The size and structure of the adult social care sector and workforce in England, 2011

Researched and compiled by William Fenton

August 2011

“we gather information about the social care sector”
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1. Introduction

The following report has been produced by Skills for Care and aims to provide a comprehensive overview of the size and structure of the adult social care sector and workforce in England as at 2010. Skills for Care aim to update these estimates on an annual basis.

Much of the detail from these analyses comes from the National Minimum Data Set for Social Care (NMDS-SC). Increased volumes and quality of data held by the NMDS-SC means these estimates are the most detailed and reliable to date.

It also means that workforce estimates for those working in adult social care are provided at CSSR (Council with Social Services Responsibilities) level for the first time (see appendix 4).

Summary of key findings

Organisations and Establishments

- An estimated 21,900 organisations were involved in providing or organising adult social care in England in 2010.
- An estimated 48,300¹ establishments employed adult social care staff to provide and/or organise adult social care in England in 2010.
- The total number of adult social care organisations was estimated to have increased by 0.5% between 2009 and 2010. The number of social care establishments was estimated to have increased by 2.6% over the same period.
- 153,791 adults and older people were receiving direct payments from councils’ social services departments in 2010 (March).
- The total number of direct payments recipients increased by 35% between March 2009 and 2010.

The Workforce

- The number of jobs in adult social care in England in 2010 was estimated at 1.77 million.
- The actual number of people doing these jobs was estimated at 1.56 million.
- The total number of adult social care jobs was estimated to have increased by around 7% between 2009 and 2010.
- Excluding jobs for direct payments recipients, the estimated increase in adult social care jobs was 1.9% between 2009 and 2010.
- The number of jobs in adult social care is projected to grow by between 24% and 82% between 2010 and 2025. This means there could be between 2.1 million and 3.1 million jobs by 2025 (based on Skills for Care 2010 estimates).

Acknowledgements

We are grateful to all the people who have contributed to this report. Particular thanks are due to Kevin Mahoney of Diagnostic Decision for producing the workforce projection model, updating the jobs to people estimates and creating the regression models used for the CSSR level estimates.

¹Local units of employment
2. Statistics on adult social care organisations and establishments

This section summarises the available data about numbers of organisations and establishments in England employing social care staff and involved in providing or organising social care services for adults and older people.

2.1 Introduction

The estimates in this section have been produced using the Office for National Statistics’ (ONS’) annual analysis of UK Business Activity, Size and Location. These analyses are derived from ONS’ Inter-Departmental Business Register (IDBR). The IDBR defines social care reasonably well particularly now that it provides numbers of PAYE registered operations as well as VAT registered operations. The IDBR also splits the data by the 2007 version of the UK Standard Industrial Classification of Economic Activity (SIC2007) which classifies social care into two groupings: 87 for “residential social care activities” and 88 for “social work activities without accommodation”. This is a very useful distinction and provides a more detailed breakdown than is available for some other sectors.

Despite these advances, some problems and uncertainties associated with making these estimates remain:

- Separating adults’ and children’s social care services still relies on assumptions in some areas.
- Separating non-residential services into domiciliary, day and community services is not addressed in SIC2007, therefore some estimating is necessary.
- Councils’ central social services operations are not well distinguished in the statistics from other council operations, being included in SIC2007 84120 (regulation of the activities of providing health care, education, cultural services and other social services, excluding social security).
- Integrated health and social care operations are recorded under healthcare.
- Some sheltered housing and supported living operations providing care are recorded under SIC2007 68201 (Renting and operating of Housing Association real estate).
- Some employment agencies supplying social care staff are recorded under SIC2007 7820 (Temporary employment agency activities).
- PAYE-registered individuals employing care and support staff, for themselves or in a carer capacity, are not treated as businesses by ONS, therefore are not included in the IDBR and hence in the statistics produced from it.

However, overall this statistical framework provides a solid basis for producing reliable statistics about the number of adult social care organisations and their workforce.
2.2 Estimated number of organisations (enterprises)

The total number of PAYE or VAT registered whole organisations (i.e. enterprises) involved in providing or organising adult social care in England is estimated at 21,900, as shown in the table below.

This estimate should not be compared directly to estimates in the State of the Adult Social Care Workforce Report 2010 due to changes in methodology (see appendix 1). Comparable trend data is provided later in this section.

The definition of organisations ranges from the largest international companies, large charities and councils with social services responsibilities (CSSRs) to the smallest care homes. As mentioned previously however it does not include individuals employing care and support staff.

This estimate is an improvement on previous Skills for Care estimates but is still likely to be an under estimate because it excludes councils’ central operations, government departments and non-departmental public bodies such as CQC, some integrated health and social care operations, employment agencies, some sheltered and supported living housing providing care and voluntary operations staffed by unpaid workers.

The charts on the next page show that 57% of adult social care organisations were providing non-residential services and 43% were providing residential services. In terms of size, the majority of adult social care organisations were micro (1 to 9 employees) or small (10 to 49 employees). Around a third of organisations had 0-4 employees and 90% of organisations had less than 50 employees.

