

# Long Term Care Manpower Study

July 2018

# Objectives

- The Lien Foundation decided to focus on long-term care manpower for this report as it is a key challenge for the sector and has a direct bearing not only on the quality of care, but also on costs
- We commissioned an international management consultancy to embark on a fact-finding project that will:
  - a) Provide an overview of Singapore's long-term care manpower landscape and compare it to four advanced APAC economies with rapidly ageing populations, three of which are facing big manpower shortages.
  - b) Uncover top-of-mind concerns of both foreign and local care workers in the sector

# The findings are based on extensive primary and secondary research done between Jan and June this year

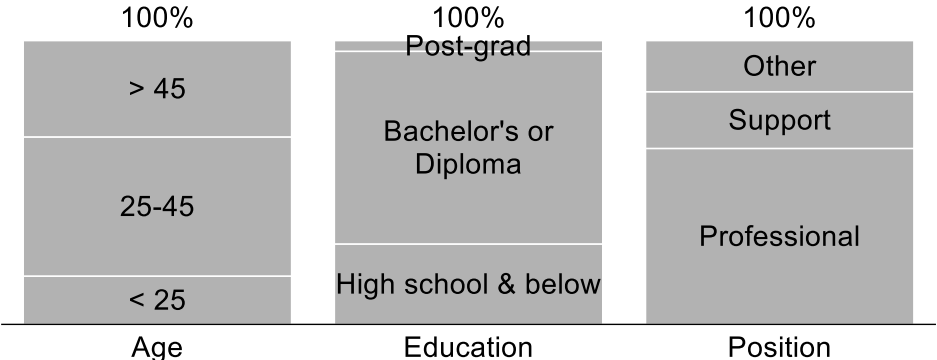
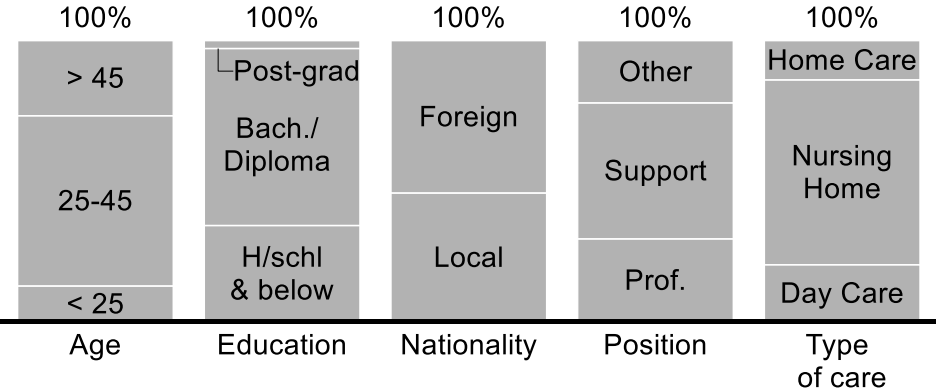
## 35 Industry Practitioner Interviews

Extensive literature search for cross-country data on LTC sector in Hong Kong, Australia, S Korea and Japan

**LONG-TERM CARE SURVEY (N=251 | TARGET=250)**

**LOCAL HOSPITAL SURVEY (N=53 | TARGET=50)**

304 Primary surveys



Note 1: We sought the views of 20 industry practitioners in Sg and 15 in the APAC markets surveyed  
 Note 2: Primary research gathered Jan-Mar, secondary research Jan-July 2018. Note 3: This survey has a relatively limited sample size, and may not be a national representation. But it throws light on an issue with very little publicly available data

# Executive Summary

- **Singapore needs to grow its long term care workforce by at least 45 per cent between 2017 and 2020, because of a rapidly ageing population, but low pay and constant churn in the sector may make it hard to meet this target**
  - As of **March 2017**, Singapore's long-term care (LTC) sector employed an estimated **11,000 LTC workers**, of which about **75% (8,300) are direct care workers** (such as nurses, therapists, nursing aide, healthcare assistants, therapy aide etc), caring for an elderly population of around 517K (2017). They work in nursing homes, day-centres for seniors and in homecare. The Ministry of Health hopes to attract another **3,700 direct care workers** to the sector between **2017 and 2020**
  - Thus, while Singapore's elderly population is projected to grow by **18%** from 517k in 2017 to 610K in 2020, we need to grow our direct care workforce by **45%** to meet growing demand
- **Singapore's LTC sector is heavily reliant on foreign workers (70% of direct care workforce), especially relative to its APAC developed market peers (Australia, Hong Kong, Japan, Korea)**
  - We benchmarked Singapore to four APAC markets —Australia, Hong Kong, Japan, Korea— all with high-income, fast-ageing populations. Singapore is the most reliant on foreign workers: Around **70 per cent of direct care workers** in Singapore's nursing homes, day-care centres and formal homecare settings **are foreigners**, vs 32% in Australia, and less than 10 per cent in Japan and five per cent or less in Hong Kong and Korea. Hong Kong plans to open its LTC sector to more foreign workers
  - Despite concerted efforts to raise pay, redesign jobs and improve skills and productivity, the sector seems afflicted by constant churn and the "leaky bucket" syndrome.
  - The heavy reliance on foreign workers coupled with short average tenures amongst foreign LTC care workers in particular (**~55% of workers have been working for their companies for two years or less, average tenure is 2.8 years**) makes it challenging to meet the workforce growth targets by 2020. The biggest churn is believed to be among direct care workers, particularly those who work in support care roles. Including local workers, average LTC tenure is 3.4 years, compared to 7.8 years in hospitals.

# Executive Summary

- **Singapore's LTC sector has a weak talent value proposition: Low pay and the lack of advancement opportunities are the key barriers to attracting and retaining workers**
  - **Spending:** The Sg Govt (MOH) spent \$800 million on LTC in FY 2016, up from \$600 million the previous year. However, despite this increase, and despite having one of the highest GDP per capita, Singapore still has relatively low government spending on LTC as of FY 2016 (0.19 % of GDP vs 0.9% in KR, 0.92% in AU\*\*\*, 2.00% in JP and 0.29 % in HK\*).
  - **Compensation:** LTC compensation in Singapore is lower than alternative jobs available here. In a tight labour market, Singaporean workers have many other jobs to choose from. (Support care workers, such as nursing aides and healthcare assistants, get paid less than childcare workers, hospital attendant or sales assistant in Singapore)
  - Direct care worker salaries are also lower than tax-adjusted LTC compensation in other markets (average monthly salary of a nursing aide in the LTC sector in Singapore is around \*\* S\$1,350 for locals and \$850 for foreigners vs a post-tax salary of \$1,830 in KR (for care workers in nursing homes), \$3,000 in JP, \$3,750 in HK, \$3,290 in AU)
  - **Opportunity for advancement:** There are limited promotion opportunities in LTC, especially for support care roles in Singapore. Foreign workers often get stuck in these roles as that's where there are the most vacancies.
  - There are many schemes – and more Government funds are being spent now – to attract and retain local workers in the sector. But the overall effectiveness is not yet clear
- **We benchmarked best-in-class work practices and policies, and identified four key levers of change. The most critical lever for Singapore is improving compensation**
  - **Right-siting LTC to promote ageing-in-place:** Reduce manpower needs as it takes lesser number of workers to support a bed/place in home care and day care than nursing homes; makes it more attractive for locals to join the sector
  - **Improving talent value proposition:** Ensure competitive compensation and offset increase in salaries by improving productivity via job redesign; create advancement opportunities by providing training that leads to qualifications, and new career pathways
  - **Exploring new sources of talent and recruitment models:** Target new segments such as current nursing students, homemakers, retirees; create new recruiting model to source and train workers directly in home countries
  - **Improving LTC sector quality and reputation:** Publicly available grading system to rank LTC facilities, encourage consolidation to increase cost-efficiency and promote professionalization of the sector

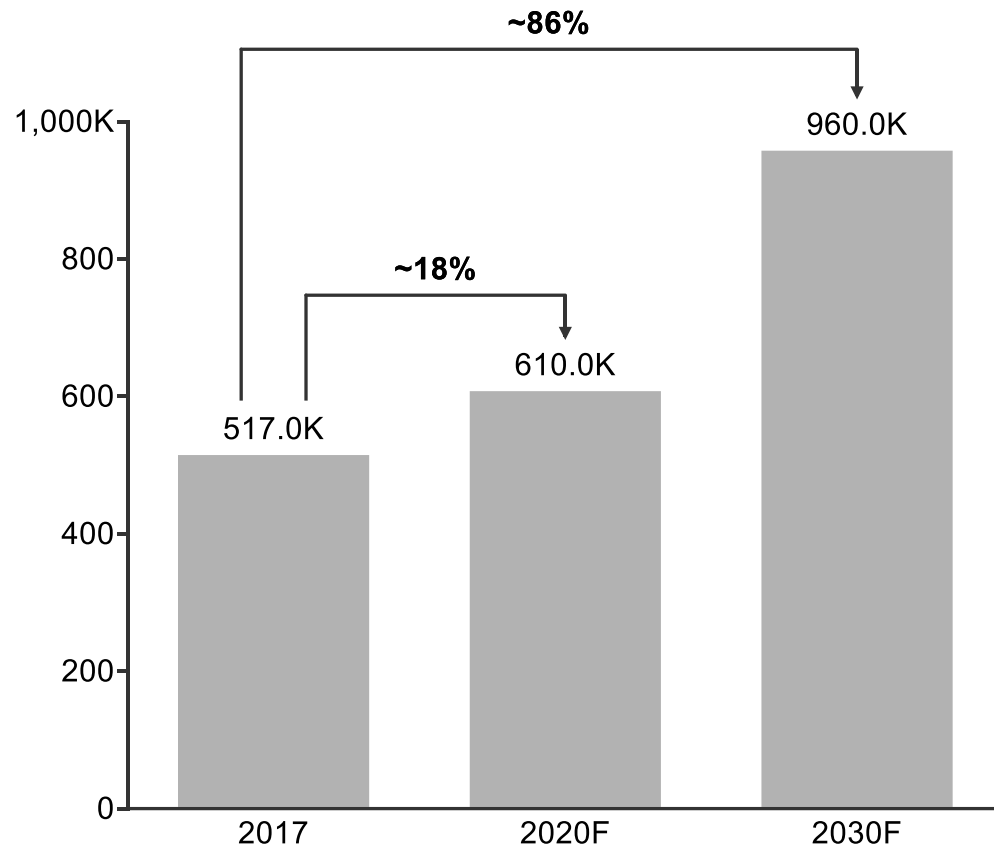
\* Figure for Hong Kong includes only recurrent expenditure and not capital costs. \*\*All figures in SGD \*\*\* Fig for FY 2015, the latest year available

- Overview of LTC in Singapore and other benchmarked countries
- Attracting & retaining LTC workers
- Emerging recommendations

# SG's elderly population set to increase by 18% & 86% from 2017 to 2020 & 2030, requiring 45% & 130% increase in LTC direct care workers respectively

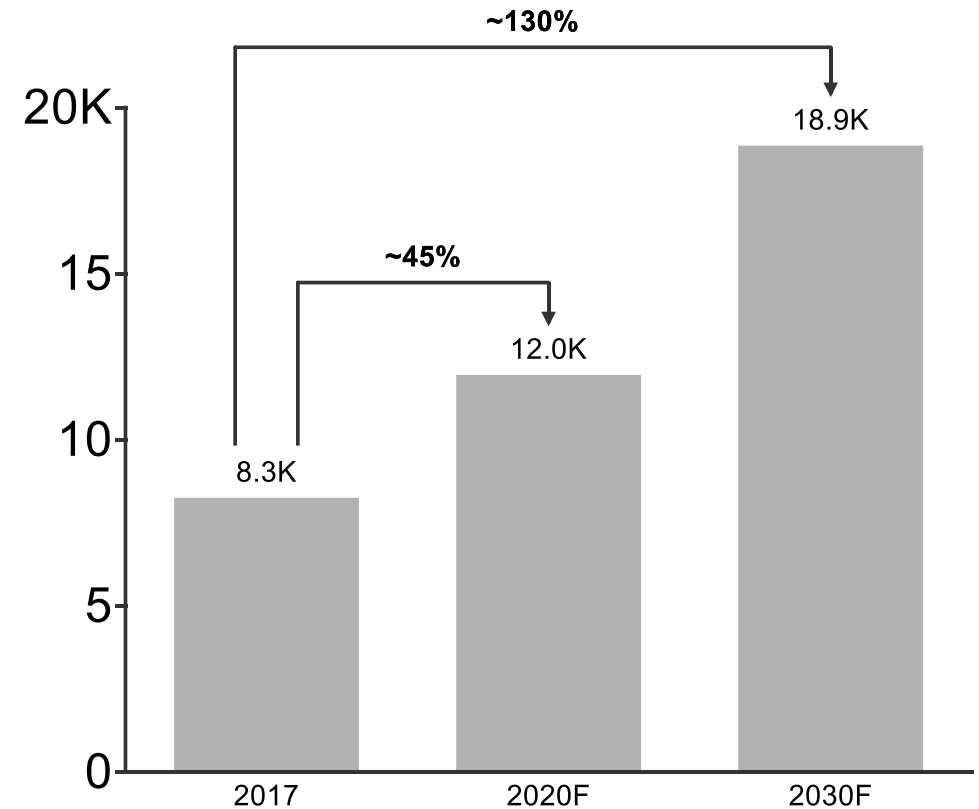
## SINGAPORE ELDERLY POPULATION

Number of people aged 65 and above (Singapore, '000)



## LTC DIRECT CARE WORKFORCE

Estimated number of direct care workers (Singapore, '000)

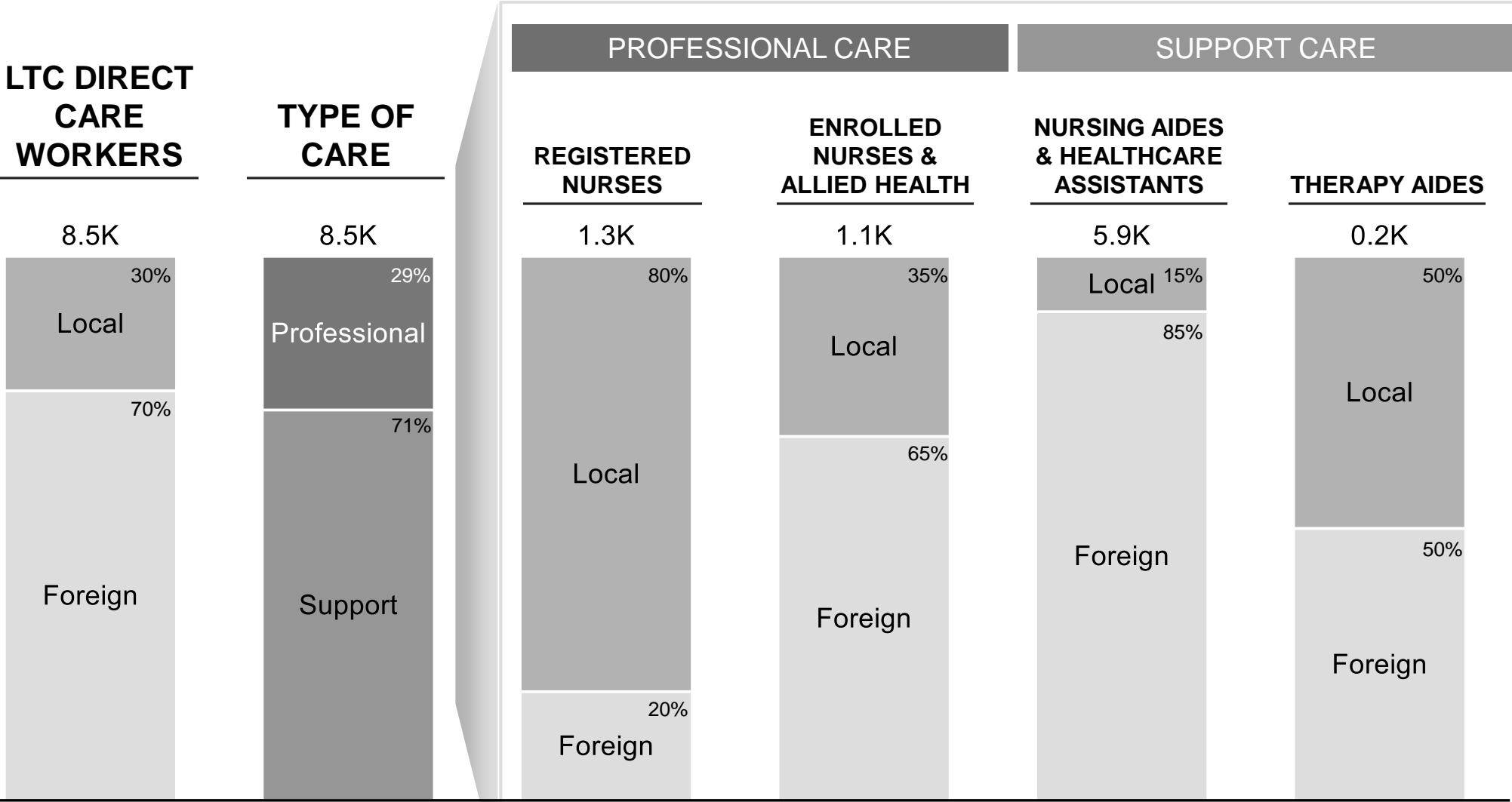


Note 1: Refers to Singapore residents aged 65 and above;

Note 2: LTC Direct Care workforce for 2017 and 2020F are based on data from MOH. 2030F Direct Care workforce projection is Lien Foundation's own calculation based on ratio of Direct Care worker per '000 elderly for 2020F, projected forward to estimated elderly population in 2030.

