

# **Sectoral Skills Assessment**

## **Social Care**

October 2025



## Sectoral Skills Assessments

First launched in 2017, Sectoral Skills Assessments (SSAs) provide a robust and consistent evidence base to support strategic skills investment planning. Skills Development Scotland (SDS) has worked with key partners and stakeholders to produce SSAs, ensuring an inclusive approach to their development, dissemination and utilisation.

SSAs include published data sets. Inevitably, when using published data there is a time lag, but the data contained is the most up-to-date available at the time of writing. SSAs also include forecast data commissioned through Oxford Economics.

The Technical Note<sup>1</sup> provides full detail on the caveats that must be applied when using forecast data, but broadly, it should be noted that:

- Forecasts are based on what we know now and include past and present trends projected into the future.
- The more disaggregated they become, especially at smaller geographical units, the less reliable they are likely to be.
- Their value is in identifying likely directions of travel rather than predicting exact figures.
- The forecasts do not account for national or sectoral activities, initiatives or investments that are planned.

Industries and occupations used in the SSAs are defined by Standard Industrial Classifications (SIC)<sup>2</sup> and Standard Occupational Classifications (SOC).<sup>3</sup>

### **This SSA report is for the Social Care sector.**

The sector encompasses Residential Nursing and Care Activities, Residential Care, Social Care Without Accommodation, and Child-Day Care Activities. Please see Appendix 1 for the SIC definition used in this report.

The SSAs are part of a suite of Labour Market Insight publications by SDS. Other products in the suite include:



**Economy, People and Skills** report which provides succinct and up-to-date evidence on Scotland's economy, businesses and people. It is published monthly.



**Regional Skills Assessments** provide a coherent, consistent evidence base to inform future investment in skills, built up from existing datasets and forecasts for College regions, Rural Scotland and all City and Growth Deals regions. These are published annually.



The **Data Matrix** is an interactive tool, offering more detailed data from a variety of sources in a visually engaging format. It is updated frequently.

Alongside the suite of Labour Market Insight publications, SDS also produces a wide range of reports such as statistics on Modern Apprenticeships and the Annual Participation measure for 16-19 year olds. This includes a wide range of data related to equalities. Further information can be found on the [Publications and Statistics](#) section of the SDS website.



**We value user feedback on the Sectoral Skills Assessments.**

If you would like to provide feedback, please do so [here](#).

For any further information or queries on the SSAs or any of our other products, please contact: [RSA@sds.co.uk](mailto:RSA@sds.co.uk)

1. SSA Technical Note (2025).

2. Office for National Statistics UK Standard Industrial Classification (SIC) 2007.

3. Office for National Statistics UK Standard Occupational Classification (SOC) 2010.

## The Context for Scotland's Labour Market

Over the past decade, the Scottish economy has experienced disruption driven by changes in the global political landscape, the cost-of-living crisis and conflicts in the Middle East and Ukraine. In addition, megatrends in demography, technology, and the environment have continued to shape Scotland's economy and labour market, many of which are interdependent. Below is an overview of the drivers that are expected to have the greatest influence on Scotland's labour market outlook in the near term, based on a comprehensive analysis of both structural and cyclical factors.

### The Economy

Scotland and the UK experienced weak economic growth of 1.1% in 2024, with inflation also staying above the 2.0% target. Forecasters expect economic growth to remain at around 1.0% in 2025, with inflation also expected to remain elevated. The effects of rising prices and high interest rates continue to impact Scottish households and businesses. This contributes to the Scottish labour market being cooler in 2025, following a period of sustained tightness in recent years.



### Demographic Change

Scotland's population is projected to grow until mid-2047, largely driven by positive net migration, which will offset the anticipated natural decline due to a falling fertility rate. However, whilst the population is growing, it is also ageing. Around one-fifth of Scotland's residents were aged 65 or over in 2024. By 2047, the number of people of pensionable age is expected to increase by 21%. This demographic change has implications for the economy and labour market, by affecting caring responsibilities, tax revenue, and productivity.



### Inclusion and Equality

There is a lingering effect from the cost-of-living crisis, which began in 2021, with rising energy prices and financial pressures continuing to have a disproportionate impact on low-to-middle income households. Poverty, including in-work poverty, persists; however, the Fair Work policy agenda aims to reduce labour market inequalities. Barriers to accessing the labour market remain for disabled people and minority ethnic groups, and gender equality still requires progress.