Estimated number of adult social care organisations in England by size, 2010
Source: Skills for Care estimates based on ONS UK Businesses: Size, Activity and Location – 2010, adjusted to exclude children’s services.

<table>
<thead>
<tr>
<th>Employees -&gt;</th>
<th>Total</th>
<th>0 to 4</th>
<th>5 to 9</th>
<th>10 to 19</th>
<th>20 to 49</th>
<th>50 to 99</th>
<th>100 to 249</th>
<th>250+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total adult social care</td>
<td>21,900</td>
<td>7,600</td>
<td>4,200</td>
<td>3,700</td>
<td>4,000</td>
<td>1,400</td>
<td>600</td>
<td>400</td>
</tr>
<tr>
<td>Residential services (SIC2007 87)</td>
<td>9,400</td>
<td>2,200</td>
<td>1,200</td>
<td>1,900</td>
<td>2,700</td>
<td>900</td>
<td>400</td>
<td>200</td>
</tr>
<tr>
<td>Non residential services (SIC2007 88)</td>
<td>12,400</td>
<td>5,500</td>
<td>3,000</td>
<td>1,800</td>
<td>1,300</td>
<td>500</td>
<td>300</td>
<td>100</td>
</tr>
</tbody>
</table>
2.3 Estimated number of establishments (local units)

The estimated number of PAYE or VAT registered establishments (local units) employing social care staff and/or providing or organising adult social care in England 2010 is 48,300.

This estimate should not be compared directly to estimates in the State of the Adult Social Care Workforce Report 2010 due to changes in methodology (see appendix 1). Comparable trend data is provided later in this section.

The data on the next page show a breakdown of the estimated 48,300 adult social care establishments in England 2010. As previously mentioned this is likely to underestimate the total due to certain social care activities that are included in non-social care SIC2007 codes.

The charts on the next page show that there is roughly a 50/50 split between residential and non-residential services. Also around half of the adult social care establishments are not CQC registered, the majority of these non-registered services are day care and community services.
Estimated number of adult social care establishments in England by service type, 2010

Source: Skills for Care estimates based on CQC data and ONS IDBR data, adjusted to exclude children’s services.

<table>
<thead>
<tr>
<th>Service type</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>CQC registered care only homes</td>
<td>13,935</td>
<td>29%</td>
</tr>
<tr>
<td>CQC registered care homes with nursing</td>
<td>4,384</td>
<td>9%</td>
</tr>
<tr>
<td>CQC registered adult placement schemes</td>
<td>132</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Estimated non-CQC registered residential services</td>
<td>4,595</td>
<td>10%</td>
</tr>
<tr>
<td>Total estimated PAYE/VAT registered residential services</td>
<td>23,046</td>
<td>48%</td>
</tr>
<tr>
<td>CQC registered domiciliary care agencies</td>
<td>5,606</td>
<td>12%</td>
</tr>
<tr>
<td>CQC registered nursing agencies</td>
<td>808</td>
<td>2%</td>
</tr>
<tr>
<td>Estimated non-CQC registered non-residential services</td>
<td>18,841</td>
<td>39%</td>
</tr>
<tr>
<td>Total estimated PAYE/VAT registered non-residential services</td>
<td>25,255</td>
<td>52%</td>
</tr>
<tr>
<td>Grand total estimated PAYE/VAT registered services</td>
<td>48,301</td>
<td></td>
</tr>
</tbody>
</table>

The preceding estimates do not include operations that are not registered for PAYE or VAT. Many of these operations have no employees, such as sole traders and partnerships, and people operating as self employed.
2.4 Trend data - organisations and establishments

The total number of adult social care organisations is estimated to have increased by 0.5% between 2009 and 2010. The number of adult social care establishments is estimated to have increased by 2.6% over the same period.

2.4.1 Organisations
The table below shows that the number of adult social care organisations grew by 0.5% between 2009 and 2010. The number of residential organisations decreased by 0.7% whilst the number of non-residential organisations increased by 1.4%.

Estimated number of adult social care organisations comparing 2009 with 2010
Source: Skills for Care estimates based on ONS UK Businesses: Size, Activity and Location 2010

<table>
<thead>
<tr>
<th>Service type</th>
<th>2009</th>
<th>2010</th>
<th>Percentage change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential services (SIC2007 87)</td>
<td>9,498</td>
<td>9,432</td>
<td>-0.7%</td>
</tr>
<tr>
<td>Non residential services (SIC2007 88)</td>
<td>12,267</td>
<td>12,439</td>
<td>+1.4%</td>
</tr>
<tr>
<td>Total adult social care</td>
<td>21,765</td>
<td>21,871</td>
<td>+0.5%</td>
</tr>
</tbody>
</table>

2.4.2 Establishments
The trend was similar in terms of establishments. The table on the next page shows that the total number of adult social care establishments increased by 2.6% between 2009 and 2010. The number of residential establishments decreased slightly (0.4%) mainly because of the 1.4% drop in the number of CQC registered care only homes. The number of non-residential establishments increased by 5.6% over this period, the numbers of domiciliary care agencies, nursing agencies and non-regulated establishments all contributed to this increase.
## Estimated number of PAYE/VAT registered adult establishments comparing 2009 with 2010

