



ACSOL GUIDE TO DIGITAL SKILLS

Care Skills *International Analysis*

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Background

Research into the changing digital skills needs in the Care workforce, and how they may have been impacted by the COVID Pandemic has been undertaken by the international partners in the ACSOL Project.

An online questionnaire was distributed to people working in the sector via both partner prompts/newsletters and direct emails to organisations in the sector. This collected data on digital skills within the workforce (defined as the ability to use information and communication technologies effectively to achieve work objectives), their growing importance in light of the pandemic and experiences of digital skills learning and training and individual perceptions of digital skills and e-learning.

The survey covered a cross section of staff employed within the sector - including owners, managers, freelancers, administrators, technicians etc. The results per country varied but enough were received to allow reliable analysis, with the exception of Italy where results were quite low, so we need to be careful about comparisons. Responses were primarily from a mixture of employees, managers and owners. We also attracted a reasonable level of response from freelancers.

The nature of the questions asked – and the subject matter of the questions -remained consistent. However national surveys did modify some questions where this was needed, and in the UK, following advice from trade unions, the questions were very slightly re-worded for those self-identifying as employees and freelancers.

Guidance Recommendations for the Triple Helix Groups

This Guide pulls together the findings from the International ACSOL Surveys exploring the impact of COVID on the digital skills needs in the Care sector. Each partner country will be delivering three sessions with employers, education providers and workforce representatives to examine these findings – most importantly those from their own country – and making recommendations for what kinds of training materials or approaches to training need greater focus. Our project will, ultimately also deliver new training materials (e-Learning Modules or similar). Having examined the findings in detail we can make the following recommendations for the Triple Helix Groups:

1. When sense checking the national findings with your Helix Groups you will need to outline how the survey was distributed and the numbers and nature of the respondents. The surveys reached a mix of employers and employees in the adult and child sectors. We need to ensure that new materials are produced that can meet the needs of both of these groups – or we could default to those supporting elderly people – with significant numbers in each country.
2. Analysis of online job advertisements in the partner countries results some interesting patterns. We see increases in demand for those employed in care and nursing in many countries, but this is nuanced by which occupation is most impacted. For example, a number of countries see increases in 'other' categories reflecting a new demand for workers not traditionally covered by occupation classifications.
3. Job advertisements also demonstrate that different countries tend to stress different skills within their job vacancies. Spain and Italy stressed soft skills/transversal skills in their adverts in this sector whilst the remaining countries stressed more 'professional' skills likely to be more sector specific. The presence of digital skills in job adverts for the sector varied considerably as did the levels and types requested. The Helix groups should explore why this is and what may be being assumed or even what needs to be included but is not currently present.
4. The importance of the digital offer within enterprises and how well it is currently perceived varies considerably and individual countries need to carefully consider their national setting.
5. Employers were asked to estimate what percentage of homecare workers have no digital skills. In all countries, about half of the respondents indicated that less than 25% of homecare workers have no digital skills (Figure 5) with indications of potentially far higher proportions in some countries. There is clearly a need for digital skills within this sector.
6. Where the responsibility for developing new digital skills lies is an interesting area that groups should discuss. Whilst many workers see a personal responsibility here – many others recognize that employers also have a role, especially as the sector moves to adopt more 'digital-by-default' practices. Clearly many care workers are expecting their employers to support their digital needs at work.
7. Our findings indicate a need for external support when providing eLearning in many care employers – so we should be 'pushing at an open door'. Particularly given the usefulness they subsequently give to ensuring their employees develop new digital skills.
8. The age profile of respondents was particularly varied and each partner will need to explore the age-profile of their sector when considering the kind of materials to develop and what kind of need exists. Younger workers may be more digitally-native whilst older workers may have barriers to working online and doing eLearning that need tackling first.

9. Regarding experience in the sector – the same is true as for 7 (above). Encouraging digital take-up in sectors with a settled and experienced staff is very different to that for one with rapid turnover. Conversations with employers and unions will be key to identifying the right way to approach staff and how to frame the offer.
10. Between 8 and 16% of respondents never or only rarely use digital technologies. Are these your priority? Our survey illustrates the kinds of areas where more digital skills may help with daily delivery of employees work and these could help identify where the new Learning Modules will have greatest impact.
11. We found that digital skills have certainly helped care workers in most of the countries sampled to master the changing pressures put upon them at work – yet many reported that they did not feel supported by their employer when looking to boost these skills. Driving up employer demand for skills – and willingness to invest staff time in gaining them - will be important.

What do we learn from Job Adverts?

Annex 2 of this report includes the results of detailed (2021) analysis by the University of Milano-Bicocca of the skills visible in online job adverts in partner countries in the Care sector (and the Arts and Culture Sector – but this is dealt with in a separate report).

We looked at the presence of three types of skills in particular in job adverts: transversal (soft /employability skills), professional skills (likely to be quite sector specific) and digital skills. The findings from Spain and Italy are similar in that adverts for both countries tend to include more transversal skills than others and digital skills, when present very much favour basic digital skills over others such as information brokerage or management and information skills. Of the three major categories of care job adverts (Human Health, Residential Care and Social Work) it is residential care adverts in both countries that most typically request digital skills.

The results from Germany and the UK are also similar in that job adverts from both countries typically contain more professional skills than other types – followed by transversal and then digital skills. Interestingly, the digital skills requested in both countries, though less commonly present, are extremely varied and include considerable proportions of skills defined as Information Brokerage skills and Applied and Management Informatic Skills.

The results for Romania were rather different. Digital skills were not sought in job adverts for Social Work activities but do appear in adverts for Human Health activities. The largest skill ‘group’ represented is that of Professional skills (as we also saw in UK and Germany). When we look at the nature of the digital skills requested – they are exclusively Basic Information Skills.

In Annex 3 of this report we present the results of further analysis on trends and changes to job adverts in the Care sector (plus as before the Arts and Culture Sector – dealt with in a separate report). These compare results from pre-Covid (2019) to Covid (2020) and unsurprisingly we see some major changes.

In Romania we see a marked drop in job adverts for Human Health activities but almost no drop in Social Work activities. The former includes nursing, community health workers and health care assistants – and the drops in each are quite consistent. The latter category includes childcare workers (demand for which drops) and social work ‘associate professionals’ which increases by over 40% - reflecting the demand for new kinds of role at this time.

In Germany marked drops are seen in the number of adverts for both Residential Care and Social Work Activities but a slight increase is seen in applications for Human Health activities. This is very different to patterns seen later in the UK and Italy for example. The increases in Human Health sub sector roles are primarily health professionals ‘not elsewhere classified’ and health care assistants. The drop in adverts for Residential Care masks a slight increase in applications for home-based personal care workers and is accounted for primarily in a reduction in adverts for more desk-based policy and administrators.

In Italy we see a very marked increase in online job adverts for all three of the categories searched for (Human Health activities, Residential Care activities and Social Work Activities). All of the sub-groups such as nursing professionals and health care assistants see notable rises in online job vacancies.

The position in the UK is very similar to that of Italy. All three major categories see marked increases, and when we look at the sub-group occupations there are also notable increases in all of those analysed. The increase in the number of vacancies for both nursing professionals and home-based personal care workers are particularly significant.

Finally, in Spain we see a different pattern again. There is a drop in online vacancy adverts for Residential Care Activities but a marked increase for Social Work Activities 'without accommodation' and a smaller increase in job vacancy numbers for Human Health Activities. When we look in more detail, we see that the rise in vacancies for Human Health Activities consists primarily of Nursing Professionals whilst other categories remain consistent or drop.

Summary

The survey has yielded a wealth of useful information from managers / business owners and employees to inform future service development and target digital skills delivery. The main points emerging are:

- Almost all surveyed organisations make some use of digital technologies, most commonly in managing the organisation and communicating with target audiences. This was echoed by responses from employees.
- The majority of organisations (other than in Germany) felt that clients were satisfied with the digital services currently provided.
- There was a clear message that digital skills are already important to the sector and will only become more important in the future.
- Most organisations stated that the pandemic had impacted on the need to use digital for working, with the main area of increased use being in internal and external communications.
- All organisations expected staff to have some level of digital skills, with use ICT hardware and email the most commonly cited expectations. Use of specific applications to control client health was among the least commonly cited expectations.
- The survey suggested there are significant gaps in digital skills among the workforce, particularly among older workers.
- The majority of employers believe digital skills are here to stay and are involved in the development of digital skills of their employees. This was supported by responses of employees, of whom a majority felt supported by their employer in developing new digital skills, although a significant minority did not feel supported.
- Over half of the employers responding to the survey had staff members that had undertaken some form of e-learning, and that employee experiences of e-learning had been broadly positive, although this was less so in Germany.
- The cohort of survey respondents was dominated by older workers, which may be linked to the perceived skills gap highlighted by employers. Research has consistently reported that older people are less likely to have high levels of digital skills and engagement with digital technologies.
- Employees were quite likely to combine their care work with other professional activity, with around a fifth reporting they were doing so. Most often this involved doing an Apprenticeship or working for another company as well as the care organisation they were employed by. Combining care work with other professional activities was higher than average in Great Britain, but very low in Romania.
- The survey suggested a high level of care experience and job stability, with the majority of respondents having been working in healthcare for at least 3 years and also being in their current job for at least 3 years, although this appears to less so in Italy.
- Use of mobile phones was very high but not ubiquitous, around three quarters use computers but only around a third use tablets / iPads. 96% had an internet connection at home, with use of emails, using search engines and online chat / video call software being the most common areas of digital competence. However, only two thirds of respondents use digital skills on a daily basis at work.
- Just under 40% of respondents use mobile apps aimed at supporting healthcare workers, with a further 23% interested in learning how to use them.
- Around 56% of respondents said that their digital skills had improved since the pandemic, and that their digital skills had helped master the new situation caused by it, although a

similar proportion felt that there was further potential for them to learn more digital skills in order to perform better in their job. This was reflected in agreement with general statements about their confidence in their digital skills going forward. 82% agreed that they felt confident they will be able to master newly needed digital skills and 90% felt they would be able to adapt to new skills requirements with the help of further training.

- Looking to the future and the delivery of digital services, a majority of respondents felt there was potential that clients and their families would welcome this, but a significant minority did not.
- Current levels of awareness of digital care platform agencies were low and take up even lower, particularly in Spain, Italy and Romania.

Survey All Respondents

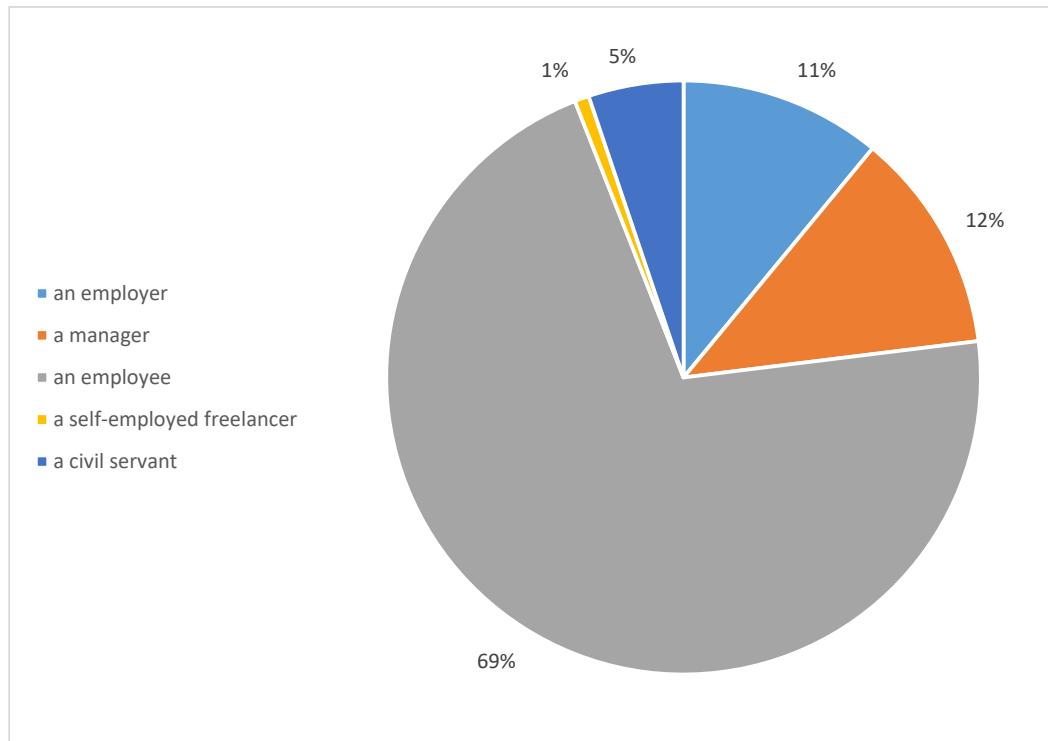
Between the five participating countries, a total of 647 survey responses were received, ranging from 210 in Romania to just 41 in Great Britain, as shown in Table 1 below. In general, far more employee responses were received than from employers, other than in Germany where numbers were comparable.

Table 1: Survey Responses by Country

| Country | Employer | Employee | Total |
|---------------|------------|------------|------------|
| Italy | 10 | 78 | 88 |
| Spain | 44 | 146 | 190 |
| Romania | 35 | 175 | 210 |
| Great Britain | 4 | 37 | 41 |
| Germany | 56 | 62 | 118 |
| Total | 149 | 498 | 647 |

Figure 1 shows that of the 846 completed responses, 11% were employers within their organisation, 12% were managers, while the largest group was employees, accounting for 69% of all responses. Civil servants accounted for a further 5%, while freelancers made up just 1% of responses.

Figure 1: Responses by Employment Status (Based on 647 completed responses)



In terms of size of organisation, Figure 2 shows that the majority of respondents were employed in small and medium sized enterprises. Around 3% were one-person organisations, 11% were in organisations with less than 10 employees, and a further 30% in organisations with 10-50 employees. 39% were in large organisations with more than 250 employees.

Figure 2: Responses by Size of Organisation (Based on 149 completed responses)

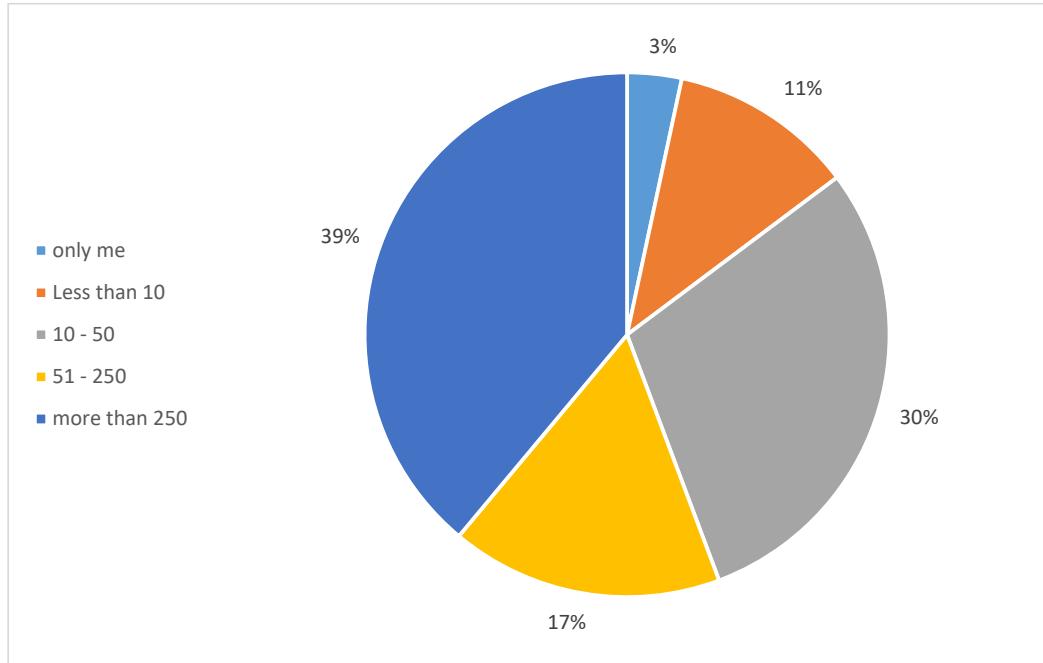


Figure 3 shows that around half of respondents were in well-established enterprises that had been in existence for over 20 years, a further 21% had been operating since the 2000s, with 8% having been established since the pandemic began.

Figure 3: Length of time operating in this field of business (Based on 149 completed responses)

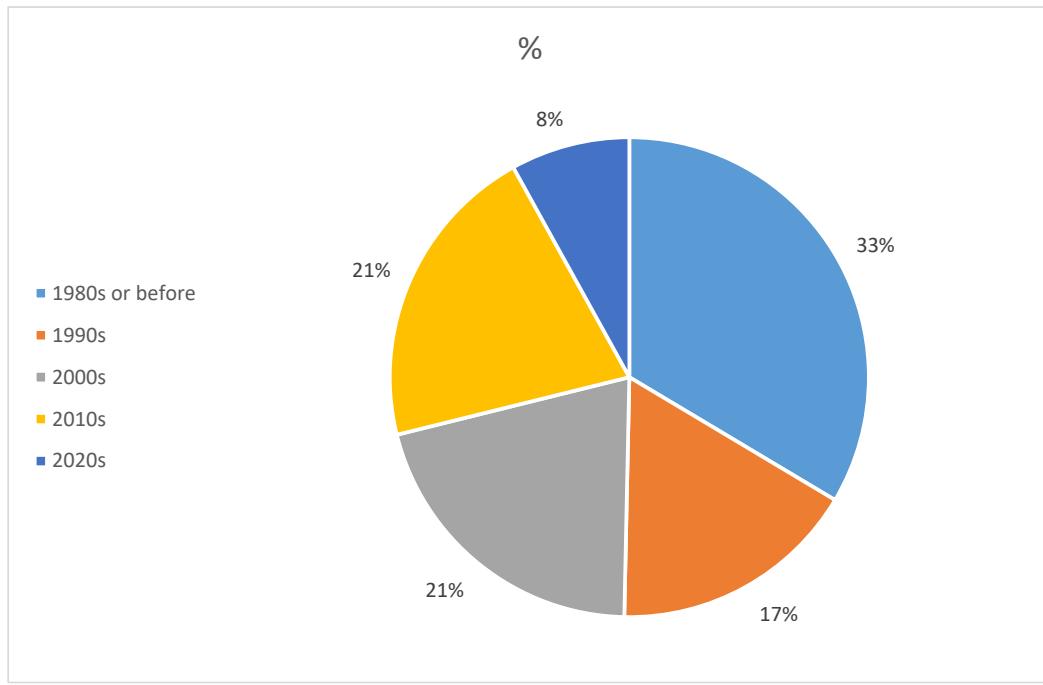


Figure 4 shows the main client groups that organisations were working with, and showed that around three quarters were working with adults (elderly and / or with disabilities), with just over half working with children and 15% with other groups.

Figure 4: Which client groups organisations are working with (Based on 149 completed responses)

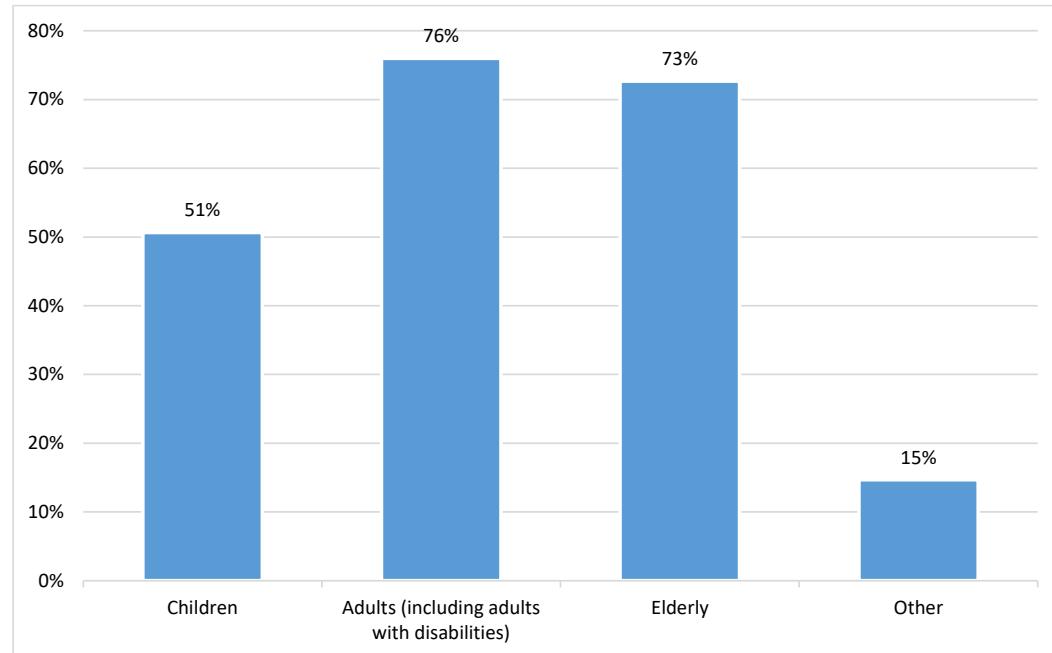
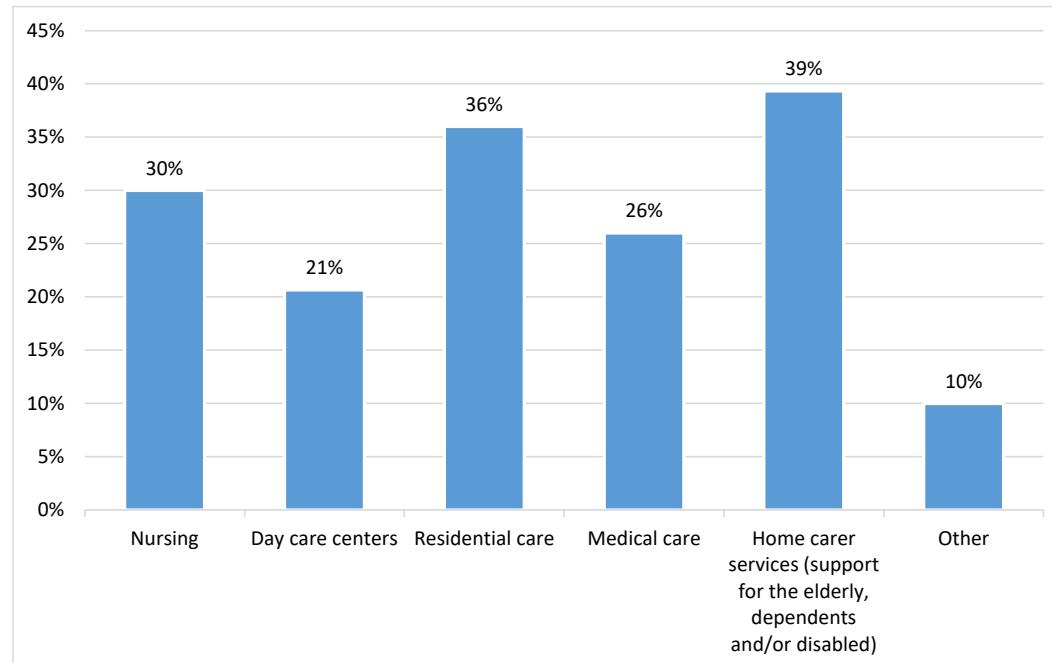


Figure 5 shows the main fields of operation that organisations are working in. The most common area of activity was in home care services (39%), closely followed by residential care (36%) and 21% were employed in day care centres.

