compared to the national workforce. The higher the score, the greater the specialism. Similarly, an LQ of less than 1 indicates a lower degree of specialism, or under-representation, when compared to nationally.

related sectors, as well as a lack of transferrable skills between these sectors and social care.

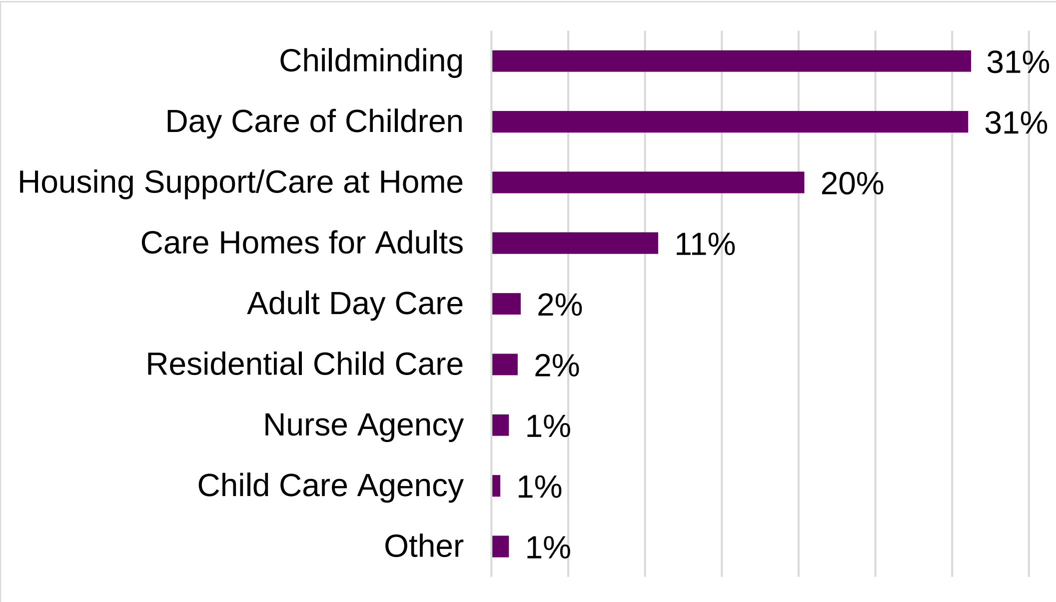
The Social Care Workforce in Aberdeen City

2.7 The social care workforce in Aberdeen City has seen a large amount of movement both within and out with the sector, with high levels of recruitment activity and turnover being reported in the survey

2.8 **Aberdeen City has a social care staff density of 350 per 10,000 population which is lower than the national rate (373)**[16] (please see Appendix A for more details). The gender profile of the social care sector in Aberdeen City is the same as nationally (85% female 15% male), but the Aberdeen City social care workforce is younger than in Scotland as a whole.

2.9 **Social care organisations in Aberdeen City employ staff in a diverse range of roles and sub-sectors, with children's services being the main sub-sectors.** As Figure 2.2 shows, almost two thirds (62%) of social care employers in Aberdeen City deliver childminding or DCC, and a further 20% of employees in Aberdeen City work in housing support/care at home.

Figure 2.2: Social service providers across Aberdeen City by sub-sector



Source: Social Service Workforce Data, SSSC (2017)

2.10 **According to SSSC workforce data, third sector social care services are significant in the area**. These account for 29% of all 525 social care services in

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

Aberdeen City[17] which is a higher proportion than the national average which is 20%. Linked to this, third sector providers in Aberdeen employ a higher proportion of the social care workforce at 34% compared to 28% for Scotland as a whole. This has implications for workforce planning and service commissioning as they will have to which has to take account of the prevalence of third sector providers

Although having a smaller number of independent services, the independent sector employs a greater share of the workforce in Aberdeen City than the Scottish average (46% vs 41%). This suggests a smaller number of larger employing independent services in Aberdeen City. Commissioners and others must therefore be mindful of this when considering the implications for workforce planning and service reform

2.11 **Seventy-five** employers from Aberdeen City responded to the ekosgen survey. This is a small number in absolute terms but it still provides useful information and insights in to the social care sector in the area and the challenges employers face.

2.12 **The survey found that social care employers struggle to recruit staff in Aberdeen City**. Over four in 10 (41%) social care employers in Aberdeen City currently have hard-to-fill vacancies compared to a quarter of employers across Scotland[18]. Along with the perception of the sector, factors specific to Aberdeen may include competition from other sectors, high housing costs and the general higher cost of living combined with low social care wages compared to the median Aberdeen City wage. The following comment from an Aberdeen City social care employer illustrates the issue further:

"The flow of applicants has decreased significantly. Perhaps with Oil & Gas resuming recruitment more opportunities are available for facilities [management] roles" (third sector, urban care at home employer)

2.13 **Of those social care employers who are facing recruitment challenges over the next year, most expect to struggle to recruit care staff.** As Table 2.1 shows, they also anticipate problems employing practitioners and support workers in ELC.

[17] Source: ekosgen survey of social care employers
[18] Ibid

Table 2.1: Proportion of social care employers anticipating recruitment challenges over the next 12 months, by job role

Job Role	Aberdeen City	Scotland
Care staff who provide direct care and support	60%	44%
Practitioner (ELC only)	37%	44%
Care staff who supervise work of staff and contribute to assessment of care needs and development and implementation of care	30%	18%
Support worker (ELC only)	23%	20%
Care staff responsible for assessment of care needs	10%	11%
Unit/project managers	10%	4%
Lead practice/service manager (ELC only)	7%	16%
Group managers	7%	2%
Administrative/support staff	0%	3%
Ancillary staff	0%	6%

Source: ekosgen employer survey (Aberdeen City n=30, Scotland n=599)

2.14 The research indicates that even employers who do not anticipate recruitment issues over the next 12 months have faced difficulties retaining staff. Almost a third (31%) of surveyed employers reported encountering regular difficulties when trying to retain care staff who provide direct care and support, compared to just 20% of social care employers across Scotland.

2.15 The following comment from an employer illustrates this issue:

> "*We are challenged due to the continued demand on services from all sectors. We just don't have enough staff applying for jobs in the service that have the experience to undertake the demanding role of a support worker."* (public sector, urban adult day care employer)

2.16 In the survey 23% of ELC employers reported that they regularly struggled to recruit ELC practitioners over the previous two years in Aberdeen City, six percentage points more than the findings for Scotland as a whole.

2.17 **Social care employers in Aberdeen reported in the survey that in their view they compete for staff most frequently with health and education sector**. This reflects the national picture as shown in Table 2.2 and indicates that there are many synergies between these sectors in terms of skills and experience needed by the workforce.

Table 2.2: Social Care employers' perception of the key competing sectors for staff[19]

Sector	Aberdeen City	Scotland
Health (e.g. Healthcare Support Worker)	61%	45%
Education – other	51%	49%
Education – classroom assistant	39%	37%
Retail	22%	14%
Other	18%	18%
Hotels and hospitality (e.g. restaurant and bar work)	16%	10%
Business services (e.g. office work)	12%	7%
Cleaning	6%	10%
Food processing and catering	2%	6%
Call centre work	0%	5%

Source: ekosgen employer survey (Aberdeen City n=51, Scotland n=1,081)

2.18 **Employers in Aberdeen City are more likely to recruit ELC and other social care staff from other parts of the sector than in Scotland as a whole**. As Table 2.3 shows, nearly half (46%) of ELC staff in Aberdeen City worked elsewhere in the social care sector before their current job, which is higher than the national rate (39%). This may reflect the movement of staff from different service types (that is, from independent to public sector jobs). Other social care staff in the area were also more likely to have come from another social care job than is the case in the wider Scottish workforce,

[19] Respondents were asked to indicate the top three sectors that they compete with for staff.

Table 2.3: Source of social care employees responding to the research

Previous employment	Current employment			
	Aberdeen City		Scotland	
	ELC[20]	Other social care[21]	ELC	Other social care
Another social care job	46%	57%	39%	51%
A different job	47%	40%	50%	45%
Full-time education	7%	3%	11%	4%
Total	**137**	**152**	**3,547**	**3,355**

Source: ekosgen employee survey (ELC=137, Other social care=152)

2.19 **Employees in the survey who previously worked in a different sector are most likely to come from retail, business services, and health work (50% of those who worked in a different sector)**. Other sectors previously worked in included hospitality, education, architecture, banking, dental nursing, and oil and gas recruitment .It should be noted that this question was not time bound so we don't know when the individual joined the social care workforce.

2.20 **In the survey most ELC and other social care workers in Aberdeen City reported that they intend to stay in the same role or progress to a promoted post**. However, as Figure 2.3 shows, ELC staff in the area are far less likely to stay in the same job (38%) than the ELC workforce in Scotland (48%), In Aberdeen City they are more likely to want to leave the sector entirely (13%, compared to 9% nationally).

2.21 Only 9% of other social care staff in Aberdeen City responding to the survey plan to leave the workforce entirely and we asked the reasons why. Of those who plan to leave, the reasons given were too much stress and an unmanageable workload, looking for a better work-life balance and wanting a career change are the main reasons for this[22]. This is of course based on a small sample but mirrors the finding in the main report for Scotland. It relates to the reason why people who intend to move want to, rather than wider perceptions amongst employees and employers of why people might want to leave.

[20] The ELC sector is a sub-part of the Day Care of Children (DCC) service type, 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.