*Source: Skills for Care estimates based on CQC data and ONS IDBR data*

<table>
<thead>
<tr>
<th>Service type</th>
<th>2009</th>
<th>2010</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>CQC registered care only homes</td>
<td>14,138</td>
<td>13,935</td>
<td>-1.4%</td>
</tr>
<tr>
<td>CQC registered care homes with nursing</td>
<td>4,324</td>
<td>4,384</td>
<td>+1.4%</td>
</tr>
<tr>
<td>CQC registered adult placement schemes</td>
<td>132</td>
<td>132</td>
<td>0.0%</td>
</tr>
<tr>
<td>Estimated non-CQC registered residential services</td>
<td>4,551</td>
<td>4,595</td>
<td>+1.0%</td>
</tr>
<tr>
<td>Total estimated PAYE/VAT registered residential services</td>
<td>23,145</td>
<td>23,046</td>
<td>-0.4%</td>
</tr>
<tr>
<td>CQC registered domiciliary care agencies</td>
<td>5,319</td>
<td>5,606</td>
<td>+5.4%</td>
</tr>
<tr>
<td>CQC registered nursing agencies</td>
<td>759</td>
<td>808</td>
<td>+6.5%</td>
</tr>
<tr>
<td>Estimated non-CQC registered non-residential services</td>
<td>17,832</td>
<td>18,841</td>
<td>+5.7%</td>
</tr>
<tr>
<td>Total estimated PAYE/VAT registered non-residential services</td>
<td>23,910</td>
<td>25,255</td>
<td>+5.6%</td>
</tr>
<tr>
<td>Grand total estimated PAYE/VAT registered services</td>
<td>47,055</td>
<td>48,301</td>
<td>+2.6%</td>
</tr>
</tbody>
</table>

### Percentage change in the number of establishments between 2009 and 2010

- Residential services: -0.4%
- Non-residential services: 5.6%
- All services: +2.6%
2.5 Direct payment recipients

In March 2010 nearly 154,000 adults and older people were receiving direct payments from councils’ social services departments.

Of these, 106,755 (69%) were service users and 47,030 (31%) were carers. Over half the recipients (59%) were under 65. The 65-74, 75-84 and 85 and over categories had similar numbers of recipients all with around 15% of the total, as shown in the table below.

<table>
<thead>
<tr>
<th>Age group</th>
<th>Service users</th>
<th>Carers</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aged 18 to 64</td>
<td>62,080</td>
<td>28,885</td>
<td>90,966</td>
</tr>
<tr>
<td>Aged 65 to 74</td>
<td>12,170</td>
<td>8,770</td>
<td>20,940</td>
</tr>
<tr>
<td>Aged 75 to 84</td>
<td>15,995</td>
<td>6,640</td>
<td>22,635</td>
</tr>
<tr>
<td>Aged 85 and over</td>
<td>16,515</td>
<td>2,735</td>
<td>19,250</td>
</tr>
<tr>
<td>Total</td>
<td>106,760</td>
<td>47,030</td>
<td>153,791</td>
</tr>
</tbody>
</table>

The table on the next page shows a breakdown of service user recipients by client type. Older people (65+) made up 42% of these services users, 32% had a physical disability, 18% had a learning disability and 8% were in the mental health category.
### Adult recipients of direct payments in England 2010 by client type

*Source: NHS Information Centre for Health & Social Care*

<table>
<thead>
<tr>
<th>Client type</th>
<th>Service users</th>
<th>Percentage of service users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Older people (65+)</td>
<td>44,680</td>
<td>42%</td>
</tr>
<tr>
<td>Physical Disability (18-64)</td>
<td>33,790</td>
<td>32%</td>
</tr>
<tr>
<td>Learning Disability (18-64)</td>
<td>18,735</td>
<td>18%</td>
</tr>
<tr>
<td>Mental Health (18-64)</td>
<td>8,580</td>
<td>8%</td>
</tr>
<tr>
<td>Substance misuse (18-64)</td>
<td>165</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Other Vulnerable People (18-64)</td>
<td>820</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>106,760</strong></td>
<td></td>
</tr>
</tbody>
</table>

#### Pie chart: Direct payments recipients by client type

- **Older people (65+)**: 42%
- **Physical Disability (18-64)**: 32%
- **Learning Disability (18-64)**: 18%
- **Mental Health (18-64)**: 8%
- **Substance misuse**: <1%
- **Other Vulnerable People (18-64)**: 1%
2.6 Trend data of direct payment recipients

After a fairly slow start, uptake of direct payments has increased rapidly as shown by the table and graph below. The total number of recipients increased by around 40,000 between March 2009 and 2010 (35%).

Total number of recipients of direct payments in England (adult services) 2002-2010
Source: CSCI and NHS Information Centre for Health & Social Care

<table>
<thead>
<tr>
<th>Year</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009*</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>7,613</td>
<td>11,573</td>
<td>19,567</td>
<td>24,693</td>
<td>36,254</td>
<td>47,088</td>
<td>64,845</td>
<td>114,455</td>
<td>154,340</td>
</tr>
</tbody>
</table>

*Included children’s services

2.7 Other individuals employing their own staff

The NHS Information Centre for Health and Social Care started to collect data on Personal Budgets holders in 2010. Initial findings show there were around 75,400 recipients (10,000 of these were also receiving a direct payment).