### Technology and Automation

Artificial Intelligence (AI) continues to be the core driver in technology transformation. Scotland has a strong technology sector, underpinned by extensive academic and business presence in AI and related fields. The adoption of AI is rapidly increasing among Scottish businesses, particularly in optimising workflows. However, the implications of AI for the labour market remain uncertain. Scotland's strong base in digital and data skills could provide an advantage, but maintaining a skilled workforce will be essential.



### Climate Change and Net Zero

The transition to net zero will directly impact the labour market as actions are taken to meet net zero targets. This shift offers significant opportunities for job creation in Scotland, particularly in the clean energy sector. Scotland has strong natural assets, and existing sectoral strengths provide a strong foundation for a green economy. However, upskilling will be crucial for transition to net zero. Especially in the construction, manufacturing, agriculture, energy and transport sectors.



A fuller report on Scotland's Labour Market Drivers can be found [here](#).

Social care can be seen as an investment in Scotland's people, society and economy, with many of Scotland's citizens requiring access to Social Care services at some point in their lives.

The most recent Census data shows that Scotland's population is ageing with the number of people aged 65 and over increasing. As the demography of Scotland evolves, the Social Care sector plays an increasingly significant role in contributing to the country's wellbeing, through providing more opportunities, creating sustainability and inclusive growth, and by reducing inequality and supporting parity between economic, environmental and social progress. However, the Social Care sector has challenges and is often perceived as unattractive, with unfavourable working conditions. This contributes to a range of reported skills gaps and shortages and a high staff-vacancy rate.

Key skills gaps in Social Care, identified by managers, are infection prevention and control, digital skills, quality improvement, and integrated service skills. The Scottish Social Services Council (SSSC) also identifies skills, including trauma informed practice.

The most recent (2024) Employer Skills Survey (ESS) reported that 9% of employers in the combined Health and Social Care workforce

experienced Skills Shortage Vacancies (SSVs), suggesting that employers in the Health and Social Care sectors have encountered difficulties in sourcing the skilled people they require. For comparison, across all sectors 7% of employers had at least one SSV.

The Social Care sector is considered to have a fragile workforce due to factors such as workforce demographics, ageing, burnout and wellbeing (mental and physical). The National Care Service's Adult Social Care workforce Evidence Report identified that the workforce is 5.7% larger in 2020 than in 2011, but with a vacancy rate of 43% (of services) which is far higher than the economy as a whole (11% in 2020).

In March 2025, the Scottish Social Services Council published their Workforce Skills Report, which determined that there will be around 40,000 workers with qualification conditions on their registration between 2025 and 2030. Based on insight gathered by both SSSC and representative body research, such as Scottish Care's Overcoming Barriers in Scottish Social Care, there are a number of barriers to qualification, including lack of learner confidence, cost and funding constraints, lack of allocated learning time within the workplace, combined with personal caring responsibilities of employees, and access to assessment capacity.

Reports suggest that workforce challenges are somewhat compounded by other factors such as a disproportionately aging workforce, higher than average attrition rates within the sector as well as recent policy changes such as qualification and registration requirements, the increase in employer national insurance contributions and changes to immigration policy.

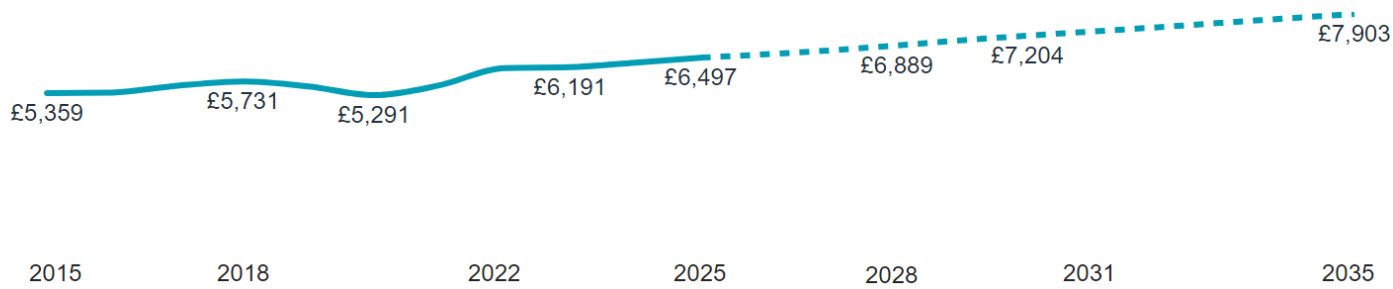
It is important to note that the forecasts used in this Sectoral Skills Assessment are policy and investment neutral.



This means the figures present a baseline outlook that takes into account historical trends and external economic conditions, but the figures do not reflect investment or policy that is unconfirmed or at planning/development stage.