Source: Department of Statistics and MOH

# ~ 70% of direct care workers are foreigners, working mainly in support care roles









# SG government is actively tackling manpower issues, focusing on talent sourcing targeted at locals for PMET / professional care roles

<b>Industry Reputation</b>	<ul style="list-style-type: none"> <li>• <b>Ministry of Health's Enhanced Nursing Home Standards (ENHS):</b> Tightened licensing requirements around clinical care, social care, and governance and organisational excellence</li> </ul>
<b>Talent Sourcing</b>	<ul style="list-style-type: none"> <li>• Increased number of <b>Allied Health programme</b> spots by 30% in Singapore Institute of Technology</li> <li>• <b>Community Nursing Scholarship</b> to pursue nursing degree, specializing in community care—only 20 per year</li> <li>• <b>Return to nursing programme</b> to attract non-practicing local nurses to return to healthcare: Bonus if they join LTC</li> <li>• <b>Professional Conversion Programme (PCP)</b> for mid-career locals: Training and salary subsidies; accelerated RN training program</li> <li>• <b>P-Max Programme and Career Support Program:</b> Training and salary subsidies for SMEs hiring PMETs</li> <li>• <b>“Work Trial” scheme:</b> Salary subsidy during short-term trials for locals to assess fit with LTC</li> </ul>
<b>Compensation</b>	<ul style="list-style-type: none"> <li>• <b>Community Silver Trust:</b> Dollar-for-dollar donation matching grant for LTC VWOs</li> <li>• <b>Salary Adjustment Exercise</b> – salaries in LTC have increased by around 30 per cent for both local and foreign staff since 2012.</li> <li>• <b>[PUBLIC HOSPITALS ONLY] Digitalization of patient records</b> to improve productivity—not implemented in LTC yet</li> </ul>
<b>Promotion Opportunities</b>	<ul style="list-style-type: none"> <li>• [WIP] <b>Accelerated diploma upgrading courses</b> for experienced ENs to become RNs</li> <li>• [WIP] MOH and SkillsFuture to develop <b>skills framework</b> for professional and support care roles</li> </ul>
<b>Work Environment</b>	<p style="text-align: center;"><b>NA</b></p>

# Four types of LTC facilities in Singapore —nursing, assisted-living (very new), home care, day care

	Nursing Home	Assisted Living	Home Care	Day Care Center
				
Type	Residential	Residential	Home-based	Center-based
Description	Serves <b>high-needs patients around the clock</b> <ul style="list-style-type: none"> <li>✓ Social services</li> <li>✓ Nursing and personal care: typically skilled services e.g. colostomy, neurological therapy, tracheostomy</li> </ul>	Serves <b>low-needs patients</b> who generally don't require nursing/medical care <ul style="list-style-type: none"> <li>✓ More popular in other countries</li> <li>✓ Not required to have a nurse on site</li> </ul>	Home visits to <b>home-bound, high-needs</b> elderly; some served by live-in caregivers <ul style="list-style-type: none"> <li>✓ Social services</li> <li>✓ Nursing and personal care including medical and palliative care</li> </ul>	Offered within a care facility, to elderly who require <b>regular care in the day</b> (~9AM-6PM) <ul style="list-style-type: none"> <li>✓ Social services</li> <li>✓ Specialized or limited nursing and personal care e.g. dementia care, procedural nursing, personal hygiene maintenance</li> </ul>
# of Beds/Places	~13K		~7.5K	~4K
No. of Facilities*	69	<ul style="list-style-type: none"> <li>• New in Singapore</li> <li>• Popular in Australia &amp; Japan</li> </ul>	21 (providers)	88
% Private Operators	~40%		~30%	~5-10%

# Singapore Ministry of Health defines types of long-term care based on amount of care required



## CATEGORY I



- Physically and mentally **independent**
- May or may **not use walking aids**
- **Minimal or no assistance** for daily activities

## CATEGORY II



- **Semi-ambulant**
- **Some assistance** for daily activities
- **May have mild dementia**, psychiatric problems

## CATEGORY III



- **Wheel-chair** or bed-bound
- **Assistance and supervision** required for daily activities most of the time
- **May have dementia**, psychiatric problems

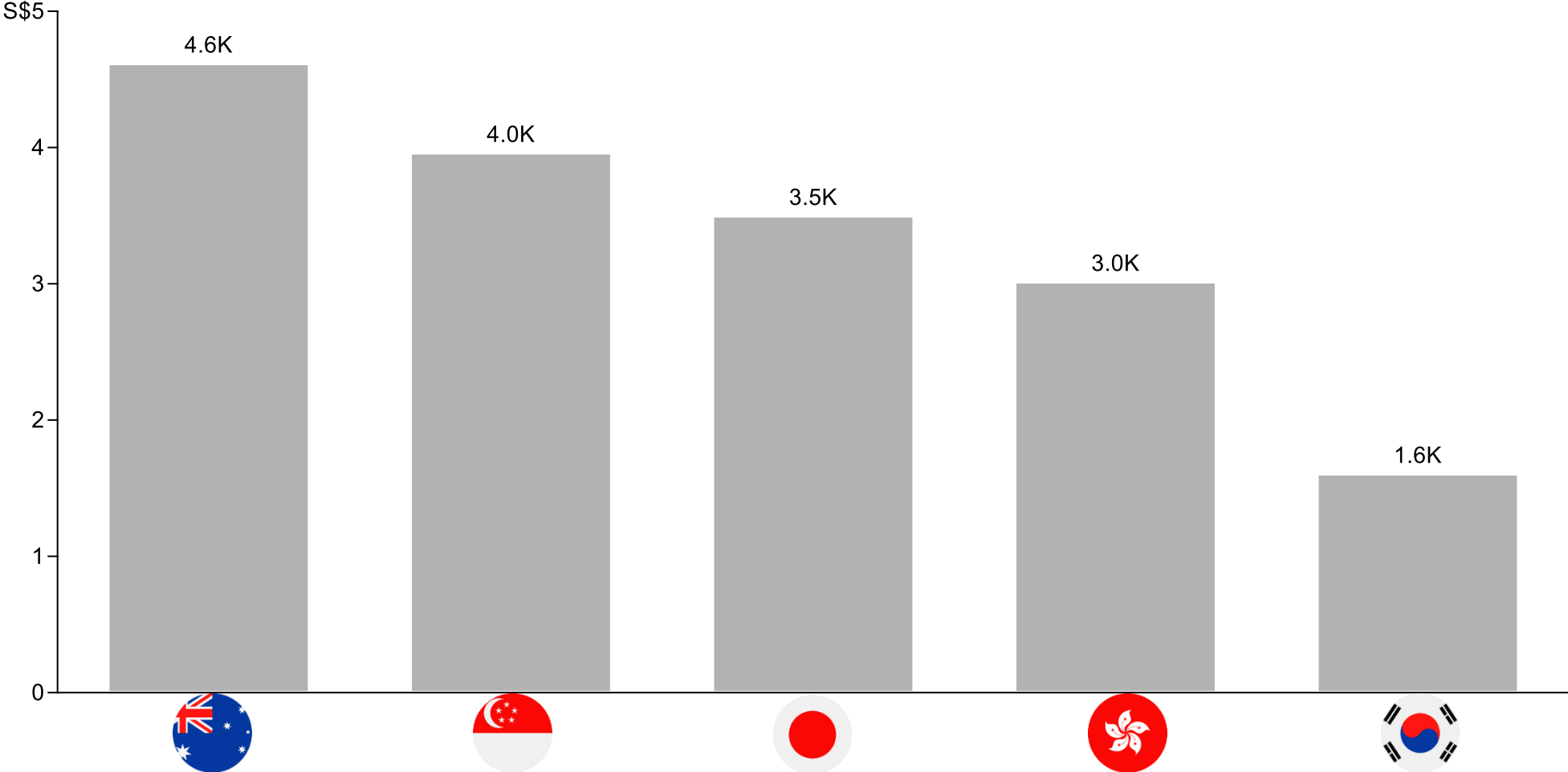
## CATEGORY IV



- **Highly dependent**
- **Total assistance and supervision** required for all daily activities
- **May have dementia**, psychiatric problems

# Compensation: Singapore comparable to peer nations for median individual income from work

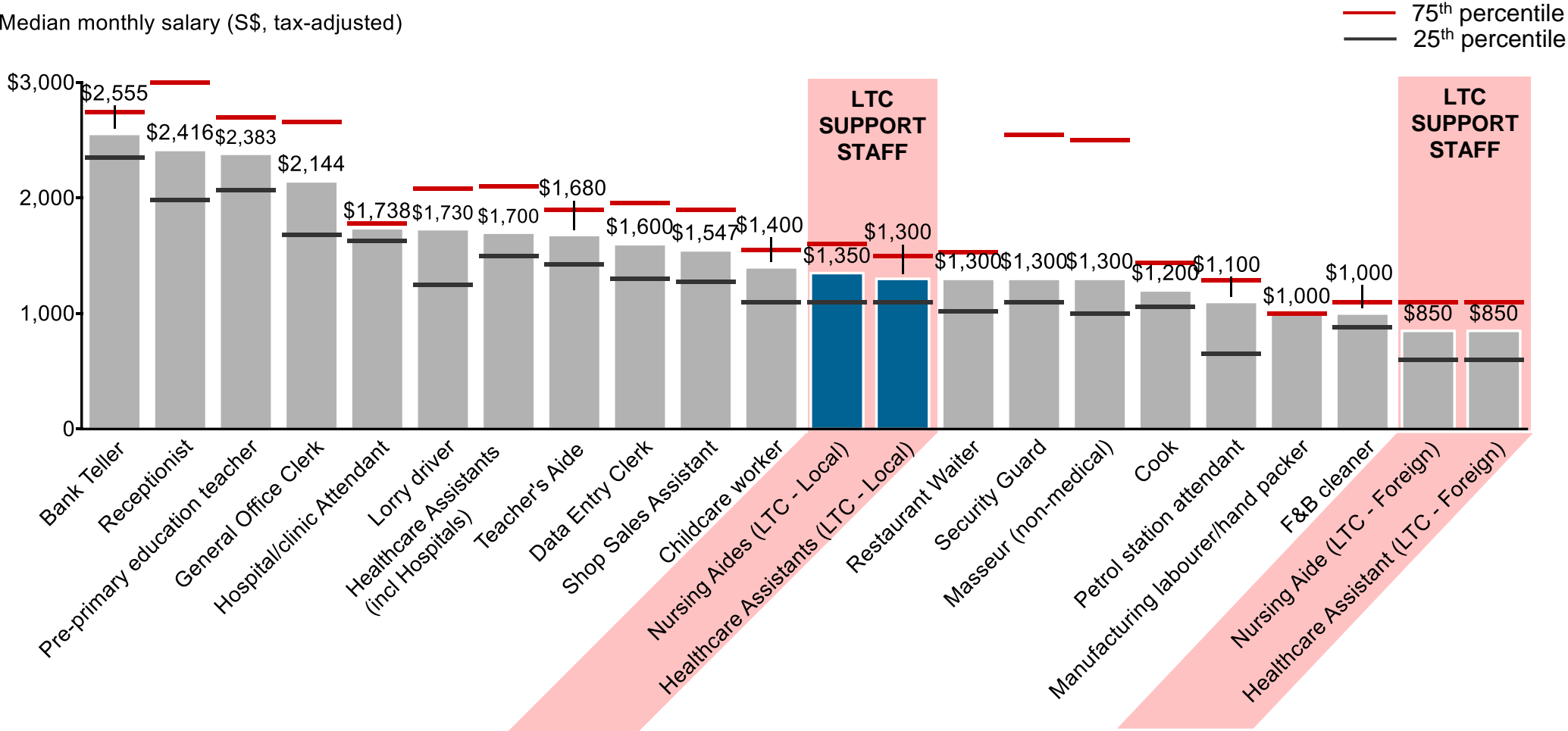
Median individual income from work (2016, S\$K, tax-adjusted)



Note: Australia median income is based on 2017 values; Hong Kong income excludes Govt employees/students/domestic workers; Japan is average income for men and women  
Source: XE currency, Singapore Ministry of Social and family development, Lit search, Hong Kong Census and Statistic Department, Kostat Korea. Japan figs to come – average salary same as Sg

# Compensation: For local workers, there are many alternative jobs that pay better (and probably are easier as well)

Median monthly salary (S\$, tax-adjusted)








Note: LTC Support Care salaries are from Industry Practitioner Interviews and surveys. Accordingly, complete ranges are represented for these instead of just 25<sup>th</sup> and 75<sup>th</sup> percentiles

Source: MOM Occupational Wages 2016, Industry Practitioner Interviews (The 2017 MOM survey, released recently, can be found at <http://stats.mom.gov.sg/Pages/Occupational-Wages-Tables2017.aspx>)