Currently there is very little information on numbers employing care and support staff via other funding streams or self funding. Skills for Care is currently investigating the potential to conduct a major research study on people employing care and support staff via all types of funding available. If commissioned this should report during 2012 and provide reliable statistics on the numbers of such people and the numbers of staff they employ.
3. Statistics on the adult social care workforce

3.1 Introduction

This section provides estimates of the numbers employed in social care services for adults in England, derived from various sources.

3.1.1 Note on data sources

Estimates of the independent sector have been made using the National Minimum Data Set for Social Care (NMDS-SC). NMDS-SC data have been grossed up to the total adult social care operations in England as recorded by the Office for National Statistics’ Inter Departmental Business Register (IDBR). The method used to gross up NMDS-SC data incorporated a high level of detail and has produced reliable estimates, although there are still some areas of uncertainty. The grossing up method used is described in Appendix 1.

At the time of writing the NMDS-SC had not received a full response from all local authorities therefore estimates of the adult social care workforce employed by councils have been estimated from NMDS-SC in conjunction with analyses of the September 2010 SSDS001 return published by the NHS Information Centre for Health and Social Care. In 2011 the NMDS-SC will replace the SSDS001 as the adult social care workforce return for local authorities and therefore in the future we will be able to use the NMDS-SC to report on this part of the workforce.

Estimates of the parts of the workforce employed by the NHS have been made from the NHS non-medical workforce census (September 2010) published by the NHS Information Centre for Health and Social Care.

Estimates of the workforce employed by individuals, for their own care and support or in a carer role, have been calculated using NMDS-SC data and NHS Information Centre for Health and Social Care data. NMDS-SC has been collecting data on this part of the sector since August 2010 and the estimates it produces will improve in the future as more data is received.

Unpaid carers also play a major role in adult social care but are not normally included in employment statistics therefore are not included in any of the workforce estimates in this section.

3.2 Workforce jobs and numbers of people doing them

In this report Skills for Care have attempted to make the distinction between the number of jobs (which is mostly what the various data collections provide) and the number of people doing these jobs. The purpose of this is to take into account people doing more than one job in adult social care.

The NMDS-SC was designed to allow for the distinction between the number of jobs and the number of people doing the jobs. This is achieved by creating a unique reference number for each worker, using the workers’ National Insurance Numbers (NINO) and their date of birth. If the same NINO and date of birth in combination appears more than once

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2This analysis is based on the unique reference numbers so individuals remain anonymous throughout.
in the dataset, it indicates that the same person has more than one job in adult social care.

The estimates shown in the table below are an improvement on the previous preliminary estimates provided in the State of the Adult Social Care Workforce Report 2010 and as such should not be directly compared.

The table below shows that Personal Assistants were much more likely to hold more than one adult social care job than other job roles with an average of 1.644 jobs per worker (164 jobs per 100 workers). Managerial roles had the next highest average (1.078), direct care and professional roles had on average slightly fewer jobs per worker (1.053 and 1.058 respectively). People in ‘other’ job roles were the least likely to hold more than one social care job with an average of 1.017 jobs per worker.

**Estimates of average number of adult social care jobs per worker, 2010**

*Source: Skills for Care estimates using NMDS-SC data*

<table>
<thead>
<tr>
<th>Main service</th>
<th>Direct Care</th>
<th>Managerial</th>
<th>Professional</th>
<th>Other</th>
<th>Personal Assistants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>1.047</td>
<td>1.071</td>
<td>1.054</td>
<td>1.011</td>
<td>-</td>
</tr>
<tr>
<td>Domiciliary</td>
<td>1.054</td>
<td>1.078</td>
<td>1.061</td>
<td>1.018</td>
<td>-</td>
</tr>
<tr>
<td>Day care</td>
<td>1.094</td>
<td>1.118</td>
<td>1.102</td>
<td>1.059</td>
<td>-</td>
</tr>
<tr>
<td>Community</td>
<td>1.078</td>
<td>1.101</td>
<td>1.085</td>
<td>1.042</td>
<td>-</td>
</tr>
<tr>
<td>Direct payments</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1.644</td>
</tr>
</tbody>
</table>

**Estimated number of jobs per worker by job group**

*Source: Skills for Care estimates*
3.3 Size of the total adult social care workforce in 2010

The number of jobs in adult social care in England 2010 is estimated at **1.77 million**. The actual number of people doing these jobs is estimated at **1.56 million**.

These estimates should not be compared directly to estimates in the State of the Adult Social Care Workforce Report 2010 due to changes in methodology (see appendix 1). Comparable trend data is provided later in this section.

3.3.1 Sector

As shown by the table and chart below around two thirds (65%) of jobs in adult social care were in the independent sector (private and voluntary). Nearly half (46%) of all jobs were in the private sector.

