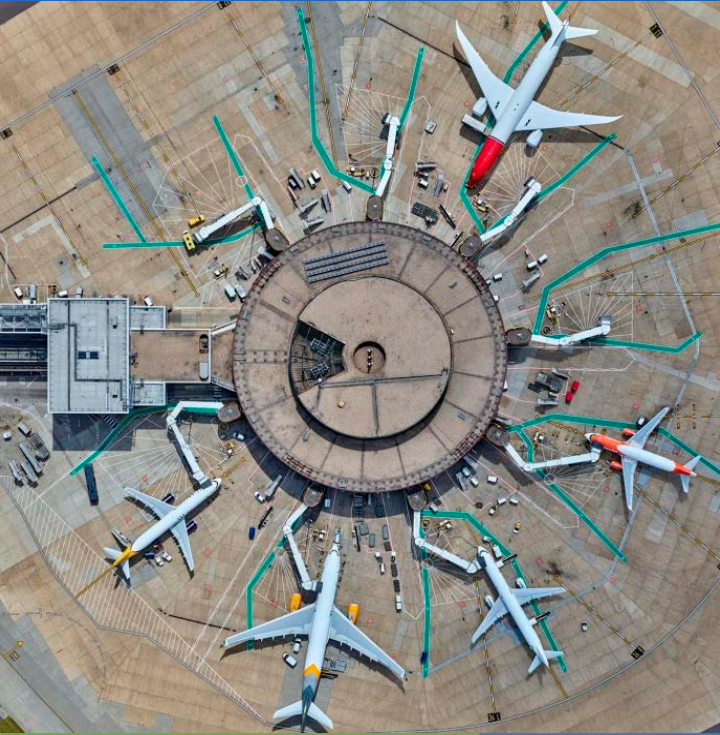




Coast to Capital LEP



76.8%

employment rate

20%

of SE economy

6th

Most prosperous region in the UK

1.9

million people

£61,000

Average GVA per employee

£48.5 bn

GVA

84,000

SME businesses in the area



Our Priorities

Housing



Infrastructure



Skills



PRIORITY SECTORS

▣ Sectors targeted for growth

- Advanced manufacturing and engineering
- Creative, digital and IT
- Environmental technologies
- Financial and business services
- Health and life sciences

▣ High employment sectors

- **Health and Social Care**
- Construction
- Visitor economy





Health and Social Care

Sector definitions

The sector is made up of three main sub-sectors:

- 📌 **Human health activities:** This comprises the delivery of healthcare in primary, secondary and tertiary settings, by a range of healthcare professionals and support staff treating a wide variety of medical conditions.
- 📌 **Residential care activities:** This comprises the provision of residential care, which is combined with nursing, supervisory or other types of care as

required by residents. The provision of residential facilities is a significant aspect of this sub-sector; and any healthcare provided is largely nursing (as opposed to medical).

- 📌 **Social work activities without accommodation:** This includes the provision of a range of social assistance services directly to clients (excluding any permanent residential services).

Health and Social Care

Sector characteristics – health and social care

Workers are generally higher educated than the wider workforce (54% vs 41%)

Sector is predominantly female (80% to 20%)

Average weekly earnings around 11% lower than average (in part due the large amount of lower skilled/paid jobs in social care)

However wages in care are rising faster than the whole economy average (wages in social care are not growing)

Higher levels of part time working compared to wider economy.

Source: UKCES Skills and Performance Challenges in the Health and Social Care sector 2015

Employers with Skills shortage vacancies slightly higher in sector compared to UK (5% vs 4%)

Employers with Skills gaps slightly higher in sector compared to UK (13% vs 12%)

Source: UKCES Employers Skills Survey 2015



Health and Social Care

Sector characteristics – adult social care

- Over half the workforce holds a recognised social care qualification (56%), while 43% have no relevant qualifications recorded
- Turnover remains an issue in adult social care with an overall turnover rate of 25.4% (equating to around 300,000 workers leaving their role each year). It should be noted however that turnover is not uniformly high although it tends to be higher in the private sector and amongst domiciliary care providers.
- It is estimated 42% of leavers remain in

the sector, while 58% leave altogether.