# SUMMARY: Key pain points for LTC workers in Singapore differ for locals vs foreigners

## LOCALS

## FOREIGNERS

	LOCALS	FOREIGNERS
<b>Industry Reputation</b> 	<ul style="list-style-type: none"> <li>• <b>Poor reputation</b> of a “hard and dirty job”</li> <li>• <b>Lack of awareness</b> of type of jobs (beyond nursing) and the meaningful nature of work</li> </ul>	<ul style="list-style-type: none"> <li>• Concerns about <b>job safety</b> (e.g. abuse by patients) and <b>working conditions</b> (e.g. respect of working hours)</li> </ul>
<b>Talent Sourcing</b> 	<ul style="list-style-type: none"> <li>• <b>Job design not conducive to non-traditional backgrounds</b> (e.g. older workers looking for re-employment, nursing students, mothers with schooling children, retirees)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Increasing international demand for LTC workers:</b> More choices of countries to work in</li> </ul>
<b>Compensation</b> 	<ul style="list-style-type: none"> <li>• <b>Sub-par compensation</b> relative to alternative jobs in Singapore</li> <li>• <b>Limited or no job perks or benefits</b> (unlike hospitals with generous allowances)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Sub-par compensation</b> vs other countries—but they have more stringent requirements</li> <li>• High recruitment <b>agency fees</b> (typically 1 month salary)</li> </ul>
<b>Promotion Opportunities</b> 	<ul style="list-style-type: none"> <li>• <b>Limited career progression:</b> No career tracks like those offered by hospitals</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Training does not always lead to certification</b></li> <li>• <b>Challenging for nursing-trained support staff to qualify as a nurse</b> in Singapore</li> <li>• Limited government <b>training subsidies</b></li> </ul>
<b>Work Environment</b> 	<ul style="list-style-type: none"> <li>• <b>Lack of respect for job scope:</b> Care staff have to “do everything” include area cleaning</li> <li>• <b>Poor working environment:</b> Long hours (12h shifts), limited flexibility (e.g. night shifts)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Challenging living conditions:</b> living away from home and family</li> <li>• <b>Unable to stay long-term:</b> Contracts must be renewed every 2 years; no clear path to PR</li> </ul>

# Barriers for foreigners to stay in Singapore on a long-term basis

## IMMIGRATION BARRIERS



### Visa renewal ceiling at 14-22 years, depending on skills

*“The gate has been tightened, and it is now difficult for Nursing Aides (NA) to get Permanent Residency status in Singapore... NA visas are renewed every 2 years. The furthest I’ve managed to stretch this for my strongest NA is 14 years.”*

LTC Operator, Nursing Home, Singapore



### Quotas are lower but still place pressure

*“Eldercare is given a slight concession on MOM quotas as the government recognizes the difficulty in attracting local workers. The AIC provides a sub-quota that is pegged to the number of elderly in the nursing home...”*

Former HR Director, LTC, Singapore

## ADVANCEMENT BARRIERS



### Stringent qualification process

*“RN qualification is very strict and slightly ‘protectionist’: foreign nurses are only able to achieve a conditional licence... even after passing the SNB exam, the Board will call the healthcare institution to verify if they have completed specific clinical hours and tasks and the process is delayed indefinitely if the candidate or institution is unable to produce the required record. For an employer, the process is quite a pain.”*

Operator, Nursing Home, Singapore



### Training subsidies/courses favour locals

*“While there are some training subsidies available for foreigners, most commercial entities typically try to cut costs by only sending EN/RNs to clock hours for certification requirements.”*

Administrator, LTC, Singapore

## PERSONAL BARRIERS



### Sub-optimal living conditions

*“Most dormitories are army-style with bunks in a long room. Given the price of land in Singapore, these dormitories are often built in very far out locations such as Woodlands.”*

Administrator, Nursing Home, Singapore








### Living away from family

*“I would consider looking for a healthcare job outside of Singapore. Philippines would be my first choice to be with my family. I would also consider other countries like USA and Japan as they offer better pay and benefits as well as career development and growth opportunities.”*

Foreign Allied Health Professional, LTC

Source: Industry Practitioner Interviews, Survey of Singapore LTC Workers (n = 251). Note: The visa renewal ceiling of 18 years was recently extended to 22 years






# As a further deep-dive, we benchmarked Singapore to four advanced, fast-ageing APAC economies

	 Singapore	 Australia	 Japan	 Korea	 Hong Kong	
<b>Population</b>	Elderly population (age 65 and above)	<b>0.5M</b>	<b>3.6M</b>	<b>33.1M</b>	<b>6.6M</b>	<b>1.1M</b>
	Elderly as % of Population	12%	15%	26%	13%	15%
<b>LTC Capacity</b>	<b>Total Capacity (beds/places) per 1000 Elderly</b>	<b>51</b>	<b>76</b>	<b>136</b>	<b>72</b>	<b>76</b>
	Institutional beds per 1000 Elderly	27	55	24	24	66
	Non-Residential places per 1000 Elderly	24	21	112	48	9
<b>LTC Workforce</b>	<b>Total LTC Workers per 1000 Elderly</b>	<b>40</b>	<b>71</b> (2012 data)	<b>59</b>	<b>33</b>	<b>21</b>

Note: Elderly to workers ratio refers to number of elderly in the LTC system (capacity as a proxy) per FTE; SG data is 2016, rest are 2015  
 Source: OECD “Long-term care Resources and Utilization”, World Bank population databank (2015), Health and Welfare Services for the Elderly (Singapore Ministry of Health, Labour & Welfare 2015), SWD Review 2013-2015 (Hong Kong), HK Audit Commission. In Singapore and Hong Kong, the formal LTC workforce is supplemented by foreign domestic workers.



# Similar LTC roles across benchmarked countries, though titles differ slightly

	 Singapore	 Australia	 Japan	 Korea	 Hong Kong
<b>Director of Nursing / Nursing Manager</b>		Director of Nursing / Clinical Care Manager / Nurse Unit Manager	Head Nurse	Facility Head (may be a Certified Nurse or Social Worker)	Superintendent / Nursing Manager
<b>Registered Nurses (RN)</b>		Registered Nurse			Registered Nurse
<b>Enrolled Nurses (EN)</b>		Enrolled Nurse (different track from RN)	Nurse	Nurse	Enrolled Nurse
<b>Nursing Aide (NA)</b>		Assistant in Nursing (AIN)/ Personal Care Worker (PCW) (Certified/Not certified)	Care Worker (Certified/Not certified)	Nursing Aide (Licensed)	Healthcare Assistant (Certified)
<b>Healthcare Assistant (HCA)</b>				Care Worker (Certified/Not certified)	Care Worker (Certified/Not certified)

# AU, JP, KR, HK have similar issues attracting and retaining LTC workers, but SG most reliant on foreigners

Legend Significant shortage Shortage No shortage



## SINGAPORE



## AUSTRALIA



## JAPAN



## HONG KONG



## KOREA

LTC CAPACITY SHORTAGE

“Due to space constraints and an overreliance of VVO care services on charity dollars, there is an inability to scale up rapidly.”  
Lee Kuan Yew School of Public Policy, 2016

“Occupancy of retirement villages in Australia is close to capacity, highlighting the forthcoming shortage of age appropriate housing for senior Australians in their local communities”  
Property Council of Australia, 2017

“In addition to the current long waiting list to enter an institution, the shortage will likely be more severe in the future because of the increase in single-resident households.”  
RIETI, 2013

“The waiting list for a place in a subsidized nursing home is extremely long and can take up to a period of 29 months while securing a place in a care and attention home can take up to 19 months”  
Lee Kuan Yew School of Public Policy, 2016

“South Korea’s nursing hospital capacity (calculated as the number of beds per 1,000 elderly people, or those over 65 years old) was 27.35 in 2012, giving South Korea a clear lead among the 34 OECD member countries”  
Hankyoreh, 2014

LTC MANPOWER SHORTAGE

“This industry is always short of people. I hire until I cry”  
Director, Recruitment Agency

“Always has been and getting more difficult to get people to work in eldercare. Not seen as attractive industry due to workload... 1:30 elderly vs 1:4 patients in hospitals..”  
Director, Recruitment Agency

“We have similar manpower challenges as Singapore, there is severe shortage of LTC workers. We have started using a many temporary / contract staff”  
Manager, Nursing Home

“It is very hard to recruit foreigners to work in LTC due to government restrictions, but we face acute shortage of workers”  
Former General Manager, Nursing Home

“No problem in hiring for eldercare facilities. A bit difficult for rural locations but not really a major issue as it is seen as an attractive sector to work in”  
Director, LTC Consultancy

DEPENDENCE\*\* ON FOREIGNERS %

~ 70 %

~32%

~10%

~5%

~5%

(Ethnically Korean, Chinese Nationality)

~5.8K

~35 – 45K

~200K  
(2015 data)

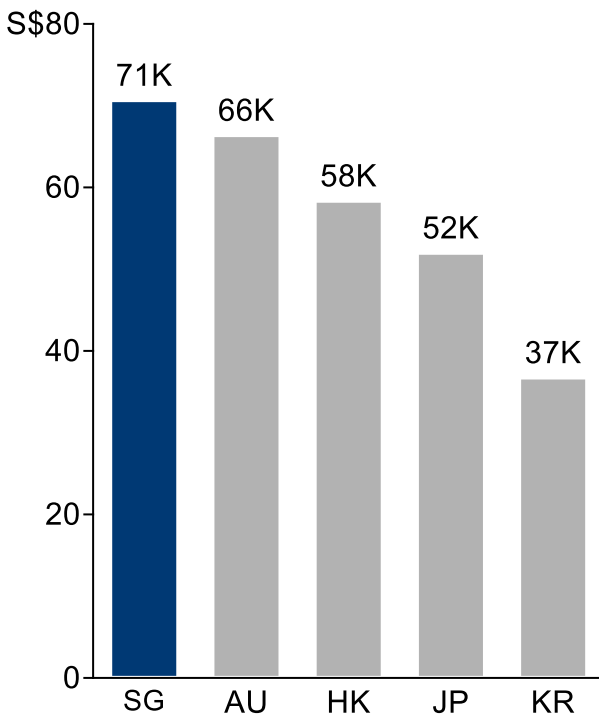
~ 1.3k

~11K  
(2015 data)

# Expenditure: SG has highest GDP per capita but relatively low government LTC spending

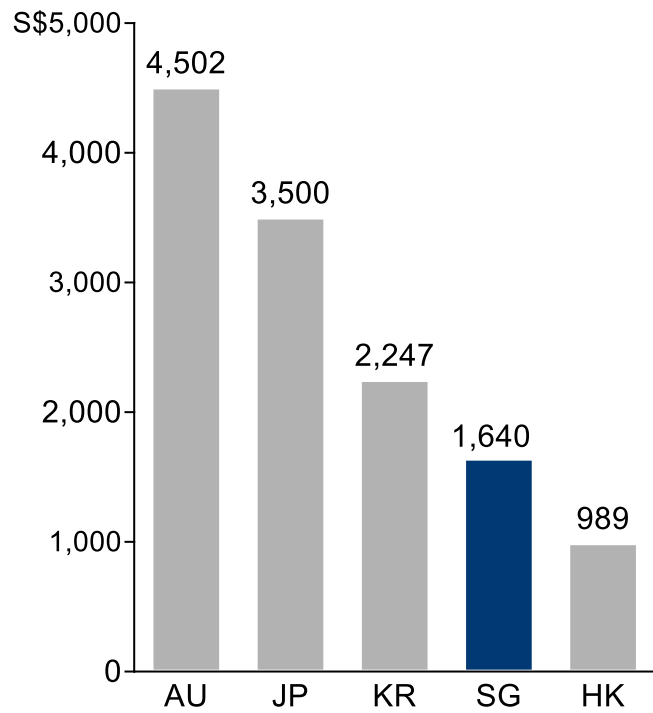
**GDP PER CAPITA**

GDP per capita (2016, S\$K)



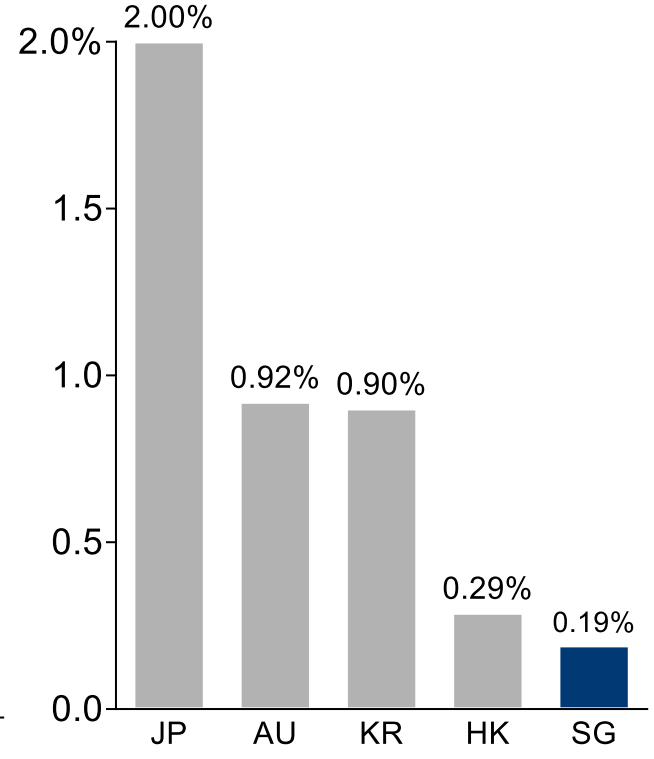
**PUBLIC LTC SPEND PER ELDERLY**

Public LTC spend per elderly 65+ (2016 or latest year available)



**PUBLIC LTC SPEND AS % OF GDP**

Public LTC spend as % of GDP (2016 or latest year available)



Elderly as % of total population 15.0% 26.0% 13.0% 11.7% 15.6%



Source: Bloomberg; OECD; World Bank; Australia Report on Government Services; Hong Kong Social Welfare Department; Singapore Ministry of Health; Australia Bureau of Statistics; Hong Kong Census and Statistics Department; Statistics Bureau, Japan; Statistics Korea; Singapore Department of Statistics. Note: Hong Kong LTC spend includes only recurrent/operational costs and not capital costs.

# In Sg, LTC staff are classified as either professional care or support care staff. Most support staff earn well below median wages