The public sector (local authorities and NHS) accounted for just 15% of jobs and the direct payments recipients’ workforce accounted for 20% of all jobs.

**Total number of adult social care jobs and people working in these jobs by sector**

*Source: Skills for Care estimates using various sources*

<table>
<thead>
<tr>
<th>Sector</th>
<th>Number of jobs 2010</th>
<th>Percentage of jobs</th>
<th>Number of people doing these jobs 2010</th>
<th>Percentage of people</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Authority</td>
<td>202,000</td>
<td>11%</td>
<td>189,000</td>
<td>12%</td>
</tr>
<tr>
<td>Independent</td>
<td>1,137,000</td>
<td>65%</td>
<td>1,080,000</td>
<td>70%</td>
</tr>
<tr>
<td>Private</td>
<td>812,000</td>
<td>46%</td>
<td>774,000</td>
<td>50%</td>
</tr>
<tr>
<td>Voluntary</td>
<td>326,000</td>
<td>18%</td>
<td>307,000</td>
<td>20%</td>
</tr>
<tr>
<td>NHS*</td>
<td>74,000</td>
<td>4%</td>
<td>74,000</td>
<td>5%</td>
</tr>
<tr>
<td>Direct payments recipients</td>
<td>355,000</td>
<td>20%</td>
<td>216,000</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,768,000</strong></td>
<td></td>
<td><strong>1,559,000</strong></td>
<td></td>
</tr>
</tbody>
</table>

*NHS data is currently only available at job level*
3.3.2 Main service

The table on the next page shows that 35% of adult social care jobs were in residential care. This category includes CQC regulated care only homes (270,000 jobs), CQC regulated care homes with nursing (242,000 jobs) and non-regulated residential services which includes various types of hostels, some extra care housing and supported living services (estimated at 65,000 jobs). The remaining jobs (45,000) were in councils.

Domiciliary care accounted for 44% of adult social care jobs - 300,000 of these jobs were in CQC regulated domiciliary care agencies, 57,000 were in CQC regulated nurses agencies and an estimated 27,000 were in non-regulated domiciliary services such as domestic services, home help and meals on wheels services. 35,000 domiciliary care jobs were in local councils while the remaining 355,000 were for direct payments recipients.

An estimated 7% (119,000) of jobs were in day care centres and other day care services. Approximately 93,000 of these jobs were in the independent sector while 26,000 were in local councils.

Community services accounted for an estimated 14% of jobs. This includes a wide range of services, such as carers’ support services, the organisation of short breaks and respite care, community support and outreach, social work and care management, adult placement schemes and services, disability adaptations and assistive technology services, occupational and employment related services and information and advice services. An estimated 86,000 of these jobs were in the independent sector, 95,000 were in councils and 73,000 were in the NHS.
Total number of adult social care jobs and people working in these jobs by main service

*Source: Skills for Care estimates using various sources*

<table>
<thead>
<tr>
<th>Main service</th>
<th>Number of jobs 2010</th>
<th>Percentage of jobs</th>
<th>Number of people doing these jobs 2010</th>
<th>Percentage of people</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>622,000</td>
<td>35%</td>
<td>597,000</td>
<td>38%</td>
</tr>
<tr>
<td>Domiciliary</td>
<td>771,000</td>
<td>44%</td>
<td>611,000</td>
<td>39%</td>
</tr>
<tr>
<td>Day</td>
<td>119,000</td>
<td>7%</td>
<td>109,000</td>
<td>7%</td>
</tr>
<tr>
<td>Community</td>
<td>255,000</td>
<td>14%</td>
<td>242,000</td>
<td>16%</td>
</tr>
<tr>
<td>Total</td>
<td>1,768,000</td>
<td></td>
<td>1,559,000</td>
<td></td>
</tr>
</tbody>
</table>

3.3.3 Job groups

The majority of adult social care jobs were direct care providing (almost 75%). This group includes care workers, senior care workers, support workers, personal assistants and a range of related jobs including employment support, advice, guidance and advocacy, education support, counsellors, technicians and other jobs involved in providing care and support directly.

Managerial and supervisory roles accounted for 8% of jobs. This group includes senior managers, middle managers, line managers, registered managers, supervisors and other managerial roles that are not care providing.

Professional roles accounted for 6% of jobs. This group includes several rather different jobs, which have in common the requirement
for a profession qualification. The jobs included in this group are social workers, occupational therapists, registered nurses, allied health professionals and teachers.

Jobs that fell in the ‘other’ category accounted for 12% of jobs. This category includes administrative jobs, ancillary jobs including catering, transport and maintenance roles, and other jobs not involved in direct care and support providing.