- The adult social care workforce remains one skewed in terms of gender with 80% of workers being female (this is higher still in direct-care providing roles). The workforce is also an older one with 1 in 5 workers being aged 55 or over

Source: State of the adult social care sector and workforce in England 2015 – Skills for Care



Health and Social Care

Sector characteristics – health

- ✔ The health sector represents one of the largest sectors of employment throughout the UK. It employs an estimated 2 million workers distributed across the UK. Almost 73% of workers are employed in the NHS, 26% are employed in the independent sector and 2% are employed in the voluntary sector
- ✔ Females make up almost 80% of the total workforce
- ✔ The workforce is also a little older than the average of other sectors, largely resulting from training times for professional staff
- ✔ The sector boasts a highly qualified workforce, with an estimated 61% of the workforce qualified to NQF Level 4 or equivalent
- ✔ Challenge is to increase the percentage of the workforce qualified to NQF Levels 2 and 3.

Source: Sector Skill Assessment 2011 – Skills for Health



Health and Social Care

Sector characteristics – health

- Ongoing demand for improved management, leadership and employee engagement.
- Limited or no growth expected in the short term with a continued pressure to deliver efficiencies.
- Structural changes likely to result in significant reduction in managerial and administrative roles.
- Predicted high volume of retirement will provide an opportunity for employers to reshape the workforce.
- Independent sector could expand to meet growing demand.
- Strong focus on increasing workforce productivity.
- Tighter public spending means focus on delivering efficiencies

Source: Sector Skill Assessment 2011 – Skills for Health





Health and Social Care

Economic contribution #1

GVA (+ Growth) estimates:

- UK - £107bn (average growth over last 5 years = 1%)
- Coast to Capital – £2.8bn (average growth over last 5 years = -0.8%)

What is GVA?

GVA measures the contribution to the economy of each individual producer, industry or sector in the United Kingdom.

Source: ONS Regional GVA Estimates 2015

Health and Social Care

Economic contribution #2

Businesses (+ Growth):

- UK - 96,000 (4.3% of all businesses)
Number of businesses grew by 20.4%
2010 to 2014
 - Human health activities grew 28.9%
 - Residential care activities remained the same
 - Social work activities grew by 16.8%

- Coast to Capital** – 3,500 (4.5% of all businesses) Number of businesses grew by 20%
 - Human health activities grew 23.3%
 - Residential care activities grew by 1%
 - Social work activities grew by 25.3%

Source: ONS UK Business Counts 2015





Health and Social Care

Economic contribution #3

Employment (+ Growth):

📊 **UK** – 3.7million (13.4% of all employment) Employment grown 9% 2009 to 2014

- 📊 Human health activities grew 7.4%
- 📊 Residential care activities grew 18.6%
- 📊 Social work activities grew by 5.8%

📊 **Coast to Capital** – 108,000 (13.6% of all employment) Employment grown 4.3% 2009 to 2014

- 📊 Human health activities grew 3.7%
- 📊 Residential care activities grew 12.9%
- 📊 Social work activities fell by 2.7%

Source: ONS Business Register and Employment Survey 2015

Health and Social Care

Geographic concentrations

- ▣ The sector is larger than average in the Greater Brighton and Coastal West Sussex areas, in particular in the Human Health activities sub-sector
- ▣ Rural and Coastal West Sussex have larger Residential Care activity sub-sectors
- ▣ Croydon has a larger than average Social Work activities sub-sector



**KEEP
CALM**

AND

**LOVE
HEALTH & SOCIAL CARE**



Health and Social Care Skills Challenges #1

- From 2012 to 2022 the sector is expected to grow by 4.3% (an additional 5,400 people). There will also need to be replacement staff of 51,000 (41% of the current workforce)
- An increasingly diverse employer base will make career progression difficult as it currently stands (structured as staff grade progression), this will require new career paths and more fluid job roles
- Increased integration across the sector will require the workforce to have multidisciplinary skills across health

(medical) and care occupations, particularly as demand for care and health services close to customer's communities increases

- Pressure on resources and increasing demand for health and care services will drive the need for efficiency whilst maintaining proper standards of care, this will require re-designing of roles and team structures and increase focus on outcomes, leading to more collection of data to measure impact of work

Health and Social Care Skills Challenges #2

- Increased multi-disciplinary teams will require increased soft skills, e.g. communication, management, effective team working
- A general shift to preventative care and guidance in the population will require staff to be able to support the population in living healthier lives
- Increasing use of technologies to remove barriers of communication between customers and health and care professionals will require technological skills in staff, as well as assistive technologies changing how and where care services are delivered

Source: UKCES Skills and Performance Challenges in the Health and Social Care sector 2015





Thank you for listening