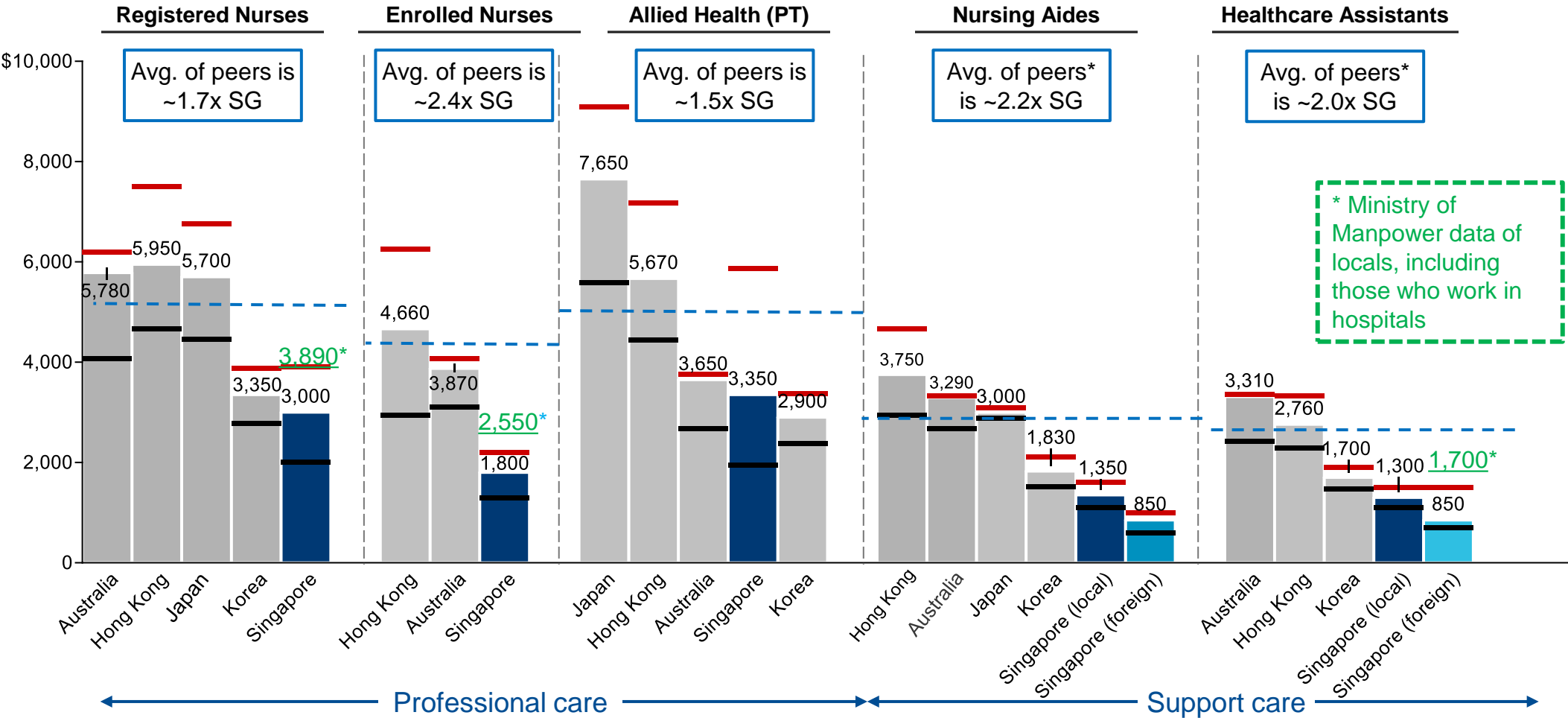
**LTC ONLY**

	PROFESSIONAL CARE STAFF			SUPPORT CARE STAFF		
	Nurses		Allied Health Professionals	Nursing Aides	Healthcare Assistants	Therapy Aides
	Registered Nurse (RN)	Enrolled Nurse (EN)				
<b>Typical responsibilities</b>	Provide all nursing services including intravenous injections, dressing of complex wounds etc.	Assist RNs to provide holistic care; limited responsibilities including subcutaneous injections, dressing of simple wounds etc.	Diverse group of healthcare professionals providing specialized services for the elderly e.g. physiotherapy, occupational therapy etc.	Basic procedures as well as limited nursing services including catheter assistance, taking vital signs, checking wounds and bruises	Basic procedures including basic hygiene, feeding, lifting and positioning	Provide support to Allied Health professionals; do not provide direct patient care
<b>Credentials required</b>	Degree or Diploma in Nursing/Health Sciences	National ITE Certificate in Nursing	Degree in area of practice, registered with the Allied Health Professions Council	Certified Nursing Aide training programs (SNB certified)	WSQ Certificate for Healthcare Support or ITE certificate for foreigners (preferred)	ITE Therapy Assistant or WSQ Certificate for Healthcare Support (preferred)
<b>% foreign</b>	20%	75%	30%	85%	85%	50%
<b>% local</b>	80%	25%	70%	10%	10%	50%
<b>Monthly base pay (foreign)</b>	\$2,000 – \$3,300	\$1,000 - \$1,900	\$3,000 - \$4,500	\$600 - \$1,100	\$600 - \$1,100	\$1,100 - \$1,400
<b>Monthly base pay (local)</b>	\$2,600 – \$3,600 (Up to \$10K for Senior Nursing Managers/ Directors)	\$1,300 - \$2,200	\$3,000 - \$4,500	\$1,100 - \$1,600	\$1,100 - \$1,500	\$1,300 - \$1,600

# Compensation: LTC salaries typically lowest in SG vs benchmarked peers, especially for Support Care roles

Monthly salary (S\$, local tax-adjusted)  
Average across local and foreign workers for all countries, except Sg

— High — Low - - - Avg. of Benchmarks



\* Ministry of Manpower data of locals, including those who work in hospitals

Professional care ← Support care →

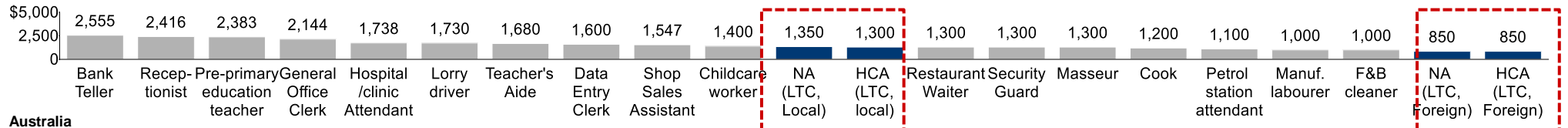
Note 1: Only considered salaries of Physiotherapists under Allied Health for consistent comparison across countries| Note 2: Japan and Korea do not have the title “Enrolled Nurse”, Japan does not have the title “Healthcare Assistant” and associate nurse is titled as “Nursing Aides”; Australia personal carer is titled as “Nursing Aides”; Note 3: Korea salaries are for care workers in nursing homes ++Average of peers is based on SG local Source: Salary Expert, PayScale, Silverco, Ejinsight, Industry Practitioner Interviews, Lit Search; Worker Survey, National Statistics of Australia; Australia Age-Care report 2016; Japan Ministry of Health, Hong Kong Department of Labor and Social Welfare and Hong Kong Statistics Department.

# Compensation: In other countries, LTC Support roles enjoy higher wages relative to alternative local jobs, unlike in Singapore



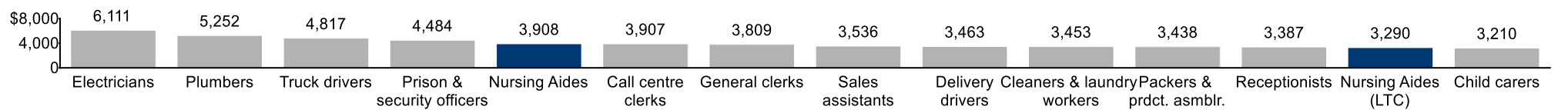
## Singapore

Median monthly salary (SGD, tax-adjusted)



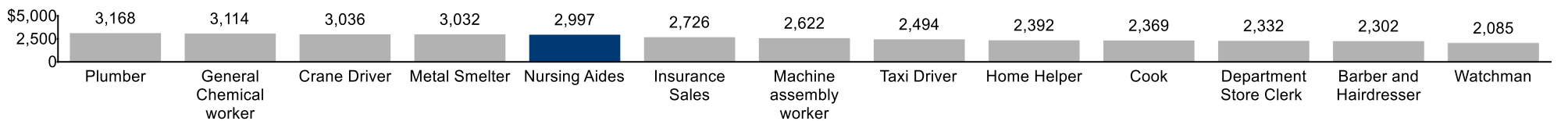
## Australia

Median monthly salary (SGD, tax-adjusted)



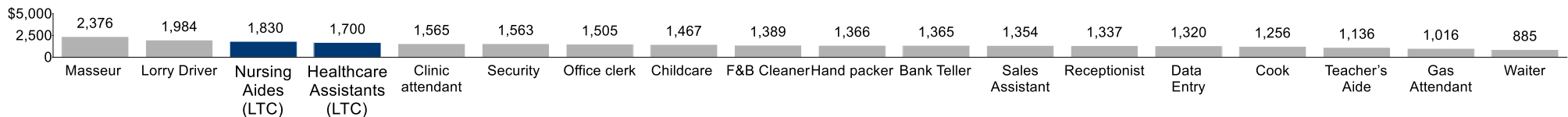
## Japan

Median monthly salary (SGD, tax-adjusted)



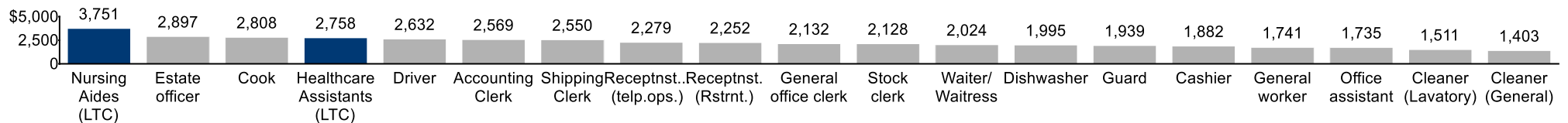
## Korea

Median monthly salary (SGD, tax-adjusted)



## Hong Kong






Median monthly salary (SGD, tax-adjusted)



Note 1: Only considered salaries of Physiotherapists under Allied Health for consistent comparison across countries| Note 2: Salaries are average wages across locals and foreigners, except Sg. Note 3: Japan and Korea do not have the title "Enrolled Nurse", Japan does not have the title "Healthcare Assistant" and associate nurse is titled as "Nursing Aides"; Australia personal care is titled as "Nursing Aides"; Note 4: All salaries for 2016

Source: For Korea: Salary Expert, PayScale, Silverco, Ejinsight, Industry Practitioner Interviews, Korea salaries are for care workers in nursing homes. Lit Search; National Statistics of Australia; Australia Age Care report 2016; Japan Ministry of Health, Labor and Welfare, Hong Kong - Benchmark salaries from Hong Kong Social Welfare Department.

# Based on primary research of LTC workers and operators, SG's LTC talent value proposition is weak relative to benchmarked countries

Singapore's proposition		Metric	 SG	 AU	 JP	 KR	 HK	
<b>Key issues</b>	<b>Compensation</b>	<ul style="list-style-type: none"> <li>Lower than LTC roles in other countries</li> </ul>	Monthly average NA salary (S\$)*	\$1,350	\$3,290	\$3,000	\$1,825	\$3,750
		<ul style="list-style-type: none"> <li>Lower than alternative local jobs</li> </ul>	Quartile (vs. alt. local jobs)**	3 <sup>rd</sup> / 4 <sup>th</sup>	2 <sup>nd</sup>	2 <sup>nd</sup> / 3 <sup>rd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>
<b>Key issues</b>	<b>Opportunities for advancement</b>	<ul style="list-style-type: none"> <li>Locals prefer promotion opp. in hospitals</li> </ul>	Credentials available for HCA/NA	Not required nor rewarded	Yes, rewarded	Yes, rewarded	Yes, rewarded	Yes, but not widely required nor rewarded
		<ul style="list-style-type: none"> <li>Foreigners find it difficult to qualify</li> </ul>	Possibility for foreigners to qualify as RN	Yes, but difficult/opaque	Yes, but difficult/opaque	No	No	No
<b>Key issues</b>	<b>Training</b>	<ul style="list-style-type: none"> <li>Varies by operator; typically provided but tends to focus on skills rather than advancement</li> </ul>	Training Hours/Year	75	20	25	40	12
			Training leads to qualifications	Only provided by a few operators	Yes	Varies by operator	No	Vocational training may lead to qual.
<b>Key issues</b>	<b>Working Conditions</b>	<ul style="list-style-type: none"> <li>Varies by operator; however other countries enjoy better hours and flexibility in general</li> </ul>	Working Hours/Week	50	39	44	45	57
			Flexibility	Low 12-hour shifts; some PT roles	High 8-hour shifts; many PT roles	High 8-hour shifts; many PT roles	High 8-hour shifts; many PT roles	High 8-hour shifts; many PT roles

**Key**

- Weak talent proposition
- Moderate talent proposition
- Strong talent proposition

Note: (\*) Average of local and foreign workers except SG, which reflects local salary; (\*\*) Indicates the rank of NA/HCA salaries amongst 15-20 alternative local jobs (with 1<sup>st</sup> quartile having the highest salaries and 4<sup>th</sup> quartile having the lowest)

Source: As provided in respective reference pages.

# Promotion opp.: Other countries offer progression pathways, or appeal to workers' requirements for stable/ flexible employment

Singapore



Australia



Japan



Korea



Hong Kong



## Limited opportunities for advancement and stability

- Locals prefer **multi-track careers in hospitals**
- Foreigners face a **career glass ceiling** as most vacancies as in support care roles. Relative **lack of training subsidies**

*"Opportunities are available for learning but they are inaccessible for foreign workers due to prices. My current company is a **good platform for gaining experience but not for promotion**. I'd consider moving to NZ, AUS or CAN for personal growth."*

Foreign Allied Health Prof.,  
Nursing Home

- Lack of flexibility**, especially in NHs (require night/ weekend shifts)
- Govt.'s efforts** on accelerated training focuses **only on locals** and just for **professional care** roles

## Clear certification and progression pathways

- Nursing students **gain early exposure to LTC** through part-time roles or supervised internships, and receive **training subsidies** for Cert III (Aged Care) or nursing degrees

- Large, integrated multi-service providers offer **internal rotations across different types of centers** similar to a typical MNC 'management associate' programme

- 'Consumer Direct Care' packages allow home carers to have **more choice and control** over what services they deliver and when

- OT, night and weekend shifts are compensated at 200%

- Nurses and care workers are able to **pursue a 'social worker' certification** that allows them to lead and manage their own nursing facility

### Straightforward salary progression

*"Promotion prospects are attractive. The average care worker salary is JPY3M/year (~S\$3K/mth). With a license, good work ethics and some leadership skills, this will increase to JPY4-5M (~S\$4-5K/mth). As ~60% of our workforce moves from a different industry, this is quite **attractive**."*

CEO, Nursing Home

## KR/HK get around lack of advancement by offering stability and flexibility, as well as focusing on the meaningful aspects of the job

- For older people, LTC is perceived as a **stable and meaningful job**

*"Most caregivers are women in their 50s. LTC is perceived as **virtuous** and allows them to secure **an income that is stable and higher than their peers**."*

Operations Head, Nursing Home

- Young people are also keen to work in LTC:

- **Personal passion** to become a social worker
- Desire to become a **small business owner**

*"**University students often intern in nursing facilities**. This inspires them to earn a social worker license in their 20s or 30s. After accumulating sufficient experience, many then aspire to own their own LTC facilities with ~10 patients/facility."*

Director, LTC Services Consultancy

- Opportunity for middle-aged, **experienced nurses to work part-time** while balancing family commitments

*"LTC roles are appealing to experienced nurses, especially those with schooling children, due to the **flexible working arrangements**."*

HK Industry Practitioner

- Offers a **stable job** "through retirement"

*"There is a stable, experienced and committed workforce in LTC of workers in their 50s. Many **NGOs develop salary packages to re-employ them after retirement from 60 to 65**."*

HK Industry Practitioner

- Vocational qualification** is available for people who make a mid-career switch or did not to pursue a degree in Nursing

*"The gov't has introduced a **6 month certification course** that can replace Form 5 qualifications to offer people more choices."*

HK Industry Practitioner

Source: Industry Practitioner Interviews, Survey of long-term care workers (n=251)



# LTC sector enjoys a positive reputation in some benchmark countries and all of them are stepping up support initiatives



## AUSTRALIA

REPUTATION OF LTC WORK

- Locals perceive as LTC being **'hard labour'**—similar to Singapore
- **Unattractive to young local workers**; staff typically 40-50 years-old
- **Attracts foreigners** due to high minimum wage, and progressive working hour regulation (maximum working hours of 10h/d and 38h/w for healthcare services)



## JAPAN

- Closely integrated into economy & society – **career pathways available**
- **Part of daily life** given 'hyper-ageing status'
  - Daily activities adapted for elderly use e.g. dedicated spaces in malls

*"The key to engaging more senior employees is by helping them focus on their care-giving job, not as a part-time wage-filler, but as a **second career that they can really develop**. For some, the **possibilities appear endless**."*

CNN, 24<sup>th</sup> Aug 2017



## KOREA

- **Positively perceived:**
  - Confucian values imbue respect for elderly
  - A stable, flexible and low pressure job (vs. hospitals), especially for low income elderly

*"**Koreans are happy to work in nursing homes** as the work is easier than in hospitals – they receive more days off, care for fewer patients – as well as other service roles, and they receive permanent employee status."*

Korean Director, LTC Consultancy, Korea



## HONG KONG

- **Restrictions on foreign workers have pushed up salaries of locals**
- However, **shortage in NGO/private sector** as public sector pays more

*"**Recruitment is a huge issue** as I cannot recruit internationally and I am unable to attract locals to work in this sector. The public sector pays significantly more than NGOs and the private sector."*

