skillsforcare

workforce intelligence

Care homes with nursing in the adult social care sector 2023/24

Key findings

290,000	4,191	10%	5.0%
Filled posts in care homes with nursing	CQC-regulated locations in England	Employed on a zero-hours contract	vacancy rare in care homes with nursing

Introduction

This report provides a summary of the adult social care workforce within care homes with nursing in the independent sector. This report covers Care Quality Commission (CQC) regulated care homes with nursing, all care homes with nursing providing personal care must be regulated by the CQC.

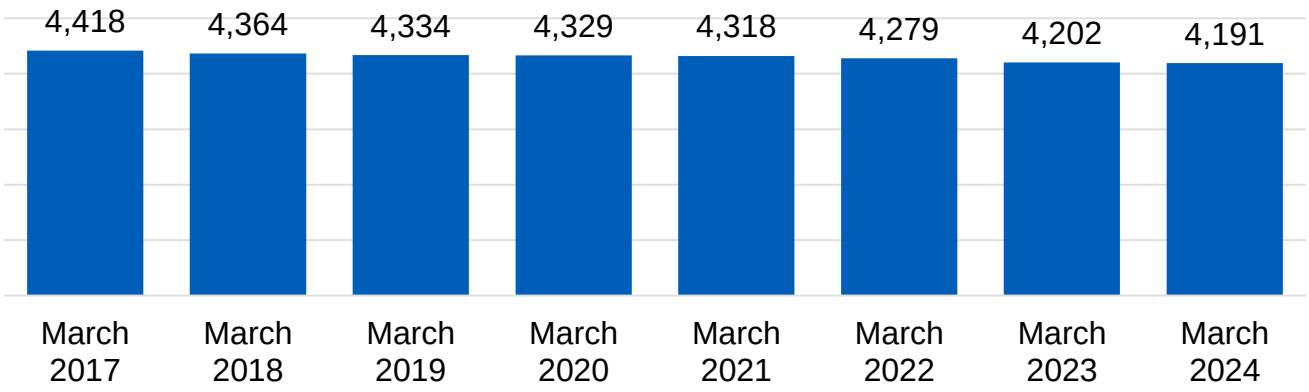
The information in this summary is derived from the Adult Social Care Workforce Data Set (ASC-WDS). The independent sector information in this report was collected between April 2023 and March 2024. As at March 2024 over half of the CQC-regulated workforce were recorded in the ASC-WDS (53%). This coverage varied by care sector, services, job role and geographical area. To produce our analysis we create annual estimates about the size and characteristics of the whole adult social care workforce, which are presented in this report. You can read more about our methodology for creating these on our website.

1. Size and Structure

As at March 2024 there were 4,191 care homes with nursing registered with CQC across England. These care providing locations had an estimated workforce of 290,000 filled posts in the independent sector and 13,500 vacancies, making 300,000 total posts. There were also 3,100 filled posts in the local authority sector not included in this report

Between March 2017 and March 2024, the number of CQC-regulated care homes with nursing decreased by 5% from 4,418 to 4,191. During the same period the number of care homes without nursing decreased by 11% whilst the number of domiciliary care services increased by 63%.

Chart 1. Number of CQC-regulated care home with nursing services, 2017 to 2024
Source: CQC Care Directory



Filled posts for care homes with nursing in the independent sector increased by 14,500 (5%) between 2022/23 and 2023/24, whilst the number of vacant posts decreased by 6,100 (31%).