Figure 5: Which fields are organisations working in (Based on 149 completed responses)



Respondents - Employers

Use of Digital Technologies

Figure 6 shows the extent to which survey respondents use technology for different purposes, with the most frequently cited uses being:

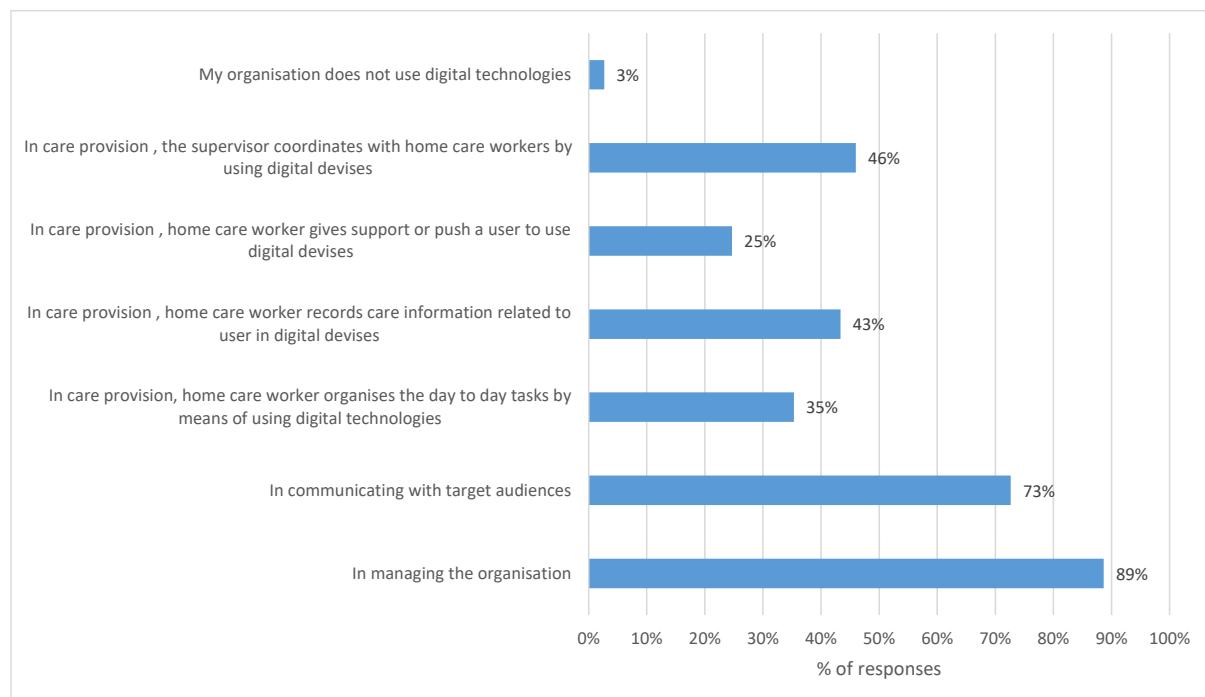
- In managing the organisation – 89% of respondents
- In communicating with target audiences – 73% of respondents

Just under half use digital technology for supervisors coordinating with home care workers (46%) and home care workers recording care information related to users in digital devices (43%), while a third use it for home care workers to organise their day-to-day tasks.

97% of respondents used digital technology in some way, with just 3% not using digital at all.

Whilst this reflects a high level of adoption across the sector for generic use of digital media (communications and administration) there seems to be scope for increasing this – including in areas related to the delivery of service and performance.

Figure 6: Use of Digital Technologies (Base: 149 responses. Respondents could select more than one answer)



There were some differences between countries in terms of the number of employees in the organizations studied, by country with larger organisations being particularly dominant in Germany and Great Britain. (Also see Annex 1.) Micro enterprises (2-10 employees) are more common in the Italy and Spain responses and Romania has a mixture of small and very large employers.

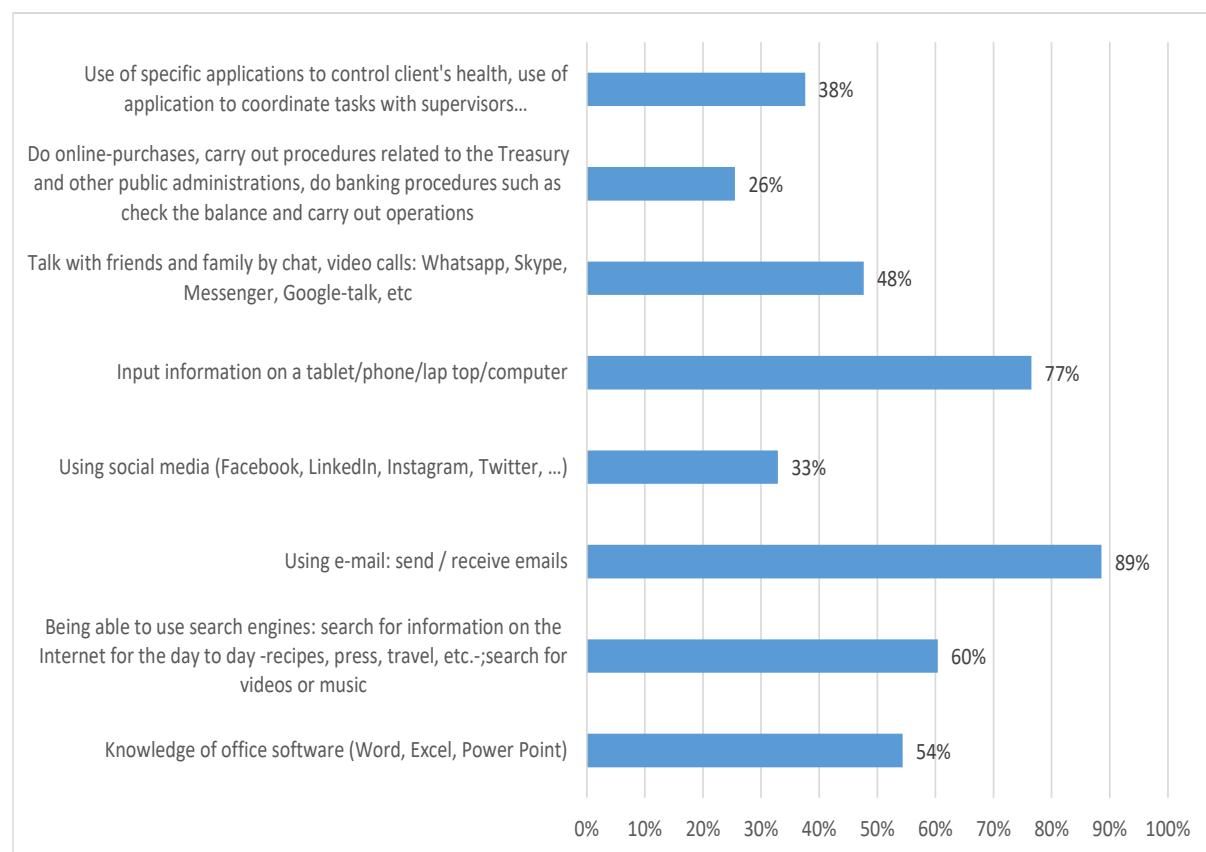
The differences above partially explained by looking at the users of the care services on offer. The users in Great Britain were primarily older people (care homes) whilst the demographic was far more mixed in the other countries.

Digital Skills needed for employment in the sector

Figure 7 shows that, unsurprisingly, use of ICT hardware and email are the most common areas of use of digital skills, with the majority of respondents citing both these areas of use. Use of search engines was also very commonly expected, but use of standard office software and social media less so.

From the data supplied, survey results suggest that digital skills specific to care worker tasks are only needed by around 30-40% of organisations, a figure that was fairly consistent across participating countries.

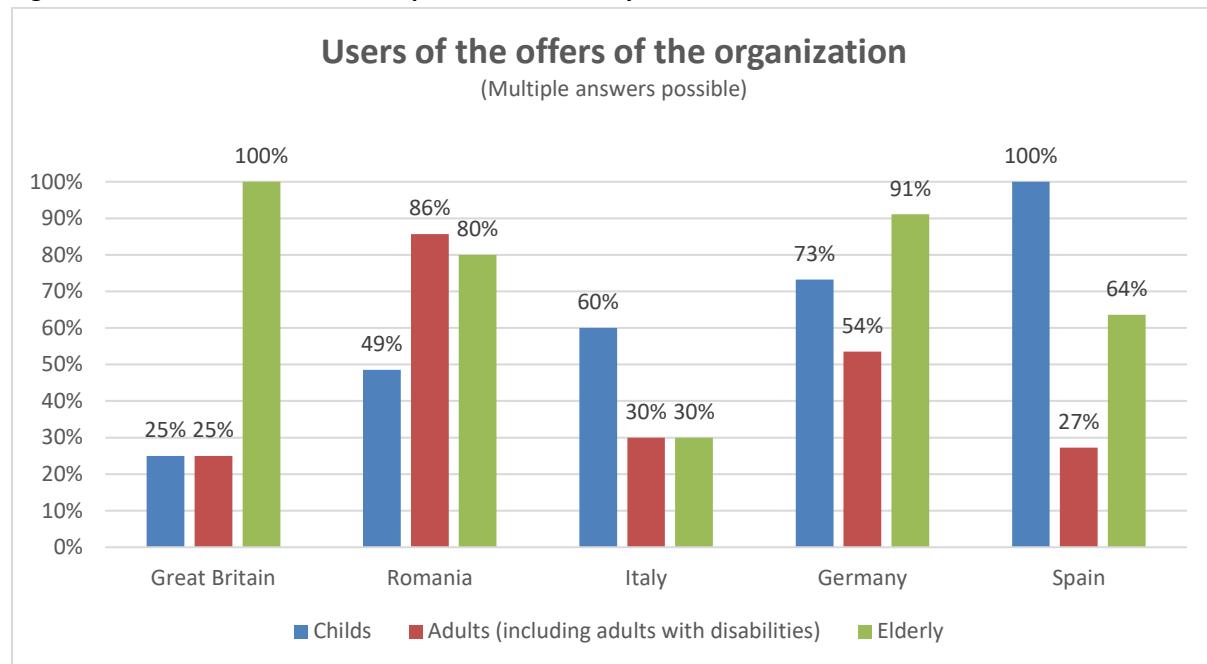
Figure 7: Digital skills most needed to perform the organisation's daily operations (%) (Base 149 responses)



There are clear differences (Figure 8) between the countries with services for children. The organizations also differ greatly in terms of the services for older people. Nevertheless, similarities can also be identified.

Commonalities exist between Great Britain, Italy and Spain. In these countries, 25-30% of the respondents stated that they provide services for adults.

Figure 8. Users of the care offer sampled in each country

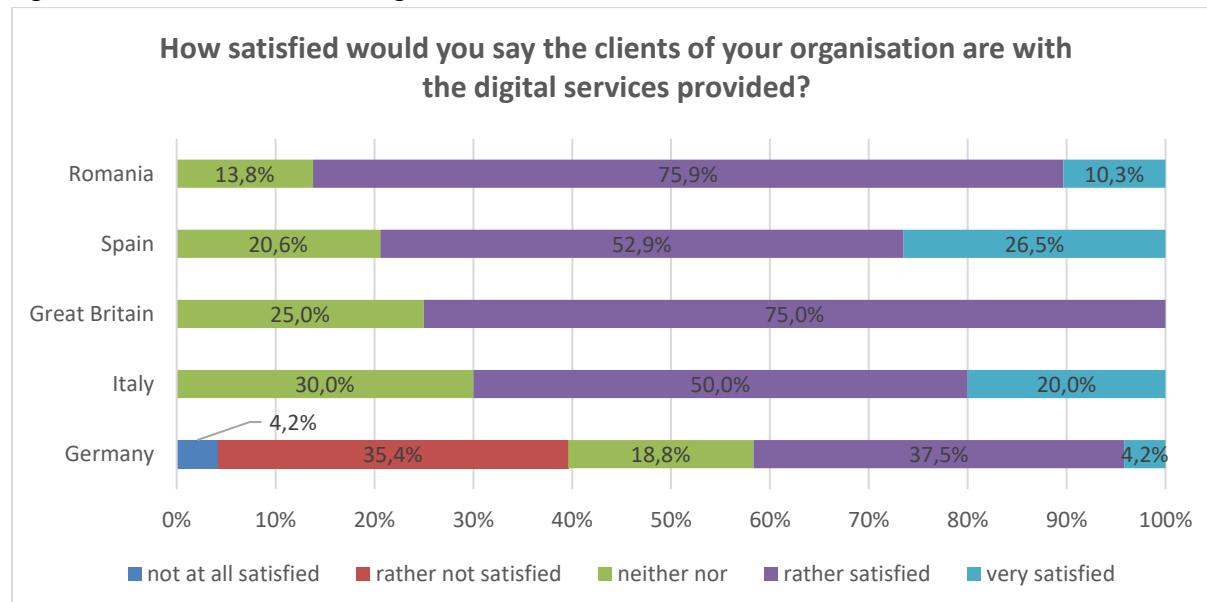


Digital technologies in the organization

Respondents were asked to rate how satisfied the company's clients are with the digital services it offers (Figure 9). The graph shows that in Romania, Spain, Great Britain and Italy, more than 70% of clients are satisfied with the digital services. Moreover, there was no indication in these countries that customers are dissatisfied.

The situation is different in Germany. In Germany, the proportions of satisfied (41.7%) and dissatisfied customers (39.6%) are similar and there are even some 'very' or not at all satisfied.

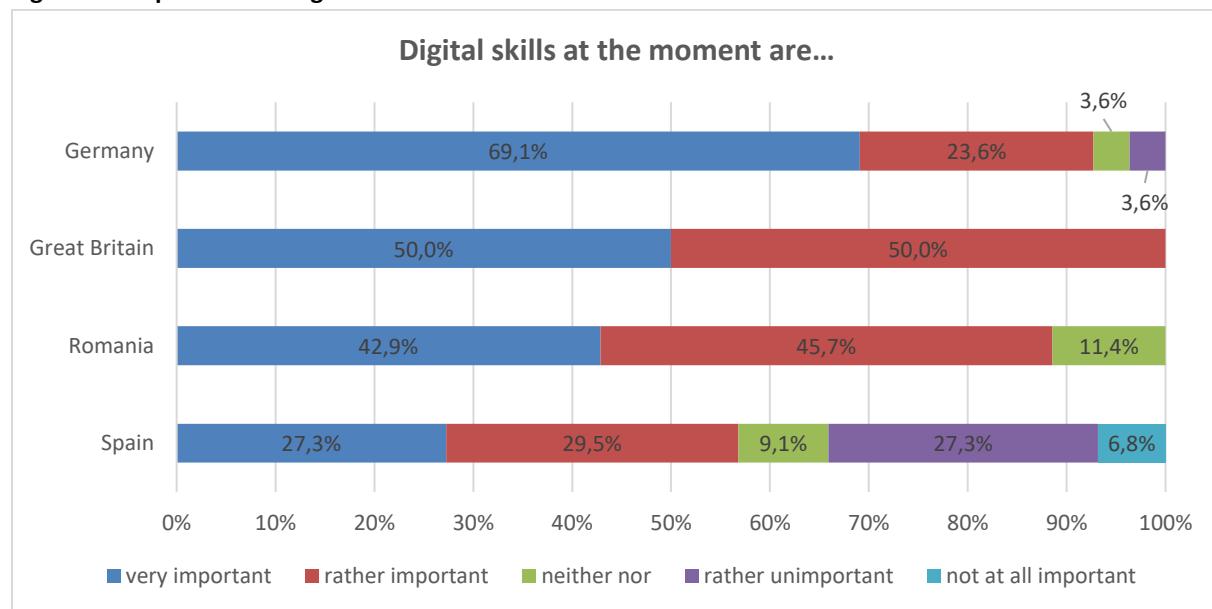
Figure 9. Client satisfaction with digital services



Importance of current digital offer

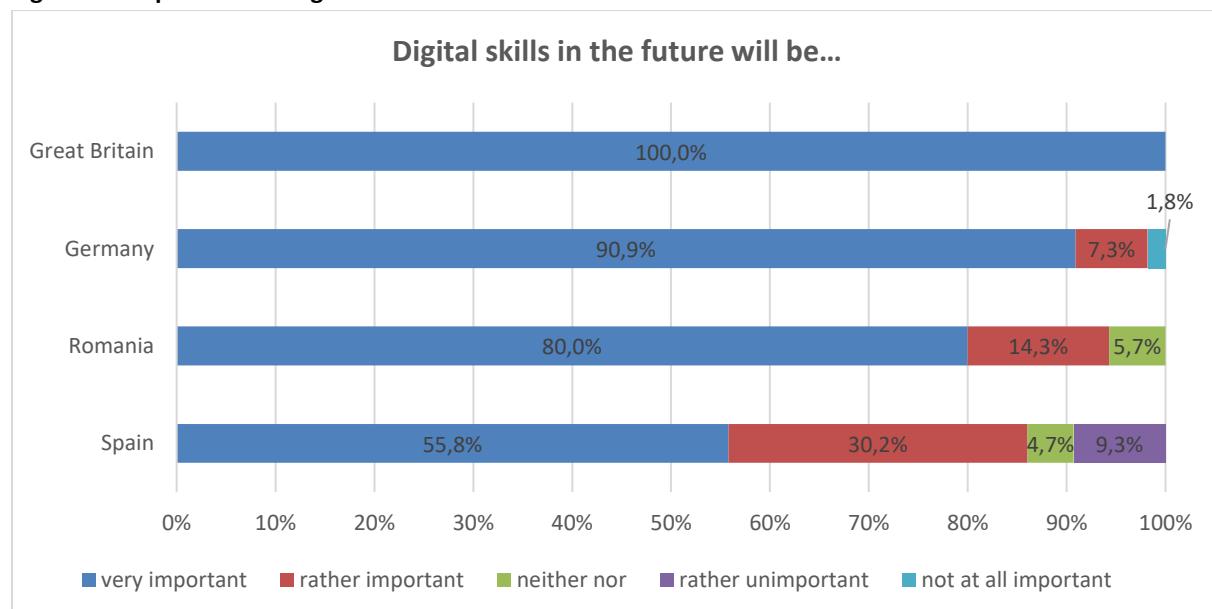
In Germany, the UK and Romania, at least 88 % of respondents said that digital skills are important at the moment (Figure 10). In Spain, only 56.8 % of respondents agreed that digital skills are important at the moment. Due to the different scales, no comparable data is available for Italy. The low rates in Spain may reflect a slower adoption of digital technologies.

Figure 10. Importance of digital skills now



Spain differs more strongly from the other countries in its assessment of the future importance of digital skills (Figure 11). While at least 80 % of respondents in Great Britain, Germany and Romania stated that digital skills will be very important in the future, only 55.8 % of respondents in Spain agreed with this statement. Furthermore, only in Spain and Germany were there respondents who stated that digital skills will be unimportant or not all important in the future. Due to the different scales, no comparable data are available for Italy.

Figure 11. Importance of digital skills in the future

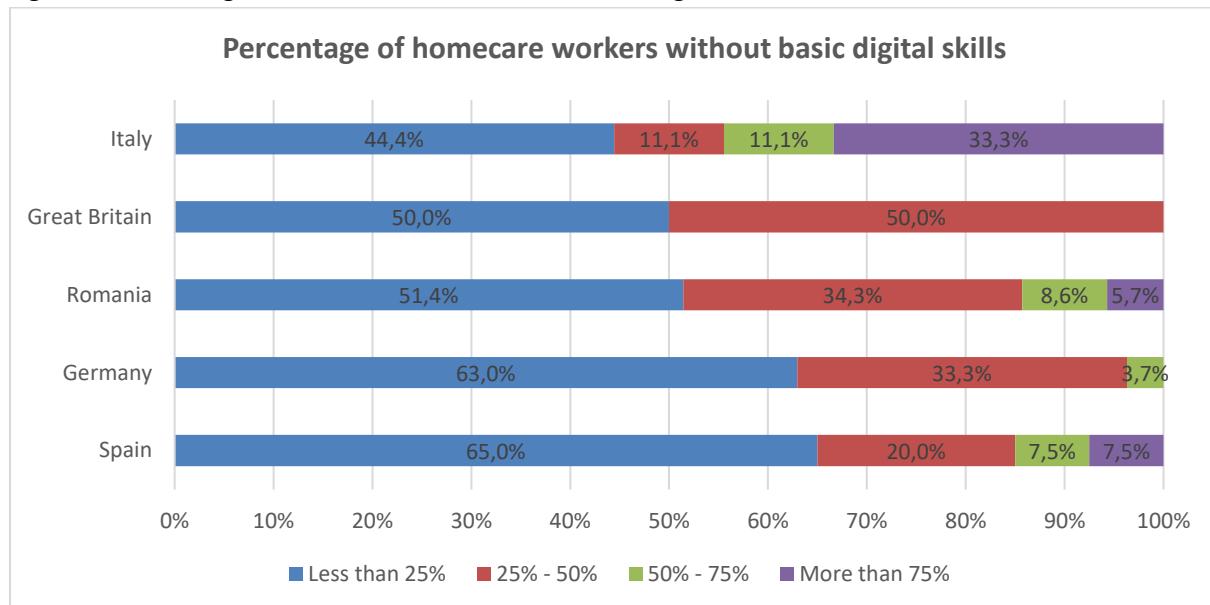


Digital skills of the homecare workers

Employers were asked to estimate what percentage of homecare workers have no digital skills. In all countries, about half of the respondents indicated that less than 25% of homecare workers have no digital skills (Figure 12) with indications of potentially far higher proportions in some countries.

There is clearly a need for digital skills within this sector.

Figure 12. Percentage of homecare workers without basic digital skills



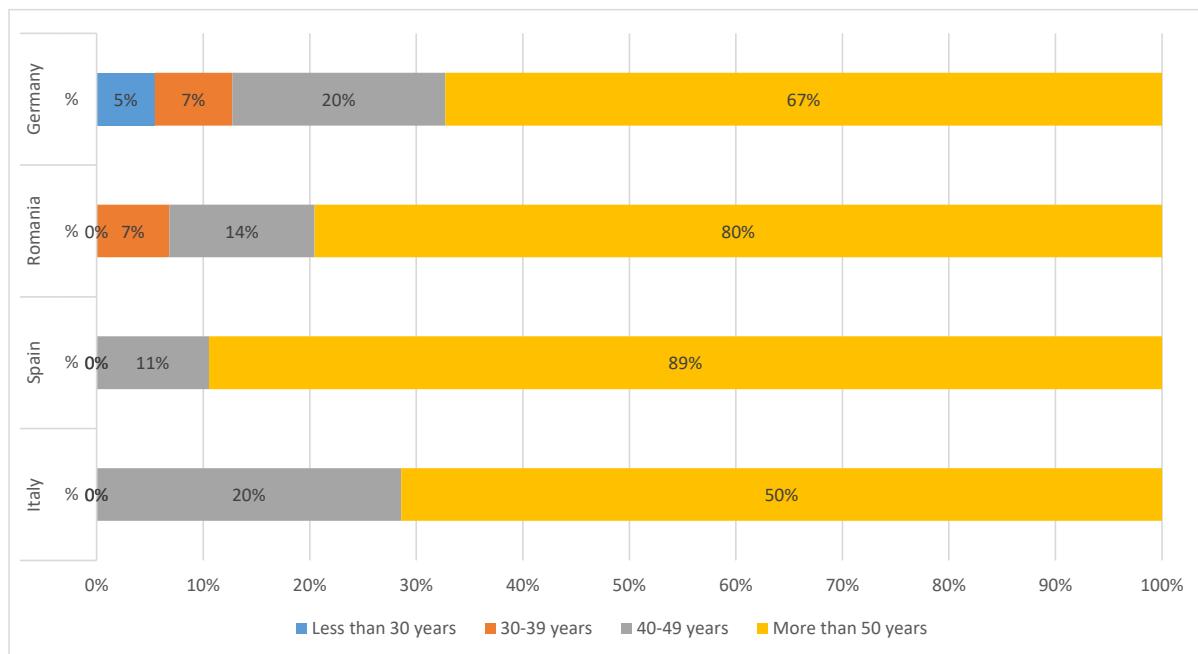
Basic/Essential Digital Skills – Employer Size and Employee Age

Basic digital skills may well be a concern for the sector – as 42% of respondents said that at least a quarter of their employees lacked basic digital skills (defined as being able to use search engines; using communication tools - send / receive emails - talk with friends and family by virtual chat, video calls - WhatsApp, Skype, Messenger, Google-talk etc.).