**Total number of adult social care jobs and people working in these jobs by job role**

*Source: Skills for Care estimates using various sources*

<table>
<thead>
<tr>
<th>Job role</th>
<th>Number of jobs 2010</th>
<th>Percentage of jobs</th>
<th>Number of people doing these jobs 2010</th>
<th>Percentage of people</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct care</td>
<td>1,316,000</td>
<td>74%</td>
<td>1,129,000</td>
<td>72%</td>
</tr>
<tr>
<td>Managerial</td>
<td>147,000</td>
<td>8%</td>
<td>136,000</td>
<td>9%</td>
</tr>
<tr>
<td>Professional</td>
<td>100,000</td>
<td>6%</td>
<td>95,000</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>204,000</td>
<td>12%</td>
<td>199,000</td>
<td>13%</td>
</tr>
<tr>
<td>Total</td>
<td>1,768,000</td>
<td></td>
<td>1,559,000</td>
<td></td>
</tr>
</tbody>
</table>

Cross tabulations and estimates by region of the number of adult social care jobs and people by sector, service type and job role group are provided in appendix 3.
3.3.4 Employment type

The table below shows that 90% of adult social care jobs were directly employed (permanent or temporary). 10% of jobs were not direct employed - these include agency staff, bank and pool staff, volunteers and students.

The majority of the 1.59 million directly employed jobs were permanent jobs (94%).

**Total number of adult social care jobs by employment type**
*Source: Skills for Care estimates using various sources*

<table>
<thead>
<tr>
<th>Employment type</th>
<th>Number of jobs 2010</th>
<th>Percentage of jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Directly employed</td>
<td>1,587,000</td>
<td>90%</td>
</tr>
<tr>
<td>Permanent</td>
<td>1,487,000</td>
<td>84%</td>
</tr>
<tr>
<td>Temporary</td>
<td>100,000</td>
<td>6%</td>
</tr>
<tr>
<td>Not directly employed</td>
<td>180,000</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,768,000</strong></td>
<td></td>
</tr>
</tbody>
</table>

The graph on the next page shows the estimated number of jobs for not directly employed roles. Of the 180,000 not directly employed jobs - 40% were agency staff (4% of all jobs), 27% were bank or pool jobs and 21% were volunteers.
### 3.4 Trend data of number of jobs

The total number of adult social care jobs increased by around 7% between 2009 and 2010.

The majority of this increase came from jobs for direct payments recipients which increased by 35%. The overall increase when excluding direct payments recipients from the total was 1.9%.

The number of local authority jobs decreased by 1.5% between 2009 and 2010 and is expected to decrease further in 2011. The number of jobs in the independent sector increased by 2.5%, the voluntary sector increased by 5.7% and the private sector by 1.4%.

#### Percentage increase of adult social care jobs between 2009 and 2010 by sector

*Source: Skills for Care estimates using various sources*

<table>
<thead>
<tr>
<th>Sector</th>
<th>Number of jobs 2009</th>
<th>Number of jobs 2010</th>
<th>Change between 2009 and 2010</th>
<th>Percentage change between 2009 and 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Authority</td>
<td>205,000</td>
<td>202,000</td>
<td>-3,000</td>
<td>-1.5%</td>
</tr>
<tr>
<td>Independent</td>
<td>1,109,000</td>
<td>1,137,000</td>
<td>28,000</td>
<td>+2.5%</td>
</tr>
<tr>
<td>Private</td>
<td>801,000</td>
<td>812,000</td>
<td>11,000</td>
<td>+1.4%</td>
</tr>
<tr>
<td>Voluntary</td>
<td>308,000</td>
<td>326,000</td>
<td>18,000</td>
<td>+5.8%</td>
</tr>
<tr>
<td>NHS</td>
<td>73,000</td>
<td>74,000</td>
<td>1,000</td>
<td>+1.4%</td>
</tr>
<tr>
<td>Direct payments recipients</td>
<td>263,000</td>
<td>355,000</td>
<td>92,000</td>
<td>+35.0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,650,000</strong></td>
<td><strong>1,768,000</strong></td>
<td><strong>118,000</strong></td>
<td><strong>+7.2%</strong></td>
</tr>
</tbody>
</table>
3.5 Projections of the future adult social care workforce

The demand for adult social care is projected to increase rapidly due to the ageing population. The size of the adult social care workforce will have to increase significantly to meet this demand.

Skills for Care estimates of the number of adult social care workers that may be needed to meet the future social care needs of adults and older people in England can be found in the State of the Adult Social Care Workforce Report 2010. The key findings are summarised below:

The workforce projections were based on projections of demand made in 2008 by the Personal Social Services Research Unit (PSSRU) for the Department of Health. These in turn were based on government projections of the future population of England. The Base Case scenario assumed the rate of provision of services remained constant. The other scenarios were developed at a workshop involving Skills for Care staff and other sector experts (see appendix 2 for descriptions of each scenario).

The table on the next page shows that, depending on the scenario, the number of jobs in adult social care is projected to grow by between 24% and 82% between 2010 and 2025. This means there could be between 2.1 million and 3.1 million jobs by 2025.