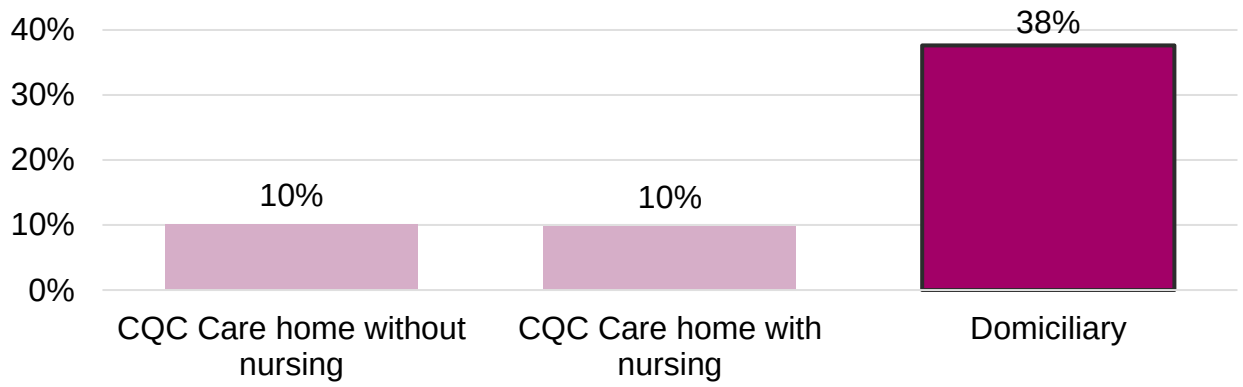
In 2023/24, the vacancy rate of independent sector care homes with nursing was 5.0%, equivalent to 13,500 vacant posts. Monthly tracking of data from the ASC-WDS has shown that the vacancy rate decreased to 4.9% by August 2024, and has therefore returned to pre-pandemic levels. It should be noted that this information is based on unweighted data and may change throughout the year as more data is submitted to ASC-WDS.

2. Employment overview

In 2023/24 there was an estimated 171,000 direct care providing filled posts in care homes with nursing in the independent sector; 11,500 managers filled posts, 33,000 regulated professions and 72,000 other filled posts, including ancillary non-care providing roles.

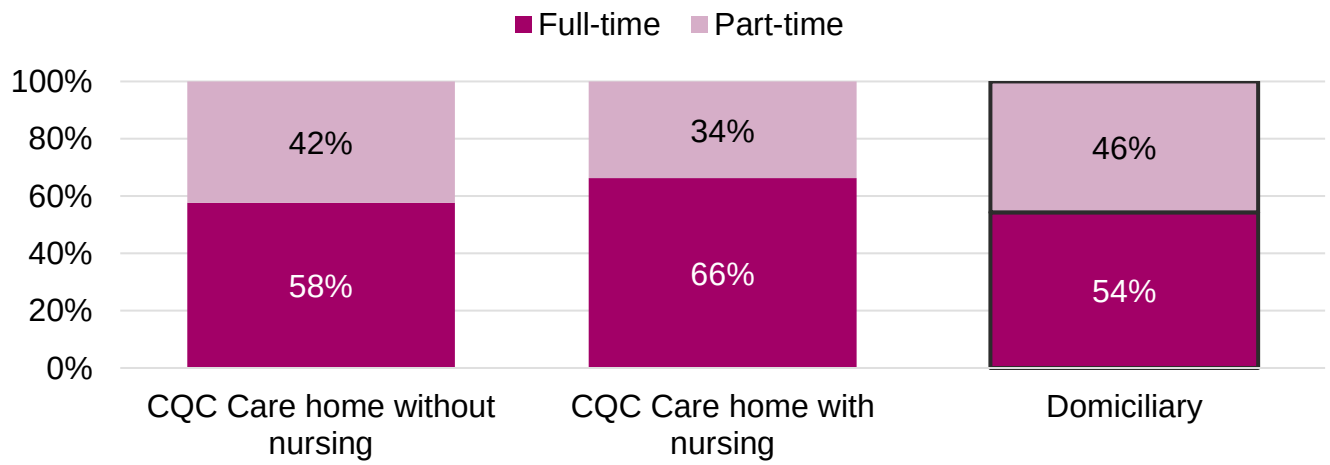
Around 10% of the workforce in care homes with nursing were employed on a zero-hours contract. This proportion has remained stable, increasing one percentage point since 2022/23. Across all care service types, 23% of the independent sector workforce were employed on zero-hours contracts.

Chart 2. Proportion of workers on a zero-hours contract by main care service, independent sector only, 2023/24
Source: Skills for Care estimates



Two thirds of staff in care homes with nursing were employed on a full-time basis (66%) and 34% employed part-time. This proportion of the workforce in full-time posts was higher than both care home without nursing and domiciliary care services.