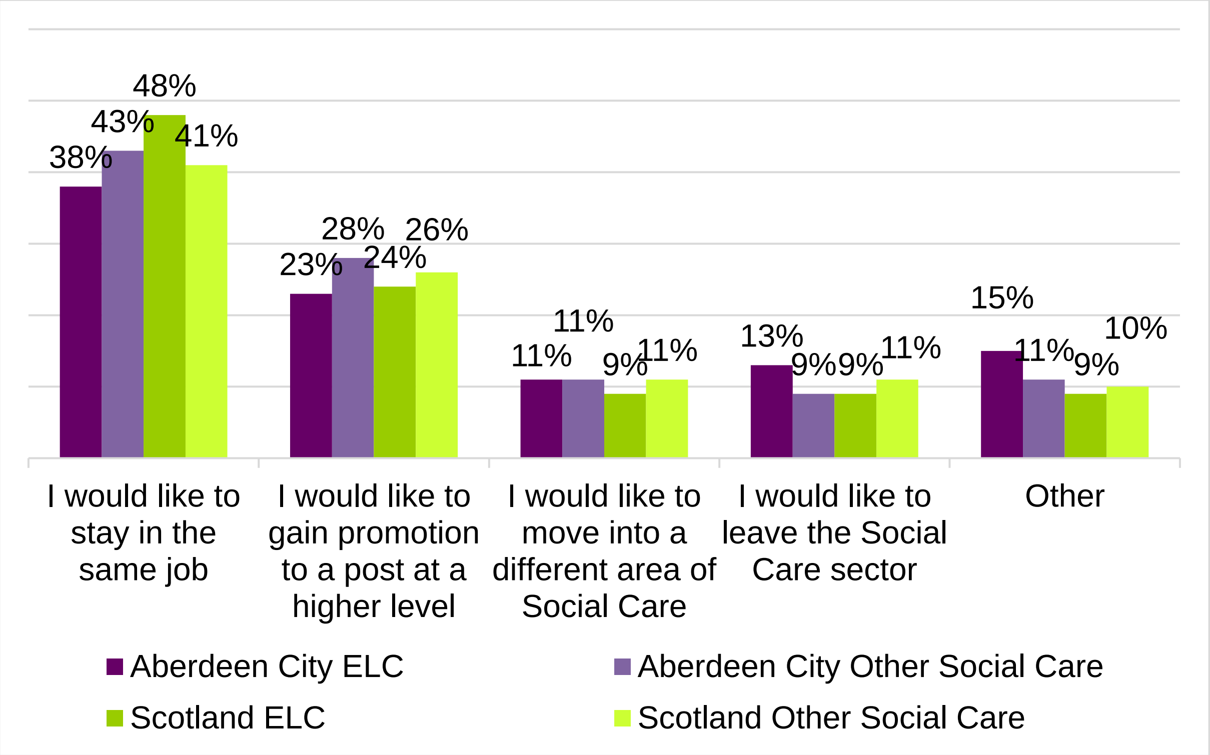
[21] NB – 'Other social care' refers to both **children's services** (i.e. adoption services, fostering services, residential childcare and fieldwork services) and **adult services** (i.e. adult day care, adult placement services, care homes, housing support/care at home for adults, nurse agencies, offender accommodation services, and fieldwork services).

[22] Source: ekosgen survey of social care employees

2.22 To address the perceived lack of career progression opportunities in the region, a Care Sector Working Group (a sub-group of the Employability Training Providers Forum) has been set up, as well as to consider training and support opportunities to help people into the sector. No further information is available at this stage but it may be worth following up as part of workforce planning in Aberdeen City.

2.23 For those looking for a career change, the most common intended destinations were business services, education and health sector jobs. Most of those who reported ‘other’ ambitions were looking to retire, with a small number unsure of future plans.

Figure 2.3: Employees’ ambitions for the future



Source: ekosgen employee survey (Aberdeen City ELC n=128, Aberdeen City Other Social Care n=141, Scotland ELC n=3,297, Scotland Other Social Care n=3,175)

2.24 Other motivating factors in leaving the sector was the terms and conditions, and the comments from social care employees in Aberdeen City largely reflected the wider workforce in this respect. Demonstrating the competition from other sectors In 2017, workplace-based median gross hourly pay for full-time employees in Aberdeen City was £15.33 (which is the second highest local authority area in Scotland). All Scottish adult social care workers are entitled to receive the Scottish Real Living

Wage which is currently £9.00 per hour[23]. It applies to care workers providing direct care and support to adults in care, care at home, and housing and support settings.

Learning Opportunities

2.25 The majority of employees in social care achieve their qualifications through work based learning. There are a variety of qualifications open to the social care sector, with provision in Aberdeen City delivered at differing levels by a variety of FE, HE and private providers. There were over 70 new Modern Apprentices (MAs) in social care areas in 2017-18 in Aberdeen City, adding to a total of 1,072 Modern Apprentices in training in the area as of March 2018. Social care MAs accounted for 11% of the total new MA uptake in Aberdeen City, in line with the picture nationally. Fifty-eight individuals completed their social care-related MA in Aberdeen City over the same period, accounting for 10% of all achievements in the area, slightly above the 9% of achievement across Scotland.

2.26 North East College had 429 enrolments in social, family and community subjects in 2017/18, and in 2019, Robert Gordon University will offer a number of courses in Social Care and Social Work (ranging from SCQF Levels 7 to 11) as well as a BA Honours in Residential Child Care. The University of Aberdeen also delivers a BA Honours in Childhood Practice.

Conclusions

Employers in Aberdeen City face particular recruitment and vacancy difficulties due to its circumstances e.g. competition for staff with the oil and gas industry which tend to offer higher paid opportunities. As with the rest of Scotland, the ageing population in Aberdeen City, and the health challenges that this brings, could lead to an increased demand for health and social care which has implications for both the supply of health and social care places as well as the need for social care staff in the area. This may be exacerbated by the competition for staff in the local economy.

2.27 The survey findings show that social care employees in Aberdeen City are more likely than their counterparts across Scotland to move within the sector than leave, with most social care workers intending to stay in the same role or progress to a promoted post in the future.

[23] The National Living Wage applies in other sectors and this is £8.21 for those aged 25 or older

3 Argyll and Bute Case Study[24]

Overview

3.1 Argyll and Bute is the second largest local authority area in Scotland with the third sparsest population (averaging 13 people per km^2). The landscape is characterised by long sea and freshwater lochs and peninsulas, and the area has 23 inhabited islands[25]. As such, the area is classified as 'Islands and Remote' in the RESAS definition of rurality[26]. The physical geography of Argyll and Bute adds considerably to the journey times between settlements and communities. The limited road network makes the area vulnerable to disruption, and diversions tend to be long. Island communities are vulnerable to ferry disruptions, particularly in the winter months. Eleven of the 122 (9%) datazones in Argyll and Bute have been identified as being in the top 20% most deprived datazones in Scotland[27].

3.2 Argyll and Bute's economy is predominantly service-based, but the area has relatively high levels of employment in agriculture and fishing[28]. Unemployment rates in the area are below the national average, although this will vary at different times of the year because of the high levels of seasonal employment in the local authority[29]. Argyll and Bute has a lower proportion of people identified as being income deprived by the Scottish Index of Multiple Deprivation (SIMD) than is the case across Scotland[30].

Socio-Economic Profile

3.3 The population in Argyll and Bute was 86,300 in 2018, with a significantly older profile than nationally. Almost half (49%) of Argyll and Bute's population is aged 50

[24] Please note that some figures, tables and findings for Argyll and Bute in this case study are based on low sample sizes and should be used with caution.

[25] These are: Bute; Coll; Colonsay; Danna; Easdale; Eilean da Mheinn; Erraid; Gigha; Gometra; Inchtavannach; Innischonan; Iona; Islay; Jura; Kerrera; Lismore; Luing; Mull; Oronsay; Seil; Shuna (Luing); Tiree; Ulva

[26] The Rural and Environment Science and Analytical Services Division (RESAS) manages the Scottish Government's strategic research in relation to Environment, Climate Change and Land Reform (ECCLR) and Rural Economy and Communities (REC) portfolios. (https://www2.gov.scot/Topics/Research/About/EBAR/research-providers)

[27] Scottish Index of Multiple Deprivation data https://simd.scot/2016/#/simd2016/BTTTFTT/9/-4.0000/55.9000/

[28] Office for National Statistics, Business Register and Employment Survey

[29] Office for National Statistics, Annual Population Survey

[30] 10% compared to 12% nationally

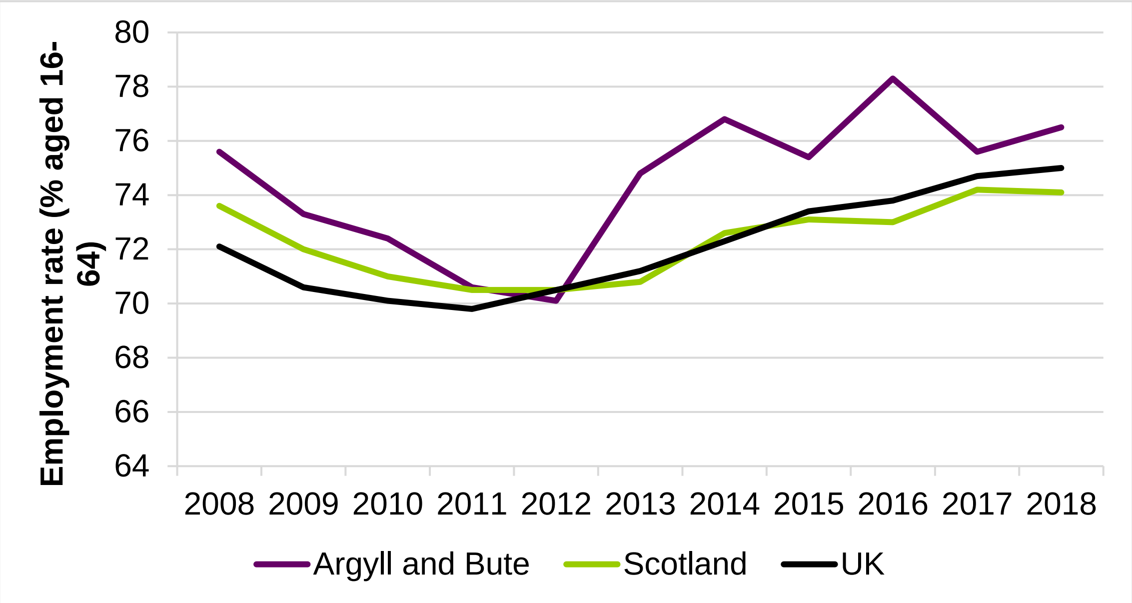
years or older, compared to just 40% for Scotland as a whole[31]. The area has seen a long term decrease in population size, with a 4% decrease over the last decade, and this trend is projected to continue. The population is ageing, and by 2041 it is forecast that the working age population will have fallen by 51%, with those aged 75 and over increasing by 65%. From 2016-17 to 2017-18, Argyll and Bute saw a 1.2% decrease in in-migration and a 4.2% increase in out-migration.

Local Labour Market

3.4 Choosing to work in the Argyll and Bute area can often be a lifestyle choice for people, and requires relocation. Argyll and Bute is geographically isolated apart from the Helensburgh area, where there is more scope for movement between employers and options for potential employees to find employment in other local authorities in the greater Glasgow area. Faslane and Coulport, both located near Helensburgh, are where HMNB Clyde (the largest employer in Argyll and Bute) is based.