Note that the model is calibrated to the workforce as estimated in 2008, which is why estimates for 2010 are different for each scenario and different to the estimates quoted earlier in this report.
Summary of four projections of adult social care workforce jobs in England 2010-2025

<table>
<thead>
<tr>
<th>Scenario (000's) -&gt;</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
<th>Total increase 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Case</td>
<td>1,783</td>
<td>2,056</td>
<td>2,397</td>
<td>2,783</td>
<td>1,000</td>
</tr>
<tr>
<td>Maximising Choice</td>
<td>1,802</td>
<td>2,138</td>
<td>2,571</td>
<td>3,082</td>
<td>1,280</td>
</tr>
<tr>
<td>Contain and Community</td>
<td>1,746</td>
<td>1,940</td>
<td>2,132</td>
<td>2,318</td>
<td>572</td>
</tr>
<tr>
<td>Restricted Resources</td>
<td>1,705</td>
<td>1,827</td>
<td>1,951</td>
<td>2,090</td>
<td>385</td>
</tr>
</tbody>
</table>

**Adult social care workforce jobs projections**

Source: Skills for Care estimates using various sources

- **2010 jobs (000's)**
- **Extra needed by 2025 (000's)**

- **Base Case:**
  - 2010 jobs: 1,783
  - Extra needed by 2025: 1,000

- **Maximising Choice:**
  - 2010 jobs: 1,802
  - Extra needed by 2025: 1,280

- **Contain and Community:**
  - 2010 jobs: 1,746
  - Extra needed by 2025: 572

- **Restricted Resources:**
  - 2010 jobs: 1,705
  - Extra needed by 2025: 385
4. Appendices

4.1 Appendix 1: Methodology 2011

4.1.1 Number of adult social care organisations

The number of adult social organisations was estimated using ONS’ annual analysis of UK Business Activity, Size and Location data. Organisations in the following SIC codes were classed as adult social care organisations (although it is acknowledged that some social care operations may fall under other categories):

<table>
<thead>
<tr>
<th>SIC2007</th>
<th>Description</th>
<th>Adult / children split</th>
</tr>
</thead>
<tbody>
<tr>
<td>87100</td>
<td>Residential nursing care activities</td>
<td>Assumed 100% adults</td>
</tr>
<tr>
<td>87200</td>
<td>Residential care activities for mental retardation, mental health and substance abuse</td>
<td>Assumed 100% adults</td>
</tr>
<tr>
<td>87300</td>
<td>Residential care activities for the elderly and disabled</td>
<td>Assumed 100% adults</td>
</tr>
<tr>
<td>87900</td>
<td>Other residential care activities</td>
<td>Mixed adults &amp; children</td>
</tr>
<tr>
<td>88100</td>
<td>Social work activities without accommodation for the elderly and disabled</td>
<td>Assumed 100% adults</td>
</tr>
<tr>
<td>88990</td>
<td>Other social work activities without accommodation n.e.c</td>
<td>Mixed adults &amp; children</td>
</tr>
</tbody>
</table>

These data were provided at UK level so organisations from Scotland, Wales and Northern Ireland were removed from the analysis.

The proportion of organisations in SIC2007 code 87900 that were for adults was estimated by calculating the proportion of regulated residential activity there were for adults (by comparing numbers of CQC registered residential establishments and Ofsted registered residential establishments). It was then assumed that the adult/children split was the same in 87900.

4.1.2 Number of adult social care establishments

The proportion of organisations in SIC2007 code 88990 that were for adults was estimated using a list of business names offering these types of service obtained from Companies House. A random sample of these businesses was taken and each business was categorised as an adults or children’s service (this technique was different to what was used previously see 4.1.5).

The estimates of the number of adult social care establishments were done at a greater degree of detail than the organisational estimates as they were used as the framework for estimating the size of the workforce.
Residential segment

The numbers of care homes with nursing, care only homes and adult placement schemes were taken direct from the CQC register as at September 2010. This made up the CQC registered portion.

The number of non-registered establishments was estimated by subtracting the number of CQC registered residential establishments and Ofsted registered residential establishments from the total number of establishments (local units) reported by the IDBR under SIC2007 codes 87100, 87200, 87300 and 87900 (adjusted to exclude children’s services as per 4.1.1).

Non-residential segment

The numbers of domiciliary care agencies and nursing agencies were taken direct from the CQC register as at September 2010. This made up the CQC registered portion.

The number of non-registered establishments was estimated by subtracting the number of CQC registered non-residential establishments from SIC2007 category 88100. This was then added to the number of establishments in SIC2007 88900 (with children’s establishments excluded using the method described in appendix 4.1.1).

4.1.3 Workforce estimates

Independent sector

CQC registered establishments

CQC’s register provides accurate and up to date information on numbers of registered establishments, by sector, geography and, for care homes capacity. In addition, NMDS-SC records can be matched with the CQC data to show precisely the proportion of each segment the NMDS-SC covers.

NMDS-SC and CQC records were matched and those not in the independent sector were excluded. The dataset was then split into private and voluntary sectors, region, CSSR and capacity (for care homes).

The NMDS-SC data were then grossed up within each of these categories to all CQC establishments to give estimates of the size of the CQC registered workforce. (Wherever possible, the data were stratified by size (in terms of number of employees) using the IDBR to minimise grossing up error).

Non-CQC registered establishments

The estimates of the number of non-CQC registered establishments (see appendix 4.1.2) were split using IDBR data to remove local authority establishments.