Chart 3. Estimated full-time or part-time status by main care service, independent sector only, 2023/24
Source: Skills for Care estimates



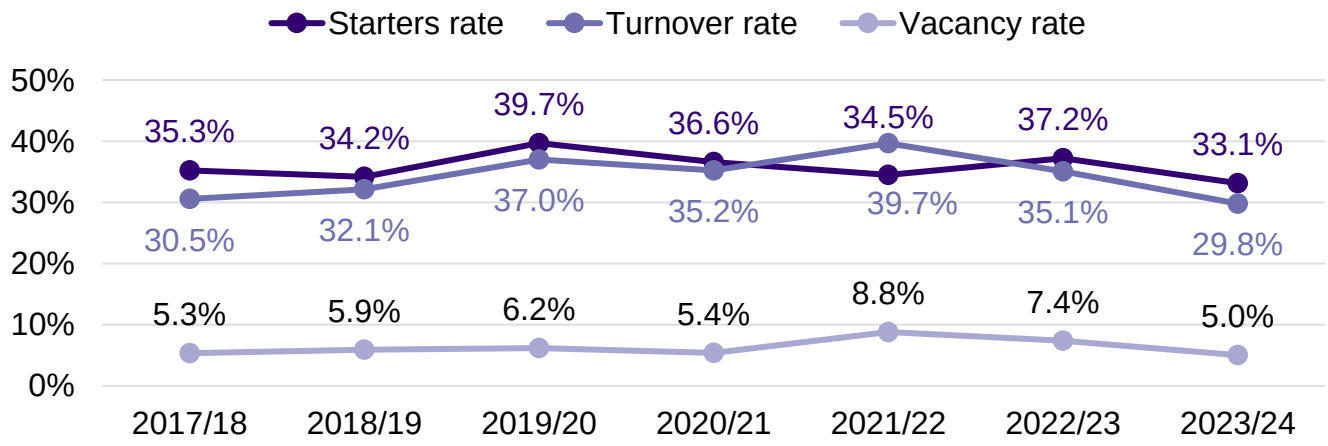
3. Recruitment and retention

The turnover rate for care homes with nursing in the independent sector was 29.8%, which was higher than care homes without nursing (26.0%). This equates to an estimated 77,000 workers leaving their role in the previous 12 months. Care workers in independent sector care homes with nursing had a turnover rate of 36.7%, which equates to an estimated 46,000 leavers. As shown in Chart 4 below, the turnover rate peaked in 2021/22 and has decreased each year since at point.

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

The vacancy rate of care homes with nursing peaked at 8.8% in 2021/22, since then it has decreased to 5.0% as at 2023/24. The monthly tracking of data in the ASC-WDS, shows that the vacancy rate have been fairly steady between April and August 2024.

Chart 4. Starter, turnover and vacancy rate trends in care homes with nursing, independent sector only, 2017/18 to 2023/24
Source: Skills for Care estimates



Not all staff turnover results in workers leaving the sector. Around 56% of the workforce in care homes with nursing were recruited from within adult social care. This means that although the high turnover rate results in employers going through the recruitment process, with its associated costs, the skills and experience of many workers are retained by the sector.

The workforce in care homes with nursing had an average of 9.7 years of experience working in social care. This was similar to the average for workers from care homes without nursing (9.6 years) but higher than the average for domiciliary care services (8.4 years).

The average length of time in current role for workers in care homes with nursing was 4.8 years, which was slightly lower than the average of those working in care homes with nursing (5.1 years) and higher than those working in domiciliary care services (4.3 years).