Therefore, the forecasts should be used in conjunction with other sources, and readers are encouraged to overlay these with their own local and sectoral knowledge.

Gross Value Added (GVA, £m) (2015-2035)<sup>1, 2</sup>



In 2025, GVA in the Social Care sector was estimated to be £6,497m, generating 3.8% of Scotland's total economic output. Between 2015 and 2025, GVA in the sector was estimated to have increased by 2.0% on average each year, compared to equivalent annual growth of 0.9% across Scotland.

Looking ahead, GVA in Social Care is forecast to grow on average by 2.0% each year between 2025 and 2035, which is slightly above Scotland's average (1.7%). In 2035, the sector is forecast to account for 4.0% of Scotland's total economic output.



**Social Care** forecast GVA in 2028:  
£6,889m

↑ up 6.0% from 2025

**Scotland** forecast GVA in 2028:  
£177,951m

↑ up 5.2% from 2025

**Social Care** forecast GVA in 2035:  
£7,903m

↑ up 14.7% from 2028

**Scotland** forecast GVA in 2035:  
£199,512m

↑ up 12.1% from 2028

Productivity (GVA per job)<sup>1, 3</sup>

In this report, we have used Oxford Economics' measure of productivity, which is calculated by dividing total sectoral GVA by total sectoral employment (measured by jobs). Please note, there are different ways of calculating productivity, and caution is needed when interpreting productivity data presented in this report. It must be considered in the context of other data and insight.

In 2025, productivity in the **Social Care** sector was estimated to be **£34,200**. In comparison, the Scottish average was £57,700.





**Social Care** forecast productivity in 2028:  
£34,900

↑ up 1.9% from 2025

**Scotland** forecast productivity in 2028:  
£59,100

↑ up 2.4% from 2025



**Social Care** forecast productivity in 2035:  
£36,800

↑ up 5.5% from 2028

**Scotland** forecast productivity in 2035:  
£63,600

↑ up 7.5% from 2028

1. SDS (2025). Oxford Economics Forecasts.  
2. GVA is the measure of the value of goods and services produced within the economy and is an indicator of the sector's health.

3. Productivity is the measure of goods and services produced per unit of labour input. The Oxford Economics forecasts of productivity shown here have been calculated by dividing total sector GVA by total sector

employment (measured by jobs).

## Current Demand



Workforce size 2025: **207,600** people<sup>1</sup>

This was estimated to account for **7.7%** of Scottish employment.

The sector's workforce was estimated to have **increased** by **10.0%** (or **18,900** people) between 2015 and 2025.

This compares to a Scotland wide increase of **5.5%** or **141,500** people between 2015 and 2025.

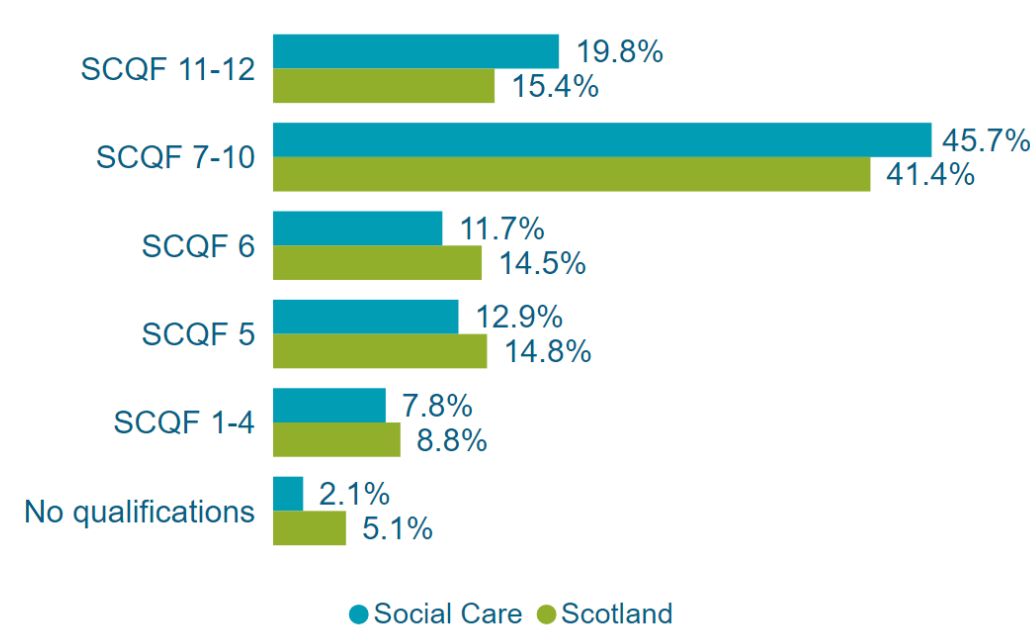
## Employment by Region (people), 2025<sup>1</sup>