3.5 As shown in Figure 3.1, in 2018, the employment rate in Argyll and Bute was 77% among 16 to 24 year olds, three percentage points higher than the employment rate for Scotland at the time (and it has been higher than nationally since 2012). The unemployment rate was lower than Scotland as a whole (3.2% vs 4.3%), and has been consistently lower over the last decade.

Figure 3.1: Employment Rate (2008-2018)



Source: Office for National Statistics, Annual Population Survey

[31] Mid-Year Population Estimates Mid-Year Population Estimates – ONS(June 2019) https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/timeseries/scpop/pop

3.6 There were high levels of retail industry employment in the area in 2017, similar to the Scottish average, while employment in agriculture in Argyll and Bute (almost one in 10 jobs in the area) was three times the Scottish average. However, Argyll and Bute has an especially strong tourism industry which is likely to compete with social care for staff. Reflecting this, there was a much higher share of employment in accommodation in Argyll and Bute compared to Scotland as a whole in 2017, with a Location Quotient (LQ) of 3.47[32]. Argyll and Bute's share of employment in education was in line with Scotland, whereas employment in the retail trade (LQ of 0.92), food and drink (0.92), office admin/support (0.81) and human health (0.79) sectors were under-represented in the area compared to nationally.

3.7 In the survey more than a third of employers in Argyll and Bute report skills issues with their current workforce. Forty-four percent identified training provision not meeting the needs of their staff, higher than the national figure of 26%, which is perhaps linked to the lack of suitable training provision in the local area.

The Social Care Workforce in Argyll and Bute

3.8 There are 257 social care services in Argyll and Bute employing almost 3,300 people, dominated by staff providing care at home services which account for 1,300 employees, and independent service providers far outnumber public and third sector providers in the area. Despite projected falls in the number of young people, there is a growing demand in the area for ELC staff, reflecting the major policy change at Scottish Government level, with 253 FTEs across all ELC delivery roles needed by 2022[33]. There is also a growing demand for broader social care staff to meet the needs of an ageing population – the biggest anticipated challenge for Argyll and Bute is meeting the projected growth in care at home needs[34]. In 2017, the median hourly pay for full-time employees in Argyll and Bute was £12.79 (which is the third lowest pay level of all local authority areas in Scotland). Since October 2016, the Scottish Government has provided funding to Local Authorities as part of an overall investment in social care to enable care workers providing direct care and support to adults in care homes, care at home, and housing support to be paid the Real Living Wage all of which has been baselined annually. **Argyll and Bute has a social care**

[32] Location Quotients (LQs) are a measure of the concentration or degree of specialism of a particular sector in a particular geography compared to the national average. An LQ of greater than 1 indicates a greater degree of specialism in the social care sector in a particular area compared to the national workforce. The higher the score, the greater the specialism. Similarly, an LQ of less than 1 indicates a lower degree of specialism, or under-representation, when compared to nationally.

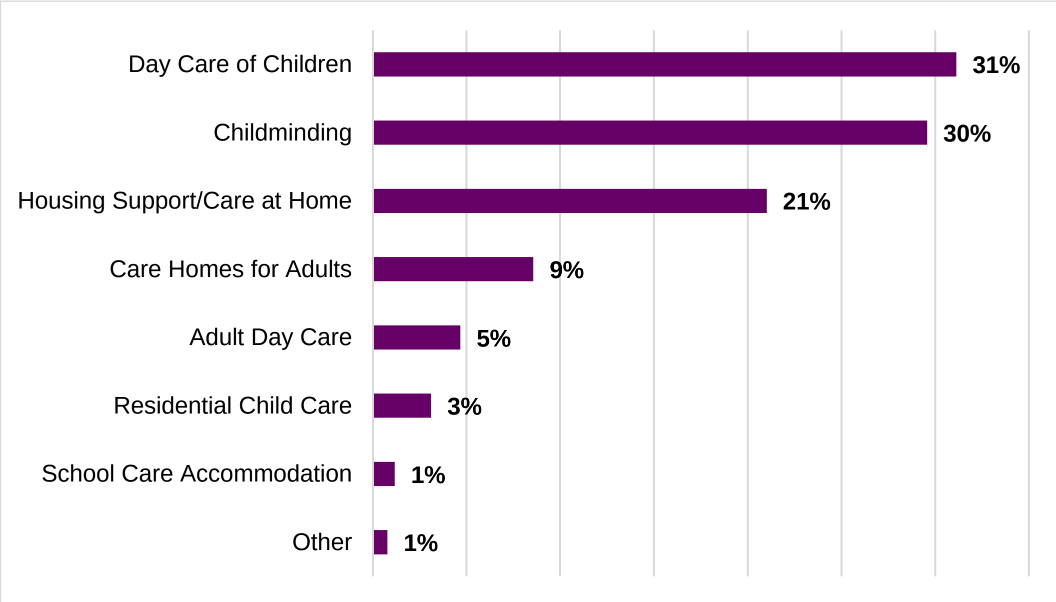
[33] Strategic Workforce Plan 2018-2022 – Argyll and Bute Council (April 2018) https://www.argyll-bute.gov.uk/sites/default/files/strategic_workforce_plan_2018_-_2022.pdf

[34] Ibid

staff density of 377 per 10,000 population, similar to the staff density across Scotland (373)[35]. Please see Appendix A for more details. The gender profile of the social care sector in the area reflects the national profile with 86% female and 14% male (85% and 15% nationally); however the age profile is marginally older than the national picture[36].

3.9 **Social care organisations in Argyll and Bute employ staff in a variety of roles and sub-sectors, particularly in children's services**. Figure 3.2 shows that according to SSSC data, over six in 10 (61%) of social care services in Argyll and Bute are in DCC or childminding, with a further 21% employing staff in housing support/care at home services.

Figure 3.2: Social service providers across Argyll and Bute by sub-sector



Source: Scottish Social Services Council Workforce Data, SSSC (2017)

3.10 Thirty-five employers from Argyll and Bute responded to the ekosgen survey. Whilst this is a small number, it provides useful information and insights in to the social care sector in the area and the challenges employers face.

3.11 **Most social care services in Argyll and Bute are independent providers, but a greater proportion of survey responses came from the third sector.** Around 40% of employers indicated they represented third sector social care services, 12% more than the national proportion. Public sector social care services make up around 31% of the regional survey responses, with 26% of responses from the independent sector[37]. The national figures are provided to give a sense of how

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

[36] Ibid

[37] Source: ekosgen employer survey, 2019

Argyll and Bute aligns or with national picture rather than providing a direct comparison.

3.12 **In the survey, social care employers in Argyll and Bute report fewer hard-to-fill vacancies than for Scotland as a whole .** Just under one-fifth (19%) of social care employers in Argyll and Bute currently have hard-to-fill vacancies compared to a quarter of all social care employers across Scotland[38].

3.13 **Over half of employers (56%) in Argyll and Bute expect to face recruitment challenges over the next 12 months.** As shown in Table 3.1, of those who responded to this question, most anticipate challenges in recruiting care staff who provide direct care (36%) and supervise work of staff (21%), with some employers foreseeing difficulties in recruiting ELC only practitioners (29%) and support workers (14%). Scottish figures are given as context but because of the small sample size for Argyll and Bute, direct comparisons cannot be drawn.

Table 3.1: Proportion of social care employers anticipating recruitment challenges over the next 12 months, by job role

Job Role	Argyll and Bute	Scotland
Care staff who provide direct care and support	36%	44%
Practitioner (ELC only)	29%	44%
Care staff who supervise work of staff and contribute to assessment of care needs and development and implementation of care plans	21%	18%
Support worker (ELC only)	14%	20%
Lead practice/service manager (ELC only)	14%	16%
Care staff responsible for assessment of care needs	7%	11%
Unit/project managers	7%	4%
Group managers	0%	2%
Administrative/support staff	0%	3%
Ancillary staff	0%	6%

Source: ekosgen employer survey (Argyll and Bute n=14, Scotland n=599)

3.14 **Even some employers who do not report any anticipated recruitment issues over the next 12 months have faced difficulties in retaining staff**. Around 23% of surveyed respondents reported encountering regular difficulties when trying to retain care staff who provide direct care and support. Scottish data is provided to

[38] Ibid

give a sense of how this relates to the national position. The sample size in Argyll and Bute means that we cannot draw statistically significant data to compare[39]. However, the findings for Argyll and Bute are not dissimilar to the findings for Scotland, suggesting similar retention challenges and providing useful information for the local area. However a larger proportion of employers in Argyll and Bute reported competition from call centres, food processing and catering, possibly reflecting the presence of employers such as WebHelp in Rothesay and the wide variety of food manufacturing companies in the area demonstrated by the Council's investment in the sector and businesses, for example in Bute Island Foods.

3.15 The following comments from employers based in Argyll and Bute illustrate the challenges faced around recruitment:

> *"Staff may be unaware of the opportunities to work in the care sector without qualifications and that they can work towards a formal qualification once employed."* (independent sector, rural housing support/ care at home employer)

> *"Limited supply of quality practitioners, [local] authority pay and conditions are better than voluntary."* (third sector, rural DCC employer)

3.16 **Employers in the sector who replied to this question consider that they primarily face the most competition from the education, health and hotels/hospitality sectors when recruiting and retaining staff**. However competition is more widespread than the national picture, as shown in Table 3.2, with competition from call centres, e.g. WebHelp in Rothesay, perceived as being significantly higher in Argyll and Bute (29% versus 5%), as well as competition from food processing and catering (17% versus 6%), which may reflect demand at HMNB Clyde.

Table 3.2: Social Care employers' perception of the key competing sectors for staff[40]

Sector	Argyll and Bute	Scotland
Education – other	54%	49%

[39] Source: ekosgen employer survey, 2019

[40] Respondents were asked to indicate the top three sectors that they compete with for staff.

Sector	Argyll and Bute	Scotland
Health (e.g. Healthcare Support Worker)	42%	45%
Hotels and hospitality (e.g. restaurant and bar work)	38%	10%
Education – classroom assistant	33%	37%
Call centre work	29%	5%
Food processing and catering	17%	6%
Retail	13%	14%
Cleaning	13%	10%
Business services (e.g. office work)	8%	7%
Other	4%	18%

Source: ekosgen employer survey (Argyll and Bute n=24[41], Scotland n=1,081)

3.17 **The previous origin of the social care workforce is similar in Argyll and Bute as it is in Scotland[42], as shown in Table 3.3**. In both, around two in five ELC employees and half of other social care employees were recruited from another part of the social care sector. Slightly more ELC employees in the area came into the sector from another industry in Argyll and Bute than across Scotland as a whole (54% versus 50%), while fewer current ELC employees came from full-time education (8% versus 11%).