Hong Kong GM, Nursing Home, Hong Kong

OPERATORS/GOVERNMENT SUPPORT

- **Innovation networks** to build a community of operators e.g. innovAGEING
- Increasing **funding**: E.g. AUD34M for Dementia & Aged Care Services Fund
- Bringing in more **foreign workers**
- **Residency visa for foreign care workers** and technical intern trainings for foreign nursing students
- Creative technological solutions
  - E.g. Iruma: waterproof QR code stickers affixed to fingernails or toenails of dementia patients in case they get lost

*"An innovative Dep't of Foreign Affairs & Trade pilot is underway, bringing in qualified Pacific Islanders to meet aged care skills gaps in remote and rural areas of Australia."*

EY Healthcare Insights, Oct 2016

*"**Japan wants 10,000 Asian elderly care workers in 3 years**; Tokyo looks to Vietnam, Thailand and Laos to help ease the labour crunch."*

Nikkei Asian Review, 13<sup>th</sup> Jun 2017

- **Long-term care insurance scheme (LTCI)** significantly relieves burden on family
- **Marketization of LTC** has directly created new jobs
  - # LTC workers increased from 38K in 2008 to 252K in 2013 (NHIC, 2013)
- **Gov't grading scheme** encourages NHs to provide highest levels of service and staff welfare quality

- **Community initiatives** for elder care & engagement
  - E.g., ICT outreach programmes, "Age-Friendly Hong Kong Project", Senior Citizens Day

- Increased **eldercare budget**: E.g. HK\$1B in subsidies for eldercare tech investment

- Opening up to **foreign workers**

*"**Indonesian officials to visit HK on elderly care scheme**."*

Asia Times, 13<sup>th</sup> Oct 2017

Source: OECD, Fairwork Australia, Hong Kong Policy Address (2016, 17), Literature Search, Industry Practitioner Interviews

# Agenda

- Overview of LTC in Singapore and other benchmarked countries

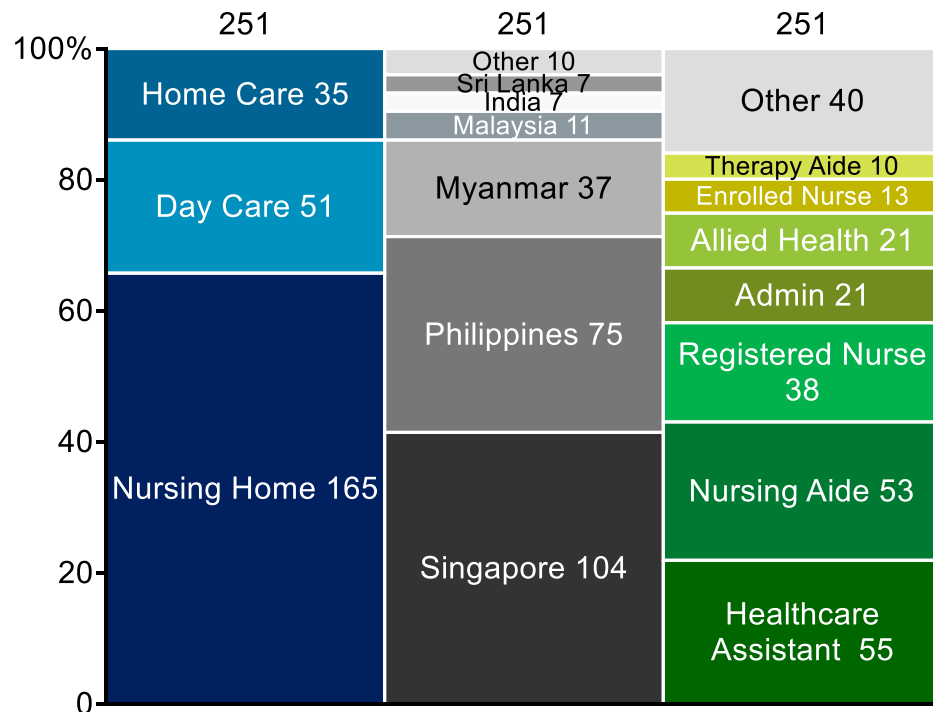
- Attracting & retaining LTC workers

- Emerging recommendations

# We surveyed 251 LTC workers as well as 53 local hospital workers to understand their perceptions of working in long-term care

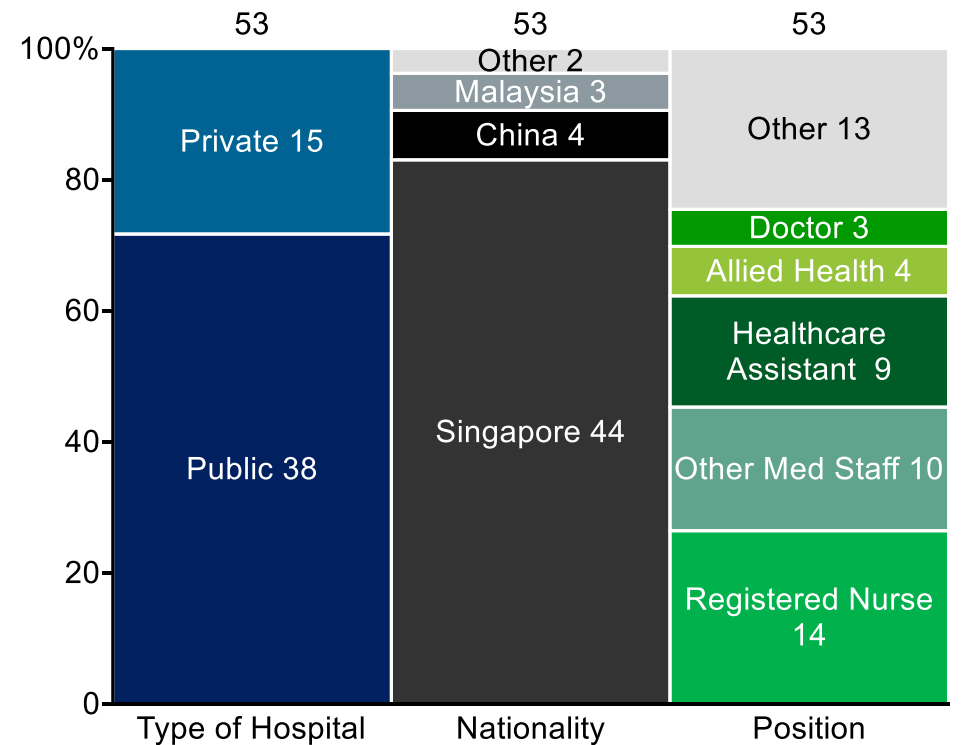
## LTC WORKERS

% LTC workers



## LOCAL HOSPITAL WORKERS

% local hospital workers



Note: "Local" defined as Singaporean citizens and PR; "Other" includes all n<5%, other positions such as drivers, cooks, cleaners, business operations staff as well as blank responses; "Other Medical staff" includes radiologists, lab technician, pharmacists etc.

Source: Survey of Singapore LTC Workers (n = 251); survey of local hospital workers (n = 53)

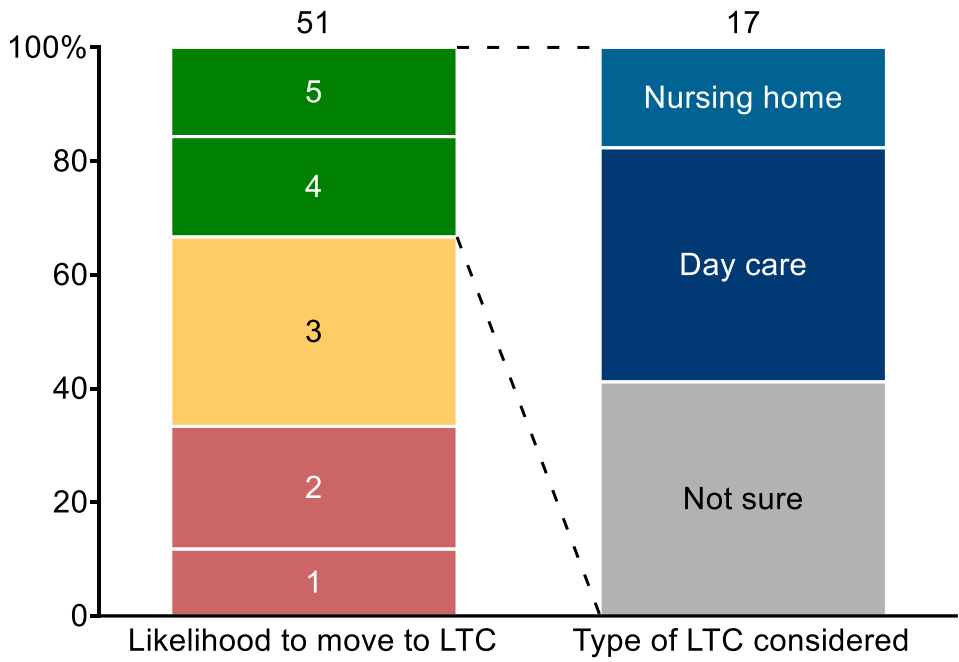
# Local healthcare workers reluctant to consider LTC: Perceive it as more difficult and less interesting than other healthcare jobs

## ONLY ~33% OF LOCAL HOSPITAL WORKERS WOULD CONSIDER A JOB IN LTC

**Q:** How likely are you to consider a job in long-term care? (1 = Not at all likely, 5 = Extremely likely)

**Q:** Which type of long-term care might you consider working in?

% local hospital workers surveyed



## KEY BARRIERS ARE NEGATIVE INDUSTRY REPUTATION, SKILLSET AND INTEREST

### REPUTATION OF BEING "DIRTY AND HARD"

*"Very few Singaporeans in long-term care, due to a stigma that long-term care jobs are "dirty and hard", involving a lot of unglamorous cleaning work. Parents themselves often discourage children from taking up long-term care jobs. It is very difficult to change people's mindsets."*

Local Director, LTC Consultancy, Singapore

### PERCEIVED AS MORE CHALLENGING

*"I'm not sure I want to work in long-term care. I will need more time to train my level of patience and diligence to care for elderly. If I do switch, I would consider working in a nursing home."*

Local Healthcare Assistant, Hospital, Singapore

### DIFFERENT SKILLSET REQUIRED

*"I will likely not switch to long-term care as the job scope is different and a different skillset is needed."*

Local Registered Nurse, Hospital, Singapore

### LACK OF INTEREST

*"I am unlikely to switch as my interest is in intensive care."*

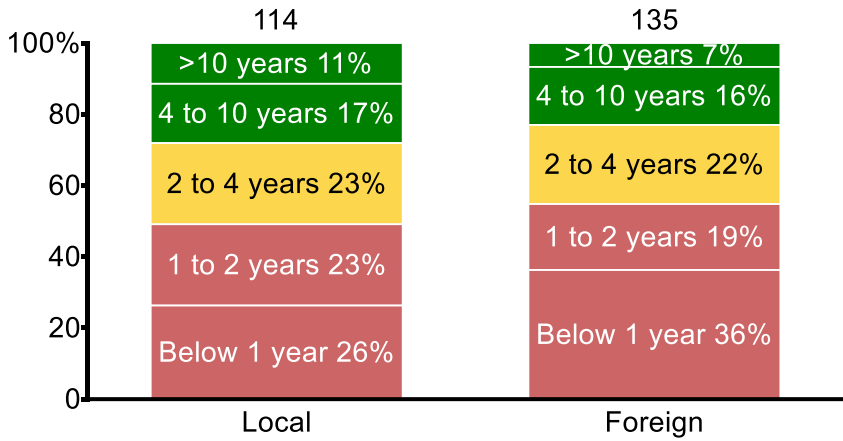
Local Registered Nurse, Hospital, Singapore

Note: "Likely" chose 4 or 5 out of a 5 point scale of how likely they are to switch  
 Source: Survey of local hospital workers (n = 53)

# Singapore’s reliance on foreigners, ~55% of whom have worked in their current company for under 2 years, may make it challenging to meet the 45% direct-care workforce growth target

## LTC FOREIGN WORKERS STAY WITH THEIR COMPANY FOR 2.8 YEARS ON AVERAGE...

% of respondents by number of years working at current company



## ... TYPICALLY RETURN HOME TO THEIR FAMILY, OR OTHER COUNTRIES FOR BETTER OPPORTUNITIES

### MAJORITY ENTER & LEAVE SG WITH THE SAME CO

*“On average, our **foreign workers** stay for 3-4 years. They typically leave during or upon completion of their 2<sup>nd</sup> contract”*  
 Executive Director, Home Care Operator, Singapore

### LEAVE FOR BETTER OPPORTUNITIES

*“People use **Singapore** as a **stepping stone** to higher paying countries”*  
 Managing Director, LTC Consultancy, Singapore

### LEAVE FOR FAMILY

*“We can’t get a dependent pass for my daughter, so she’s now living in **Philippines** with my mother. We **plan to go home** so our family can be reunited”*  
 Foreign, Registered Nurse, Nursing Home, Singapore



**To reduce churn, Singapore’s LTC sector needs to hire more Singaporeans—but locals are reluctant to work in the LTC sector**

# Foreign LTC workers increasingly considering other countries for higher pay and better conditions, or staying home

## OTHER COUNTRIES ARE BECOMING MORE AGGRESSIVE: E.G. JAPAN TO HIRE ~30K NEW FOREIGN WORKERS BY 2023

---

*“Japan aims to attract 10,000 Asian interns to its nursing care sector over the next three years to help address the growing labor shortage. The first arrivals will come in November from Vietnam. Last year, the government added nursing care services to the list of sectors allowed to offer technical intern training programs for foreigners.”*

Nikkei Asian Review, 13<sup>th</sup> June 2017

*“Historically, foreigners have only been allowed to work as personal care workers in private nursing homes. However, due to rising manpower demand, the gov’t is expected to open this quota to gov’t nursing homes as well beginning Sep 2018.”*

Consultant, LTC Services Association,  
Hong Kong

## SOURCE MARKETS ARE CLAMPING DOWN

---

*“Due to a growth in demand for healthcare services, Myanmar has increased healthcare salaries for local workers to US\$500 per month and imposed a two year bond. Local experience is equally recognized as international experience on a tenure basis for salary considerations.”*

Director, Nursing Home, Singapore

*“The Philippines is tightening their screws as the embassy does not want local workers to pay high recruitment fees to agents.”*

Director, LTC Consultancy, Singapore

*“Source markets like Philippines are becoming more protective of their citizen’s labor rights, and making it more challenging to hire their citizens.”*

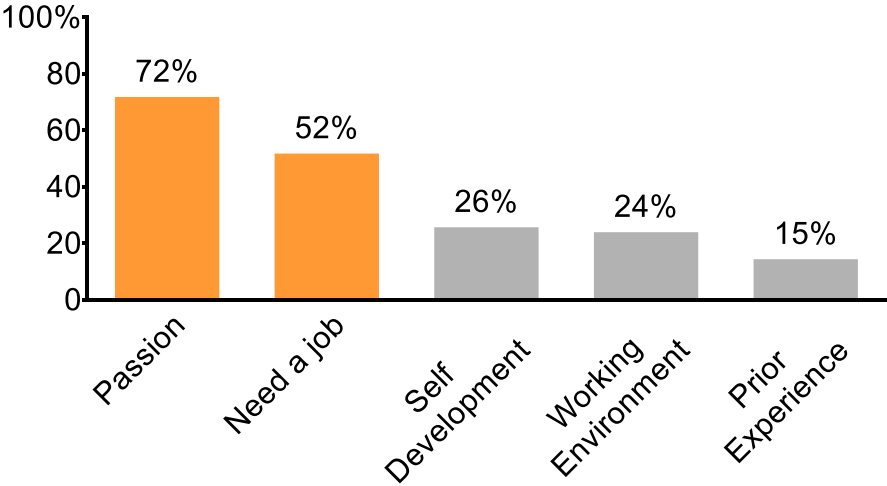
Director, Nursing Home, Singapore

# Singapore LTC workers are motivated to join LTC because of passion and the need for a job

**Question:** Why did you choose to work in your current job? What are 3 most important reasons?

## LOCAL WORKERS: PASSION AND FINDING A JOB THE PRIMARY MOTIVATORS FOR WORKING IN LTC

% total responses (Top 5 identified drivers)