The greatest number of people employed in **Social Care** were estimated to be in:

| Glasgow College Region * | Edinburgh, East and Midlothian | Lanarkshire | West Region |
|--------------------------|--------------------------------|-------------|-------------|
| 35,300                   | 35,000                         | 25,000      | 19,100      |

## Workforce Qualifications, 2025<sup>1</sup>

It was estimated that workers in **Social Care** had higher qualifications than the Scottish average. In 2025, it was estimated that 66% of workers in the sector were qualified to SCQF Level 7 and above.<sup>2</sup>



## Top 10 Employing Occupations (people), 2025<sup>1</sup>



1. SDS (2025). Oxford Economics Forecasts.  
2. See [SCQF Framework](#) for further information on SCQF qualification levels.

\*Glasgow College Region covers East Dunbartonshire, East Renfrewshire and Glasgow City local authorities.

## Current Demand

### The proportion of Local Authorities' workforce employed in Social Care, 2025<sup>1, 2</sup>

Scottish local authorities have sectoral strengths that make them unique. This means that the **Social Care** sector may be more important to some local economies, as a higher proportion of the local workforce is employed in the sector.

The sector was most prominent in these local authorities:

**Inverclyde**  
**14.9%**

**Angus**  
**13.8%**

**South Ayrshire**  
**12.9%**

**East Renfrewshire**  
**12.8%**



## Real Living Wage and Gender Pay Gap<sup>3</sup>

### Individuals earning Real Living Wage or more:

In April 2024, the real living wage rate for employees who did not work in London was £12.00.



#### Human Health & Social Work Activities

2023: **94.4%**      2024: **92.4%**

#### All sectors

2023: **89.8%**      2024: **88.6%**

### Gender Pay Gap for median full-time hourly earnings:



#### Human Health & Social Work Activities

2023: **16.0%**      2024: **11.4%**

#### Scotland

2023: **1.4%**      2024: **2.2%**

*Due to data availability, a 'best fit SIC code approach' has been used, so sectors definitions here may not fully match key sector definitions.*

## Modern Apprenticeships<sup>4</sup>



### MA starts for Sport, Health & Social Care\*:

Q4 2023/24: **5,915**      Q4 2024/25: **6,661**



### MAs in training for Sport, Health & Social Care\*:

Q4 2023/24: **6,689**      Q4 2024/25: **7,034**

For the latest quarterly MA statistics, please click [here](#).

\* Based on SDS Occupational Groupings.

For data on FAs and GAs please see the Publications section of our [website](#). For data on colleges and universities please see [Scottish Funding Council](#) and [Higher Education Statistics Agency](#).

1. SDS (2025). Oxford Economics Forecasts.

2. The proportion of the workforce in the Local Authority employed in the sector is calculated by dividing the sectoral employment in the area by total employment in the area.

3. Scottish Government (2025). Annual Survey of Hours and Earnings: 2024. The figures for 2023 have been revised. Due to data availability, a 'best fit SIC code approach' has been used, so the sectoral definitions and totals in this section may vary from those we have used elsewhere.

4. SDS (2025). Modern Apprenticeship Statistics.

# Job Postings<sup>1,2,3</sup>



Between July 2024 and June 2025, there were **505,170** job postings in Scotland across all sectors. The labour market across the country has cooled following a peak in job postings in 2022, and since the end of 2023 the number of jobs postings each month has been broadly stable.



## Spotlight on... Care Workers and Home Carers<sup>4</sup>

Between July 2024 and June 2025 there were **15,490 job postings** for Care Workers and Home Carers. The number of job postings has decreased by **1.1%** compared to the period between July 2023 and June 2024 (**8.0%** decline across all occupations comparatively). However, demand for these roles remained steady.

### Top Locations:



Glasgow City  
1,590 job postings



Edinburgh City  
1,100 job postings



Fife  
1,050 job postings



Highland  
950 job postings

### Specialised skills and knowledge included:



Personal Care



Home Health Care



Medication Administration



Social Work



Meal Planning and Preparation



Median real-time advertised salary: **£26,400**



## Spotlight on... Residential, Day and Domiciliary Care Managers and Proprietors<sup>5</sup>

Between July 2024 and June 2025 there were **810 job postings** for Residential, Day and Domiciliary Care Managers and Proprietors. The number of job postings has decreased by **28.9%** compared to the period between July 2023 and June 2024 (**8.0%** decline across all occupations comparatively). However, demand for these roles remained steady.