Table 3.3: Source of social care employees responding to the research

Previous employment	Current employment	
	Argyll and Bute	Scotland

[41] The small number of responses to this question from Argyll and Bute do not provide statistically significant data but are very useful in understanding competition from other sectors in the area.

[42] Scottish figures are provided as context and due to the small number of response sin Argyll and Bute, direct statistical comparisons cannot be made.

	ELC[43]	Other social care[44]	ELC	Other social care
Another social care job	38%	52%	39%	51%
A different job	54%	47%	50%	45%
Full-time education	8%	1%	11%	4%
Total	**76**	**77**	**3,547**	**3,355**

Source: ekosgen employee survey (ELC=76, Other social care=77)

3.18 **Employees in Argyll and Bute responding to the survey are most likely to come from retail, hotels and hospitality, and the education sectors**. Other job types that responding social care employees in Argyll and Bute were previously employed in included agricultural work, and public service occupations such as working for the police and for Scottish Fire and Rescue[45].

3.19 **Most ELC and other social care workers in Argyll and Bute who responded to the survey intend to remain in the social care sector, either in the same role or in a promoted post**. As Figure 3.3 shows, only 4% of other social care staff wish to leave the sector entirely. Of those who plan to leave, the reasons given were stress, retirement and better[46]. This is based on a small sample and identifies the reason why people who intend to leave want to, rather than wider perceptions of why people might want to leave. Losing staff can cause problems for employers in terms of loss of skills, maintaining continuity of staff and investment in training and skills development.

3.20 The education and health sectors are perceived by employers as the most likely sectors competing for social care staff in Argyll and Bute (as shown in Table 3.2). The following comment from an independent service provider based in the area describes the reasons why they perceive the education sector as being attractive to their staff:

"They are able to offer more regular hours than us (we require staff to work after school and at weekends, but for longer periods during the school holidays) and

[43] The ELC sector is a sub-part of the Day Care of Children (DCC) service type, 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.

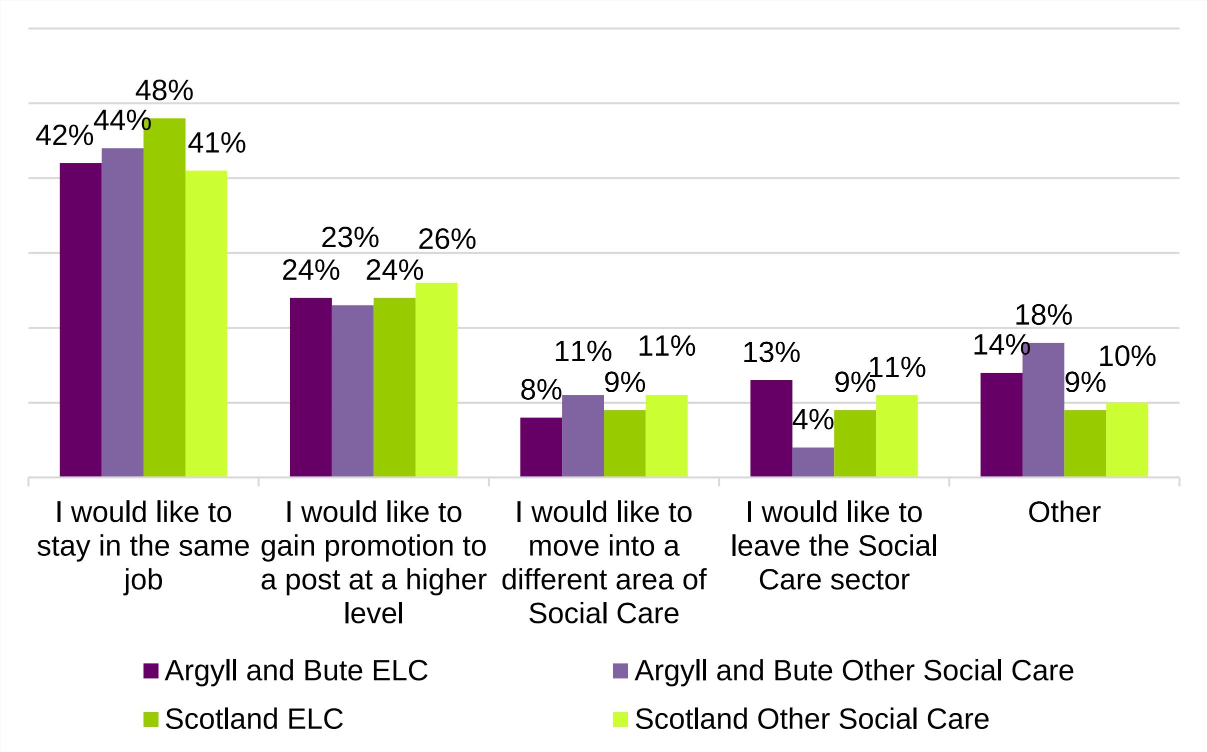
[44] NB – 'Other social care' refers to both **children's services** (i.e. adoption services, fostering services, residential childcare and fieldwork services) and **adult services** (i.e. adult day care, adult placement services, care homes, housing support/care at home for adults, nurse agencies, offender accommodation services, and fieldwork services).

[45] Source: ekosgen employee survey, 2019

[46] Source: ekosgen survey of social care employees

are often able to pay more." (independent sector, urban/rural, children's service employer)

Figure 3.3: Employees' ambitions for the future



Source: ekosgen employee survey (Argyll and Bute ELC n=72, Argyll and Bute Other Social Care n=73, Scotland ELC n=3,297, Scotland Other Social Care n=3,175)

3.21 Other motivating factors for leaving the sector included concerns over the lack of opportunity for progression. The following comment from an employee from Argyll and Bute highlights this point:

"As there is so little opportunity to change and/or be challenged by a job that has no progression, I will have to find this elsewhere." (public sector, rural ELC practitioner)

Learning Opportunities

3.22 As we might expect, locally based provision of social care qualifications is more limited in Argyll and Bute than in more urban areas. This has implications for workforce planning and also, development of existing staff. There were 15 new Modern Apprentices (MAs) in social care areas in 2017-18 in Argyll and Bute, adding to a total of 536 Modern Apprentices in training in the area as of March 2018. Social care MAs accounted for 4% of the total new MA uptake in Argyll and Bute, well below 11% for Scotland. Thirty-one individuals completed their social care-related MA in

Argyll and Bute over the same period, accounting for 12% of all achievements in the area, above the corresponding 9% rate across Scotland[47].

3.23 In 2017/18, Argyll College saw 104 enrolments for students studying social, family, and community subjects[48], and from 2019, the University of Highlands and Islands will offer a number of social care-related courses ranging from SCQF Level 7-11. This includes Social Services (previously HNC Social Care), Social Services (Children and Young People), Social Services and Healthcare, as well as Childhood Practice and Child and Youth Studies.

Conclusions

3.24 It is important to bear in mind that the figures in this and the other sections are based on relatively small numbers of responses and whilst we have given Scottish figures as context, the small samples in each area cannot be directly compared to the Scottish data.

3.25 Social care jobs tend to be more concentrated in more rural and remote areas of Scotland. The growing demand for social care services in Argyll and Bute (for both ELC staff and social care staff working in adult services) is likely to add further pressure to the existing recruitment and retention challenges faced in the area. Argyll and Bute has a reliance on HMNB Clyde and its extensive supply chain for employment, which brings young families to the area and therefore has implications for the demand on ELC. Any expansion or rationalisation of the base will also affect social care demands.

3.26 Around 43% of social care and ELC employers in Argyll and Bute reported in the survey that they are happy to stay in their current role which is broadly in line with the picture for Scotland and points to reasonable continuity of staff. A sizeable proportion are aiming for promotion within social care demonstrating ambition. Only a small proportion aspire to leave the sector altogether which is a positive finding in terms of stability. However people working in ELC are much more likely to report than they want to leave the sector altogether. This should be considered carefully by workforce planners as it is important that there is an adequate ELC workforce to deliver extended provision.

3.27 Argyll and Bute is geographically isolated with dispersed communities which has implications for social care workers in terms of travel to work and service delivery. Employers in the area report a lack of staff with sufficient experience, and

[47] Modern Apprentice Performance Report, SDS, 2019

[48] SFC Infact data, 2019 https://stats.sfc.ac.uk/infact/

there is also more limited access to locally available training and social care qualifications.

4 Dumfries and Galloway Case Study[49]

Overview

4.1 Dumfries and Galloway is a mostly rural area in south-west Scotland, renowned for its diverse natural landscape. The population is widely dispersed and the area is characterised by small settlements of 4,000 people or less, spread across a large area[50]. It has a population density of around 24 people per km^2. Dumfries and Galloway is recognised as being in the ‘Mainly rural’ RESAS definition of rurality[51]. The council area is bordered by five local authorities: East Ayrshire; South Ayrshire; South Lanarkshire; Scottish Borders; and Cumbria in England. In general, levels of deprivation in Dumfries and Galloway are relatively low, but there are still pockets of deprivation, with 17 of the 201 datazones (8%) in the area ranking among the 20% most deprived datazones in Scotland[52]. Human health and social work, and wholesale and retail account for around a third of the Dumfries and Galloway economy, with agriculture accounting for 10%. Productivity in Dumfries and Galloway is below the Scottish average, but is nonetheless expected to grow at a rate above the Scottish rate and in line with the UK level.

Socio-Economic Profile

4.2 The population of Dumfries and Galloway was 148,800 in 2018, which was a small decrease from the previous year of 0.3%, set against a small rise nationally. The current population of Dumfries and Galloway is substantially different from the Scottish population profile. There are a large proportion of older people (49% of the population is aged 50 years or older, compared to 40% for Scotland), and a markedly smaller proportion of those aged 25 to 49 years (26%, compared to 33% for

[49] Please note that some figures, tables and findings for Dumfries and Galloway in this case study are based on low sample sizes and should be used with caution.

[50] Whilst it is the 13th largest council area in Scotland in terms of population numbers, the population density is relatively low (60 people per km^2 compared to the Scottish average of 168[50]).