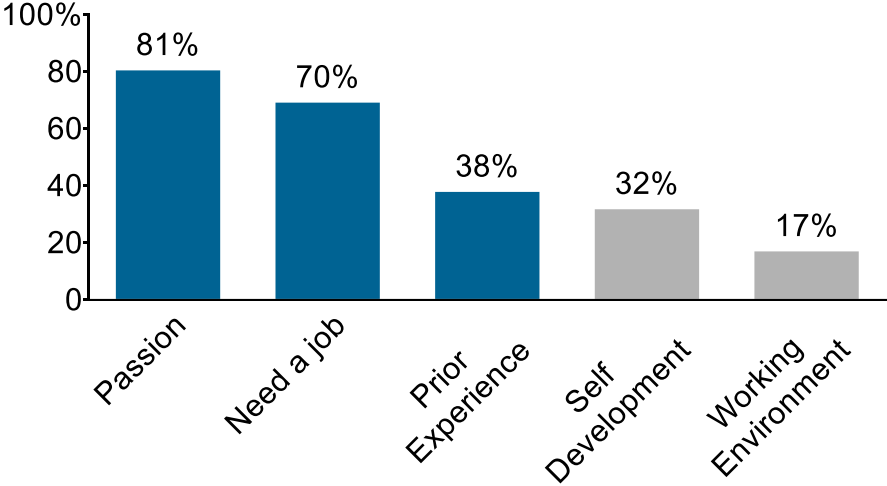


*“Working in long-term care is a personal **passion**. I find it **rewarding** to build strong relations with the elderly.”*  
Local Healthcare Assistant, LTC

*“I started working in long-term care 2.5 years ago because I **needed a new job**. I am above 46 years old.”*  
Local Healthcare Assistant, LTC

## FOREIGN WORKERS: PASSION AND FINDING A JOB ARE STILL KEY, BUT RELEVANT EXPERIENCE IS ALSO IMPORTANT

% total responses (Top 5 identified drivers)



*“I was a **nurse in the Philippines** and I have a **passion for caring**.”*  
Foreign Nursing Aide, LTC

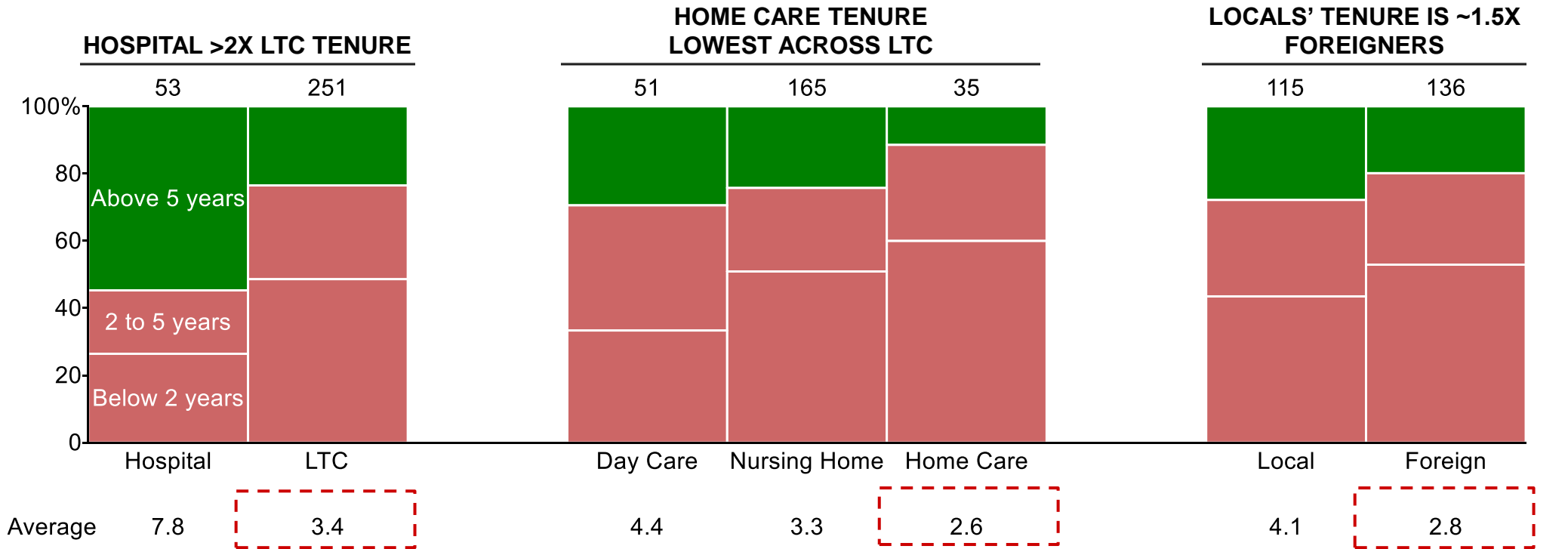
*“I came to work in Singapore to **earn money**; back home, there is not enough income in the family.”*  
Foreign Nursing Aide, LTC

Note: Local includes Singapore citizens/PRs; Percentage indicates the number of respondents who have provided a key word linked to a specific factor, divided by the total number of local or foreign respondents respectively  
Source: Survey of Singapore LTC Workers (n = 251 as of 28 Feb 2018)

# Average LTC tenure is 3.4 years, lowest in home care (2.6) and amongst foreigners (2.8)

**Question:** How many years have you been working in your current company?

% of respondents by number of years working at current company



*“Long-term care workers play **“musical chairs”** in the industry; as there are such limited resources, every time a new center opens, they just steal from someone else”*  
 Director, LTC Services Operator, Singapore

*“**Home care is the least popular**, because you’re working alone. Staff often move to other types of LTC for better workload, and support.”*  
 Director, LTC Consultancy, Singapore

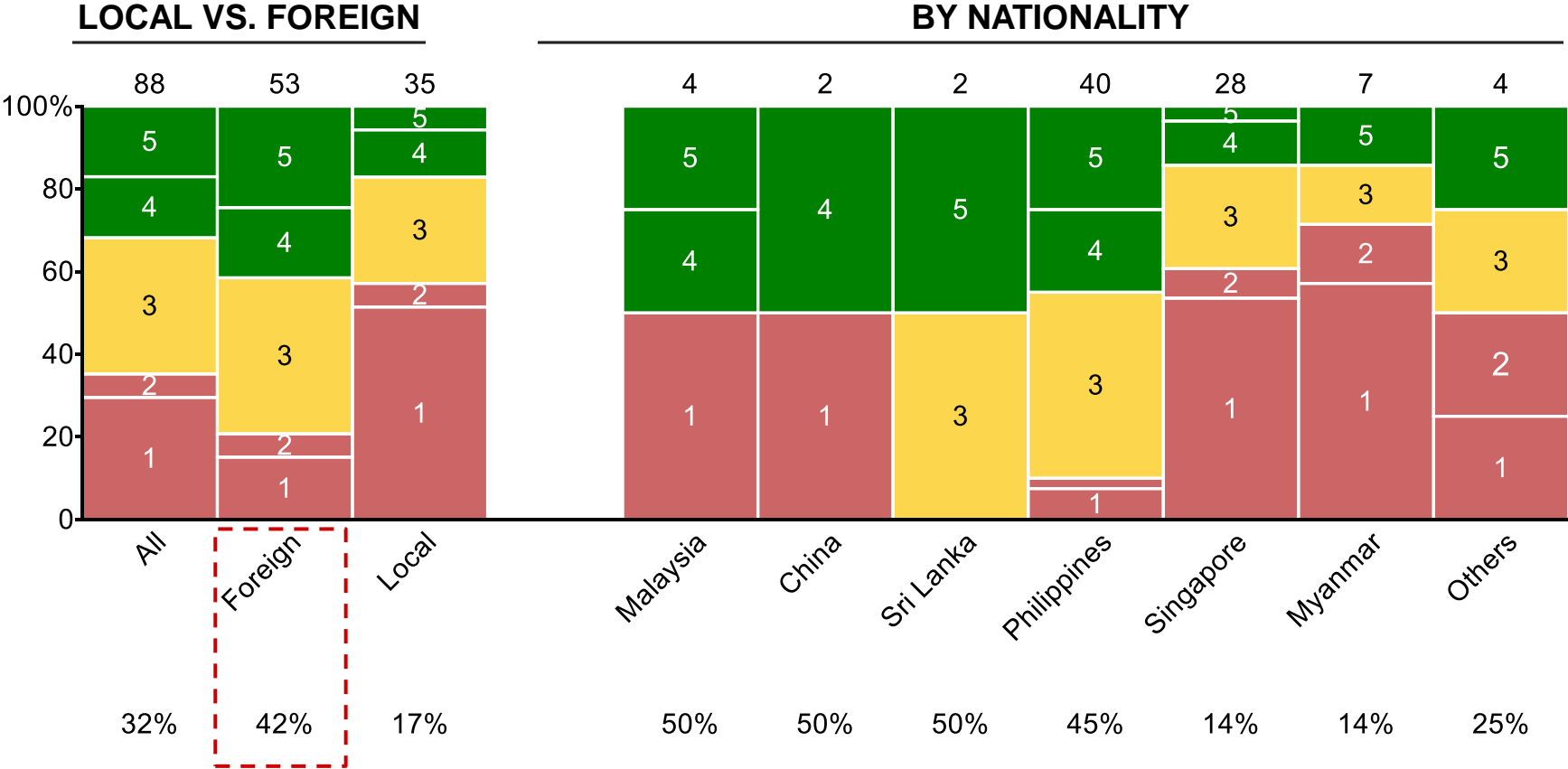
*“**Most foreign workers leave after their first contract**. Many see Singapore as a stepping stone to countries like Australia with better pay and job prospects.”*  
 COO, Nursing Home, Singapore



# Significant proportion of foreign LTC workers (42%) are likely to consider leaving Singapore

**Question:** How likely are you to consider working in another country?  
(1 = Not at all likely, 5 = Extremely likely)

% respondents who are likely to consider working outside of SG

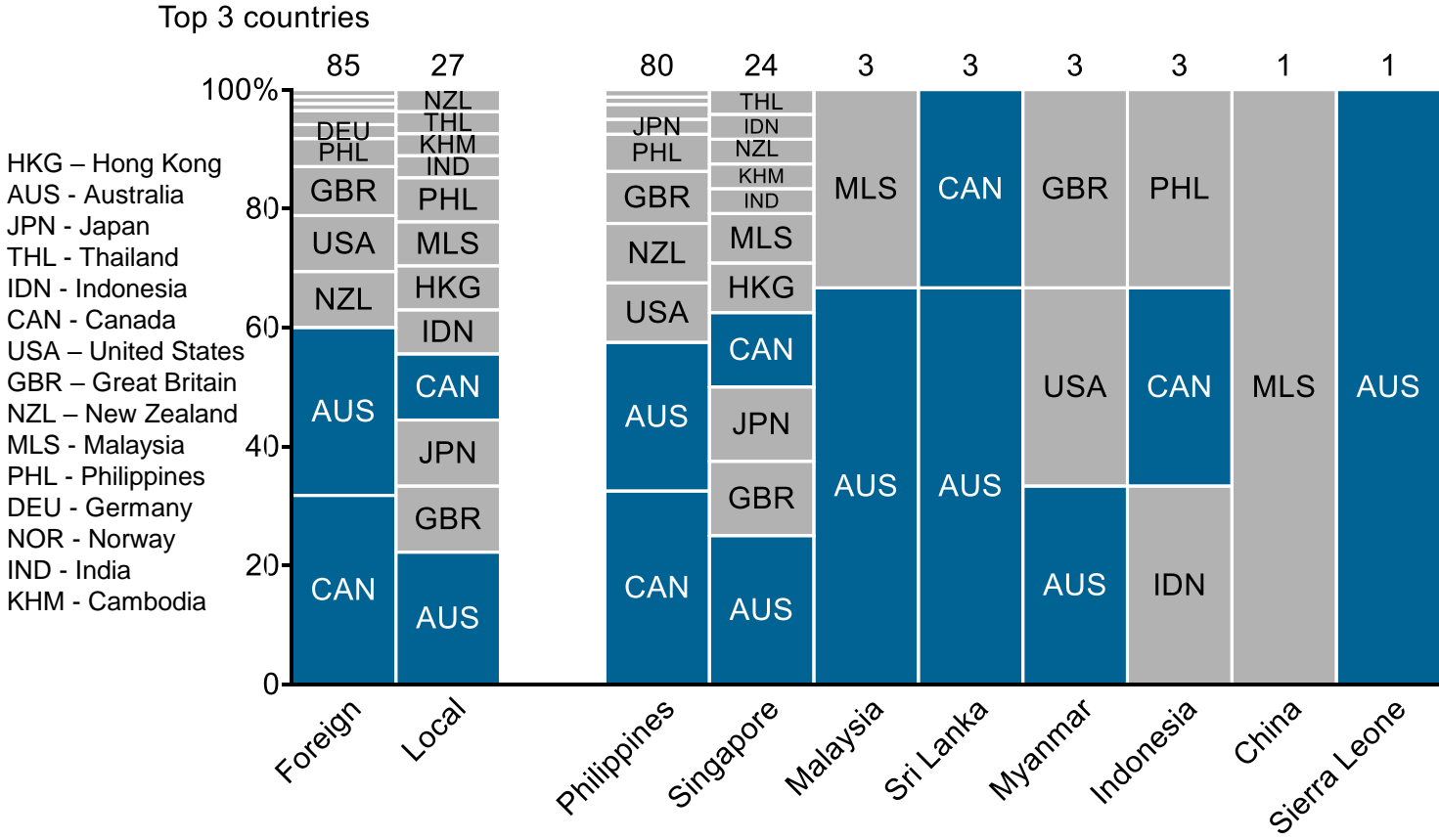


Note: Only respondents who have indicated they are likely to look for a new job are asked this question  
Source: Survey of Singapore LTC Workers (n = 251)

# Singapore LTC workers are most interested in moving to Australia and Canada for better pay and working conditions

## MOST INTERESTED IN AUSTRALIA & CANADA

**Question:** If you are likely to move to another country, what are the top 3 countries you are interested in?



## LEAVING FOR COMP & WORKING CONDITIONS

**Q:** Why do you want to work outside of Singapore?

**COMPENSATION**

*"I would like to move to Australia, Canada or New Zealand, as these countries offer better opportunities and higher salary."*

Foreign Nursing Aide, LTC

**WORKING CONDITIONS**

*"I am interested in working in Hong Kong or Japan as these countries have different cultures in taking care of the elderly that I want to learn from."*