There was some variation by country, with this level being 35% in Spain and 39% in Germany, rising to 49% in Romania and 60% in Italy (although this is based on a very small sample of responses). 6% actually stated that more than three quarters of their employees lacked these basic digital skills.

Respondents were also asked about the predominant age range of employees in the organisation that they perceive do not have this same range of basic digital skills. Figure 13 shows that respondents thought that older workers over the age of 50 were the age group most perceived to be lacking skills, accounting for 70% of respondents across the participating countries, but reaching 80% in Romania and 89% in Spain.

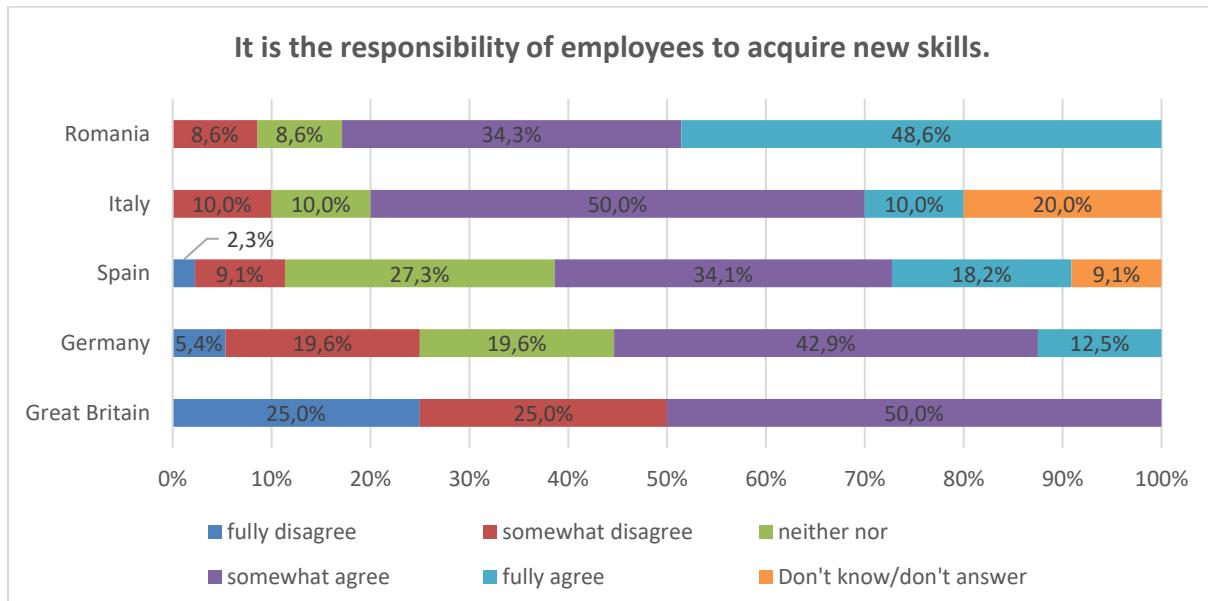
Figure 13: Perceptions of predominant age group where basic digital skills are lacking (%) (Data for Great Britain omitted due to low number of responses to this question)



Responsibility of employees to acquire skills

In all countries, at least half of the respondents agreed with the statement that homecare workers are responsible for acquiring new skills (Figure 14). Agreement was highest in Romania (82.9%). Agreement was lowest in Germany (55.4%) and Great Britain (50.0%). This will influence how we target our ultimate intellectual output – the new learning materials.

Figure 14. Percentage of homecare workers agreeing it is their responsibility to acquire new skills

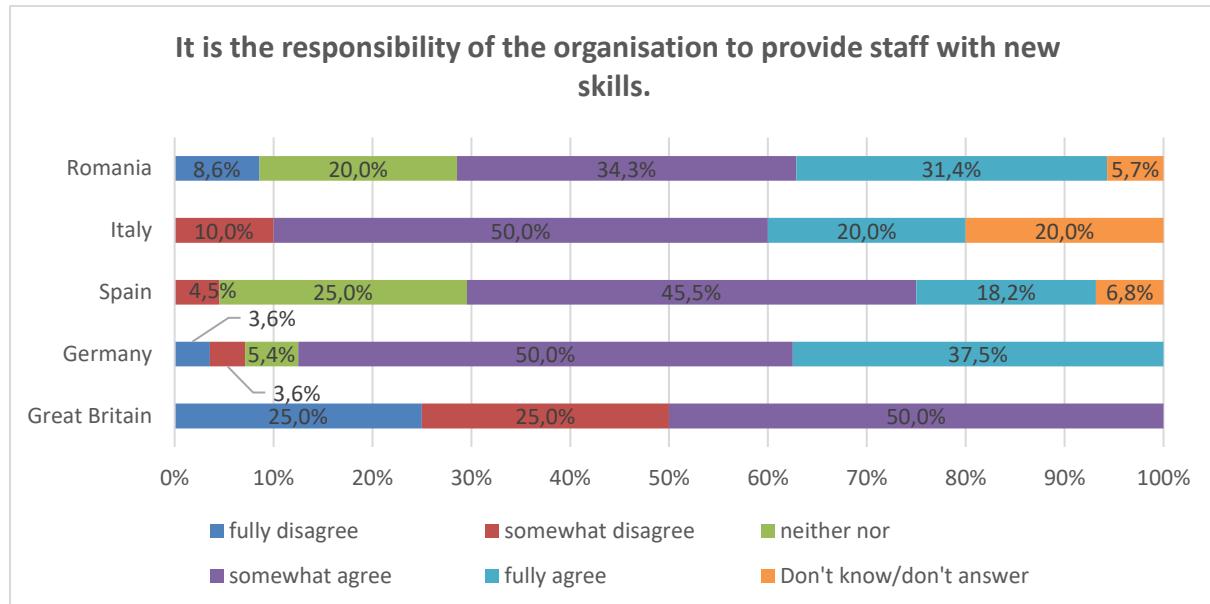


At least half of respondents in all countries agreed that it is the company's responsibility to provide employees with new skills (Figure 15). The level of agreement is highest in Germany (87.5%). In Great

Britain (50.0%), the level of agreement is lowest. Clearly many care workers are expecting their employers to support their digital needs at work.

The results show that, from the employers' point of view, it is the responsibility of both the organization and the homecare workers to develop and expand digital skills. The results from Great Britain are noteworthy: UK responses were the lowest in a country comparison. This result could be due to the low response rate.

Figure 15. Homecare workers expectations of their organization to provide skills



New Digital Systems and Processes

In terms of plans announced to support home care workers to acquire digital skills (Table 2), by far the most commonly planned activity is in-house training, cited by 38% of respondents. Less than 20% said they were planning to provide opportunities for further education (external), and just 13% were planning to offer time for self-study. This suggests that significant parts of the sector are clearly learning from the Pandemic and have plans to modify how it works.

Table 2: Have plans been announced to support care workers acquire digital skills? (%) (Base: 149 respondents)

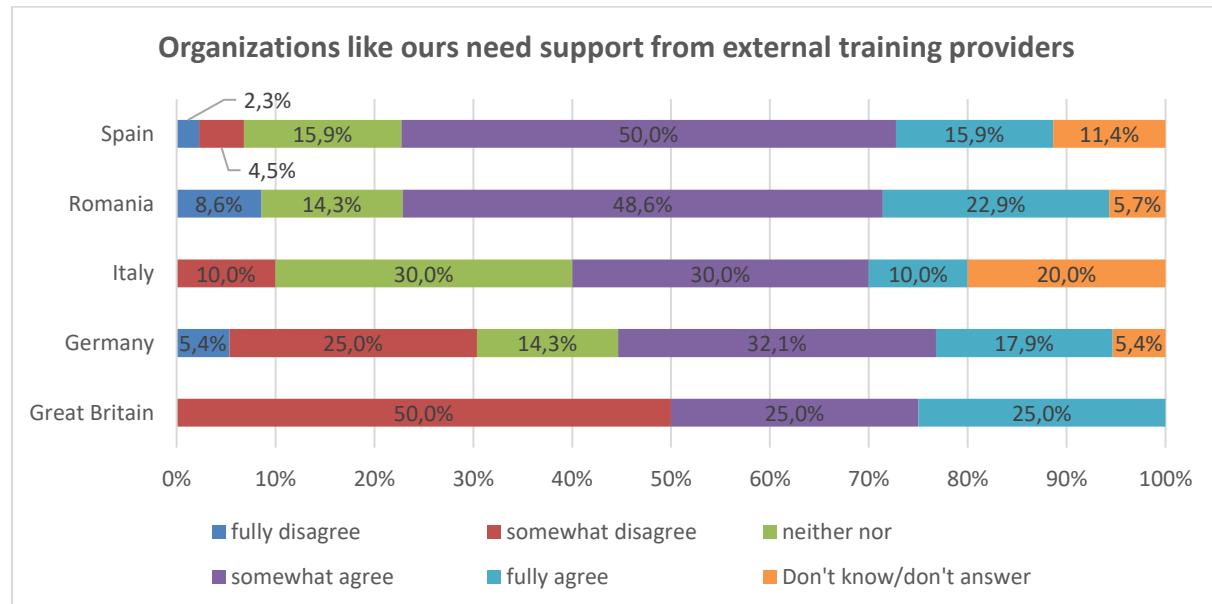
| System / Process | % |
|--|-----|
| Yes, provision of in-house trainings | 38% |
| Yes, provision of opportunities for further education (external) | 18% |
| Yes, provision of time slots for self-study | 13% |
| Yes, other, please specify | 5% |
| No, there have not been any plan announced | 27% |

By country, results suggest that plans to support digital skills development among staff were highest in Germany (90%), and lowest in Spain (43%).

External Support Requirements

In Spain and Romania, around 65% of respondents said they need the support of external training providers. In contrast, only about half of the respondents from Germany and Great Britain felt the same way (Figure 16).

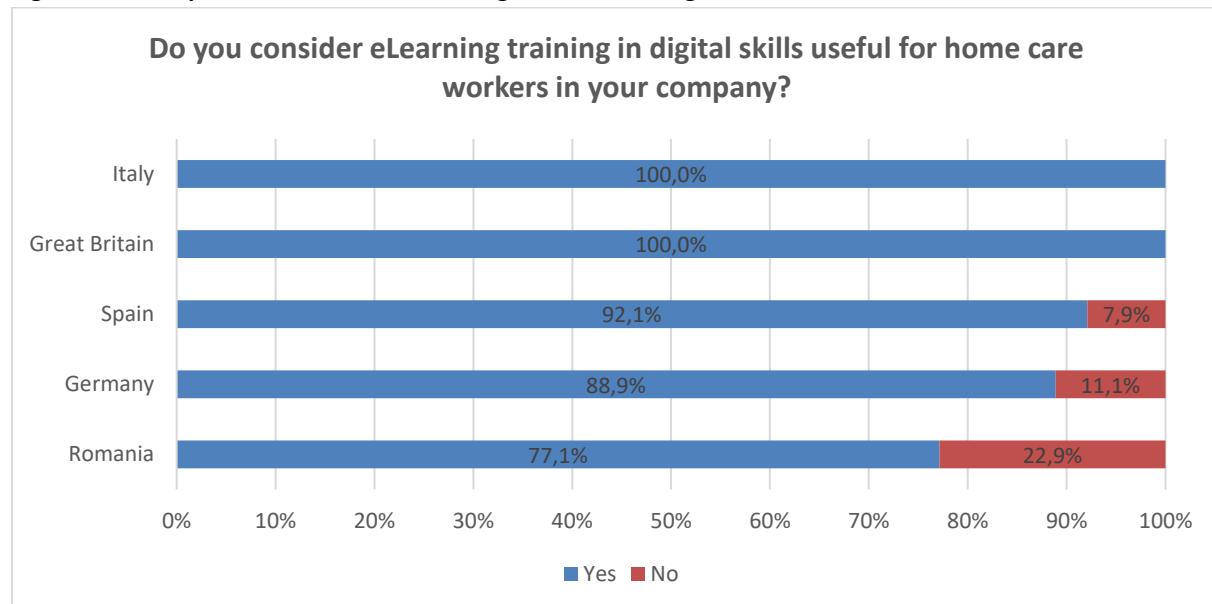
Figure 16. Perceived need for external support with training



Usefulness of Digital Skills Training

There was very broad support for respondents believing that digital skills training is useful for homecare workers in the company (Figure 17). Italy and Romania answered this question completely in the affirmative, whilst 22.9% Romanian respondents answered that digital skills training is not useful for homecare workers in the company.

Figure 17. Perception of the usefulness of digital skills training



Excluding Italy (for which no data was provided), just over half (54%) of respondents reported some of their care workers had undertaken some form of e-learning activity. This was highest in Romania at 60%, Germany (57%), but much lower in Spain at 39%.

Respondents were asked to rate their staff's experiences of e-learning, on a scale of 1-5, with one being the least positive. Experiences of e-learning were broadly positive across all participating countries other than Germany, with positive ratings of 4/5 being as follows:

- Great Britain - 50%
- Spain - 67%
- Romania - 58%
- Germany - 34%

Of those respondents from organisations who had made use of digital skills training, the majority stated they felt digital skills learning had been useful for their home care workers:

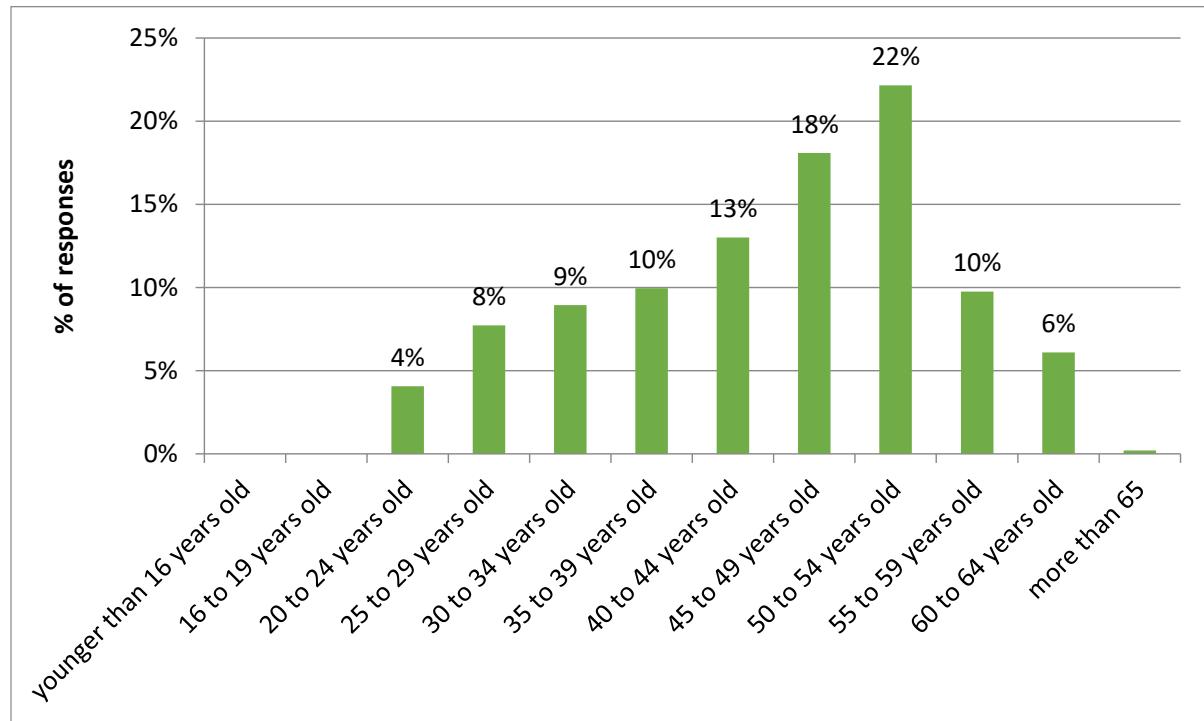
- Italy - 83%
- Great Britain - 100%
- Spain - 80%
- Romania - 77%
- Germany - 86%

Report Survey Social Care – *Employees*

Demographics

In our country comparison, the Italian respondents are the youngest and the respondents from Great Britain the oldest. The high proportion of people over 60 years in Great Britain (31.4%) is particularly striking. In all other countries, the proportion is considerably lower. A larger number of respondents completed the details about their own circumstances and characteristics. Figure 18 shows that the age profile of respondents was skewed towards older workers, with almost 40% aged over 50, and just 12% aged under 30.

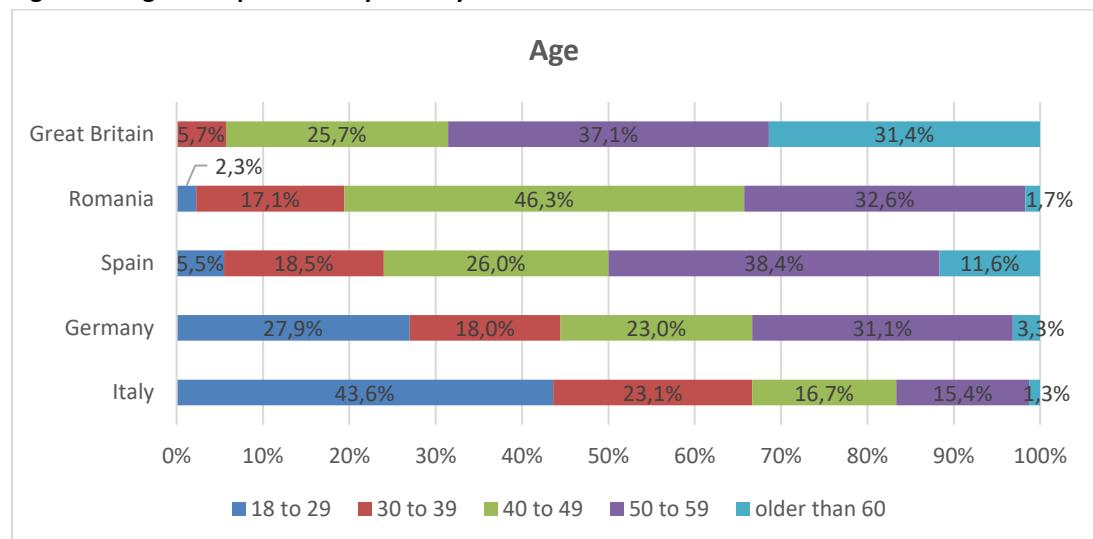
Figure 18: Age of all survey respondents (Base: 492 responses)



There are also similarities between countries (Figure 19). In Great Britain (37.1%), Romania (32.6%), Spain (38.4%) and Germany (31.1%), the proportion of 50- to 59-year-olds is similar.

In the Great Britain (25.7%), Spain (26.0%) and Germany (23.0%), the proportion of 40- to 49-year-olds is very similar. Though only Italy has a significantly younger age profile responding from the sector.

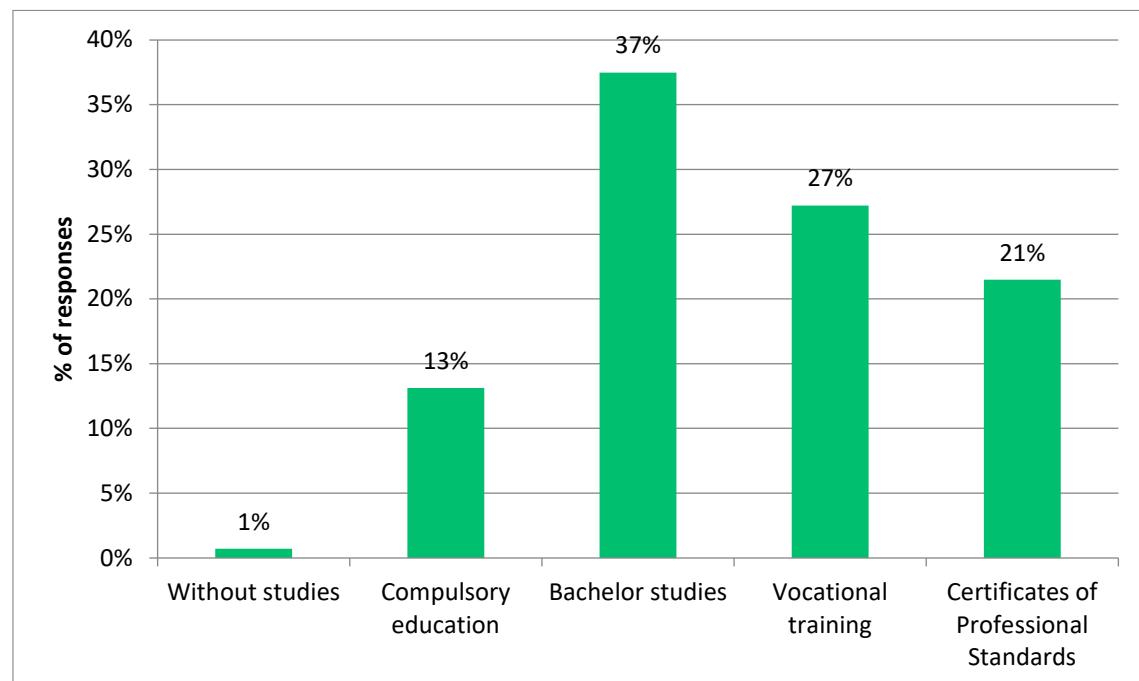
Figure 19. Age of respondents by country



Respondents Qualifications

With regards to highest qualification levels of respondents, only 1% had no formal qualifications, while 13% had some qualifications from compulsory education. More than a third (37%) had qualifications at Bachelor level, more than a quarter (27%) from vocational training and 21% had Certificates of Professional Standards. Just over half of all respondents from Romania were qualified to Bachelor level, suggesting a very highly qualified care workforce (Figure 20).