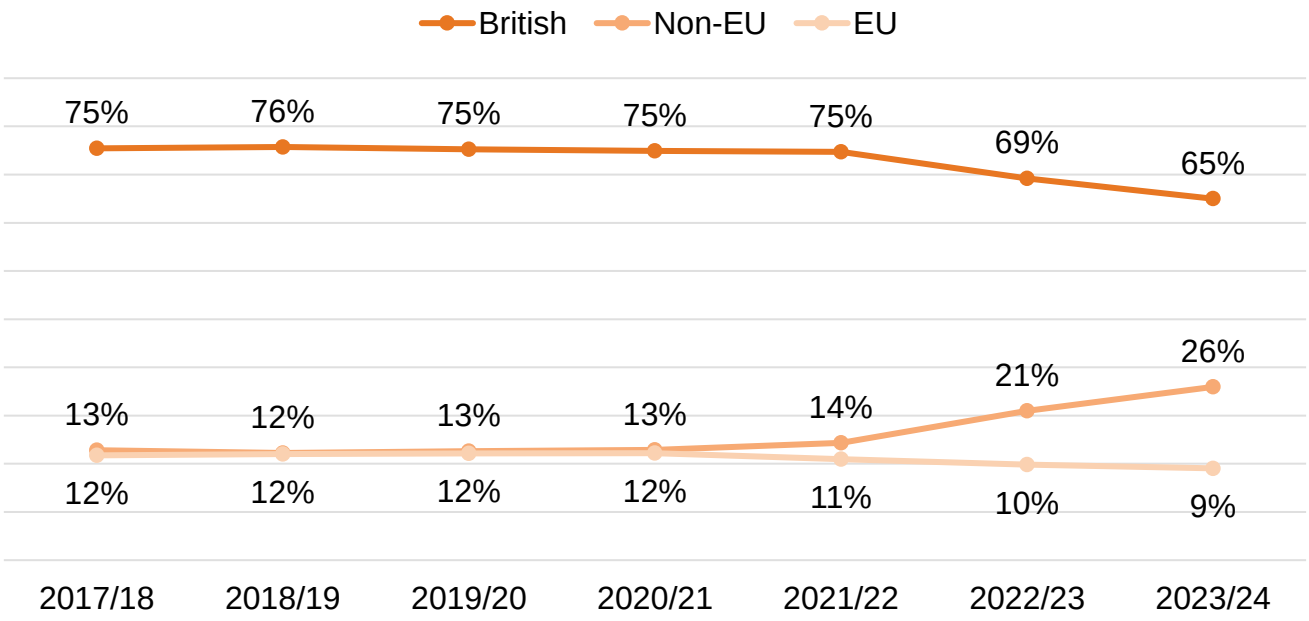
4. Demographics

Around 79% of workers in care homes with nursing identified as female and 21% identified as male. The proportion of male workers was slightly lower in managers roles (18%) compared to direct care roles (20%). Around 25% of the workforce were aged 55 and above in 2023/24, this proportion has increased from 23% in 2017/18. The average age of workers in care homes with nursing in 2023/24 was 43.2, this was similar for domiciliary (43.1) and care home without nursing services (43.3).

The nationality distribution of the workforce in care homes with nursing was 65% British, 26% non-EU and 9% EU. The proportion of British workers in care home with nursing services remained similar between 2017/18 and 2021/22, however since 2021/22 the proportion of British workers has decreased from 75% to 65% in 2023/24, this equates to a decrease of around 11,000 workers. Over the same period the proportion of EU workers decreased from 11% to 9%, a decrease of around 3,000 workers and the proportion of non-EU workers increased from 14% to 26%, an increase of around 37,000 workers.

Chart 5. Estimated proportion of workers by nationality, independent sector only, 2017/18 to 2023/24