[51] The Rural and Environment Science and Analytical Services Division (RESAS) manages the Scottish Government’s strategic research in relation to Environment, Climate Change and Land Reform (ECCLR) and Rural Economy and Communities (REC) portfolios. (https://www2.gov.scot/Topics/Research/About/EBAR/research-providers)

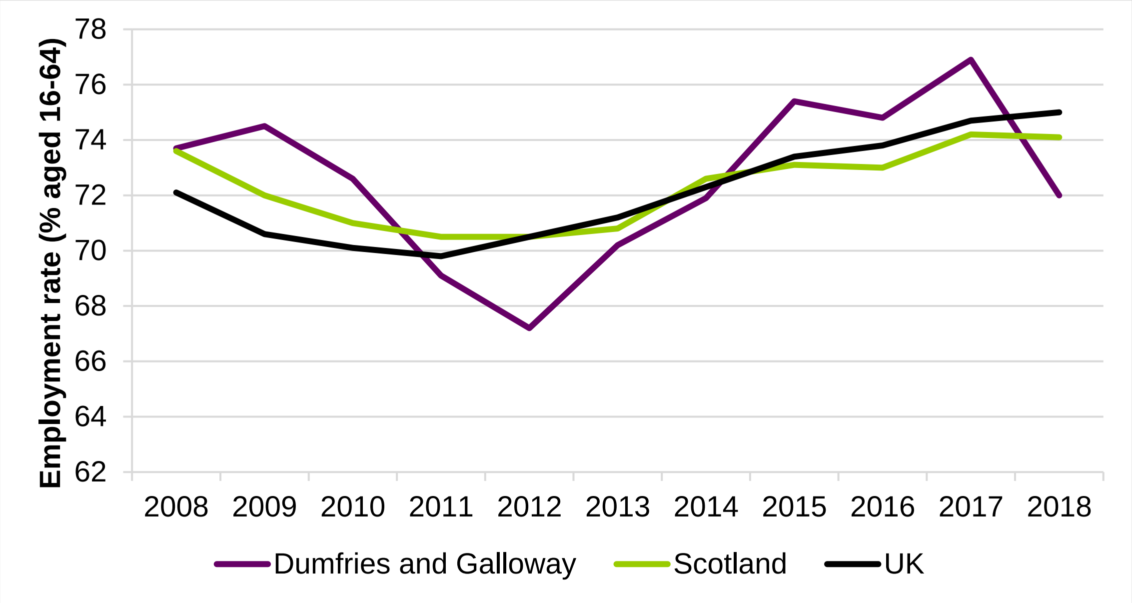
[52] Scottish Index of Multiple Deprivation data https://simd.scot/2016/#/simd2016/BTTTFTT/9/-4.0000/55.9000/

Scotland)[53]. Between 2016-17 and 2017-18, Dumfries and Galloway saw a small increase of 0.2% in in-migration and a 1.4% decrease in out-migration.

Local Labour Market

4.3 As shown in Figure 4.1, in 2018, the employment rate in Dumfries and Galloway was 72% among the working age population, marginally below the Scottish rate (74%) and five percentage points lower than the previous year. The unemployment rate in Dumfries and Galloway was very low in 2018, at 2.3%, compared to 4.3% nationally, and this has fallen year-on-year from a post-recession peak in 2012. This low unemployment rate will likely have implications for social care recruitment in the area, where 37% of services reported having vacancies in 2017, in line with the Scottish average (38%)[54].

Figure 4.1: Employment Rate (2008-2018)



Source: Office for National Statistics, Annual Population Survey

4.4 There were high levels of employment in agriculture (12%) in the area in 2017, four times more than the Scottish average. There were higher shares of employment in accommodation and retail in Dumfries and Galloway when compared to Scotland as a whole in 2017, representing Location Quotients (LQ) of 1.73 and 1.10

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[53] Mid-Year Population Estimates Mid-Year Population Estimates – ONS(June 2019) https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/timeseries/scpop/pop

[54] Staff Vacancies in Care Services - Care Inspectorate and SSSC (2017) https://data.sssc.uk.com/images/StaffVacancies/Staff-vacancies-in-care-services-2017.pdf

respectively[55]. The shares of employment in education and human health were broadly in line with Scotland as a whole, whereas employment was less concentrated in food and drink (0.83). Employment was significantly less concentrated in Dumfries and Galloway in office admin/support at just over half the national rate (LQ of 0.58).

The Social Care Workforce in Dumfries and Galloway

4.5 There are more than 360 social care services in Dumfries and Galloway, employing over 5,600 staff. The social care sector is dominated by services providing care at home (2,300 services) and care homes for adults (1,500 services), and a large proportion of social care services are delivered by independent and third sector organisations[56]. In 2017, the median hourly pay for full-time employees in Dumfries and Galloway was £11.52 (which is the lowest pay level of all local authority areas in Scotland). All Scottish adult social care workers providing direct care and support to adults in care, care at home, and housing and support settings are entitled to receive the Scottish Real Living Wage which is currently £9 per hour[57].

4.6 **Dumfries and Galloway has a social care staff density of 377 per 10,000 population, similar to the social care staff density across Scotland (373)[58].** Please see Appendix A for more details. The gender profile of the social care sector in the area reflects the national profile with 86% female and 14% male (85% and 15% nationally), as does the age profile[59].

4.7 **Social care organisations in Dumfries and Galloway employ staff in a range of roles and sub-sectors, with childminding a particularly prevalent service.** Figure 4.2 shows 36% of organisations operate in the childminding sub-sector, with a further 26% employing staff in DCC services and 19% in housing support/care at home services.

[55] Location Quotients (LQs) are a measure of the concentration or degree of specialism of a particular sector in a particular geography compared to the national average. An LQ of greater than 1 indicates a greater degree of specialism in the social care sector in a particular area compared to the national workforce. The higher the score, the greater the specialism. Similarly, an LQ of less than 1 indicates a lower degree of specialism, or under-representation, when compared to nationally.

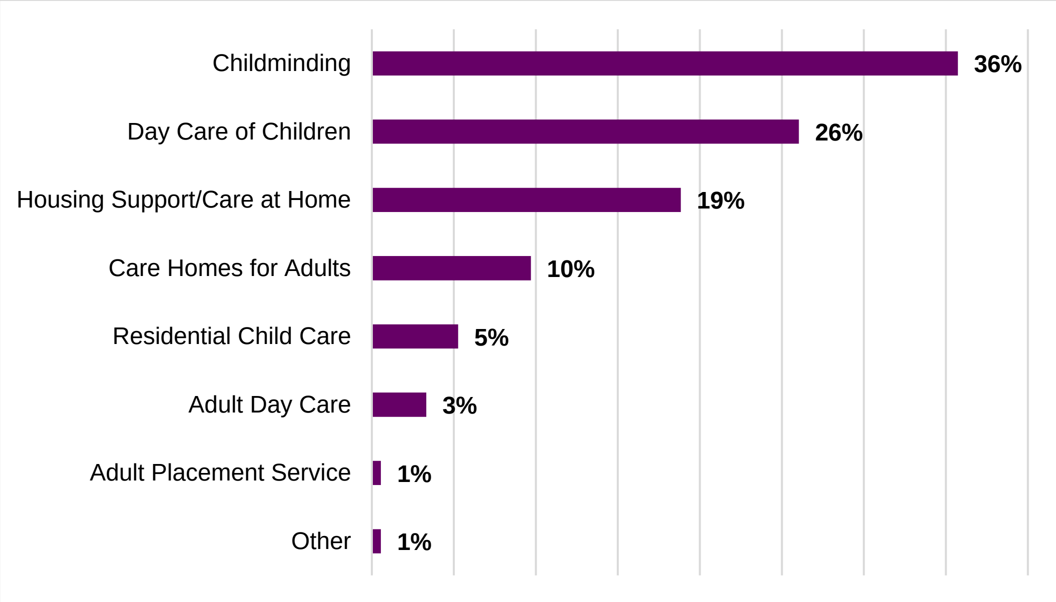
[56] Scottish Social Service Sector: Report on 2017 Workforce Data – SSSC (August 2018) https://data.sssc.uk.com/images/WDR/WDR2017.pdf

[57] The National Living Wage applies in other sectors and this is £8.21 for those aged 25 or older

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

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

Figure 4.2: Social service providers across Dumfries and Galloway by sub-sector



Source: Social Service Workforce Data, SSSC (2017)

4.8 **The sector in Dumfries and Galloway is dominated by independent services.** Around 61% of social care services are independent in the area, compared to 41% nationally, while there are smaller shares of services in the public (18% vs 31%) and third (21% vs 28%) sectors than across Scotland as a whole[60].

4.9 Seventeen employers from Dumfries and Galloway responded to the ekosgen survey. This is a small number and not statistically significant however it provides useful information and insights in to the social care sector in the area and the challenges employers face.

4.10 **From this survey of 17 employers, we can see that social care employers in Dumfries and Galloway appear to struggle less than the national average when it comes to recruiting staff.** Only 16% of responding employers reported hard-to-fill vacancies, defined as any vacancy open for three months or longer. This is less than all social care employers across Scotland (25%)[61]. Care Inspectorate research for 2017 shows 45% of social care service providers report problems filling vacancies although these are not necessarily hard-to-fill as it is defined.

4.11 **Over half (53%) of responding employers anticipate challenges in recruiting new staff over the next 12 months.** As Table 4.1 shows, 53% of employers expect to struggle when it comes to recruiting ELC-only practitioners, with

[60] Ibid

[61] Source: ekosgen employer survey, 2019

35% anticipating struggles recruiting ELC-only support workers, in both cases more so than employers on a national basis.

Table 4.1: Proportion of social care employers anticipating recruitment challenges over the next 12 months, by job role

Job Role	Dumfries and Galloway	Scotland
Practitioner (ELC only)	53%	44%
Support worker (ELC only)	35%	20%
Care staff who provide direct care and support	18%	44%
Lead practice/service manager (ELC only)	18%	16%
Care staff who supervise work of staff and contribute to assessment of care needs and development and implementation of care plans	6%	18%
Administrative/support staff	0%	3%
Ancillary staff	0%	6%
Care staff responsible for assessment of care needs	0%	11%
Unit/project managers	0%	4%
Group managers	0%	2%

Source: ekosgen employer survey (Dumfries and Galloway n=17, Scotland n=599)

4.12 **Even some employers who do not anticipate recruitment issues over the next 12 months have faced difficulties in retaining staff.** Around 28% of all Dumfries and Galloway surveyed respondents reported encountering either regular or occasional difficulties when trying to retain care staff who provide direct care and support. The figure for social care employers across Scotland is 47%[62]. The following comments from employers based in Dumfries and Galloway illustrate the challenges faced around retention:

> *"They pay a higher salary, as we are a charitable-based nursery we cannot compete with council wages."* (third sector, rural DCC employer)

> *"We have only a small pool of people who seek employment in the care and support industry and too many job vacancies to fill, therefore staff move around from job to job."* (independent sector, rural adult day care and housing support/ care at home employer)

> *"Third sector wages are lower than local authority. Also other benefits such as sick pay, maternity and pensions are not as clear."* (third sector, rural DCC employer)

[62] Source: ekosgen employee survey, 2019

4.13 **Local employers in the sector consider that they face competition mostly from the education and health sectors when it comes to recruiting and retaining staff.** This reflects the national picture, as shown in Table 4.2, suggesting there are many synergies between these sectors in terms of skills and experience needed by the workforce. There is also likely to be competition for staff from employers based out with the area – in neighbouring authorities such as South Ayrshire and Scottish Borders, but also from those based over the English border in Carlisle.