Figure 20: Highest qualification of survey respondents (Base: 419 responses)

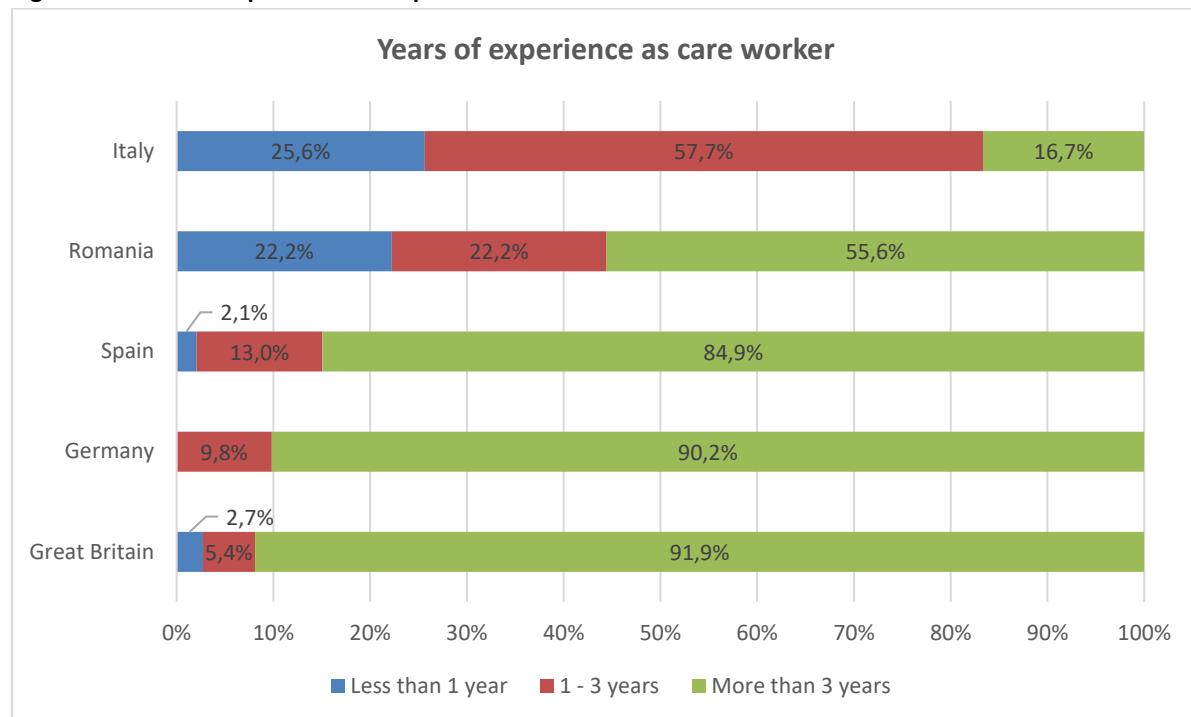


Professional Experience

At least 80% of respondents from Spain, Germany and Great Britain have more than 3 years of professional experience as a homecare worker. In Romania, about half of the respondents have more

than 3 years of professional experience. Italian respondents (57.7%) indicated that most of them have 1-3 years of work experience (Figure 21).

Figure 21. Years of experience of respondents



Of the 498 respondents, the majority (53%) were employees of official institutions e.g. public sector. 36% worked for private sector companies, while 3% were directly employed by the client they were looking after and just 2% were self-employed healthcare workers. Private sector employees as a percentage of all employees was much higher in Italy and Spain than in the other participating countries.

Just under a fifth of respondents stated that they combined their healthcare work with other professional activities, the most common of which was doing apprenticeships (6%) and working for another company (4%). Combining healthcare work with other professional activity ranged from just 2% in Romania up to 38% in Great Britain, with the other participating countries at around 20-25%.

Regarding experience, the majority of respondents (70%) had been working in healthcare for at least 3 years, with just 8% having been a healthcare worker for less than a year. By country, Great Britain, Germany and Spain has high levels of experienced respondents, which was in stark contrast to Italy, where just 17% had at least 3 years' experience and a quarter had less than a year.

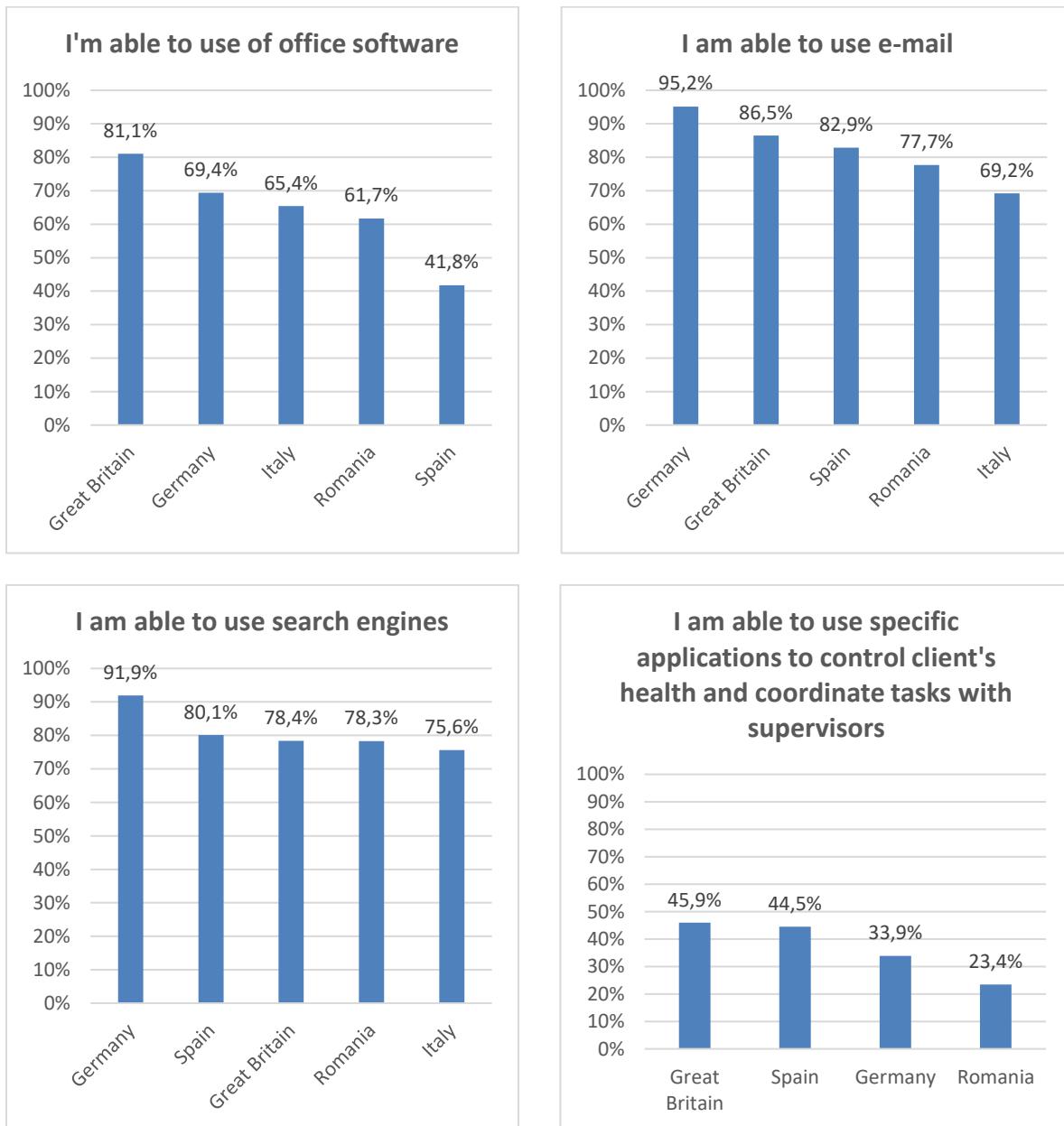
Data suggests that there is a high degree of job stability among respondents, with two thirds having been in their current job for more than three years, and just 12% respondent having been in their current job for less than a year. In line with the results regarding experience, Italy had around a third of respondents who had been in their current job for less than one year.

Digital Skills at work

In the questionnaire, respondents were asked to assess whether they possess certain skills (Figure 22). For all skills explored, differences by country exist. This is important as it will impact on the

nature of the Learning materials we produce in the final stages of the project. There are a persistent number of individuals in all countries with limited experience using email and search engines. Less than 50% in each respondent country identified that they are using digital means to help with their clients health or even liaising with supervisors.

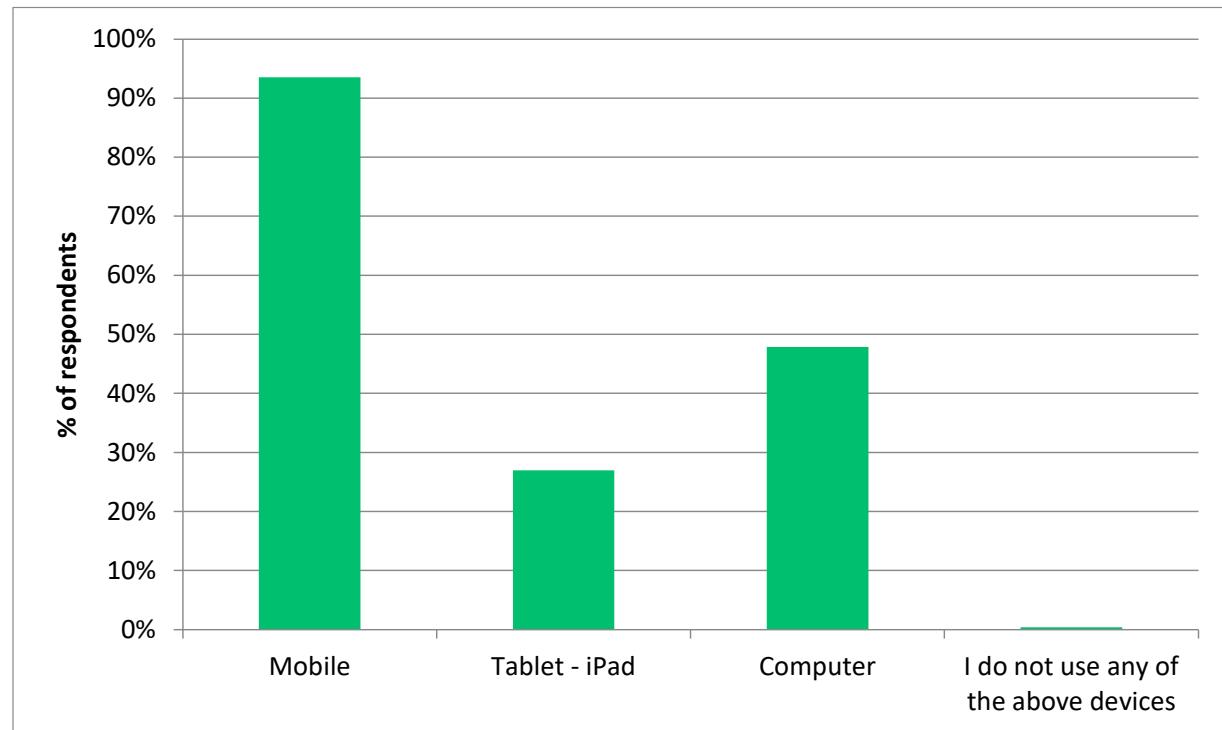
Figure 11. Experience with the digital world



Digital Skills in the workforce

Figure 23 below shows that all bar a handful of survey respondents use either a mobile phone, tablet / iPad or computer in their daily lives. Over 90% use a mobile phone, although computer use was much lower at just under half of respondents, with tablets / iPads less common at under 30%.

Figure 23: Use of ICT hardware in daily life of survey respondents (Base: 493 responses)



By country, mobile phone usage was similarly high in all five countries, but in Italy Tablet / iPad use was much higher than computer use, which may be reflected in the younger age profile of Italian respondents compared to the other countries (Table 3).

A very similar pattern was evident in which devices respondents most frequently use to access the internet, although the percentage of respondents using each type of device was lower than stated for daily use. Rather than be indicative of lower use of the internet, this may suggest that respondents have one preferred type of device for internet use.

96% of respondents have an internet connection at home, a figure that was similarly high across all countries.

Table 3 shows that use of emails, was the most common area of digital skills reported, closely followed by the ability to use search engines and online chat and video call software.

Use of social media, online purchasing and inputting information into a digital device were cited by almost two thirds of respondents, with knowledge of office software slightly lower at 59%, but only just over a third (36%) use specific applications to control clients' health or co-ordinate tasks with their supervisors.

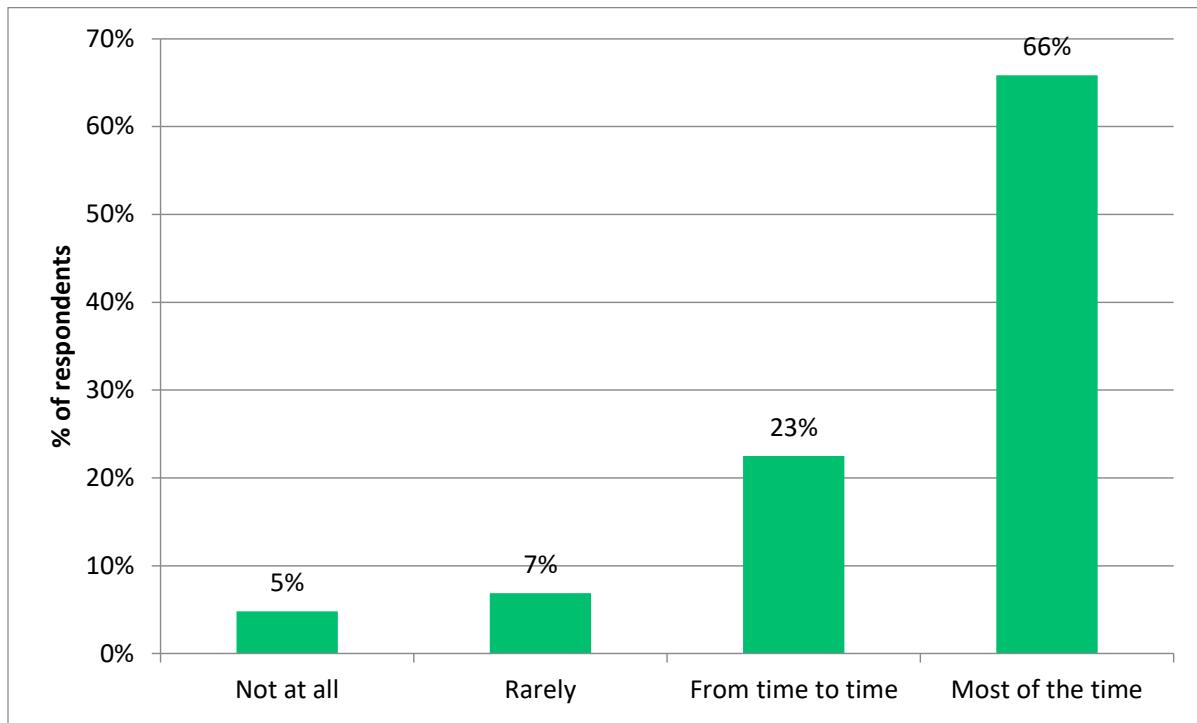
Table 3: Which of the following actions would you be able to carry out on digital devices (mobile, tablet or computer) (Base: 498 responses)

| Digital Skill | % of respondents able to carry out |
|-------------------------------------|------------------------------------|
| Using e-mail: send / receive emails | 81% |

| | |
|--|-----|
| Being able to use search engines: search for information on the Internet for my day to day -recipes, press, travel, etc.-;search for videos or music | 80% |
| Talk with friends and family by chat, video calls: Whatsapp, Skype, Messenger, Google-talk, etc | 80% |
| Using social media (Facebook, LinkedIn, Instagram, Twitter, ...) | 68% |
| Do online-purchases, carry out procedures related to the Treasury and other public administrations, do banking procedures such as check the balance and carry out operations | 64% |
| Input information on a tablet/phone/lap top/computer | 64% |
| Knowledge of office software (Word, Excel, Power Point) | 59% |
| Use of specific applications to control client's health, use of application to coordinate tasks with supervisors... | 36% |

Figure 24 shows that around two thirds of respondents use digital technologies at work most of the time, with a further 23% using them from time to time. Just 5% do not use digital technologies at all in their daily work.

Figure 24: Use of digital technologies in daily tasks at work, % of survey respondents (Base: 480 responses)



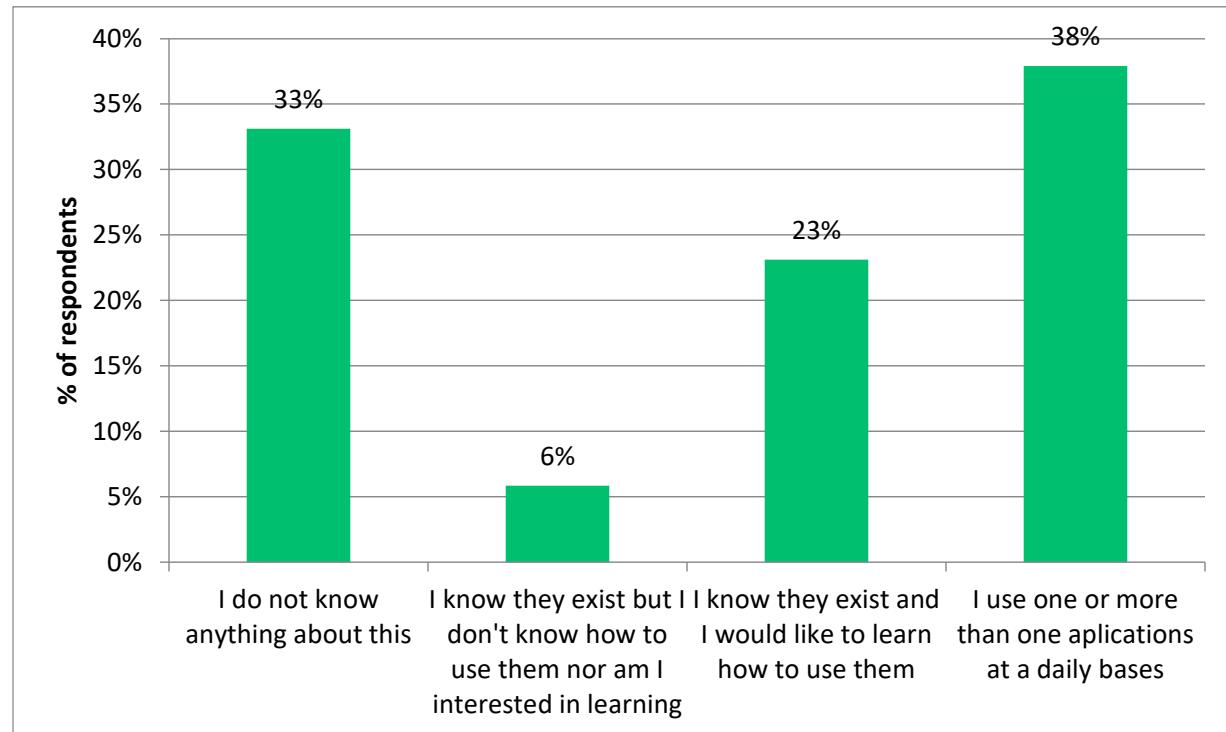
In terms of how digital skills can help regarding respondents' daily tasks, responses were as follows:

- daily control of my client regarding health aspects (diet, tension, medication), 42%
- offering entertainment (online games designed to exercise their mind), 29%
- improving communication with family members / client, with work colleagues and work coordinator, 68%

Figure 25 shows respondents' knowledge and use of mobile apps aimed at helping healthcare workers, and shows that just under two fifths (38%) use at least one mobile app on a daily basis, but a third know nothing about them, and a further 6% are aware of their existence but have no interest in using

them. However, there does appear to be a healthy level of interest in learning how to use them, expressed by almost a quarter (23%) of respondents.

Figure 25: Knowledge / use of mobile applications in daily tasks at work, % of survey respondents (Base: 498 responses)

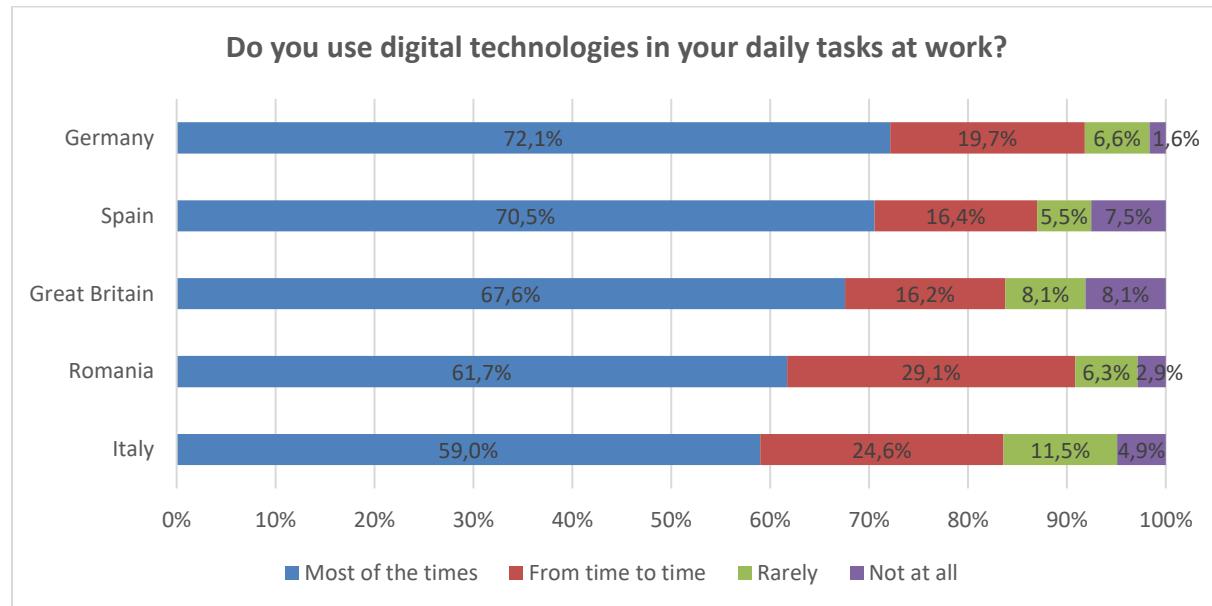


There were some significant differences between countries with regard to awareness and use of mobile apps:

- Italy 18% use daily, 37% do not know anything about them
- Spain 14% use, 46% unaware
- Romania 73%, 7%
- Great Britain 57%, 11%
- Germany 2%, 85%

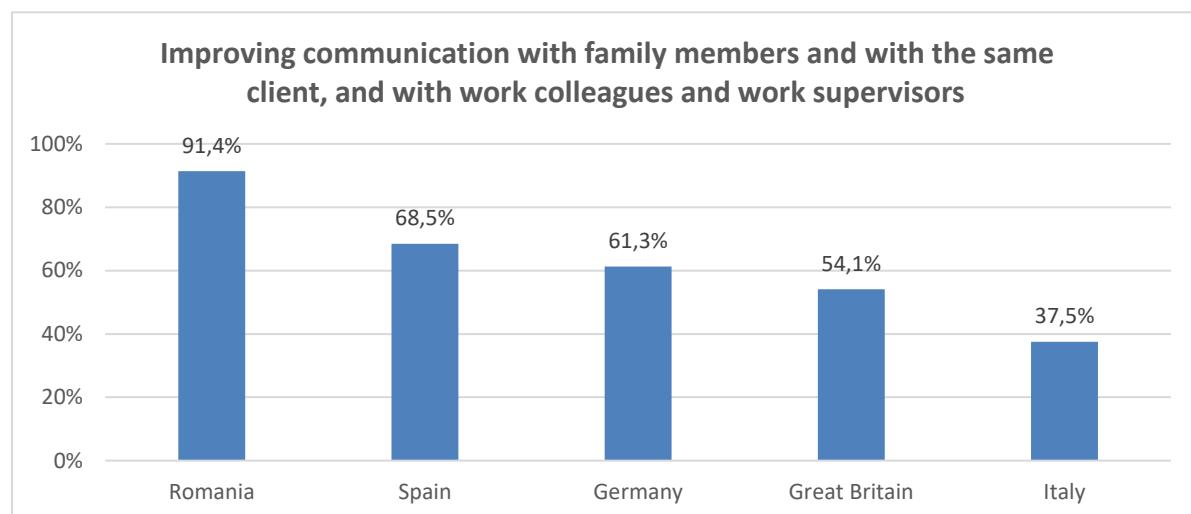
The majority of respondents from all countries use of digital technologies for their daily tasks at work either most of the time or from time to time. Between 8 and 16% though never or only rarely use digital technologies. In a country comparison, it is noticeable that respondents from Italy (16.3%), Great Britain (16.2%), and Spain (13.05) use digital technologies less frequently than respondents from the other countries.