Source: Skills for Care estimates

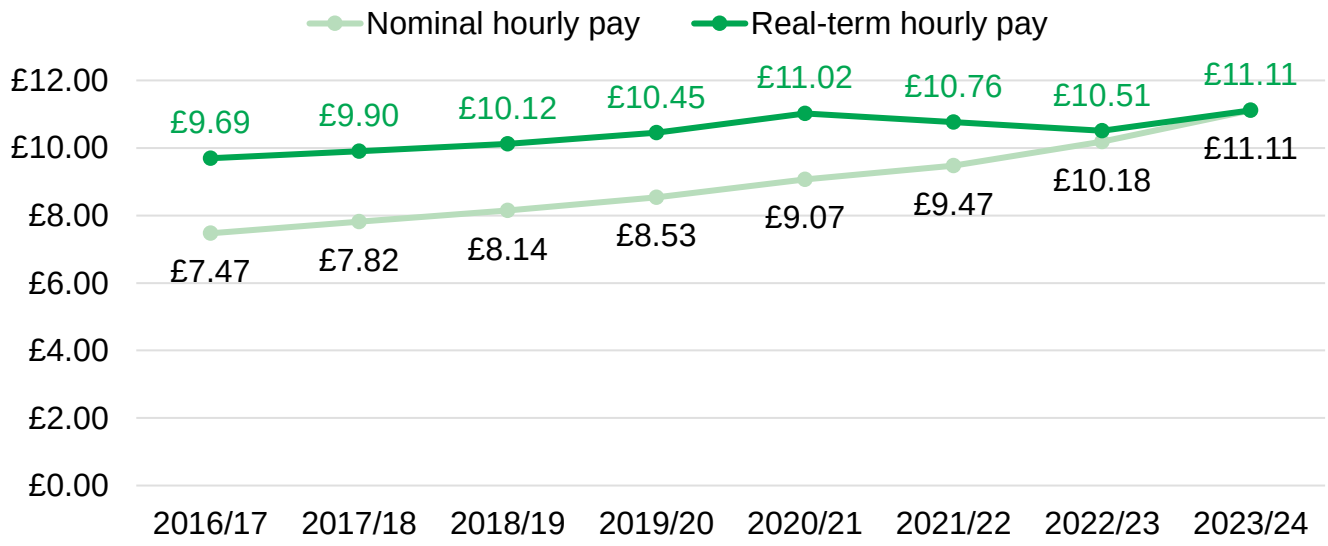


5. Pay

This section shows the mean hourly pay trend of care workers at care homes with nursing in the independent sector, in both nominal and real-term amounts. Nominal pay rates are not adjusted for inflation and present the rates as they were in each year. 'Real term' pay means that pay rates have been adjusted to take inflation into account and have been calculated using the Consumers Price Index (CPI) (the official measure of inflation of consumer prices in the UK) and expressed in prices as at March 2024. As an example, a worker's wage may have increased by 2% in a year. However, if inflation also rises by 2% then the worker will be no better off as a result of the pay rise; the nominal pay rise was 2%, but in real terms, the 'rise' would have been zero.

Chart 6 shows the increase in nominal and real term hourly pay since 2016/17, when the National Living Wage (NLW) was introduced. The mean nominal hourly rate of care workers in independent sector care homes with nursing has increased every year from £7.47 in 2016/17 to £11.11 in 2023/24, an increase of 49% over the whole period. Their real-term pay also increased every year up to 2020/21, meaning the nominal increases were usually above the change in inflation. However, their real-term pay has only increased by 1% between 2020/21 and 2023/24, which means care workers are paid only slightly more now compared to three years ago.

Chart 6. Average mean nominal and real-term hourly pay of care workers in care homes with nursing, independent sector only, 2016/17 to 2023/24
Source: Skills for Care estimates



Further information

We provide valuable workforce intelligence which the Government, strategic bodies, employers, and individuals rely upon to help them make decisions that will improve outcomes for the people who use care services. In addition to this publication, we produce and analyse workforce estimates at national, regional and local levels. This allows for greater scrutiny of the sector and its workforce and helps support local decision making in these geographical areas.

National information

This summary accompanies our flagship publication: The state of the adult social care sector and workforce in England. This report analyses the size and structure of the workforce, as well as key workforce characteristics and additional analysis on international recruitment and factors affecting turnover and CQC ratings.

Regional information

We have data visualisations and written reports which provide an annual overview of adult social care services and the workforce in each region. We have two data visualisations that show regional information: one looks at one region at a time, the other looks at key variables and compares the nine regions. Alongside these data visualisations are nine regional written summaries.

Local area information

There are six pages of local area information on our website, these are split by either local authority area or NHS Integrated Care Board (ICB) geography area.

- Individual areas: we have one report looking at the workforce in each local authority area or ICB area, one at a time.
- Our comparison reports compare key variables across local areas or ICB areas
- Each local area has a written summary report, summarising the workforce statistics.
- Our 'My ICB area (MH and LD&A)' report shows the latest information from the ASC-WDS for the mental health and learning disability and/or autism workforces, split into ICB areas.

We also publish tracking information about the adult social care workforce in key areas on a monthly and quarterly basis. These trackers do not use weighted estimates (as shown in our other annual reports) but do give a good indication of moving trends through the year. Trackers are available for recruitment and retention, filled posts and international recruitment.

To access all these reports and accompanying data visualisations, please refer to the relevant pages on our Workforce Intelligence website.

For bespoke analysis of workforce information or to answer any specific questions you have about the adult social care workforce please contact us at analysis@skillsforcare.org.uk.

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