### Top Locations:



Glasgow City  
120 job postings



Edinburgh City  
70 job postings



Highland  
70 job postings



Fife  
50 job postings

### Specialised skills and knowledge included:



Nursing



Care Planning and Management



Social Work



Care Standards Act 2000



Budget Management



Median real-time advertised salary: **£50,000**

1. Lightcast 2025. Online job postings data provides a useful barometer for the health of the jobs market. It is important to note that the data does not capture all activity, so it should be considered as an estimate of activity.

2. Job postings are rounded to the nearest 10.

3. Data is for the period covering July 2024 – June 2025

4. Data is based on SOC 6135 for the whole of Scotland. Median salary based on 63% of job postings.

5. Data is based on SOC 1232 for the whole of Scotland. Median salary

based on 49% of job postings.

# Spotlight: Digital Practitioners in Health and Social Care\*

## Digital Practitioners in Scotland



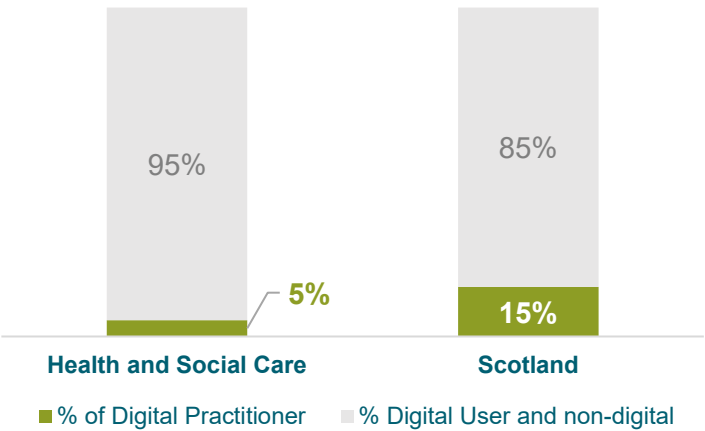
Recognising that digital skills permeate roles across all sectors and are no longer confined to traditional technology roles, SDS has undertaken research to define Scotland’s Digital Economy in 2025, building on the [Digital Economy Skills Action Plan](#).

This definition strengthens the evidence base and ensures SDS and partners can understand the spread of digital jobs across Scotland’s key sectors and identify how digital transformation is shaping skills demand, productivity and sectoral growth. More information on this research is available in Appendix 2.

This spotlight focuses on the presence of **Digital Practitioner** roles within the Health and Social Care sector. Digital Practitioners are occupations that utilise technical and professional digital skills, either within the traditional digital sector or integrated into other roles outside the sector. Digital Practitioner roles include occupations like **Health Services and Public Health Managers and Directors** and **Laboratory Technicians**.

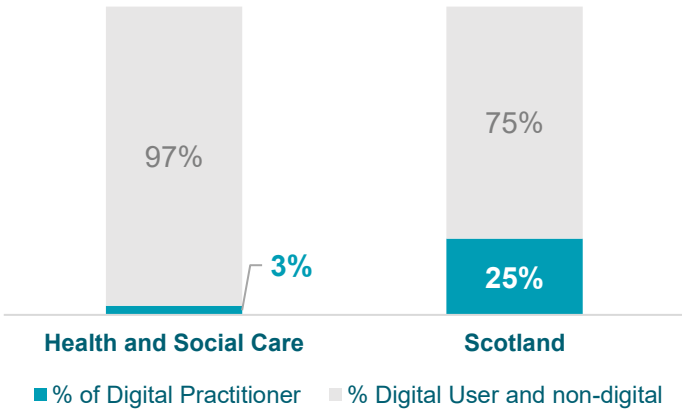
## Employment <sup>1</sup>

In 2022, **5%** of people employed in the Health and Social Care sector were employed in Digital Practitioner roles. This was lower than the Scottish average of **15%**.



## Gross Value Added (GVA)<sup>2</sup>

Digital Practitioner roles within the Health and Social Care sector make a small contribution to the GVA of the whole sector (**3%** in 2022), lower than the average in Scotland.



## Digital Insight for Social Care<sup>3</sup>



In Scotland’s social care sector, the presence of dedicated digital practitioner roles (that focus on the technical and professional digital skills) remains relatively limited compared to other industries. This reflects a broader emphasis on digital adoption and the development of essential digital skills across the wider workforce.

Rather than relying on specialist digital roles, the sector is increasingly focused on equipping frontline staff, managers, and support workers with the capabilities to use digital tools in everyday practice. This includes care planning systems, secure communication platforms, and digital record-keeping, all of which are becoming integral to delivering responsive and efficient care. As the sector continues to evolve, building digital confidence and capability across all roles will help strengthen service delivery within the sector.