Figure 26. Use of digital technologies in daily tasks



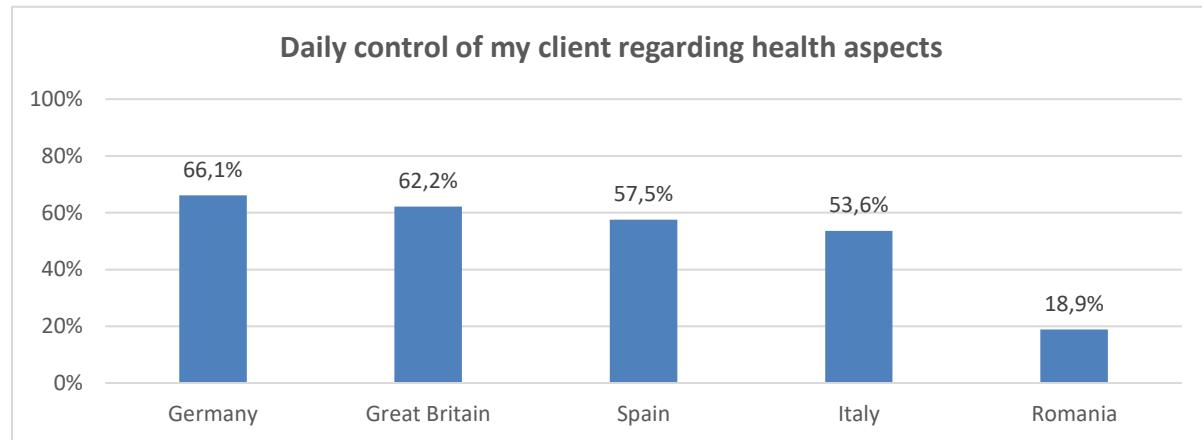
In the survey, participants were also asked to assess in which aspects of their daily work they think digital skills could be helpful. The following figure (Figure 27) shows selected results when respondents were asked to rate whether digital skills would be helpful in improving communication with clients, their families, colleagues and supervisors. Romanian respondents showed the highest level of agreement (91.4%). In contrast, only 37.5% of Italian respondents agreed with the statement.

Figure 27. Use of digital technologies in daily tasks



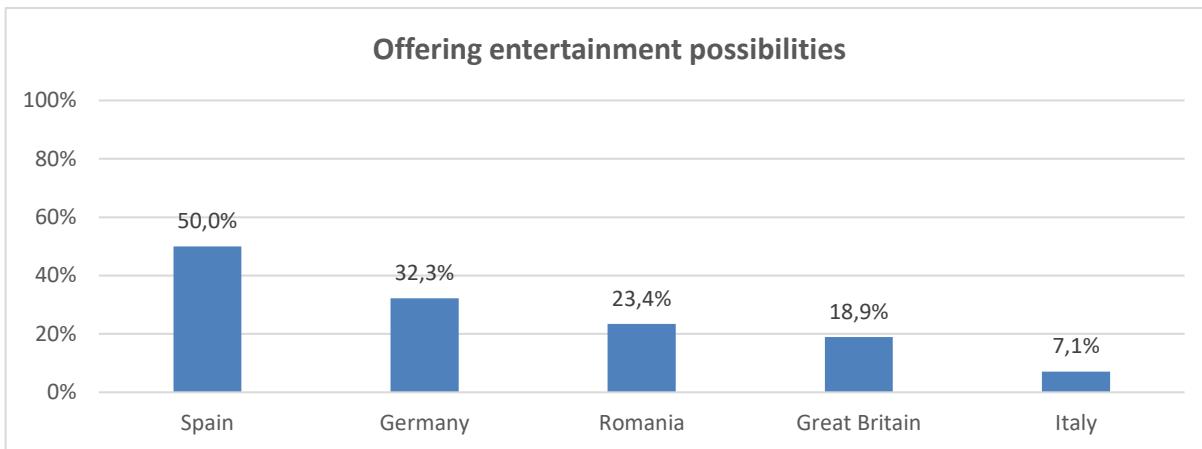
Respondents were also asked to rate whether digital skills for monitoring clients' health would be helpful (Figure 28). The results for Germany (66.1%), the UK (62.2%), Spain (57.5%) and Italy (53.6%) are somehow similar. More than half of the respondents in these countries agreed with the statement. The level of agreement by Romanian respondents is significantly lower. Only 18.9% of Romanian respondents agreed with the statement.

Figure 28. Experience with the digital world



50.0% of Spanish respondents stated that digital skills would be helpful in offering entertainment possibilities to clients (Figure 29). In contrast, only 7.1% of Romanian respondents agreed.

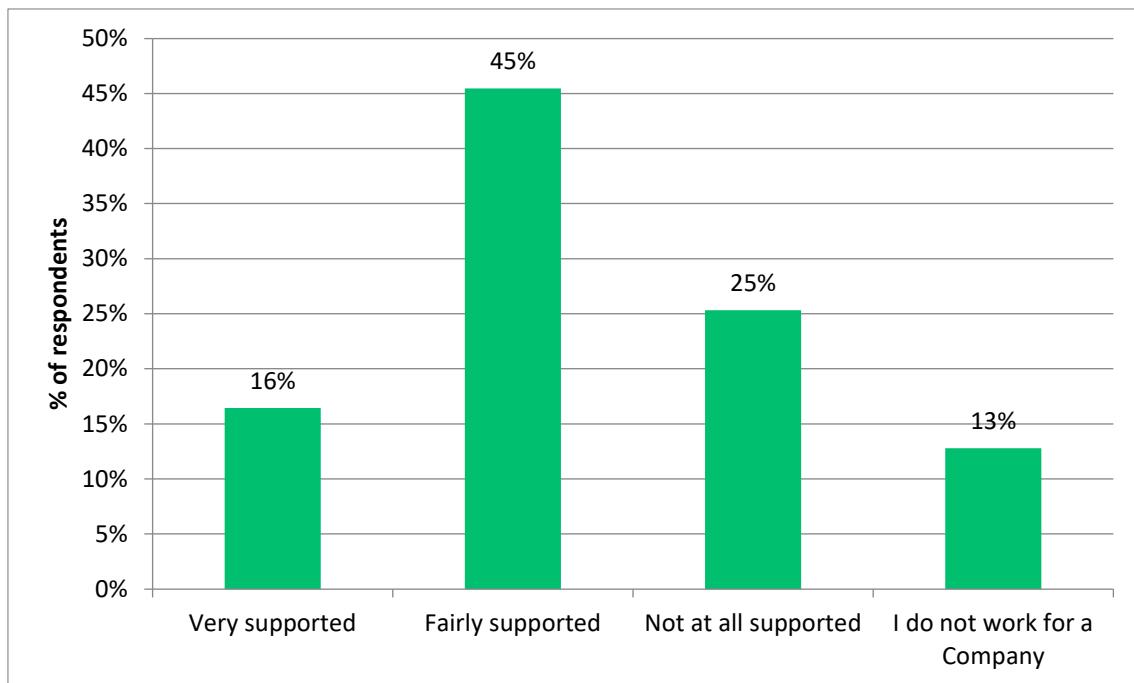
Figure 29. Offering entertainment possibilities to clients



Respondents' views on Digital Skills and their Acquisition

Figure 30 shows that only around 16% of respondents feel 'very supported' by their organisation in developing new digital skills, with a further 45% saying they felt 'fairly supported'. However, a quarter of respondents said they did not feel at all supported by their employer with regard to digital skills development. The proportion of respondents who did not feel at all supported was as high as 45% in both Italy and Germany.

Figure 30: Perceptions of support in digital skills acquisition, % of survey respondents (Base: 462 responses)



A similar level of response was observed with regard to opinions about whether employers were doing enough to develop a digital work place and digital services. 39% said yes, 31% said somewhat, while 20% said they did not believe their employer was doing enough. Again, sentiment that employers were not sufficiently supporting staff in digital skill development was higher in Italy and Germany.

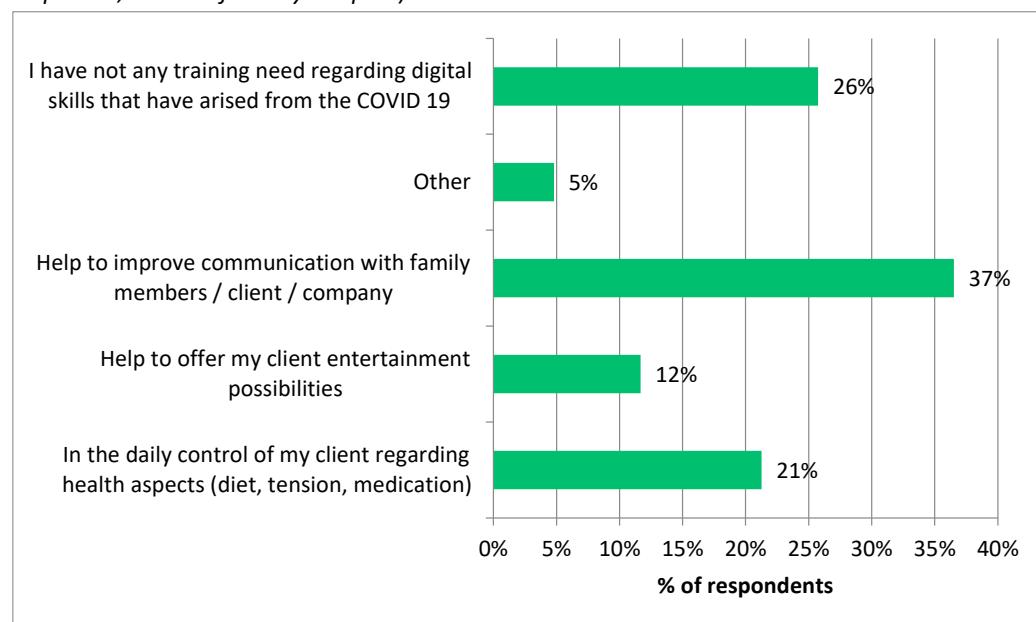
Consistent with the above findings, around two thirds of respondents said that they were making more intensive use of the digital technologies at work since the pandemic, while 7% do not make more use since the pandemic because they did not use pre-Covid and still did not at the time of the survey. Increasing use of digital was lower in Germany (34%) than other countries.

Around three quarters of respondents felt that their digital skills have helped them master the new situation coming from the Covid-19 pandemic, while 17% did not, and the remaining 7% said they have no digital skills. Again, this was lower in Germany (39% felt that digital skills had helped them adapt to the new situation) compared to other countries.

56% said they felt their digital skills had improved since the pandemic (although again this was lower than average in Germany at 31%), but just over 60% said that, since the pandemic, they felt they needed to know more about digital skills in order to do their work better (again this was lower than average in Germany, at 23%).

Figure 31 shows that although more than a quarter of respondents said they had no digital skills needs that had arisen as a result of Covid (26%), a higher percentage did identify a need for better digital communication skills (37%). 21% highlighted a need for digital skills that help manage clients' health, while skills needs for helping offer clients entertainment possibilities was somewhat lower at 12% of respondents.

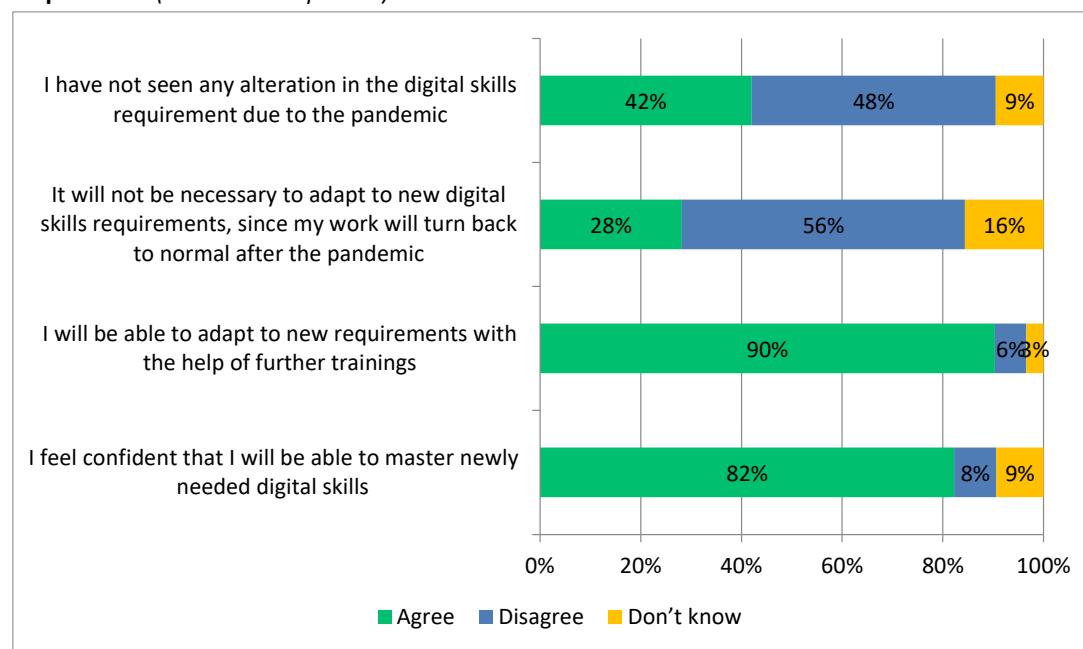
Figure 31: Areas of identified training need for digital skill post Covid, % of survey respondents (Base: 334 responses, no data for Italy or Spain)



Since the pandemic, just over 40% of respondents said that they interact more via digital technologies with their clients.

Figure 32 shows that respondents have delivered a clear message that the pandemic has seen an increase in digital skills requirements and that people working in the healthcare sector need to adapt to these new skills requirements, although a significant minority said they hadn't seen any increase in digital skills requirements (particularly so in Spain and Germany). Confidence is high that care workers will be able to master the digital skills now required and that further training is key to helping them achieve this.

Figure 32: Levels of agreement / disagreement regarding the importance of digital skills, % of survey respondents (Base: 468 responses)

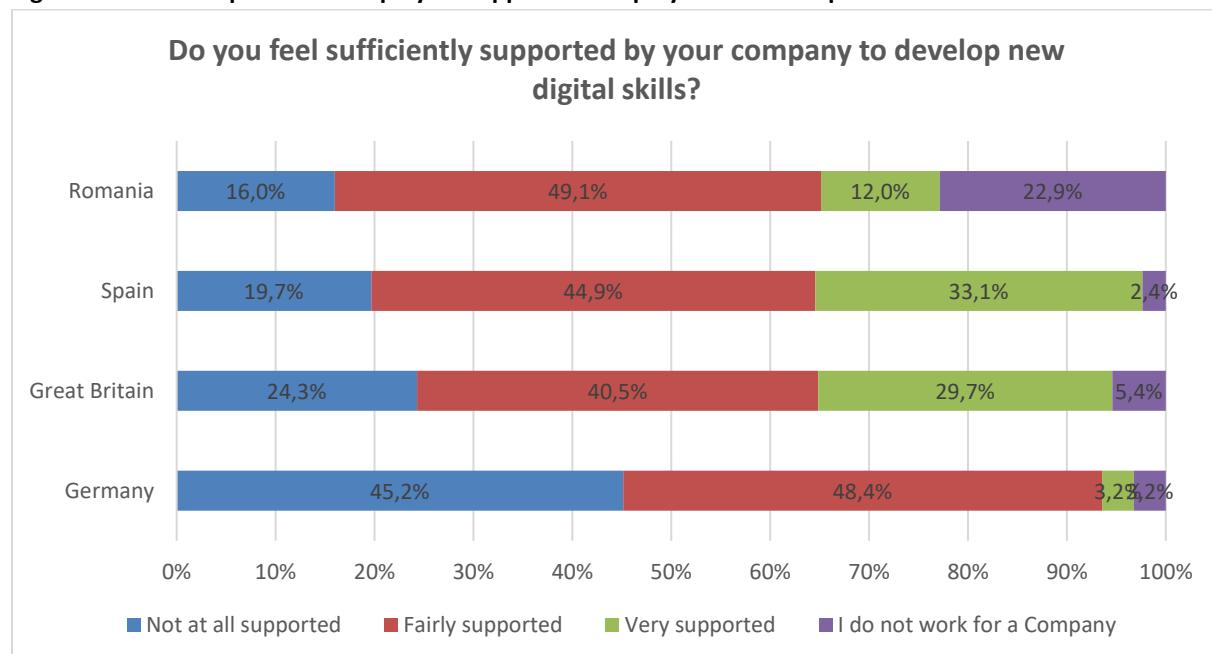


Excluding Germany, 83% of all organisations with employees stated they were involved in the development of their staff's digital skills, with in house training being the most common form of involvement (69%), while just 6% said they had used external trainers. These figures are high and indicate a sector that is actively developing new digital competences.

In country comparison, when asked about whether employees felt sufficiently supported by their employers to develop new digital skills - Spain (33.1%) and Great Britain (29.7%) show the highest values for "very supported" (Figure 33).

This percentage is significantly lower in Romania (12.0%) and Germany (3.2%). The high proportion of "not at all supported" in Germany (45.2%) is particularly striking. Again, these results will inform the decision of what materials we make and how they are promoted.

Figure 33. Levels of perceived employers support for employees to develop their skills



Impact of the Covid 19 pandemic

In all countries, respondents indicated that the use of digital technologies has increased since the beginning of the pandemic. However, the countries differ in their extent. In Romania, Great Britain and Italy, at least 73% of respondents said that use had increased.

The level of agreement was slightly lower in Spain (60.35) and significantly lower in Germany (34.4%). Table 3 shows that digital technology has seen an increase in use across several areas of care organizations' activities, with management / administration being among the most frequently cited area of increased use, typically at around 60-70% of respondents, although this was much higher in Romania. Increased use of digital was consistently higher in Romania than other countries, across all areas.

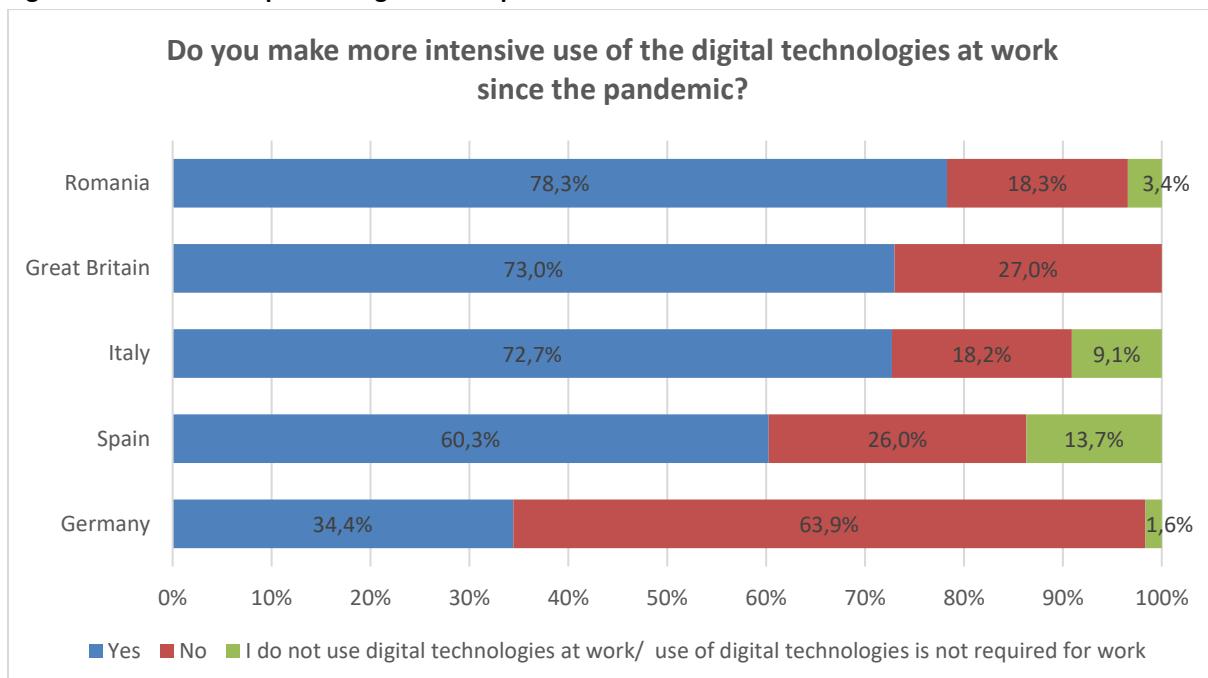
Increased digital use for care-specific tasks has been lower, with data suggesting that increases were less prevalent in Spain and Germany.

Table 3: Areas where digital skills are being used more since pandemic (%)

| Area of Use | Italy | Spain | Romania | UK | Germany |
|--|-------|-------|---------|------|---------|
| Management | 70% | 60% | 93% | 67% | 57% |
| Communication (internal) | 55% | - | 94% | 100% | 66% |
| Communication (with clients and stakeholders) | - | 72% | 94% | 100% | - |
| Home care worker organises the day to day tasks by means of using digital technologies | - | 17% | 42% | 50% | 14% |
| Home care worker records care information related to user in digital devices | - | 17% | 42% | 50% | 14% |
| Home care worker gives support or push a user to use digital devices | - | 26% | 45% | 50% | 29% |
| Supervisor coordinates with home care workers by using digital devices | - | 38% | 58% | 75% | 25% |

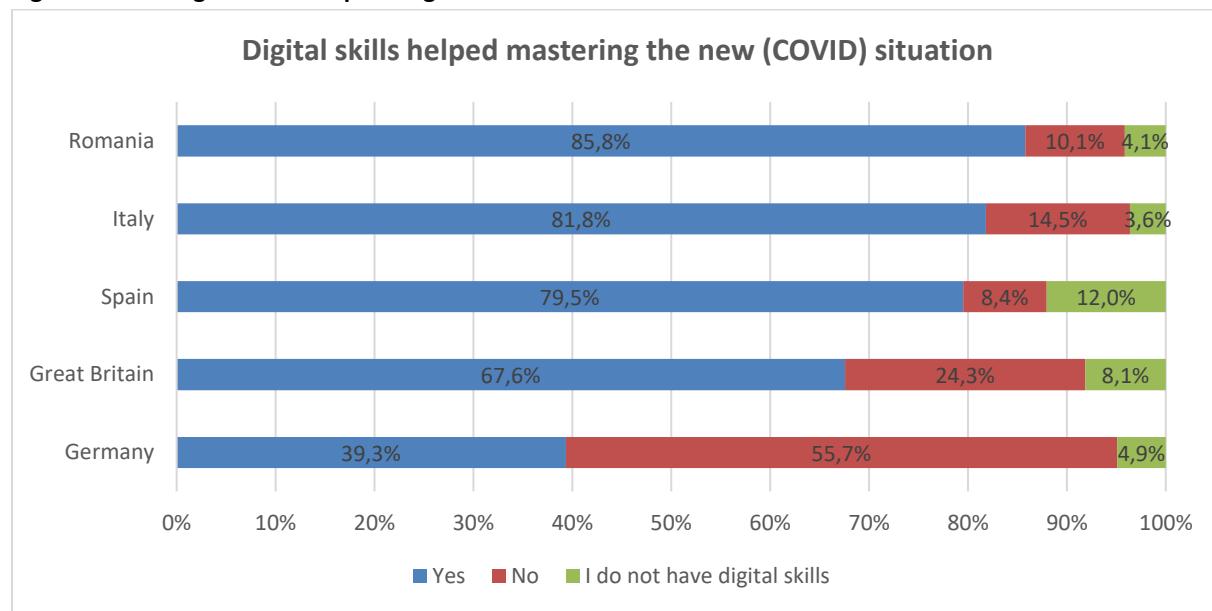
It is also striking that in Spain (13.7%) and Italy (9.1%) the proportion of respondents who said they did not use digital technologies was highest (Figure 34).