Local Healthcare Assistant, LTC

**OPPORTUNITIES**

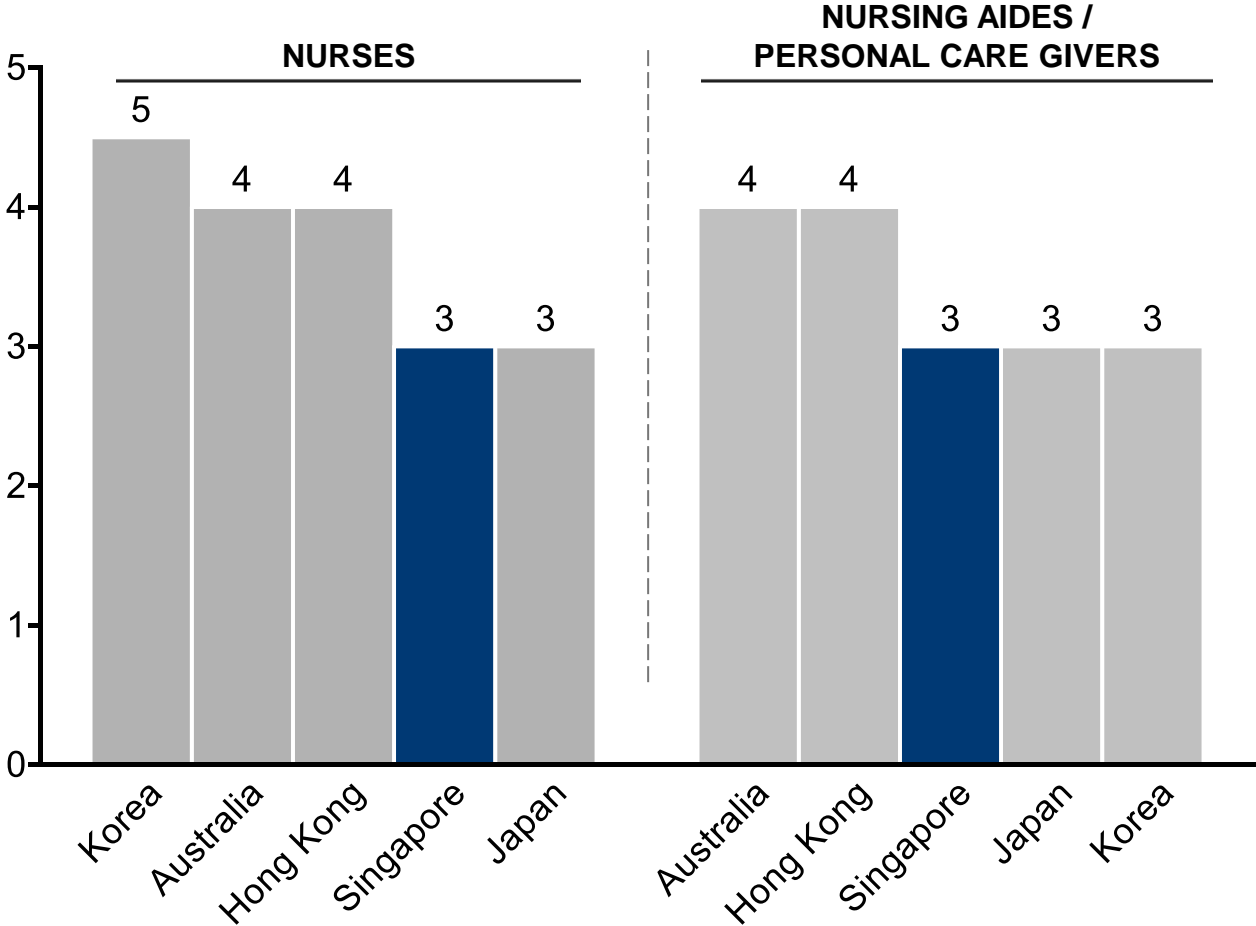
*"I would like to move to the UK, Germany or Norway, as these countries have more attractive compensation and fewer working hours."*

Foreign Registered Nurse, LTC

Note: Total # of responses may not tally with # of respondents as each respondent may indicate 0 to 3 countries of interest  
 Source: Survey of Singapore LTC Workers (n = 251)

# SG's LTC average tenure typically on the lower end relative to benchmarked peers, indicating higher attrition

Average Tenure (years)



**ESTIMATES**



*"We rely a lot on **current university students** who work part-time with us, they typically leave after their graduation in 3-4 years. However, the current industry boom with the opening of many new centers is driving up attrition."*

Head of Talent, Eldercare Group, Australia



*"We have **very high attrition due to low salaries and working conditions**. Many of our staff suffer from back pain and mental health issues such as depression."*

Manager, Nursing Home, Japan



*"Eldercare is generally considered an **attractive industry to work in**. Most workers leave for personal reasons like the distance from their homes."*

Independent Expert, Consultancy, Korea



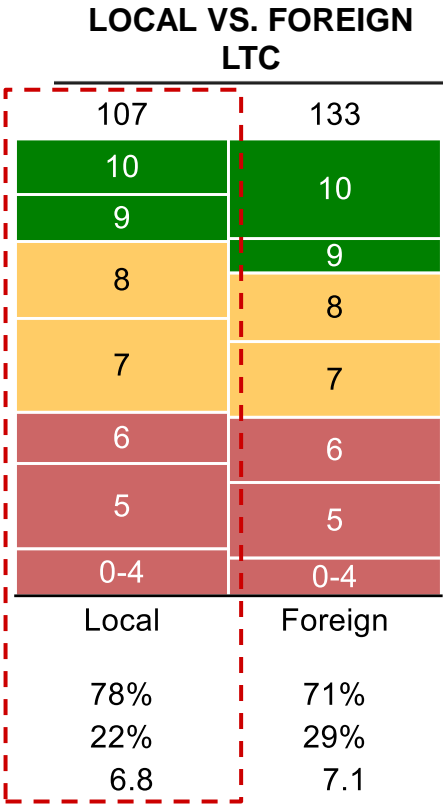
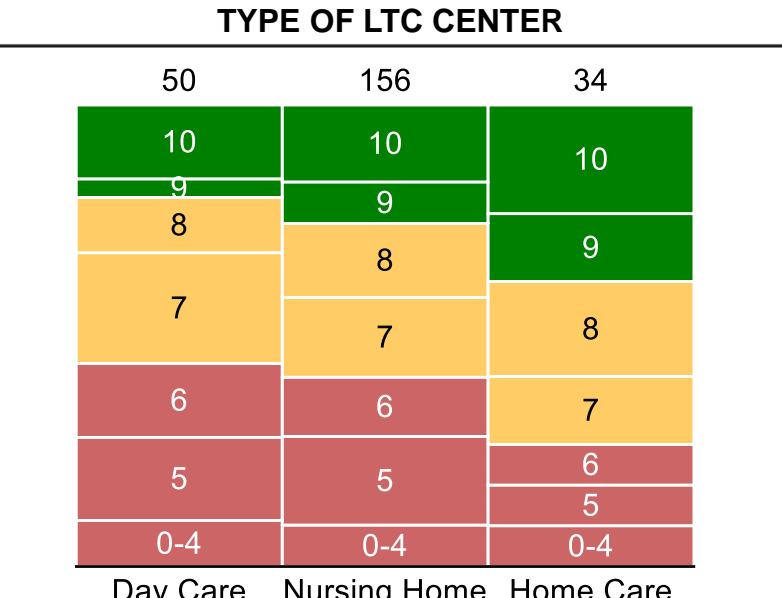
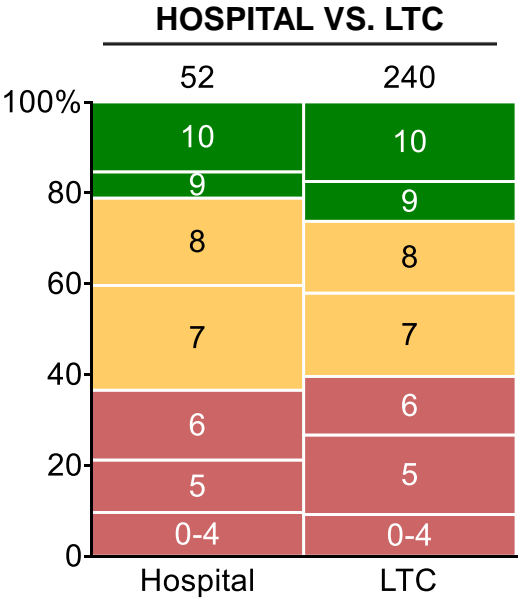
*"Gov't homes offer good welfare--people typically stay 3-5 years in the same home. You may find people who work for 8 to 10 years through retirement at age 65."*

Research Consultant, LTC Association, Hong Kong

# Overall, 3 of 4 SG LTC workers are unlikely to recommend their company as a place to work, especially among local workers

**Question:** How likely are you to recommend your company to a friend or a relative as a place to work?  
 (On a scale from 0 to 10, where “0” means “not at all likely” and “10” means “extremely likely”)

% respondents



% 0 - 8	79%	74%
% 9 - 10	21%	26%
Average score	7.0	7.0

% 0 - 8	80%	74%	62%
% 9 - 10	20%	26%	38%
Average score	6.7	7.0	7.5

% 0 - 8	78%	71%
% 9 - 10	22%	29%
Average score	6.8	7.1

“Long-term care seen as **poor cousin** to hospitals—people think our work is mundane and boring.”  
 Local Allied Health Professional, LTC

“Working with elderly requires a **very high level of patience and diligence**. This is my passion but others might not share it.”  
 Local Healthcare Assistant, LTC

“This is a **very challenging** job that **requires a lot of patience, love and care**. It is quite hard to encourage other people to join the industry”  
 Local Therapy Aide, LTC

“**Long hours** (12 hours a day), with **heavy workload** and **changing job scope**”  
 Foreign Nursing Aide, LTC

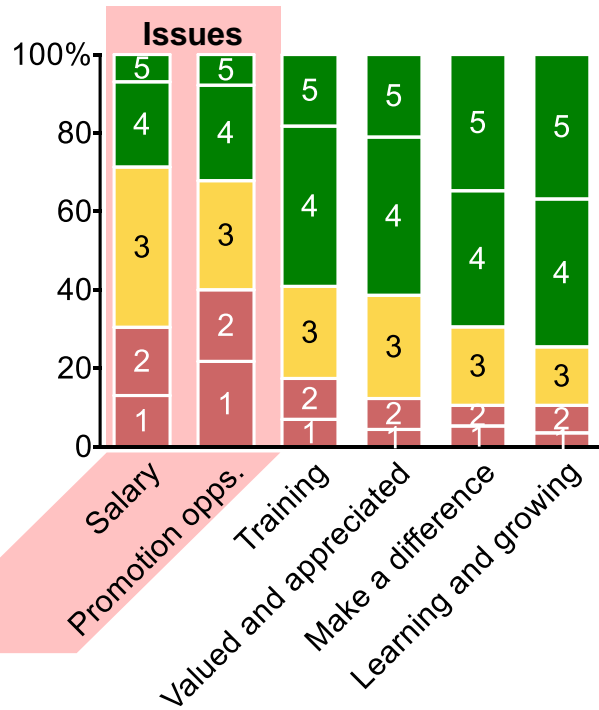
Source: Survey of Singapore LTC Workers (n = 251); survey of local hospital workers (n = 53). Note: Ranking based on Net Promoter Score method, where only those who opt for 9 and 10 in 11-pt scale are considered true “promoters”

# SG LTC workers more dissatisfied with promotion opportunities, followed by compensation relative to other issues like training

**Question:** To what extent do you agree with the following statements?  
(1 = Significantly disagree, 5 = Significantly agree)

## LOCAL

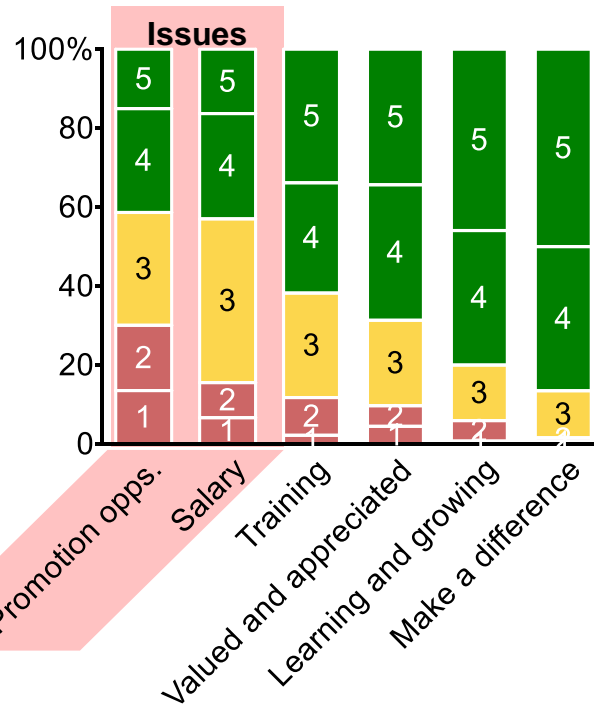
% of respondents



% 1 - 2 30% 40% 17% 12% 11% 11%  
% 4 - 5 29% 32% 59% 61% 69% 75%

## FOREIGN

% of respondents



% 1 - 2 30% 16% 12% 10% 6% 2%  
% 4 - 5 41% 43% 62% 69% 80% 87%

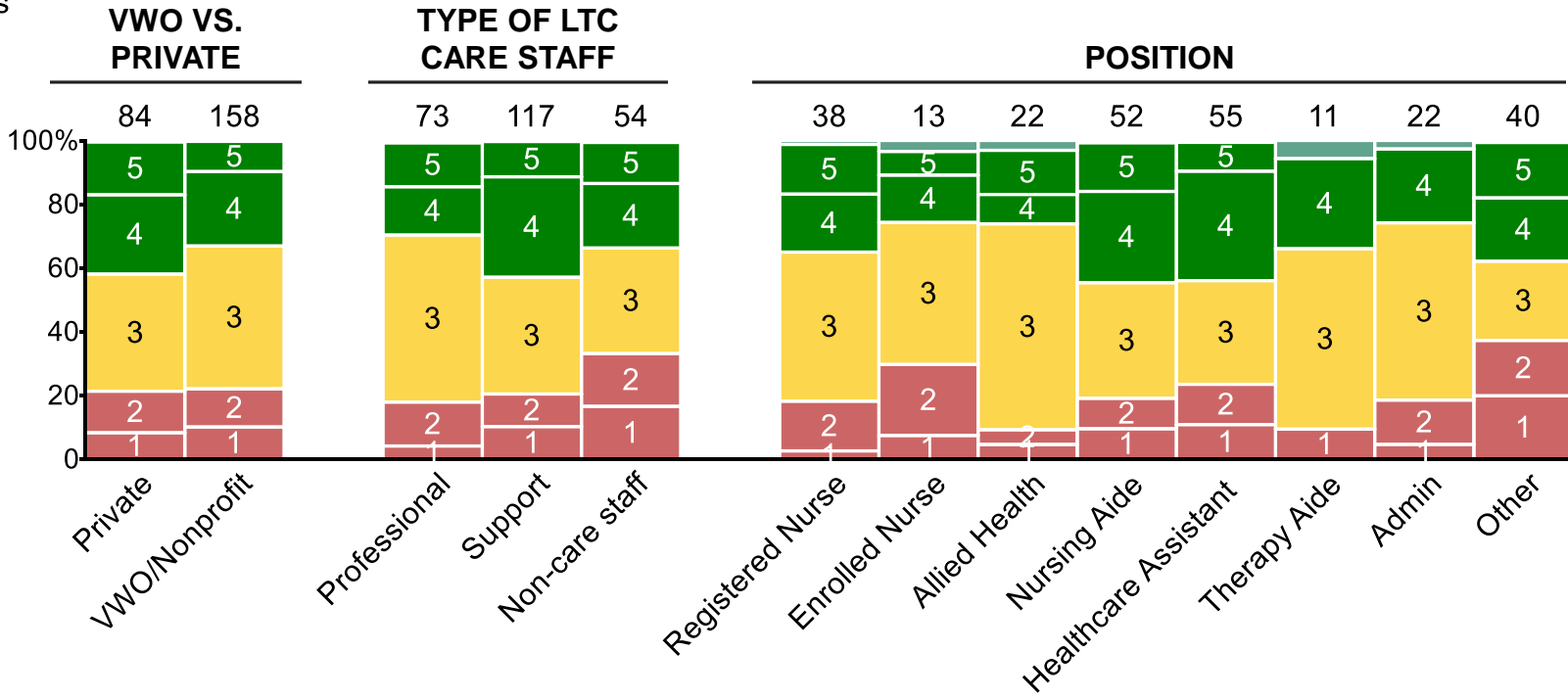
## LEGEND

Salary	My salary is competitive for the work I do
Promotion opportunities	I have attractive promotion opportunities
Valued and appreciated	I feel valued and appreciated in my job
Training	I am satisfied with the training my company provides
Learning and growing	I am learning and growing in my current job
Make a difference	I make a difference to the lives of elderly