\*Health and Social Care definition captures both Health Care and Social Care

1. SDS analysis of Lightcast Labour Market Data (2022, accessed in 2024).

2. SDS analysis of Annual Business Survey Data (2022, published in 2024).

3. Insight from the sector gathered via Skills Development Scotland (2025).

## Future Demand: Mid-term (2025-2028)<sup>1</sup>

In the mid-term (2025-2028), **the number of people in employment is forecast to grow by 2.8% (5,800 people)** in the **Social Care** sector. This is a larger percentage growth than is forecast overall across Scotland where employment is anticipated to rise by 2.5% (68,000 people).

By 2028, the regions forecast to have the greatest level of sectoral employment are **Edinburgh, East and Midlothian**, and **Glasgow College Region**, the same as in 2025. Between 2025 and 2028, the sector is forecast to see the greatest growth in **Caring Personal Service Occupations (2,700 people)**, followed by **Health Professionals (1,800)**.

Forecasts for the mid-term (2025-2028) suggest there could be demand for **24,500 people in the sector**, as a result of the **need to replace workers** leaving the labour market and **opportunities created** through expansion demand. Whilst positive, caution is needed as a wide range of factors may impact the labour market over this period.

### Workforce (people), 2028<sup>1</sup>



Workforce size 2028: **213,400** people



The sector's workforce is expected to **grow** by **2.8%** (or **5,800** people) between 2025 and 2028



Compared to a Scotland wide increase of **2.5%** or **68,000** people

### Total Requirement<sup>1,2</sup>



=



+



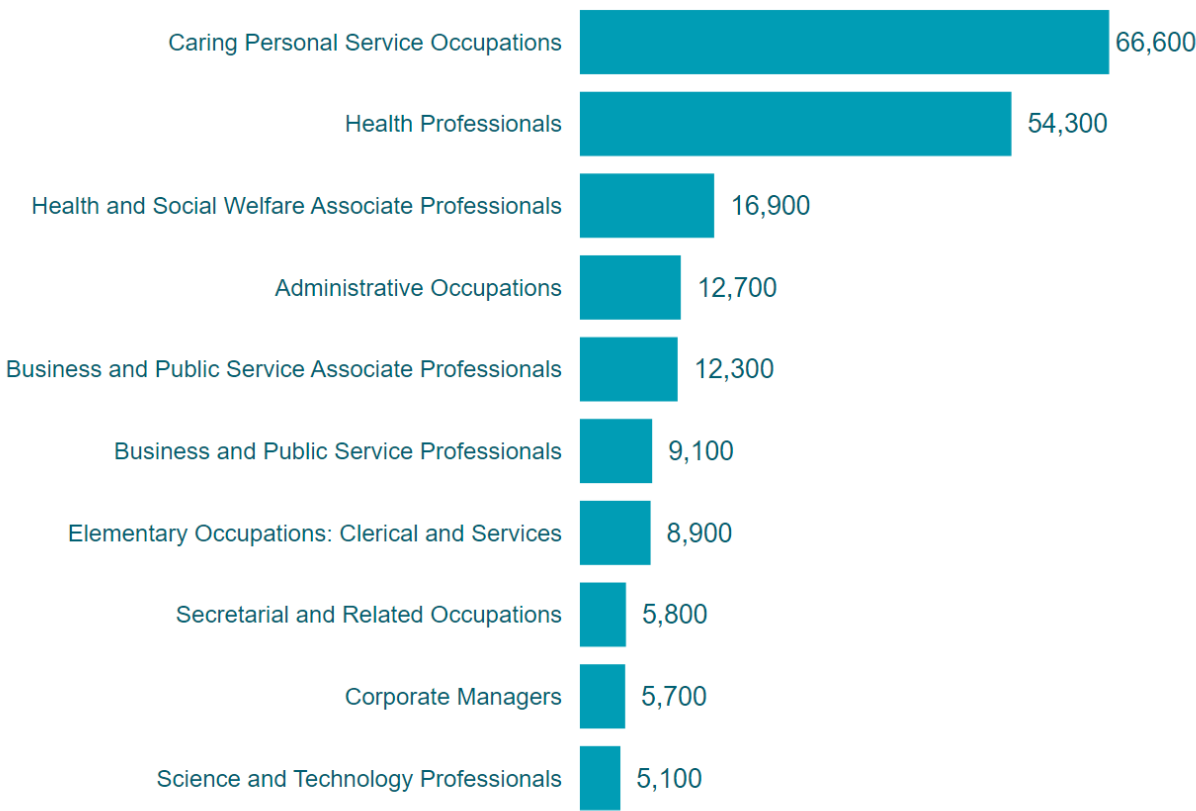
**Total requirement:**  
**24,500** people