Figure 34. Pandemic impact on digital take-up



Digital skills have certainly helped care workers in most of the countries sampled to master the changing pressures put upon them at work. Figure 35 below, shows that respondents from Romania (85.8%), Italy (81.8%) and Spain (79.5%) have a similar opinion. In contrast, the agreement of respondents from Great Britain (67.6%) is slightly lower and the agreement of German respondents (39.3%) is considerably lower – reflecting their relative early adoption of digital technologies.

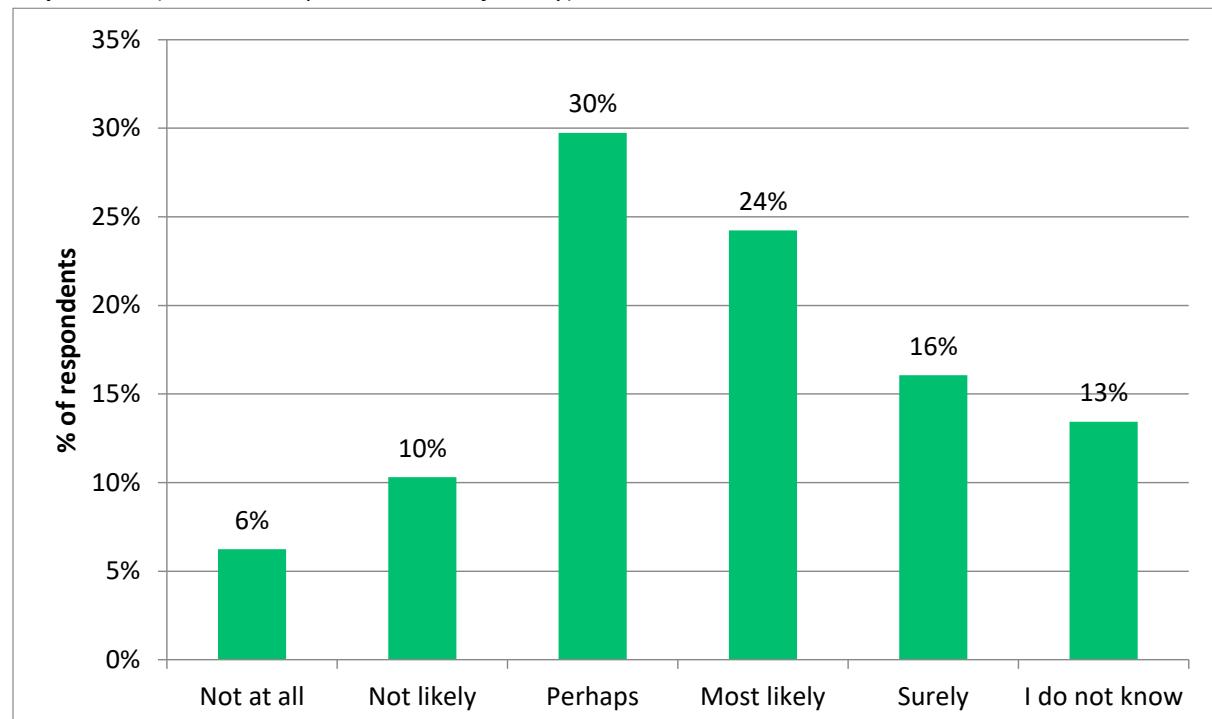
Figure 35. Did Digital Skills help during the Pandemic



New Digital Systems and Processes

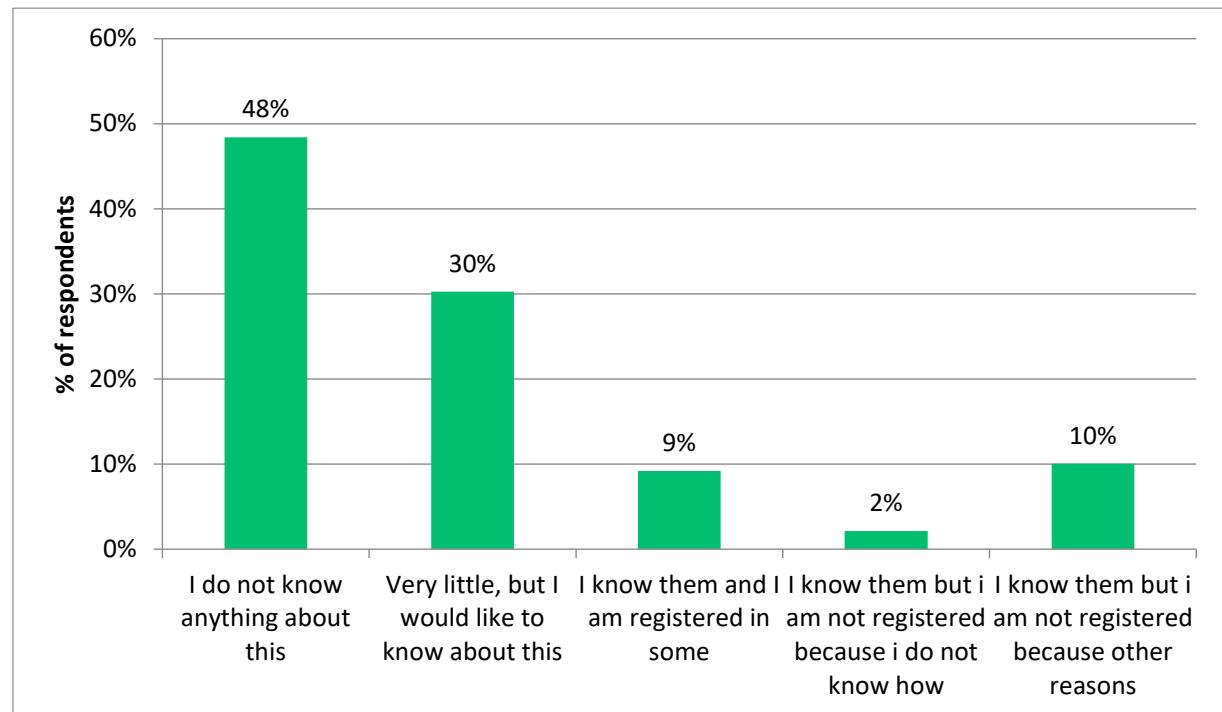
Figure 36 suggests that many respondents feel that clients and their families would welcome services being offered digitally. While a significant minority (16%) did not think that digital services would be a welcome method of delivery and around 13% did not know how such service delivery would be received, 30% thought that perhaps it would be welcomed, with around a quarter feeling that it would be likely.

Figure 36: Likelihood of digital service delivery being welcomed by clients and their families, % of survey respondents (Base: 417 responses, no data for Italy)

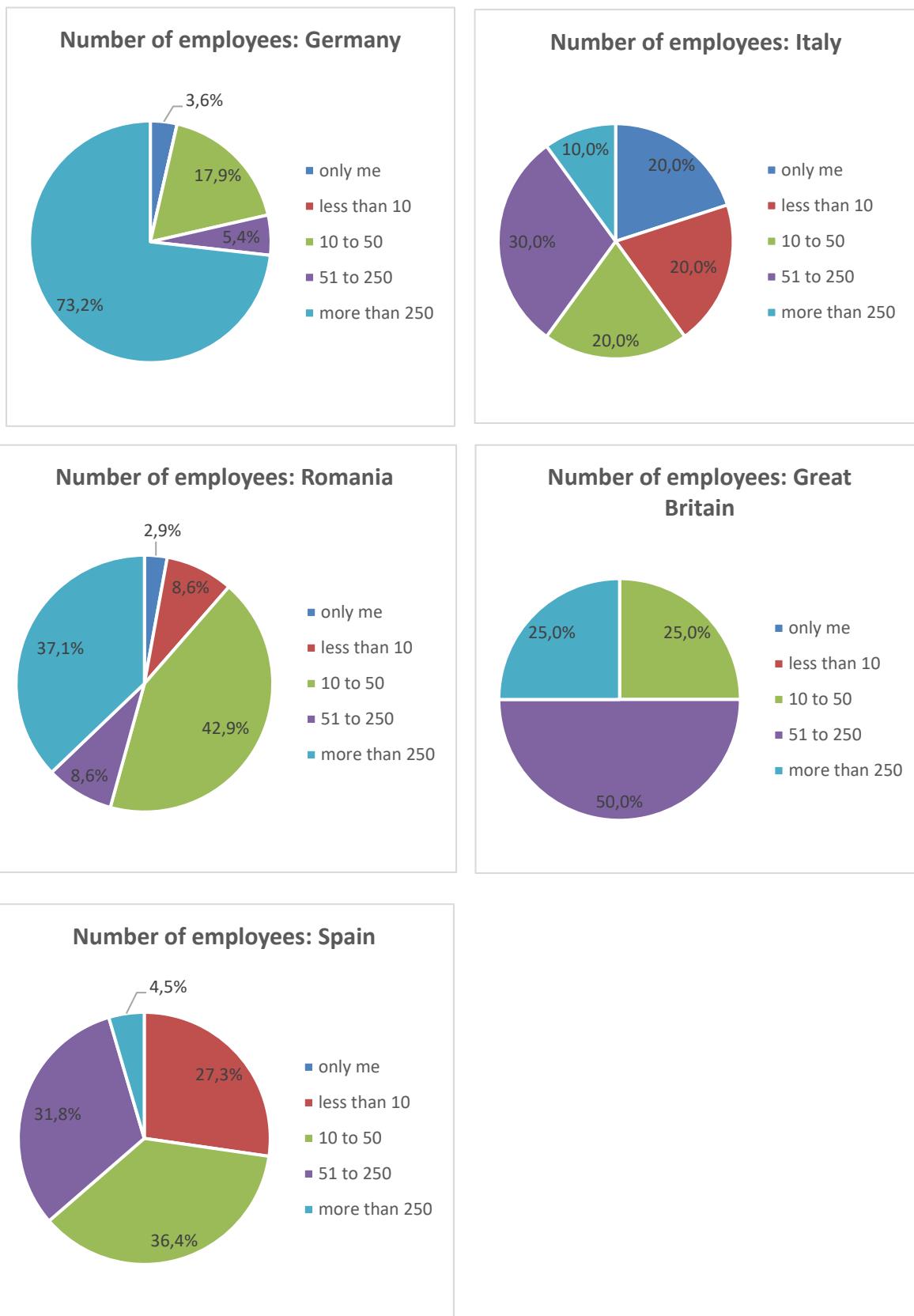


Finally, the survey asked about healthcare workers knowledge about the existence of digital care platform agencies. Figure 37 shows that awareness is low and being registered with them is lower still. Just under half of respondents (48%) knew nothing about them, with a further 30% admitting to knowing little, but showing interest in finding out more. Only 9% of respondents were actually registered in some of them at the time of the survey. Registration in digital care platform agencies was higher than average in Germany and Great Britain, while no respondents in Italy were registered.

Figure 37: Levels of awareness of digital care platform agencies, % of survey respondents (Base: 461 responses)

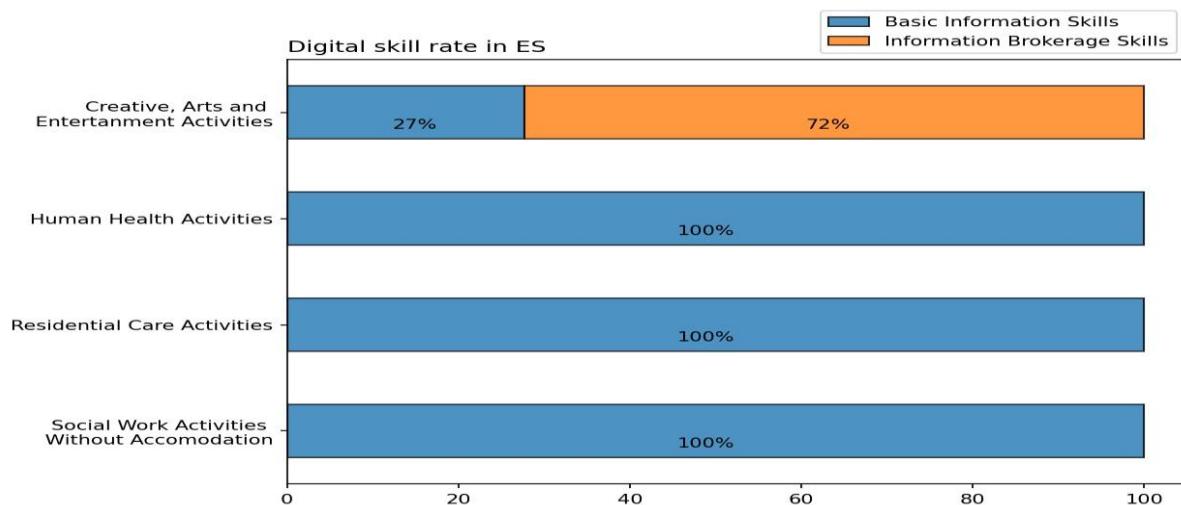
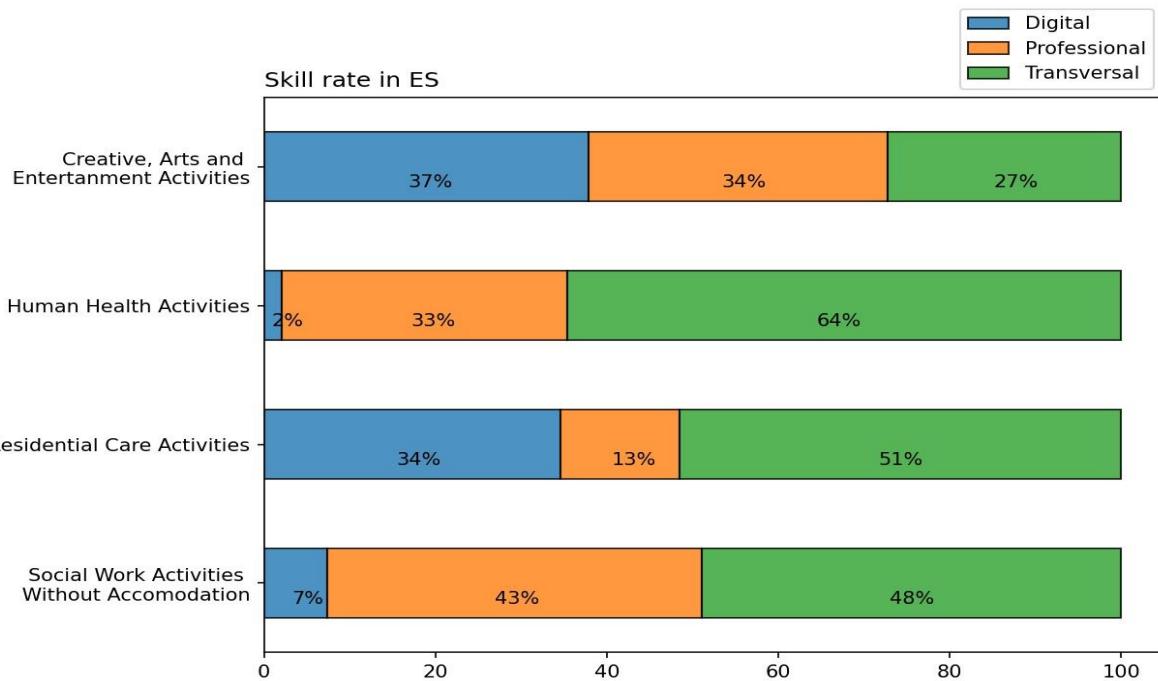


Annex 1. Company size by country

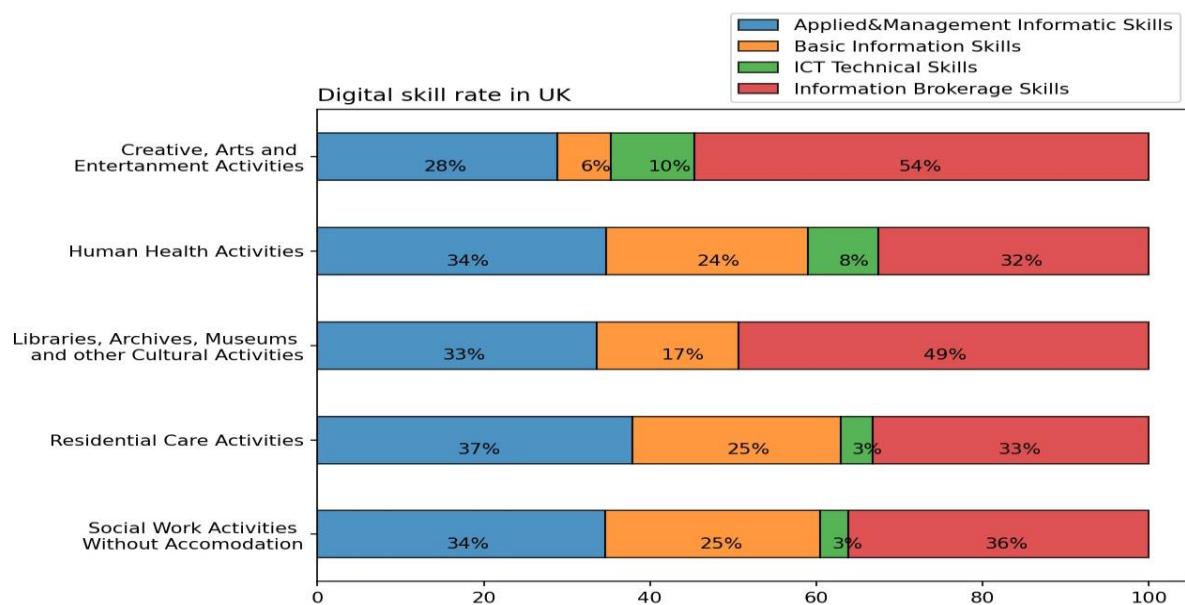
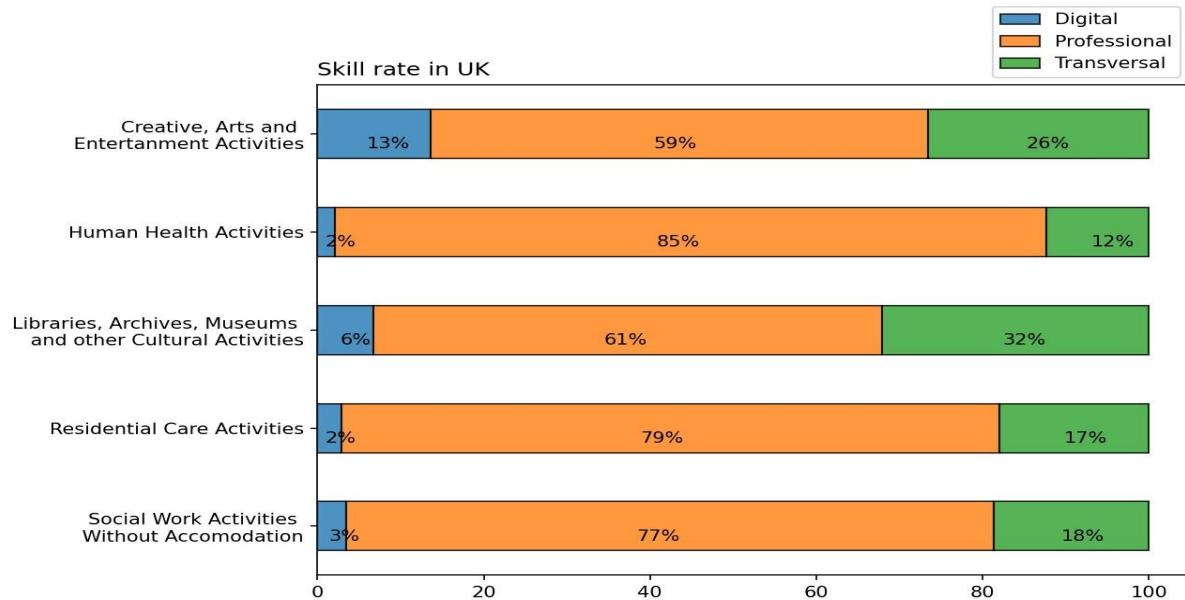