Table 4.2: Social Care employers' perception of the key competing sectors for staff[63]

Sector	Dumfries and Galloway	Scotland
Education - Classroom Assistants	47%	37%
Health (e.g. Healthcare Support Workers)	44%	45%
Education - other	41%	49%
Other	19%	18%
Business services (e.g. office work)	13%	7%
Retail	13%	14%
Cleaning	6%	10%
Food processing and catering	6%	6%
Hotels and hospitality (e.g. restaurant and bar work)	6%	10%
Call centre work	0%	5%

Source: ekosgen employer survey (Dumfries and Galloway n=32[64], Scotland n=1,081)

4.14 **Whilst most other social care workers in Dumfries and Galloway came from another social care job (57%), less than a third (29%) of ELC staff came from a previous job within the sector. Most ELC employees in the survey (60%) entered the sector from a different job role altogether,** which, for context, is higher than for Scotland as a whole**.** Care should be taken not to make direct comparisons due to the sample size in Dumfries and Galloway. Around the same proportion of social care employees came into the sector from a different job role altogether in Dumfries and Galloway (40%) as compared to nationally (45%), with

63 Respondents were asked to indicate the top three sectors that they compete with for staff.

64 The small number of responses to this question from Dumfries and Galloway do not provide statistically significant data but are very useful in understanding competition from other sectors in the area. Scottish data is provided as context but due to sample sizes, direct comparisons cannot be drawn.

full-time education accounting for 11% of routes into the ELC sector (but only 2% of other social care) in Dumfries and Galloway.

Table 4.3: Source of social care employees responding to the research

Previous employment	Current employment			
	Dumfries and Galloway		Scotland	
	ELC[65]	Other social care[66]	ELC	Other social care
Another social care job	29%	57%	39%	51%
A different job	60%	40%	50%	45%
Full-time education	11%	2%	11%	4%
Total	**63**	**124**	**3,547**	**3,355**

Source: ekosgen employee survey (ELC=63, Other social care=124). Figures may not sum to 100 due to rounding.

4.15 **Our findings suggest that employees are most likely to come from the business services (such as office work), retail and hotel/hospitality sectors.** This is similar to the picture nationally, although hotels/hospitality is a more common origin of social care staff in Dumfries and Galloway. In addition, some of the current social care workforce were previously employed in other job types, including factory work and housing[67].

4.16 **Most ELC workers in Dumfries and Galloway intend to remain in the social care sector, either in the same role (53%) or in a promoted post (20%).** This is a very positive picture, with a further 7% indicating that they would like to remain in the sector but move to a different area. As Figure 4.3 shows, only 10% of ELC staff wish to leave the sector entirely. Most of those who reported 'other' ambitions were looking to retire, with a number undecided on their future.

4.17 **Fewer than one in 10 other social care workers (8%) in Dumfries and Galloway intend to leave the workforce entirely.** Of those who plan to leave, the reasons given were stress, better terms and conditions, and enhanced work-life

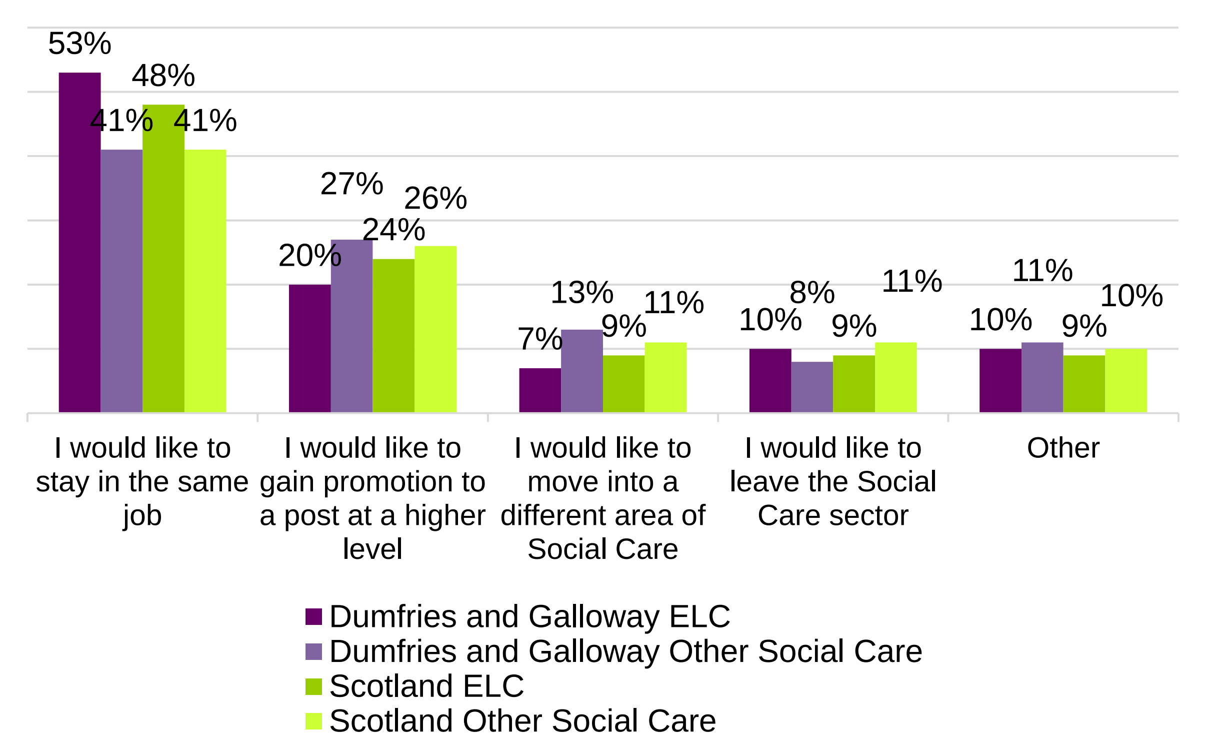
[65] The ELC sector is a sub-part of the Day Care of Children (DCC) service type, and refers to those DCC services which are funded by Government to provide the free pre-school offer of 600 hours currently and soon to become 1140.

[66] NB – 'Other social care' refers to 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).

[67] Source: ekosgen employee survey, 2019

balance[68]. This is of course based on a very small sample and identifies the reason why people who intend to leave want to, rather than wider perceptions of why people might want to leave.

Figure 4.3: Employees' ambitions for the future



Source: ekosgen employee survey (Dumfries and Galloway ELC n=59, Dumfries and Galloway Other Social Care n=117, Scotland ELC n=3,297, Scotland Other Social Care n=3.125)

Learning Opportunities

4.18 There are a range of qualifications open to the social care sector, with provision in Dumfries and Galloway delivered at differing levels by FE, HE and private providers. There were 56 new Modern Apprentices (MAs) in social care areas in 2017-18 in Dumfries and Galloway, adding to a total of 994 Modern Apprentices in training in the area as of March 2018. Social care MAs accounted for 6% of the total new MA uptake in Dumfries and Galloway, almost half the rate for Scotland as a whole (11%). Forty-three individuals completed their social care-related MA in Dumfries and Galloway over the same period, accounting for 7% of all achievements, below the corresponding 9% rate for Scotland[69].

[68] Source: ekosgen survey of social care employees

[69] Modern Apprentice Performance Report, SDS, 2019

4.19 Dumfries and Galloway College saw 1,063 enrolments in 2017-18 studying social, family and community subjects[70]. The University of the West of Scotland has a Dumfries campus and this will offer a number of social care-related subjects at BA (Hons) level in 2019, including Childhood Studies, Social Work, and Integrated Health and Social Care. The University of Glasgow also operates a Dumfries campus and will offer an MA (Hons) in Health and Social Policy in 2019, with a HNC in Social Care accepted as a second-year entry route[71].

Conclusions

4.20 As with the rest of Scotland, the ageing population profile in Dumfries and Galloway brings with it significant challenges and greater demands for services throughout the area, and the nature of the work and perceived low levels of remuneration can make recruitment a challenges. However, employers must also overcome the barriers associated with the geography of Dumfries and Galloway. This can prove very challenging for social care workers living or working in more remote rural areas, particularly when driving becomes a problem and public transport is poor. Also, given its locality, social care employers in Dumfries and Galloway are likely to face competition from those based in surrounding authorities (e.g. South Ayrshire), but also from those based over the English border in Carlisle.

[70] SFC Infact data, 2019 https://stats.sfc.ac.uk/infact/

[71] University of Glasgow – Dumfries Campus Prospectus 2019 https://www.gla.ac.uk/media/media_525606_en.pdf

5 South Lanarkshire Case Study

Overview

5.1 South Lanarkshire is the fifth largest local authority in Scotland[72] and has a population density of 179 people per km^2. The area consists of four larger towns – East Kilbride, Rutherglen, Hamilton and Cambuslang – and 23 smaller towns. It is recognised as being in the 'Urban with substantial rural areas' RESAS definition of rurality[73]. South Lanarkshire faces significant issues of deprivation and, according to the Scottish Index of Multiple Deprivation (SIMD), 89 of its 431 datazones (21%) are among the 20% most deprived in Scotland, and 21 datazones (5%) are in the most deprived 5%[74]. More people commute from South Lanarkshire (which connects to Glasgow by the M74) than any other council area in Scotland, with almost 59,000 residents making a journey out with South Lanarkshire every day to get to work[75].

Socio-Economic Profile

5.2 The population of South Lanarkshire was 319,000 in 2018, which was an increase of 0.3% from the previous year, slightly higher than the Scottish growth for the same period (0.2%). In 2018, the age profile of South Lanarkshire's population was very similar to that of Scotland as whole, with 63% of the population of working age (16 to 64 years) compared to 64% nationally[76]. However, the South Lanarkshire population has experienced significant changes in the last decade – the number of people aged 65 years or over has grown by almost 20%, while there has been a reduction in the number of people aged 0 to 15 years and of working age population.