NMDS-SC establishments offering these types of service were then grossed up to the total number of non-registered services. Again the universe data were stratified by size using the IDBR to minimise grossing up error.
Local authorities

The SSDS001 was used for the total number of directly employed jobs employed by local authorities. Workers in children’s specific roles were excluded. The NMDS-SC was then used to estimate the number of non-directly employed jobs in local authorities and these were added to the total.

NHS

These numbers were taken from NHS census data published by the NHS Information Centre for Health and Social Care. It is not possible to be precise about the number of staff working in adult social care roles employed in the NHS. This is because many NHS jobs include elements of social care work and also because NHS-wide job classification does not lend itself to identify those involved in social care work for adults. For this report, healthcare assistants (excluding maternity services), occupational therapists, social service staff and their assistants were all counted as adult social care staff.

Direct payment recipients

The total number of direct payments recipients was taken from data published by the NHS Information Centre for Health and Social Care. The NMDS-SC was then used to estimate the average number of workers each recipient employed. These numbers were multiplied to give an estimate of the total number of jobs for direct payments recipients. In the future as the NMDS-SC collects more data on this sector more accurate and detailed estimates will be made.

4.1.4 Jobs to people estimates

The NMDS-SC contains a unique global identification number based on the employees National Insurance number and date of birth (in coded format) which indexes individual workers (anonymously). This allowed us to count the number of jobs held by each individual recorded in the NMDS-SC database.

Adjustments were then made to the figures to account for the following:

- The NMDS-SC had records for about one-third of all jobs in the adult social care sector in England; workers recorded in the NMDS-SC can therefore have jobs in non-participating social care establishments.
- Participating establishments update their records at different intervals and, in the interim, workers can change jobs and be recorded in the NMDS-SC in jobs they have left.
- About 20% of jobs have no unique global identification number (mainly because of missing National Insurance numbers) and could not be included in the analysis.

This methodology was an improvement on our previous effort (see appendix 4.1.5). As the coverage of the NMDS-SC increases these estimates will continue to improve.
4.1.5 Changes in methodology (2010 to 2011)

SIC2007 88990 – Other social work activities without accommodation

The SIC2007 category 88990 includes both adults and children’s establishments. In the State of the Adult Social Care Workforce report 2010 the method used to remove children’s establishments from this category was to assume the adults/children’s split was the same as it was for residential services. It was acknowledged that this was likely to be an overestimate of the number of adult establishments however no alternative data were available at the time.

For this report Skills for Care obtained a list of business names from Companies House for organisations offering these types of service. A random sample of these organisations were selected and then categorised as adults or children’s services based on their business name and service type. The results using this method were more reliable than previous estimates.

This method was still not perfect however as the Companies House data was split using the SIC2003 classification. We therefore could not isolate precisely organisations in SIC2007 code 88900. In the future hopefully a SIC2007 split will be available and this estimate can be improved further still.

As a result of this change in methodology the estimated number of organisations, establishments and jobs in this SIC code were lower in this report than the estimated number in the State of the Adult Social Care Workforce report 2010 and therefore the results should not be directly compared.

Jobs to people estimates

The methodology used for the jobs to people estimates was refined and improved since the first Skills for Care estimates published in the State of the Adult Social Care Workforce report 2010.

The NMDS-SC now has far more worker data and NINOs than previously allowing for more accurate estimates. Also the methods used in this report were improved to take better account of jobs in establishments outside the NMDS-SC.

As a result the estimated number of jobs per worker detected in this report is higher than previously estimated so the results should not be directly compared to previously published estimates.

4.2 Appendix 2: Future workforce scenarios

The Base Case

The Base Case scenario assumes the same patterns of service which existed in 2008-9 continue at a constant rate while demand for services increases as anticipated. The number of jobs could rise by 65% to 2.8 million in 2025, and the number of people working in the sector by 53% to 2.4 million.
Maximising Choice

Under the Maximising Choice scenario, all who wish to have their publicly funded-social care provided in a highly personalised way in their own homes could do so. The number of jobs would nearly double to 3.1 million by 2025, and the number of people working in adult social care would rise to 2.6 million. Most jobs will be personal assistants.

Contain and Community

The Contain and Community scenario envisages that most care and support would be provided by a largely unpaid workforce of family carers and community volunteers. The paid workforce would focus on managing these resources and on front-line professionalised support at whole family level. Paid jobs would increase by 37% to 2.3 million in 2025, and the number of people paid to work in the sector by 26% to 2.0 million.

Restricted Resources

The Restricted Resources scenario assumes that future resources for adult social care will be very limited. Consequently it envisages fewer but more stringent assessments and reviews, greater roles for community advice and guidance services and higher client-staff ratios in publicly-funded residential care. The number of jobs would increase by 24% to just over 2 million, and the number of people working in the sector by 14% to 1.8 million.

4.3 Appendix 3: Cross tabulations and regional estimates

This appendix is available as an excel document and can be downloaded via the Skills for Care website at www.skillsforcare.org.uk/research.

4.4 Appendix 4: CSSR level data

This appendix is available as an excel document and can be downloaded via the Skills for Care website at www.skillsforcare.org.uk/research.