Annex 2. Skill Rates in partner Countries in Care and Arts and Culture Sectors

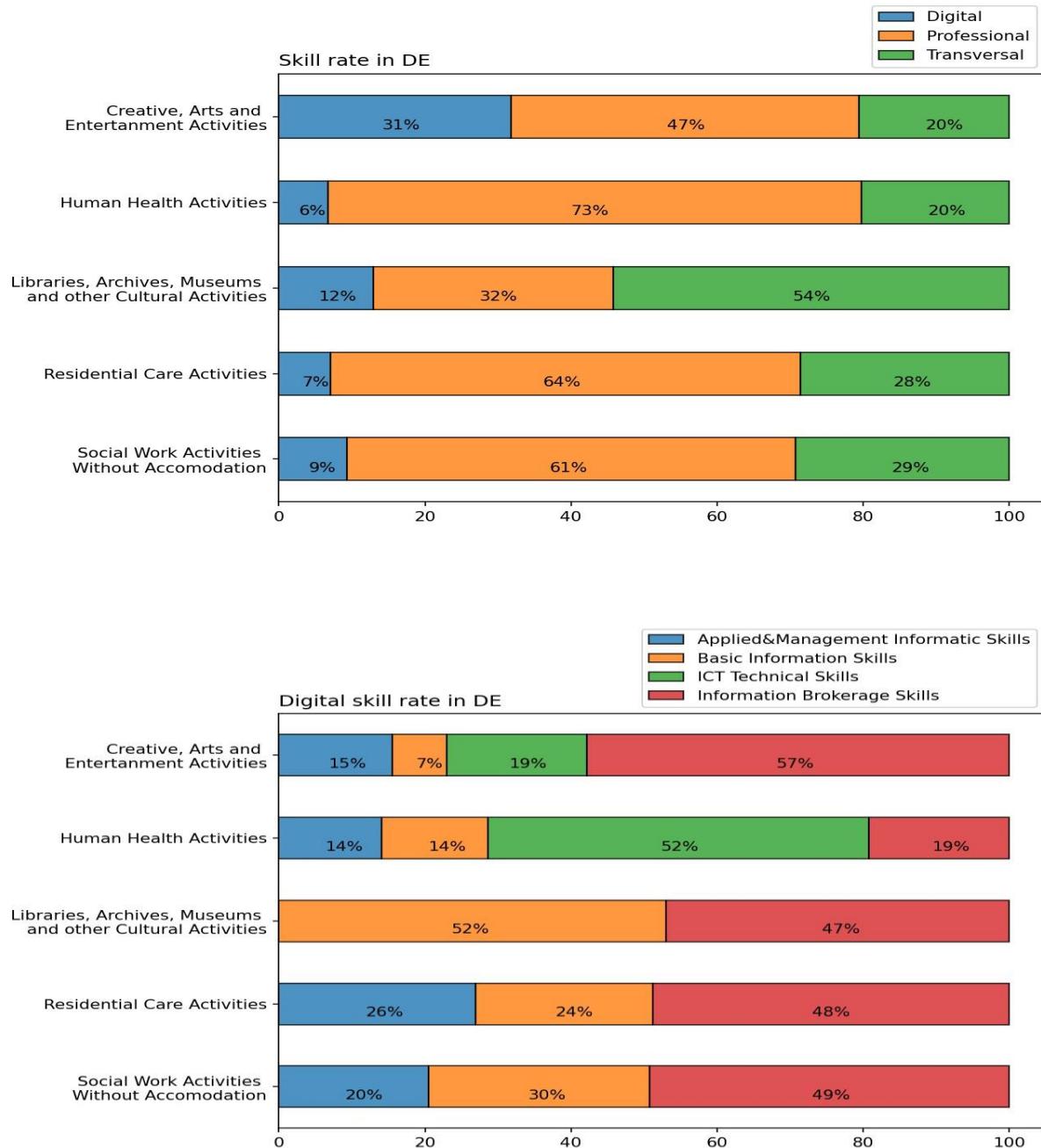
Findings for Spain



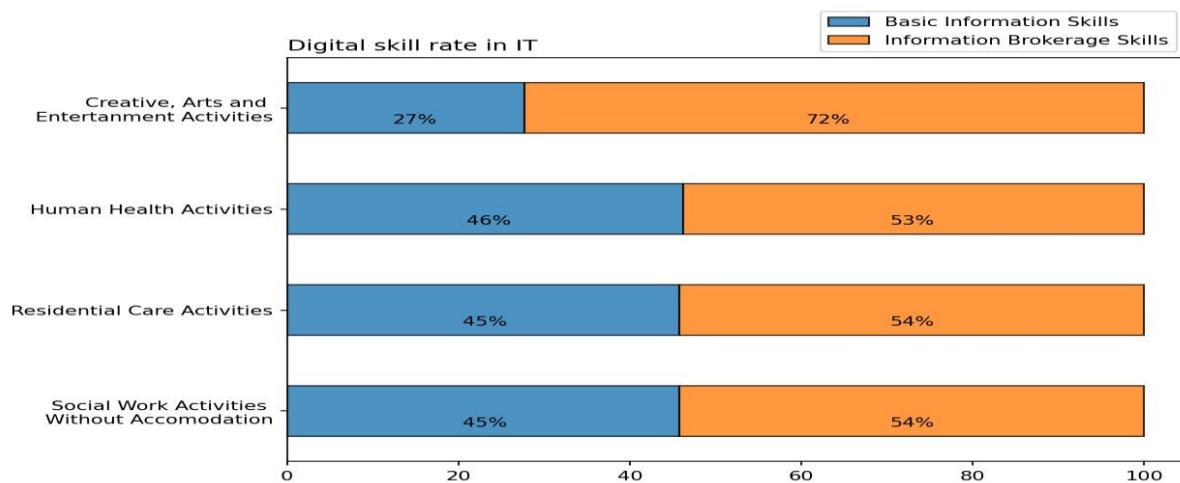
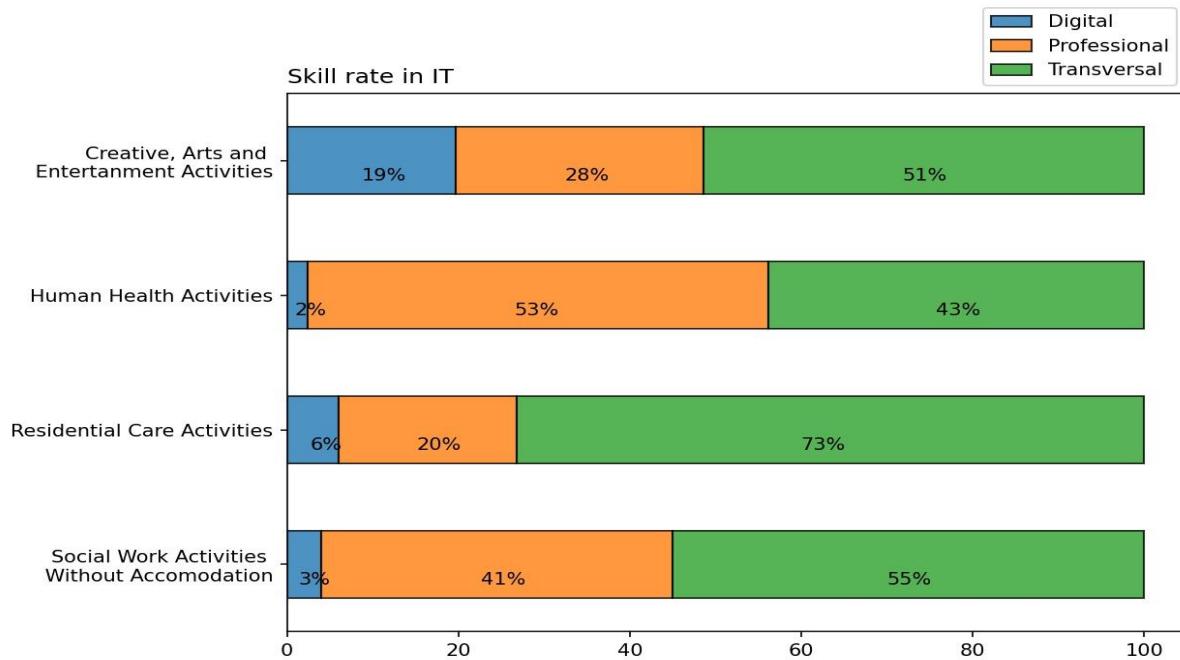
Findings for UK



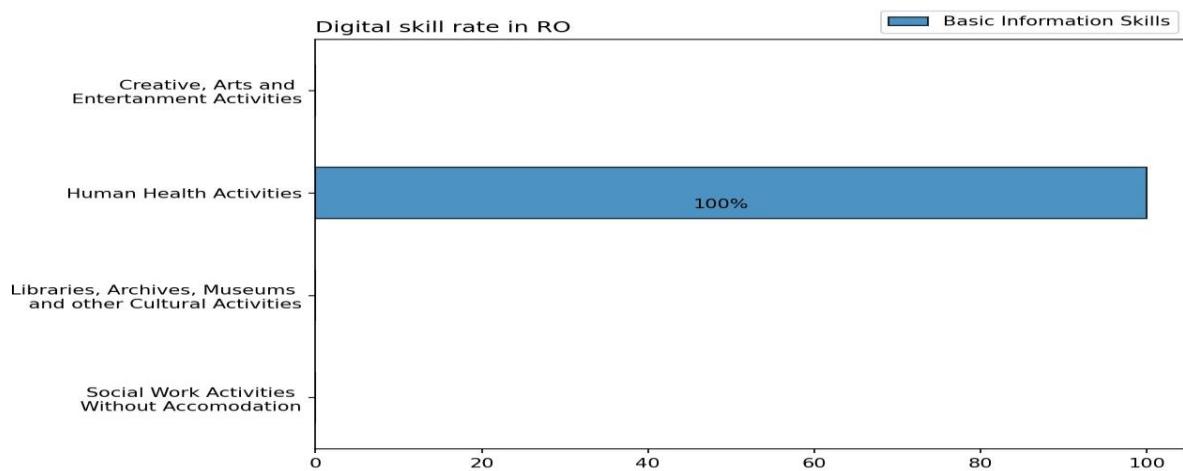
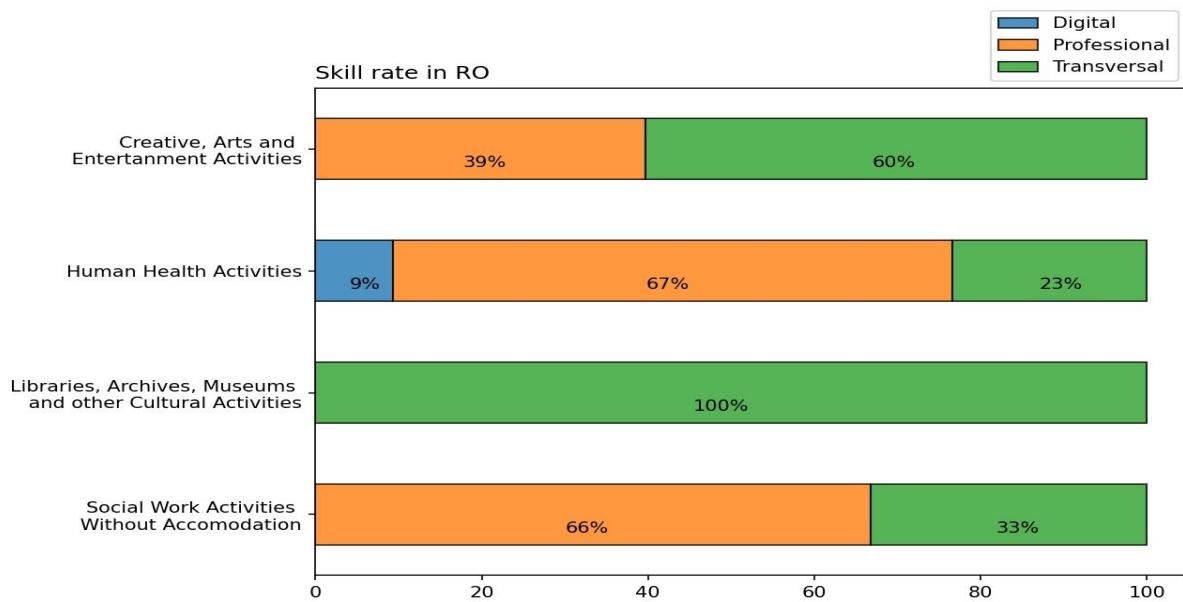
Findings for Germany



Findings from Italy



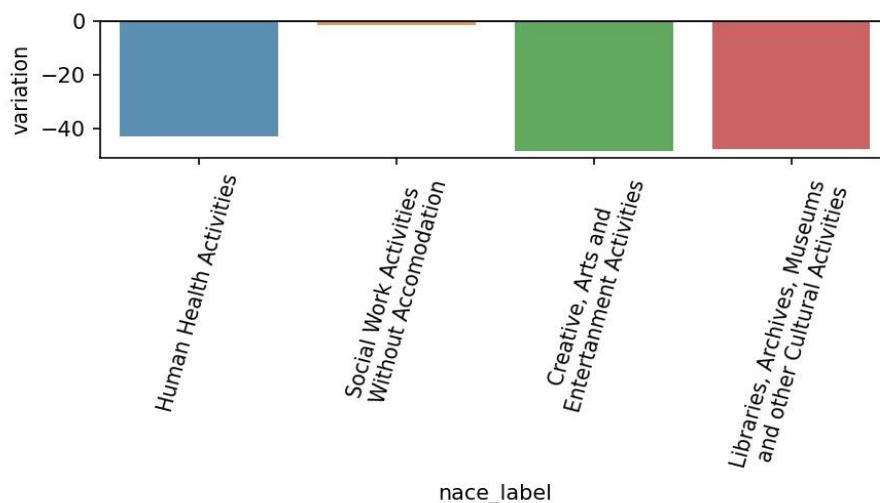
Findings from Romania



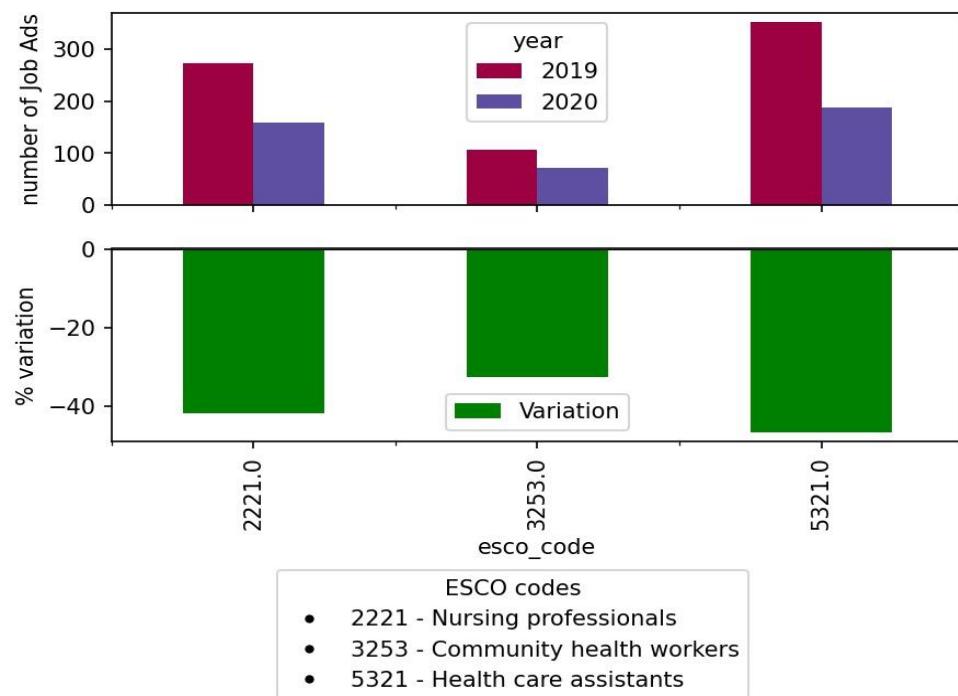
Annex 3. Trends in Job Adverts

Findings from Romania

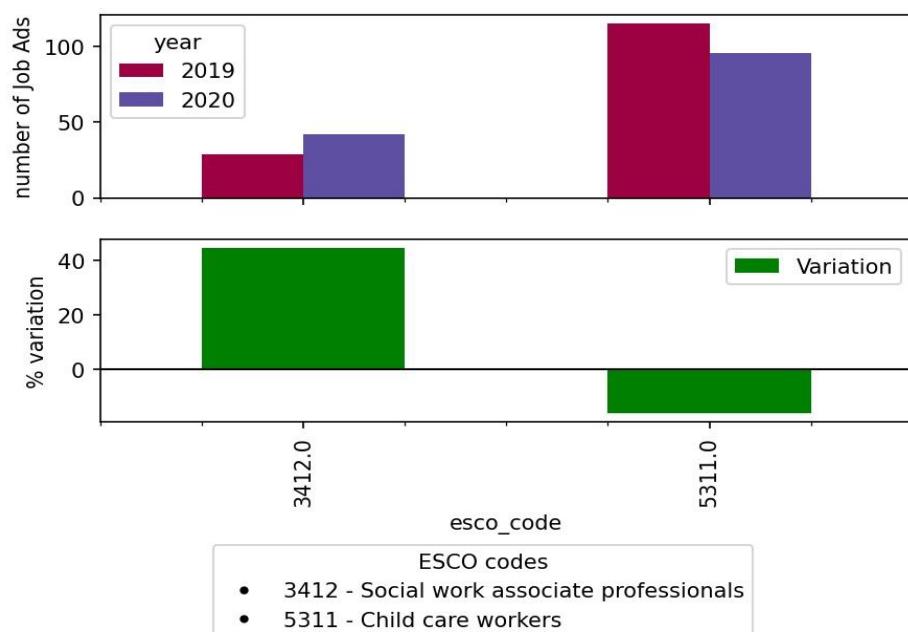
Variation % in Job Ads - 2020 vs 2019 - RO



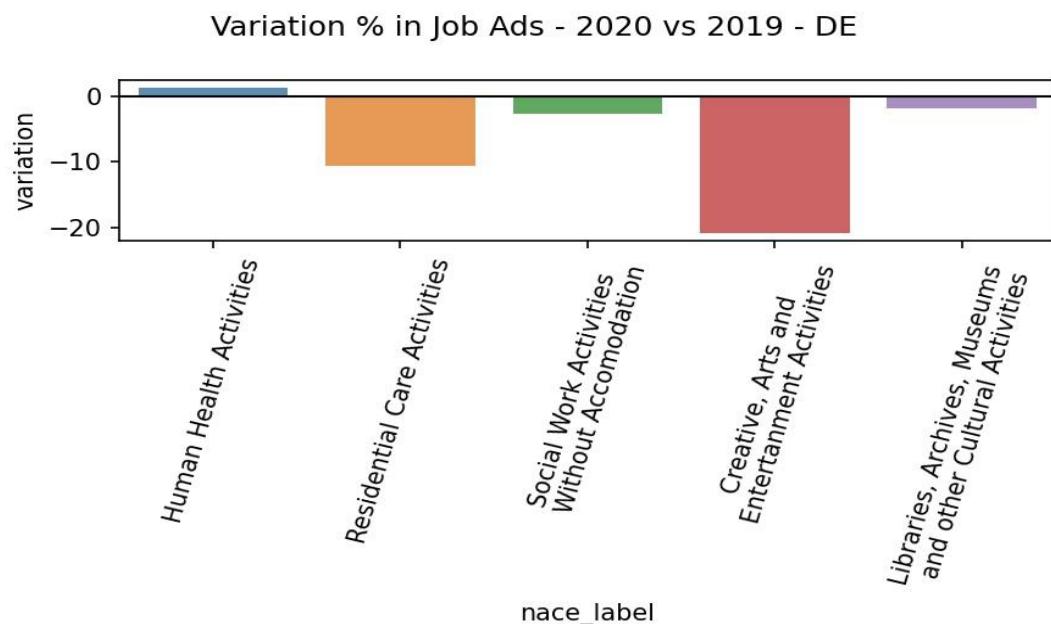
Trend of Job Vacancies (2019-2020) for the NACE division:
86 - ['Human Health Activities'] in RO



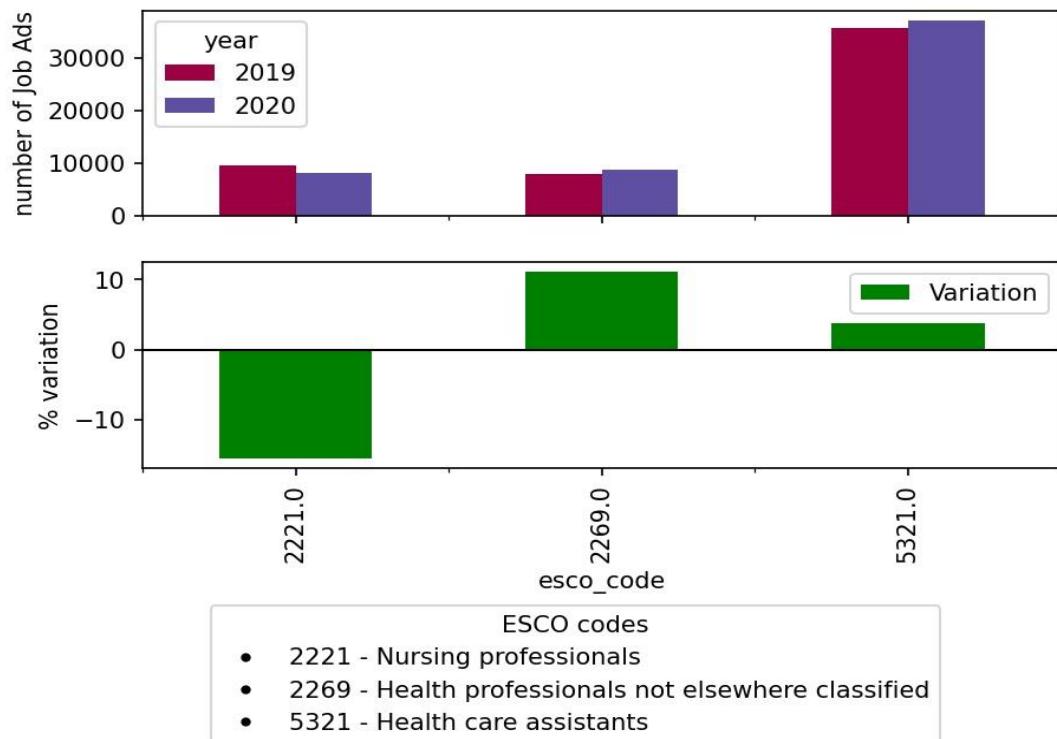
Trend of Job Vacancies (2019-2020) for the NACE division:
88 - ['Social Work Activities Without Accommodation'] in RO



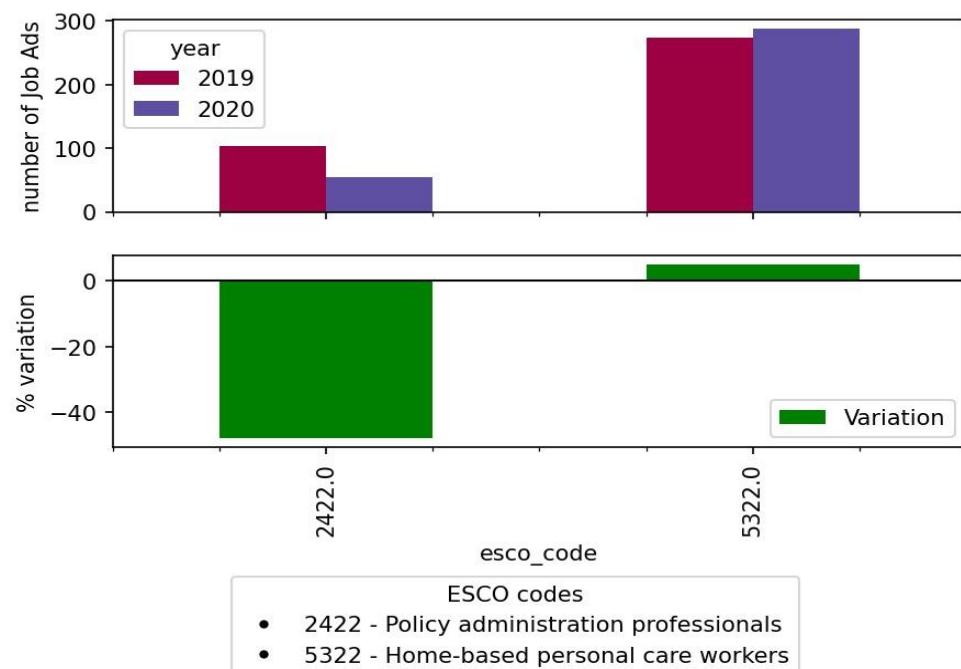
Findings from Germany



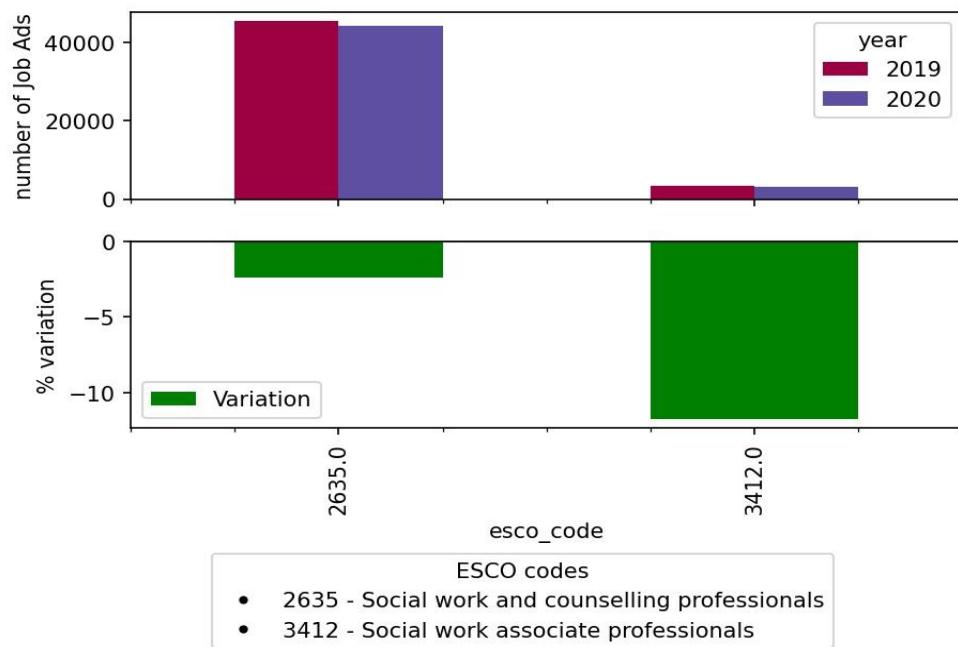
Trend of Job Vacancies (2019-2020) for the NACE division:
86 - ['Human Health Activities'] in DE