[72] Chief Social Work Officer's Annual Report 2017-2018 – South Lanarkshire Council https://www.southlanarkshire.gov.uk/downloads/file/12014/chief_social_work_officer_report_201718

[73] The Rural and Environment Science and Analytical Services Division (RESAS) manages the Scottish Government's strategic research in relation to Environment, Climate Change and Land Reform (ECCLR) and Rural Economy and Communities (REC) portfolios. (https://www2.gov.scot/Topics/Research/About/EBAR/research-providers)

[74] Scottish Index of Multiple Deprivation data https://simd.scot/2016/#/simd2016/BTTTFTT/9/-4.0000/55.9000/

[75] Commuting in Scotland: who is on the move and where to? – The Scotsman (December 2015) https://www.scotsman.com/news-2-15012/commuting-in-scotland-who-is-on-the-move-and-where-to-1-3970714

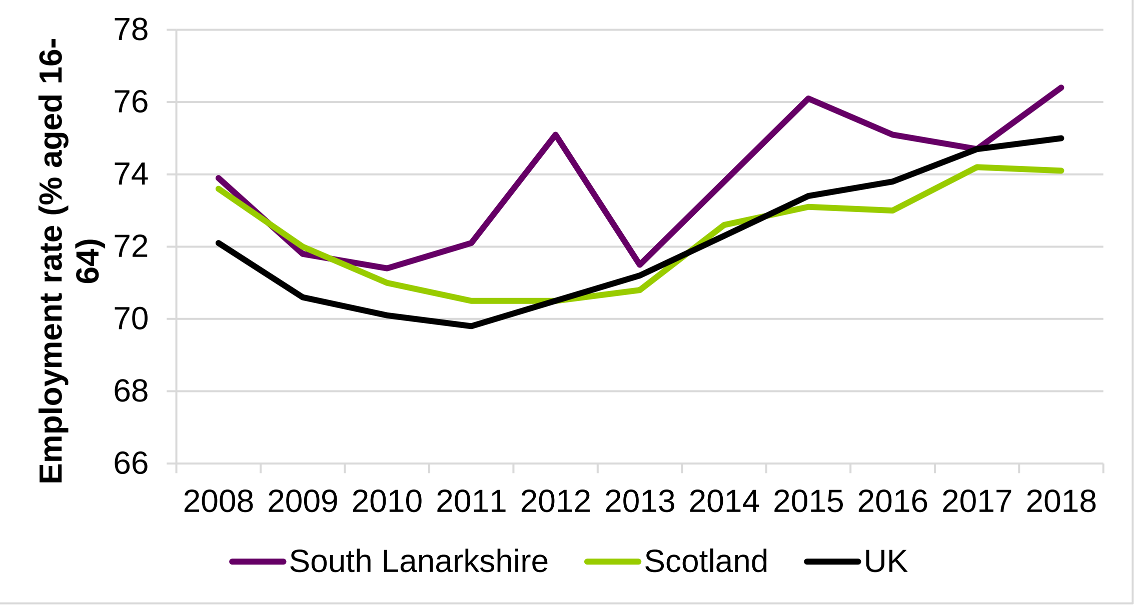
[76] Mid-Year Population Estimates – ONS(June 2019) https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/timeseries/scpop/pop

In the period from 2016-17 to 2017-18, there was an equal amount of in-migration and out-migration of 2% in the area[77].

Local Labour Market

5.3 As shown in Figure 5.1, South Lanarkshire's employment rate in 2018 was higher than the Scottish and UK rates, and had been for most of the previous decade. The unemployment rate was lower than for Scotland as a whole (3.4% versus 4.3%), having fallen at a faster rate than nationally substantially from a post-recession peak in 2013.

Figure 5.1: Employment rate (2008-2018)



Source: Office for National Statistics, Annual Population Survey

5.4 There were high levels of wholesale and retail industry employment (18%) in the area in 2017, more than Scotland as a whole (14%). In terms of sectors that regularly compete with social care, there were higher shares of employment in retail trade and office admin/support in South Lanarkshire compared to Scotland in 2017, with Location Quotients (LQ)[78] of 1.14 and 1.08 respectively. The share of employment in food and drink (LQ of 0.90), education (0.89), and human health

[77] South Lanarkshire Council Area Profile https://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/south-lanarkshire-council-profile.html#migration

[78] Location Quotients (LQs) are a measure of the concentration or degree of specialism of a particular sector in a particular geography compared to the national average. An LQ of greater than 1 indicates a greater degree of specialism in the social care sector in a particular area compared to the national workforce. The higher the score, the greater the specialism. Similarly, an LQ of less than 1 indicates a lower degree of specialism, or under-representation, when compared to nationally.

(0.70) were less concentrated in the area; while accommodation employment was much lower, at around half the national rate (LQ of 0.48).

The Social Care Workforce in South Lanarkshire

5.5 **The social care workforce is one the most significant employment groups in South Lanarkshire.** There are 645 social care organisations employing almost 10,000 registered staff in South Lanarkshire, dominated by care homes for adults which has 3,300 staff, and housing support/care at home which has 2,500 staff[79]. The workforce is reasonably active, with around half of employers currently recruiting, but only one in five reporting hard-to-fill vacancies. In 2017, the median hourly pay for full-time employees in South Lanarkshire was £14.65 (which is the seventh highest pay level of all local authority areas in Scotland). However it has been estimated that approximately 200,000 people in South Lanarkshire are earning less than the National Living Wage[80]. All Scottish adult social care workers are entitled to receive the Scottish real Living Wage which is currently £9 per hour[81]. It applies to care workers providing direct care and support to adults in care, care at home, and housing and support settings.

5.6 **South Lanarkshire has a social care staff density of 304 per 10,000 population, much less than Scotland as a whole (373)[82].** Social Care staff density for every local authority area in Scotland is provided at Appendix A. It ranges from 705 in the Shetland Islands to 269 in West Lothian. The gender profile of the social care sector in the area essentially reflects the national profile with 87% female and 13% male (85% and 15% nationally), however the age profile is slightly older than across Scotland[83].

5.7 **Social care organisations in South Lanarkshire report employing staff in a range of roles and sub-sectors, though childminding is particularly common in the area.** Figure 5.2 shows that almost half (45%) of the social care services in South Lanarkshire are childminding services. A further 27% of services deliver DCC services. Adult services are much less prevalent in the area, with just 20% of services delivering housing support/care at home and care homes for adult services.

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

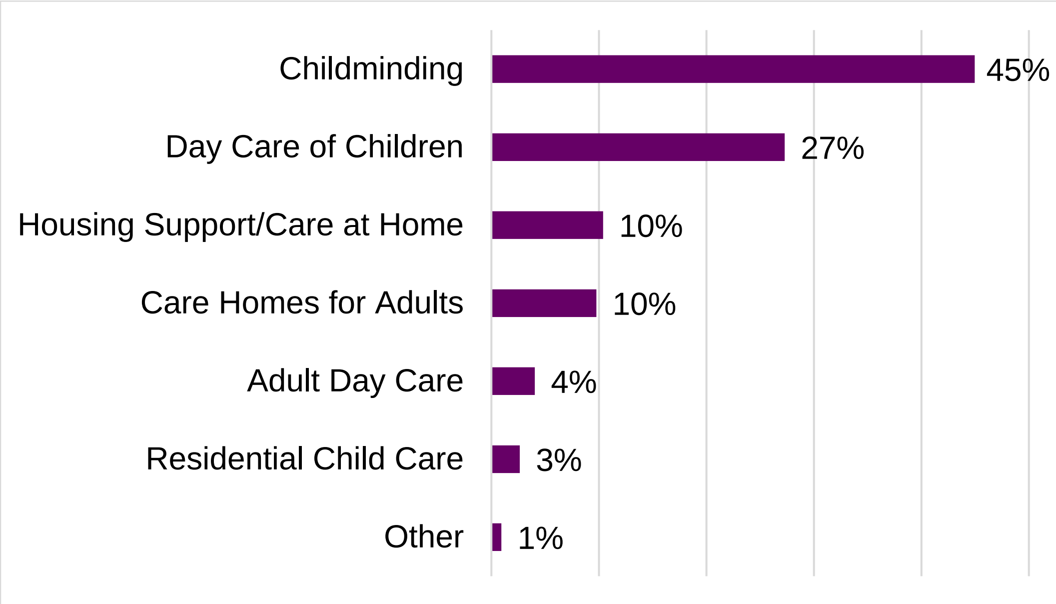
[80] Currently, the National Living Wage is £8.21/ hour.

[81] The National Living Wage applies in other sectors and this is £8.21 for those aged 25 or older

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

[83] Ibid

Figure 5.2: Social service providers across South Lanarkshire by sub-sector



Source: Social Service Workforce Data, SSSC (2017)

5.8 The social care sector in South Lanarkshire is dominated by independent services. Two thirds (67%) of services are in the independent sector, with 21% in the public sector (this compares to 41% and 31% nationally, respectively). Only 12% of social care services in South Lanarkshire are third sector[84].

5.9 **For survey respondents, the proportion of hard-to-fill vacancies was lower in South Lanarkshire than the national average reported by social care employers.** Around 21% of 84 responding social care employers in South Lanarkshire currently have hard-to-fill vacancies, below the level across the Scotland where 25% of employers have hard-to-fill vacancies[85]. Whilst sample sizes in South Lanarkshire are not sufficient to be compared directly to the Scottish figure, the Scottish data is provided as useful context. It may indicate that the area faces fewer challenges in terms of attracting candidates than other areas. It arguably reflects similar findings from the Care Inspectorate which suggest that Angus (3%), South Lanarkshire (4.2%) and East Ayrshire (4.5% of services) had the lowest rate of WTE vacancies of all local authority areas[86]

5.10 **Less than half of employers (45%) report that they might face recruitment challenges over the next 12 months.** As shown in Table 5.1, over half (52%) of employers in South Lanarkshire foresee recruitment issues around

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[84] Ibid

[85] Source: ekosgen employer survey, 2019

[86] https://www.careinspectorate.com/images/documents/4766/Joint%20CI%20&%20SSSC%20staff%20vacancies%20in%20care%20services%202017.pdf

practitioners (ELC only), more than across Scotland as a whole. Comparatively fewer employers in South Lanarkshire expect to face challenges around recruiting care staff who provide direct care and support, albeit the number is still over one-third (38% versus 44% nationally).