**Replacement demand:**  
**18,700** people

**Expansion demand:**  
**5,800** people

**Social Care** is forecast to account for **6.2%** of Scotland's total requirement for people in the mid-term (2025-2028)

### Top 10 Employing Occupations (people), 2028<sup>1</sup>



1. SDS (2025). Oxford Economics Forecasts.

2.Total requirement for people is made up of expansion and replacement demand.

The expansion demand is the number of people required as a result of economic growth or contraction.

The replacement demand is the number of people required to replace workers leaving the labour market (i.e. those who retire, move away or change jobs). Please note, figures are rounded to the nearest 100 and as a result totals may not equal the sum of the constituent parts.

## Future Demand: Long-term (2028-2035)<sup>1</sup>

Employment growth in the **Social Care** sector is **forecast to continue, with an increase of 7.2% (15,500 people)** in the long-term (2028-2035). This is a larger percentage growth than is anticipated overall across Scotland where employment is forecast to rise by 4.0% (112,500 people).

By 2035, the regions forecast to have the greatest level of sectoral employment are **Edinburgh, East and Midlothian**, and **Glasgow College Region**. Between 2028 and 2035, the greatest growth is forecast to be in **Caring Personal Service Occupations (6,800 people)**, followed by **Health Professionals (4,400)** in the sector.

Forecasts for the long-term (2028-2035) estimate that **60,000 people** could be required in the sector. This will be driven by **the need to replace workers** leaving the labour market **and the creation of opportunities** through expansion demand. Whilst positive, caution is needed as a wide range of factors may impact the labour market over this period.

### Workforce (people), 2035<sup>1</sup>



Workforce size 2035: **228,900** people



The sector's workforce is expected to **grow** by **7.2%** (or **15,500** people) between 2028 and 2035



Compared to a Scotland wide increase of **4.0%** or **112,500** people

### Total Requirement<sup>1,2</sup>



=



+



**Total requirement:**  
**60,000** people

**Replacement demand:**  
**44,500** people

**Expansion demand:**  
**15,500** people

**Social Care** is forecast to account for **6.8%** of Scotland's total requirement for people in the long-term (2028-2035)

### Top 10 Employing Occupations (people), 2035<sup>1</sup>



1. SDS (2025). Oxford Economics Forecasts.

2. Total requirement for people is made up of expansion and replacement demand.

The expansion demand is the number of people required as a result of economic growth or contraction.

The replacement demand is the number of people required to replace workers leaving the labour market (i.e. those who retire, move away or change jobs). Please note, figures are rounded to the nearest 100 and as a result totals may not equal the sum of the constituent parts.

Appendix 1: Social Care Sector Definition (SIC 2007)

| SIC   | Name                                                                                     |
|-------|------------------------------------------------------------------------------------------|
| 87.1  | Residential nursing care activities                                                      |
| 87.2  | Residential care activities for learning disabilities, mental health and substance abuse |
| 87.3  | Residential care activities for the elderly and disabled                                 |
| 87.9  | Other residential care activities                                                        |
| 88.1  | Social work activities without accommodation for the elderly and disabled                |
| 88.91 | Child day-care activities                                                                |
| 88.99 | Other social work activities without accommodation n.e.c.                                |