Trend of Job Vacancies (2019-2020) for the NACE division:
87 - ['Residential Care Activities'] in DE

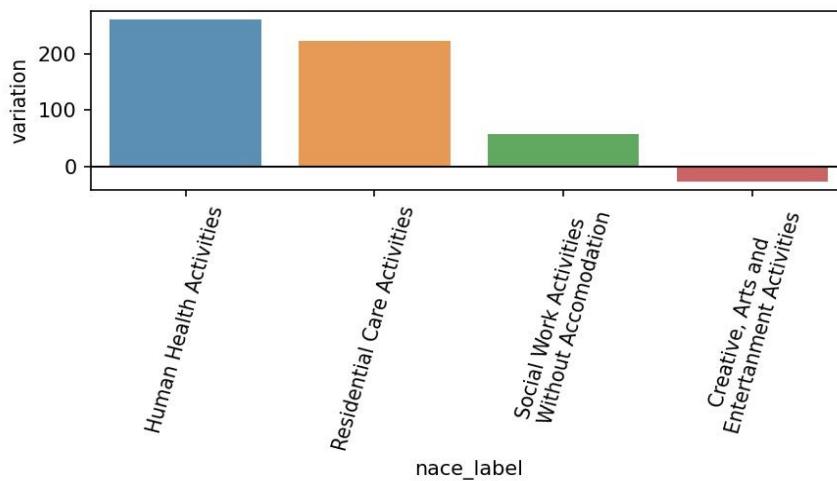


Trend of Job Vacancies (2019-2020) for the NACE division:
88 - ['Social Work Activities Without Accommodation'] in DE

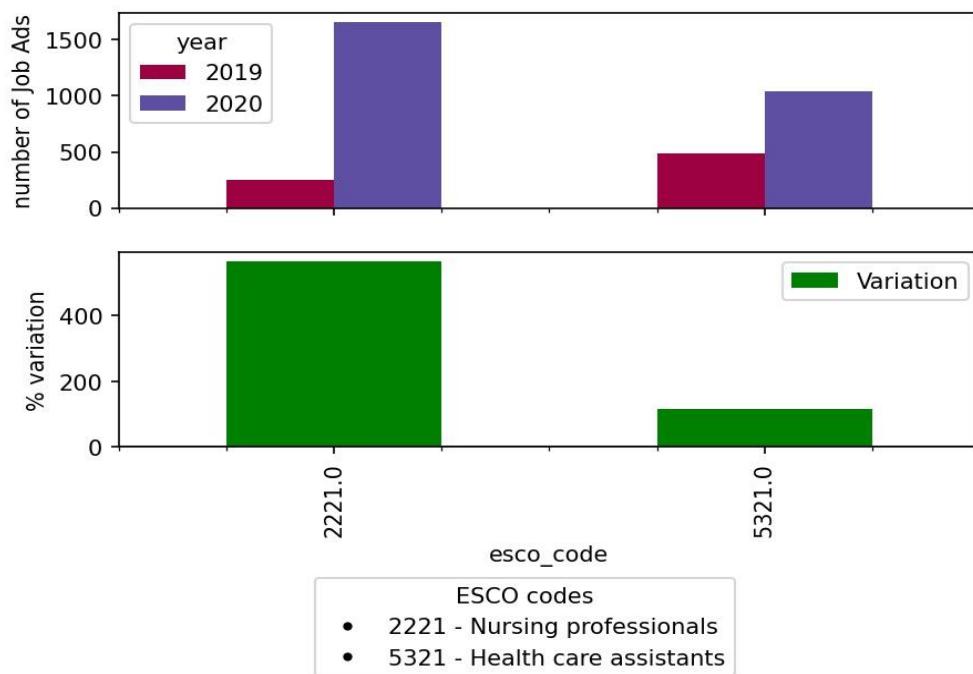


Findings from Italy

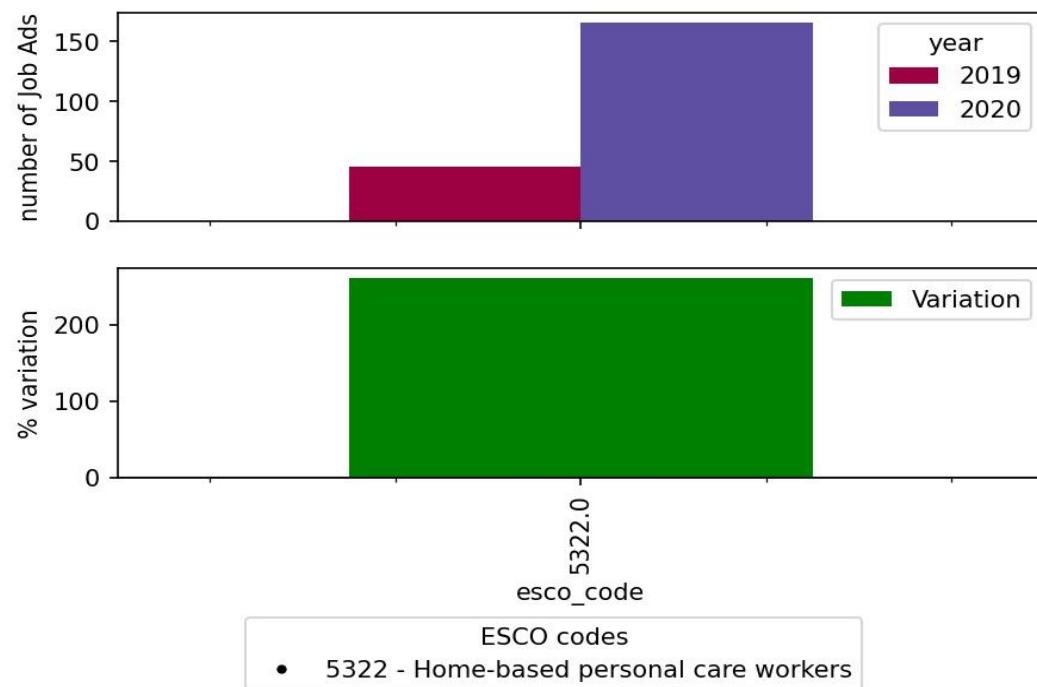
Variation % in Job Ads - 2020 vs 2019 - IT



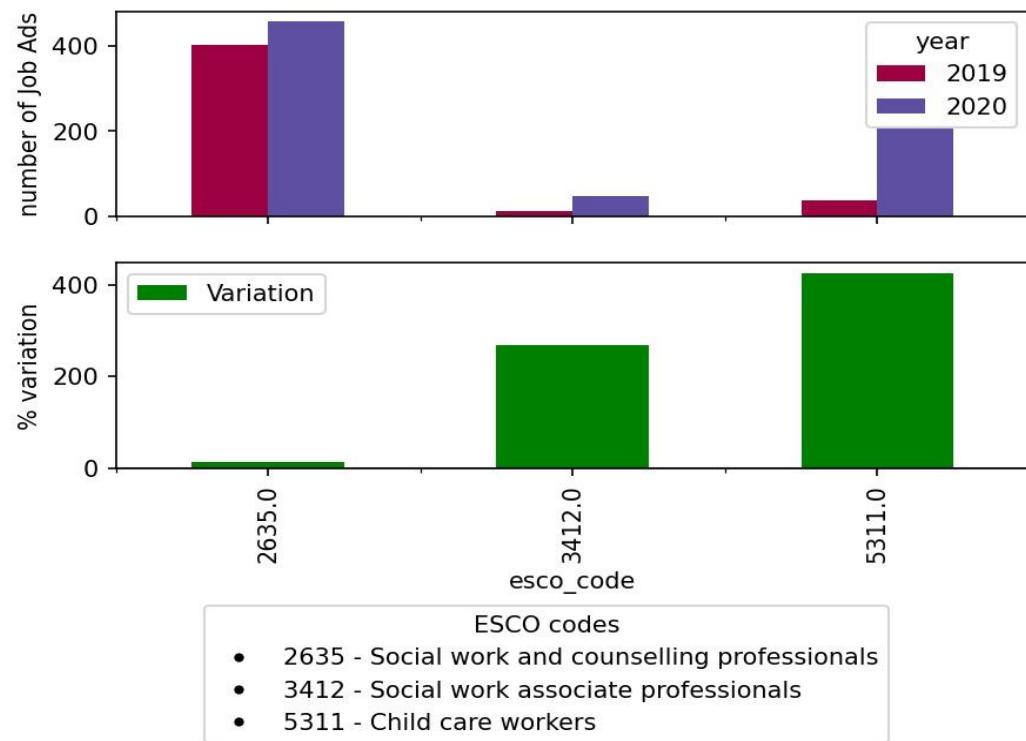
Trend of Job Vacancies (2019-2020) for the NACE division:
86 - ['Human Health Activities'] in IT



Trend of Job Vacancies (2019-2020) for the NACE division:
87 - ['Residential Care Activities'] in IT

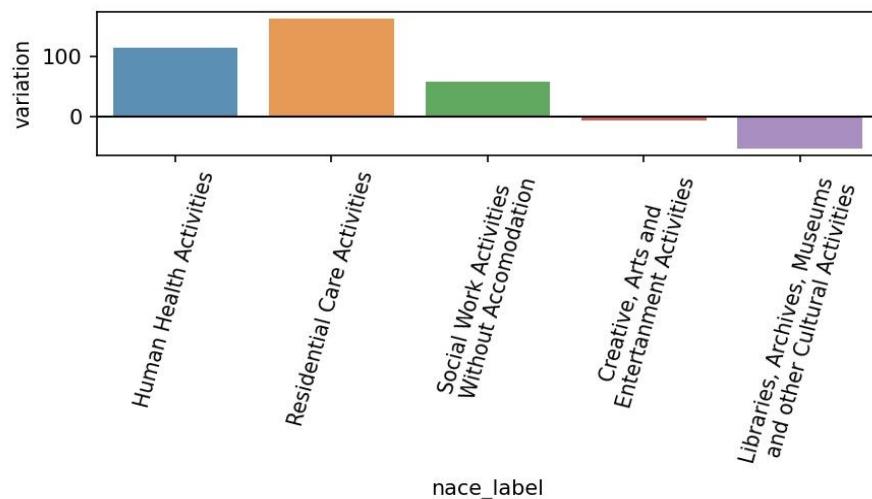


Trend of Job Vacancies (2019-2020) for the NACE division:
88 - ['Social Work Activities Without Accommodation'] in IT

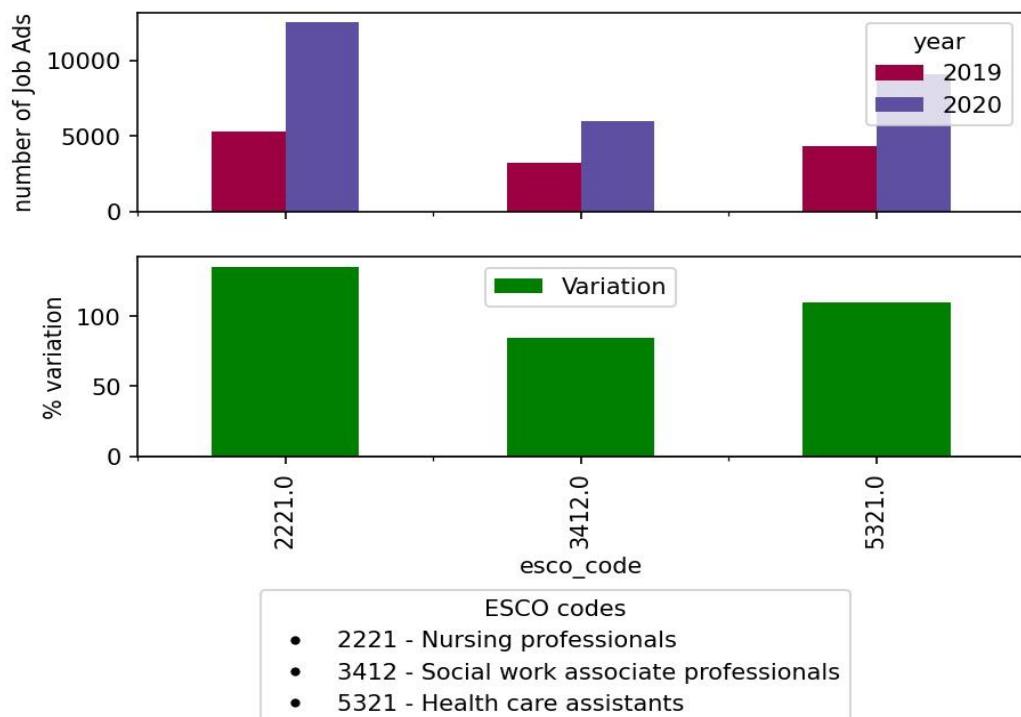


Findings from the UK

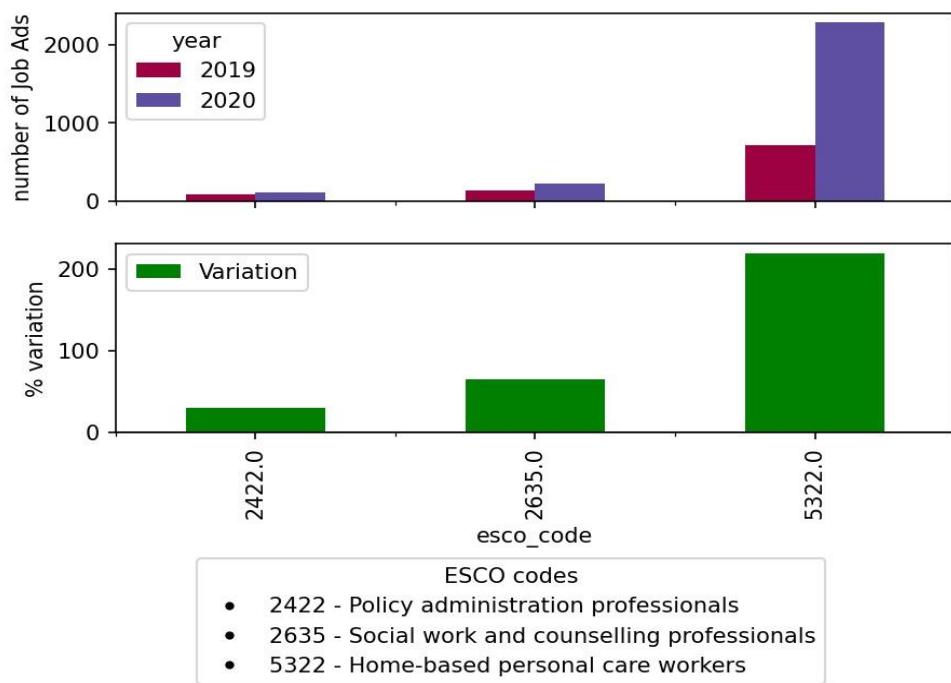
Variation % in Job Ads - 2020 vs 2019 - UK



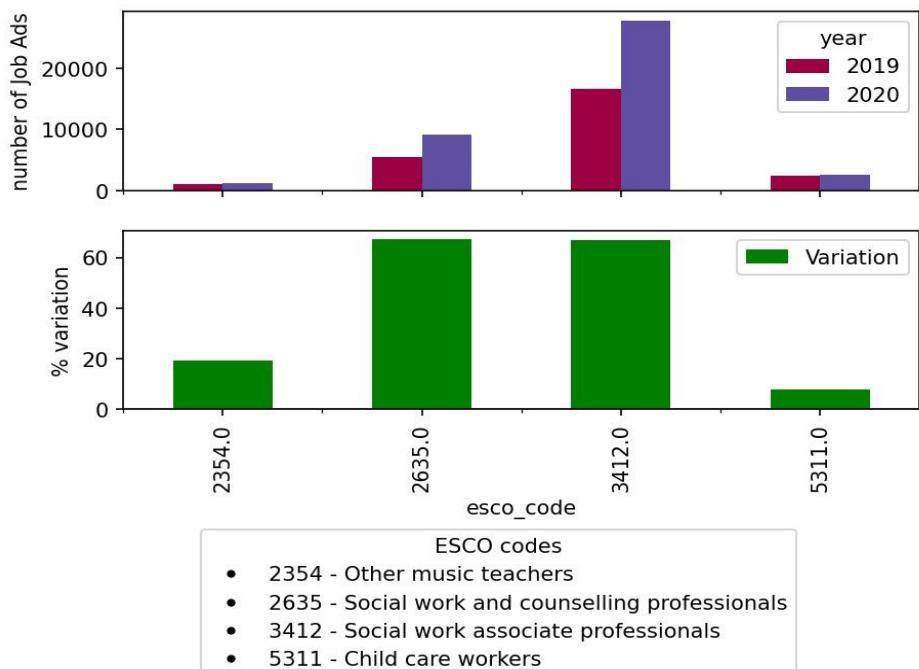
Trend of Job Vacancies (2019-2020) for the NACE division:
86 - ['Human Health Activities'] in UK



Trend of Job Vacancies (2019-2020) for the NACE division:
87 - ['Residential Care Activities'] in UK

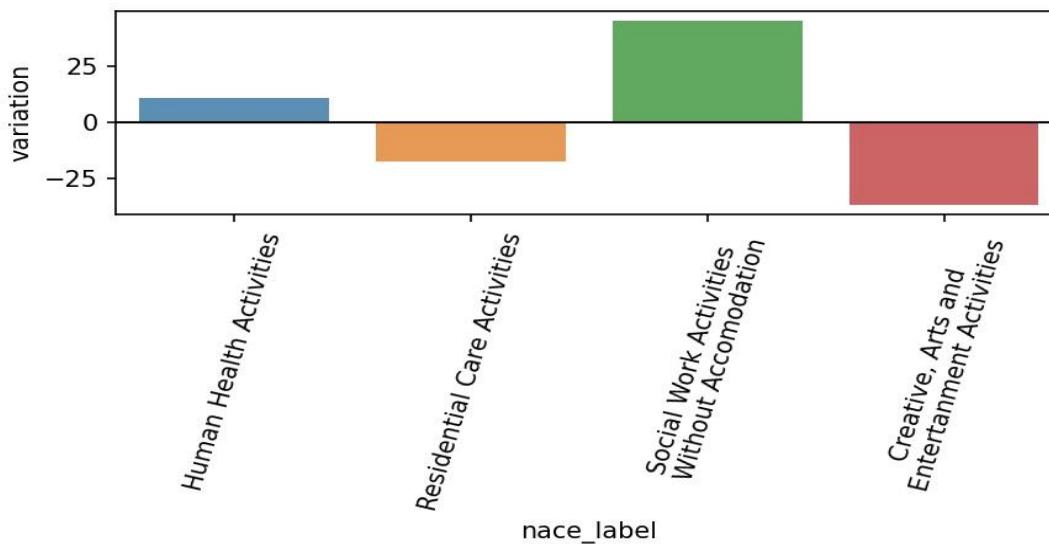


Trend of Job Vacancies (2019-2020) for the NACE division:
88 - ['Social Work Activities Without Accommodation'] in UK

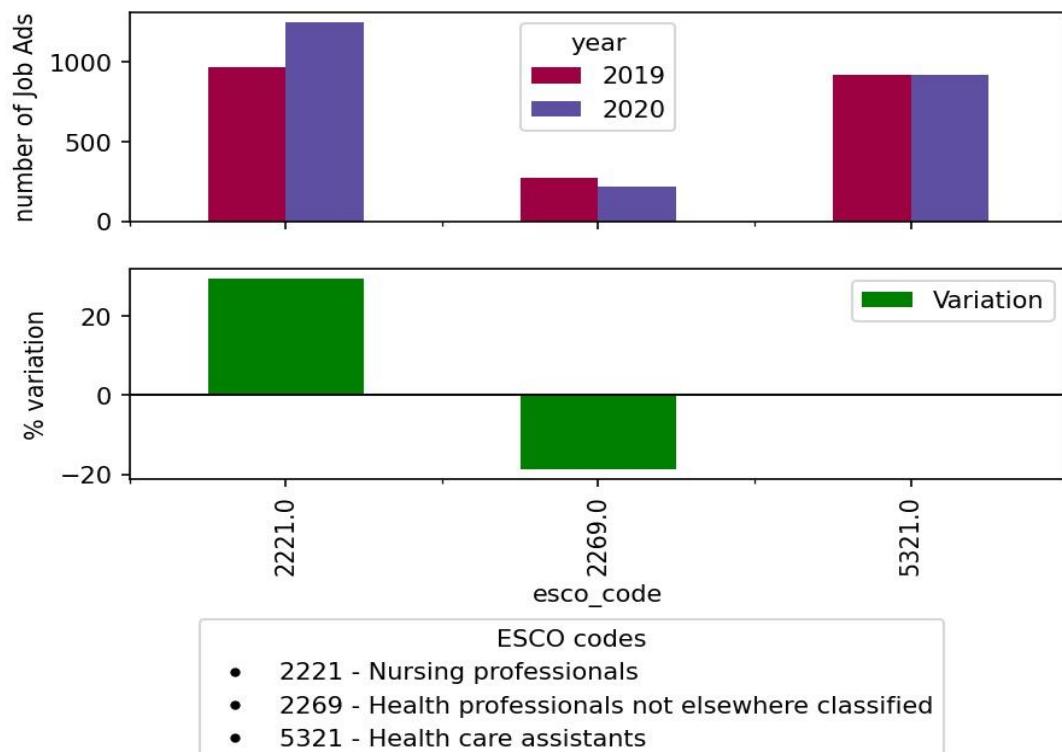


Findings from Spain

Variation % in Job Ads - 2020 vs 2019 - ES



Trend of Job Vacancies (2019-2020) for the NACE division:
86 - ['Human Health Activities'] in ES



Trend of Job Vacancies (2019-2020) for the NACE division:
87 - ['Residential Care Activities'] in ES