Table 5.1: Proportion of social care employers anticipating recruitment challenges over the next 12 months, by job role

Job Role	South Lanarkshire	Scotland
Practitioner (ELC only)	52%	44%
Care staff who provide direct care and support	38%	44%
Support worker (ELC only)	21%	20%
Care staff who supervise work of staff and contribute to assessment of care needs and development and implementation of care plans	17%	18%
Lead practice/service manager (ELC only)	7%	16%
Administrative/support staff	7%	3%
Care staff responsible for assessment of care needs	3%	11%
Unit/project managers	0%	4%
Group managers	0%	2%
Ancillary staff	0%	6%

Source: ekosgen employer survey (South Lanarkshire n=29[87], Scotland n=599)

5.11 **Even some employers who do not anticipate recruitment issues over the next 12 months have faced difficulties in retaining staff.** Around 45% of all South Lanarkshire respondents reported encountering either regular or occasional difficulties when trying to retain care staff who provide direct care and support, compared to 47% of social care employers across Scotland, although the sample size in South Lanarkshire means that direct comparisons cannot be drawn. In the survey 47% of South Lanarkshire employers reported either regular or occasional difficulties in retaining ELC practitioners[88]. The following comment from a South Lanarkshire based employer illustrate the retention challenges they face:

> *“There is a difference in pay scales between authorities. Staff have a tendency to move to the highest paid [job] if they get the opportunity.”* (public sector, rural DCC employer)

[87] The small number of responses to this question from South Lanarkshire do not provide statistically significant data but are very useful in understanding recruitment challenges. Scottish data is provided as context but due to sample sizes, direct comparisons cannot be drawn.

[88] Source: ekosgen employee survey, 2019

5.12 **Employers in the sector consider that they face most competition from the education sector, as well as health.** This reflects the national picture as shown in Table 5.2, albeit with fewer respondents perceiving competition from health in South Lanarkshire than Scotland as a whole (32% versus 45%). The following comment from a South Lanarkshire based employer illustrates the types of competitive advantages that different sectors can offer social care staff:

> *"Retail: longer hours. Education: the idea of working in a school (office or even in janitorial). Classroom assistants: higher wages and bigger pension offered by the council."* (independent sector, urban DCC employer)

Table 5.2: Social Care employers' perception of the key competing sectors for staff[89]

Sector	South Lanarkshire	Scotland
Education – other	55%	49%
Education - Classroom Assistants	38%	37%
Health (e.g. Healthcare Support Workers)	32%	45%
Other	20%	18%
Cleaning	15%	10%
Call centre work	10%	5%
Food processing and catering	10%	6%
Retail	10%	14%
Business services (e.g. office work)	5%	7%
Hotels and hospitality (e.g. restaurant and bar work)	2%	10%

Source: ekosgen employer survey (South Lanarkshire n=60, Scotland n=1,081)

5.13 **Workforce movement within the sector in South Lanarkshire is very similar to Scotland.** As Table 5.3 indicates, more existing ELC employee respondents (19%) came into the sector from full-time education in South Lanarkshire than nationally (11%), with slightly fewer moving into the ELC sector from an entirely different job in South Lanarkshire (45% versus 50% nationally). Other social care employee respondents are most likely to have come from another social care job than from outwith the sector (50% versus 45%). This reflects the national findings.

[89] Respondents were asked to indicate the top three sectors that they compete with for staff.

Table 5.3: Source of social care employees responding to the research

Previous employment	Current employment			
	South Lanarkshire		Scotland	
	ELC[90]	Other social care[91]	ELC	Other social care
Another social care job	36%	50%	39%	51%
A different job	45%	45%	50%	45%
Full-time education	19%	5%	11%	4%
Total	**199**	**231**	**3,547**	**3,355**

Source: ekosgen employee survey (ELC=199, Other social care=231)

5.14 **Employees are most likely to come into the sector from retail, business services (such as office work) and hotels/hospitality.** Just over a quarter of current responding social care employees in South Lanarkshire were previously employed in other job types, including housing, banking, factory work and youth work[92].

5.15 **Most ELC and other social care workers in South Lanarkshire intend to stay in the same role or progress to a promoted post, reflecting the national picture.** As Figure 5.3 shows, one in 10 current other social care employees would like to leave the sector. Their main reasons for leaving the sector mirror those outlined in the main report: work is too stressful, looking for a better work-life balance and seeking a career change.

5.16 Employees also noted they were looking for better terms and conditions, while others highlighted the poor rate of pay and a lack of career progression. These issues are highlighted in the following comments from employees from South Lanarkshire:

> *"Rate of pay is very poor considering the workload and stress."* (public sector, urban ELC practitioner)

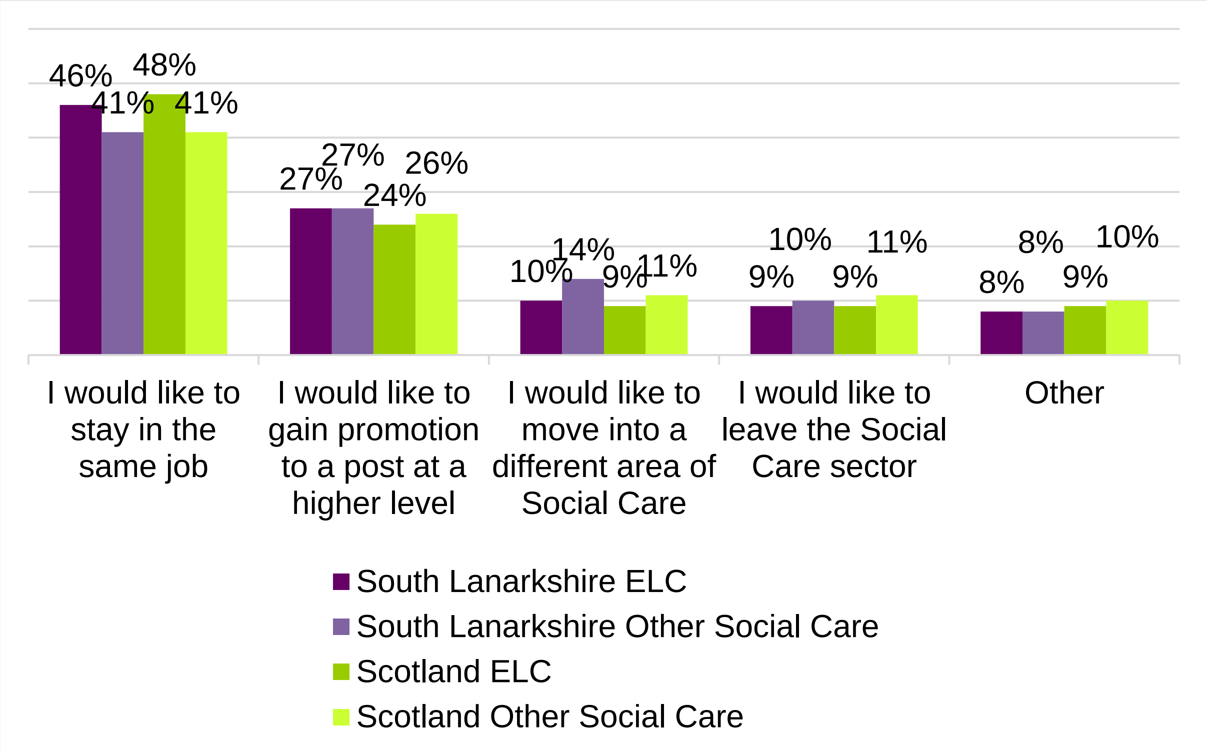
[90] The ELC sector is a sub-part of the Day Care of Children (DCC) service type, and refers to those DCC services which are funded by Government to provide the free pre-school offer of 600 hours currently and soon to become 1140.

[91] NB – 'Other social care' refers to 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).

[92] Source: ekosgen employee survey, 2019

"Very little support from management and no opportunities to progress." (third sector, urban administrative/support worker in adult day care)

Figure 5.3: Employees' ambitions for the future



Source: ekosgen employee survey (South Lanarkshire ELC n=184, South Lanarkshire Other Social Care n=217, Scotland ELC n=3,297, Scotland Other Social Care n=3,175)

Learning Opportunities

5.17 There are a variety of social care qualifications open to the social care sector, with provision in South Lanarkshire delivered at differing levels by a variety of FE, HE and private providers. There were 250 new MAs in social care areas in 2017-18 in South Lanarkshire, adding to a total of 2,559 MAs in training in the area as of March 2018. Social care MAs accounted for 14% of the total new uptake in South Lanarkshire, above the Scotland figure of 11%. Over 115 individuals completed their social care-related MA in South Lanarkshire over the same time period, accounting for 9% of all achievements in the area, in line with the picture nationally[93].

5.18 South Lanarkshire College saw 92 enrolments in 2017-18 studying social, family and community subjects[94]. There were significantly more social, family and community subject enrolments in the neighbouring New College Lanarkshire at 711. The University of the West of Scotland, which has a Lanarkshire campus, will offer a

[93] Modern Apprentice Performance Report, SDS, 2019

[94] SFC Infact data, 2019 https://stats.sfc.ac.uk/infact/

number of social care-related subjects at BA (Hons) level in 2019, including Childhood Studies, Social Work, and Integrated Health and Social Care.

Conclusions

5.19 Whilst employers in South Lanarkshire have a relatively large pool of applicants for social care jobs (and have a lower proportion of hard-to-fill vacancies than employers in other areas), a significant number report difficulties in attracting staff. This may be due to higher than average employment in the area (meaning there are fewer candidates), competition from other sectors – particularly the education sector – or the fact that a large proportion of people living in the area can easily (and are willing to) commute to other localities for work.

Appendix A: Social care staff density by local authority

Local authority	Staff density per 10,000 pop
Shetland Islands	705
Orkney Islands	575
Na h-Eileanan Siar	508
East Ayrshire	471
Inverclyde	470
South Ayrshire	437
Dundee City	431
Glasgow City	417
Perth and Kinross	413
North Ayrshire	407
Renfrewshire	402
Moray	387
Highland	385
Edinburgh, City of	384
Clackmannanshire	381
Midlothian	378
Dumfries and Galloway	377
Argyll and Bute	376
Aberdeenshire	356
Aberdeen City	350
Fife	347
Angus	344
East Lothian	344
Stirling	341
West Dunbartonshire	339
East Dunbartonshire	334
North Lanarkshire	332
Scottish Borders	323
Falkirk	318
East Renfrewshire	315
South Lanarkshire	304
West Lothian	269

Appendix B: Clarifications of Social Care Services in Scotland

As defined in the Public Sector Reform (Scotland) Act 2010[95], 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[96]	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.

[95] Public Services Reform (Scotland) Act 2010 – Scottish Government (2010) https://www.legislation.gov.uk/asp/2010/8/contents

[96] 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-sector[96]	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[96]	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.