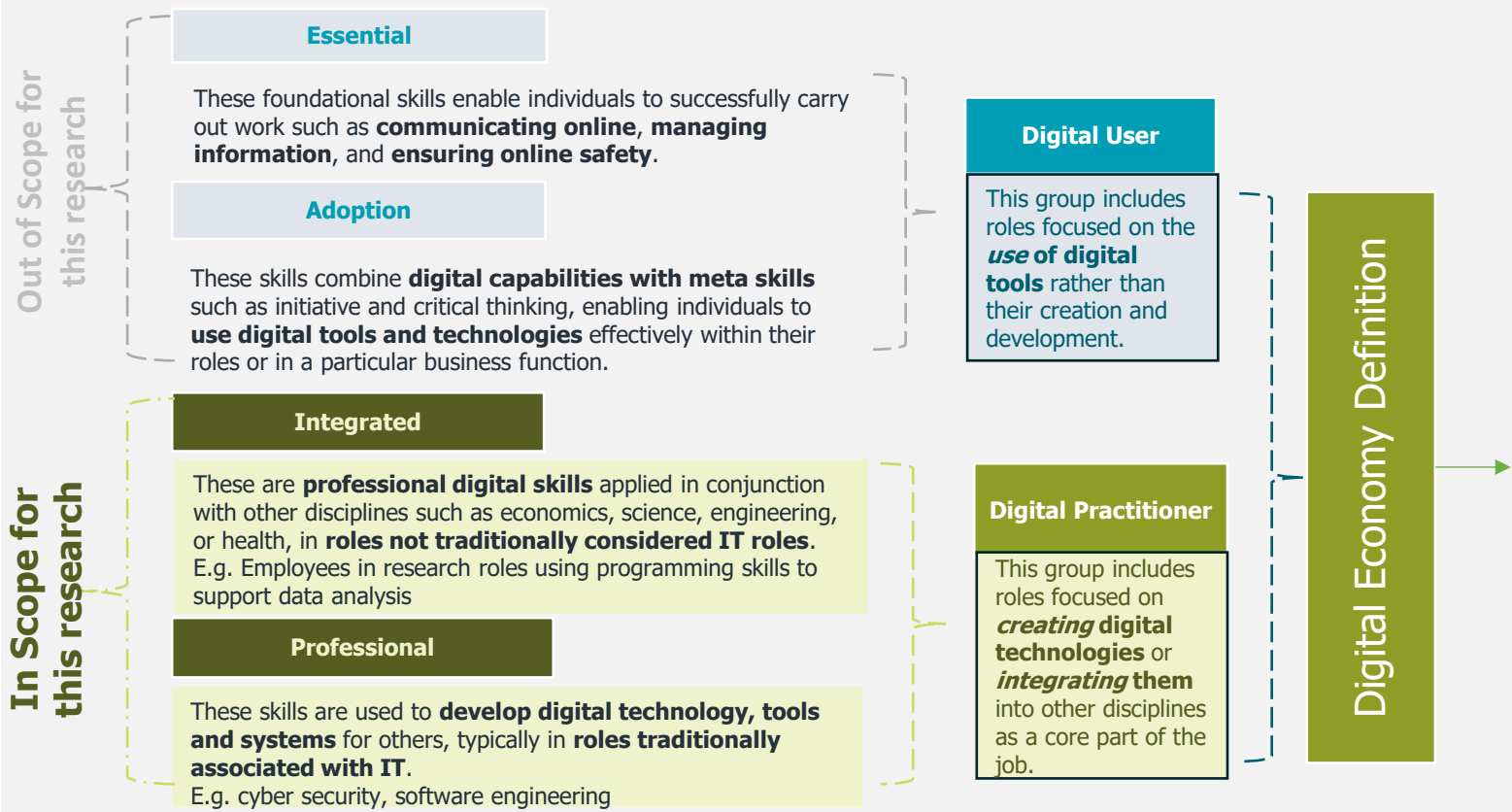
Project Background

In March 2023, SDS released the [Digital Economy Skills Action Plan](#) (DESAP), which emphasised the increasing importance of digital skills across all sectors in Scotland. While the Digital Tech Sector is well-defined and focuses on activity related to the production of digital technologies, the DESAP noted a lack of comparable data for the wider Digital Economy (which encompasses all economic activity that is enabled by digital technology) due to an unclear definition. To address this, SDS worked collaboratively with stakeholders to define the Digital Economy with the aim of improving the understanding of related jobs and skills.

Methodology

Following a literature review and stakeholder consultations, a final definition of the digital economy was produced (see below). This was then used to identify jobs (based on SOCs) and skills (from the Lightcast Skill Taxonomy) that were considered part of the Digital Economy. The research focused on Digital Practitioners as a particular area of interest to understand how skills that create or integrate digital technologies are permeating across occupations. This list of Digital Practitioner jobs and skills was then applied to the Scottish Labour Market to assess the economic value of Digital Practitioner jobs in Scotland.

Definition of the Digital Economy



Key Findings for Scotland



Estimated at almost 400,000, Digital Practitioner jobs in Scotland account for **15% of the total workforce.** This is comparable to the size of the Human Health and Social Work sector.



Digital practitioner roles contribute £34.6 billion in GVA to Scotland's economy, which represents around **25% of Scotland's GVA.**



At least **half** of all Digital Practitioner job postings require a **bachelor's degree or equivalent.**



The median advertised salary for Digital Practitioner job postings in Scotland was **£38,627. This was 35% higher than the average median advertised salary across all Scottish job postings.**

For further information or queries on the SSAs or any of our other products, please contact: [\*\*RSA@sds.co.uk\*\*](mailto:RSA@sds.co.uk)