# Compensation: Only 29% of professional care staff find their salary competitive, compared to 43% of support care staff

**Question:** To what extent do you agree with the following statements? – My salary is competitive for the work I do (1 = Significantly disagree, 5 = Significantly agree)

% respondents

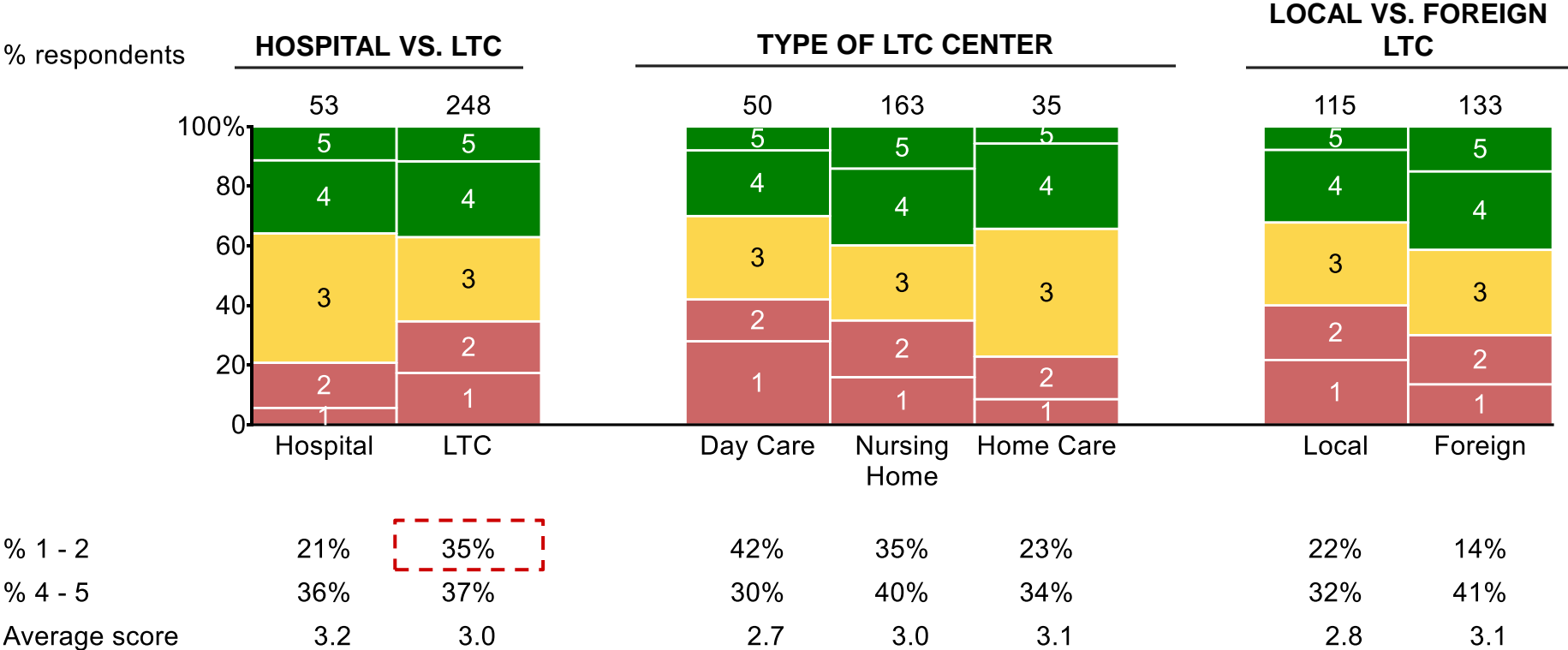


% 1 - 2	21%	22%	18%	21%	33%	18%	31%	10%	19%	24%	10%	19%	38%
% 3	37%	45%	53%	37%	33%	47%	46%	67%	37%	33%	60%	57%	25%
% 4 - 5	42%	33%	29%	43%	33%	34%	23%	24%	44%	44%	30%	24%	38%
Average score	3.3	3.1	3.2	3.2	3.0	3.3	2.9	3.2	3.3	3.2	3.1	3.0	3.0

Note: Other includes drivers, cooks, cleaners, concierge, customer service etc.  
Source: Survey of Singapore LTC Workers (n = 251)

# Promotion opportunities: 35% of LTC workers disagree that they have attractive promotion opportunities

**Question:** To what extent do you agree with the following statements? – I have attractive promotion opportunities (1 = Significantly disagree, 5 = Significantly agree)



“Local nurses often prefer hospitals because they typically offer multiple career progression tracks and higher salaries and bonuses.”

Former HR Director. Nursing Home, Singapore

“I would consider moving to UK, Australia or New Zealand, so that I can get more exposure and gain an opportunity at promotion.”

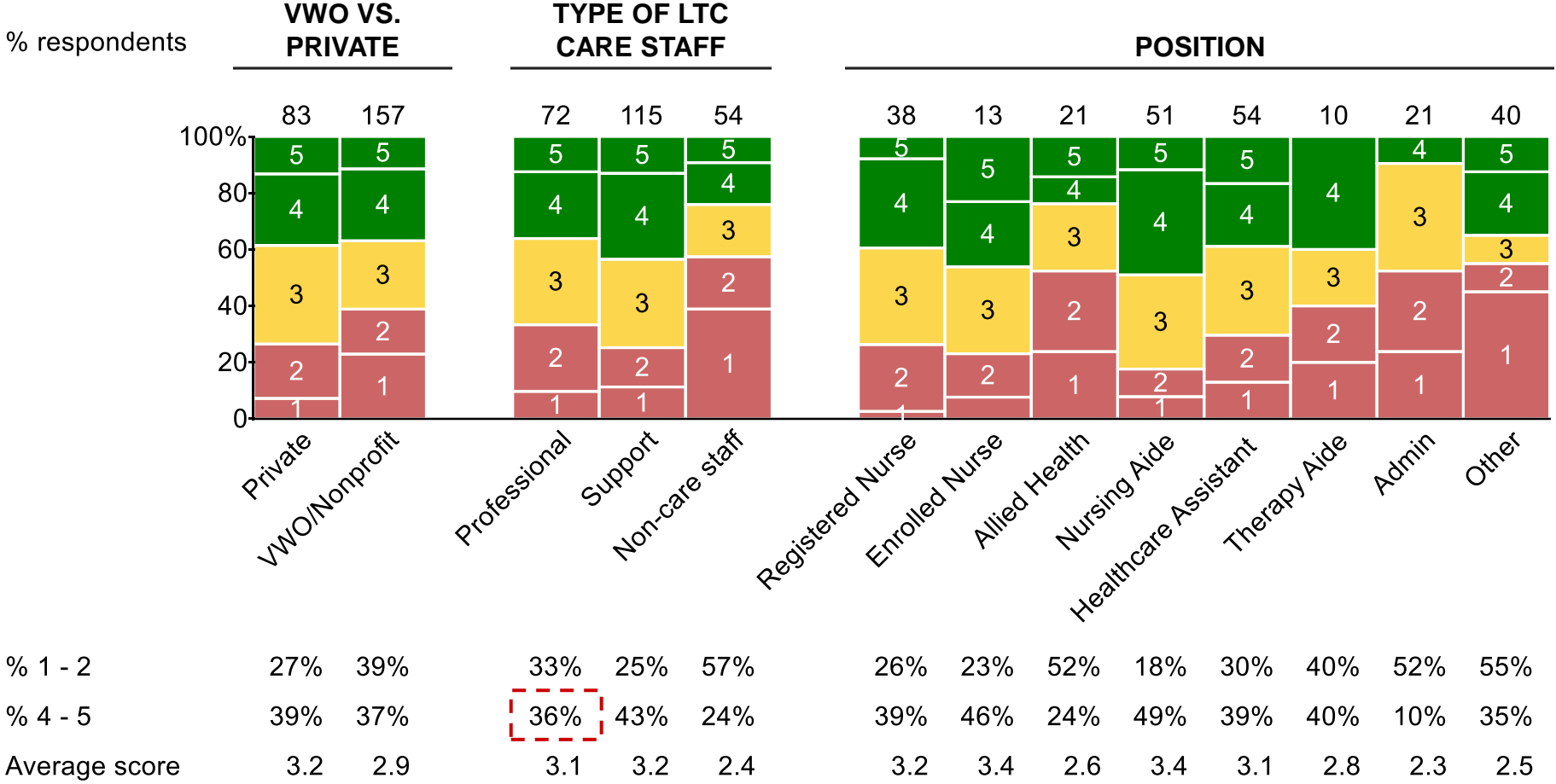
Local Healthcare Assistant, LTC

“Many foreign healthcare workers leave due to a lack of progression. it is very competitive and the exams are difficult. Foreign nurses are ambitious and will leave for more exciting opportunities.”

Administrator, Nursing Home, Singapore

# Promotion opp.: Only 36% of professional care staff are satisfied with promotion opportunities, vs 43% of support care staff

**Question:** To what extent do you agree with the following statements? – I have attractive promotion opportunities  
(1 = Significantly disagree, 5 = Significantly agree)





# Promotion opp.: Qualification process is comparable across countries and appears to be equally difficult/ opaque for foreigners



Singapore



Australia



Japan



Korea



Hong Kong

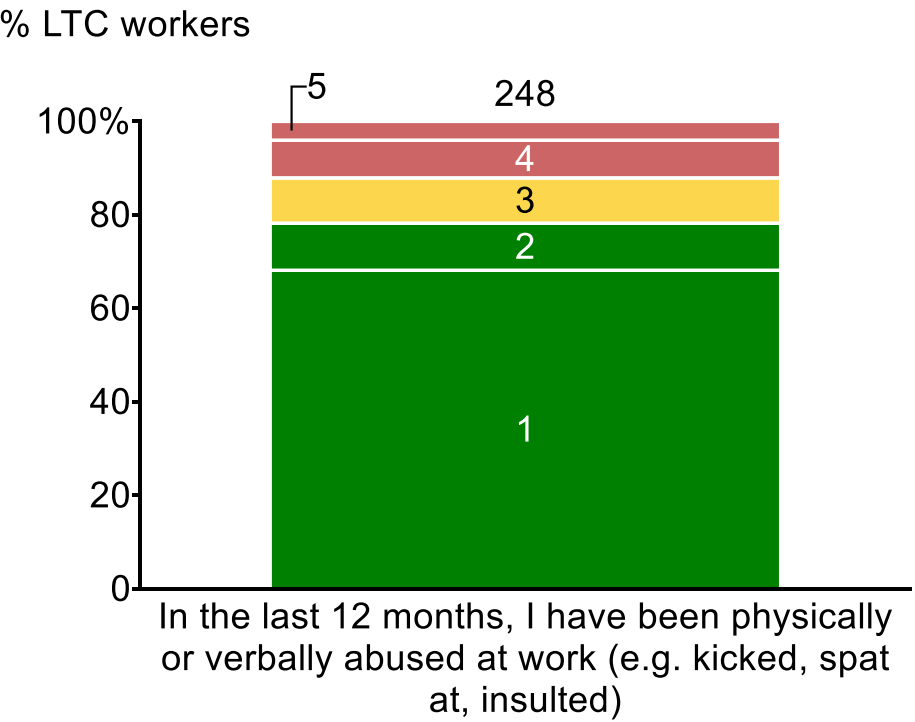
## Qualification process for Nurses (Registered/Enrolled)

<b>Paths to qualification</b>		<ul style="list-style-type: none"> <li>NA &gt; EN &gt; RN</li> <li>Difficult for HCAs to become EN</li> </ul>	<ul style="list-style-type: none"> <li>Assistant in Nursing &gt; EN &gt; RN</li> <li>If RN, 1-2 years further studies for Clinical Nurse/ Nurse Practitioner cert.</li> </ul>	<ul style="list-style-type: none"> <li>Separate nurse, care worker &amp; social worker licenses</li> </ul>	<ul style="list-style-type: none"> <li>Separate nurse, care worker &amp; social worker (SW) licenses</li> </ul>	<ul style="list-style-type: none"> <li>Separate nurse and care worker licenses</li> </ul>
<b>Est. time to qualification (local)</b>	<b>RN</b>	~4 years (incl. 3 year degree in Nursing)				
	<b>EN</b>	~3 years (incl. 2 year Diploma in Nursing)	~3 years (incl. 2 year Diploma in Nursing)	n/a	n/a	~3 years (incl. 2 year Nursing programme)
	<b>NA/HCA</b>	Not required	~5 months Cert. III Aged Care course (NA equiv.)	~3 years experience to apply for care worker license (HCA equiv.)	~3 years experience or 240h training; Nurses/ NAs/ SWs only require 40-50h training (HCA equiv.)	Not required
<b>Est. time to qualification (foreigner)</b>	<b>RN</b>	2 – 5 years as EN	Possible but difficult for foreign nurses to move from AIN (NA equiv.) > EN > RN	Locals only	Locals only	Locals only
	<b>EN</b>	2 – 5 years as NA		~3 years (incl. 2 year training at care facility)		
	<b>NA/HCA</b>	n/a				
<b>Expert commentary/ News articles</b>		<p>“RN qualification is very strict and <b>most foreign nurses are only ever able to achieve a provision license.</b>”</p> <p>Former HR Director, Nursing Home, SG</p>	<p>“We have 10-20 foreigners now. There used to be 40-50 but it is <b>difficult for foreigners to get local certification and the visa approval process seems to be tightening.</b>”</p> <p>GM, Nursing Home, AU</p>	<p>“<b>The bar for foreigners is set high.</b> Passing the national exam in Japanese is <b>incredibly difficult</b> and only 304 foreign nurses and carers have so far managed to make Japan their temporary home.”</p> <p>BBC, 16<sup>th</sup> Mar 2015</p>	<p>“There is a lack of foreigners in the Korean eldercare industry primarily because of the <b>language barrier</b>, maybe because of <b>immigration rules</b> as well.”</p> <p>Director, LTC Consultancy, KR</p>	<p>“In government homes, <b>foreign workers are not allowed.</b> Private homes typically employ foreigners for <b>24 months.</b>”</p> <p>Consultant, Elderly Services Association, HK</p>

# Working conditions: By its nature, working conditions are often challenging in the LTC sector

## ~12% LTC WORKERS HAVE BEEN PHYSICALLY OR VERBALLY ABUSED (BY PATIENTS)

**Q:** To what extent do you agree with the statement below?  
(1 = Significantly disagree, 5 = Significantly agree)



## LTC WORKERS OFTEN HAVE TO PUT UP WITH POOR TREATMENT

*“It is very challenging as it is **physically and mentally demanding** to handle patients with dementia.”*  
Local Healthcare Assistant, LTC

*“Sometimes the elderly will hit me, scold me or throw things at me – however I’m fine with that as I know they’re undergoing treatment. Instead, I get **more stress by family members of the elderly who often treat me poorly** and ask me to do additional cleaning chores that is not in my job scope.”*  
Local Registered Nurse, LTC

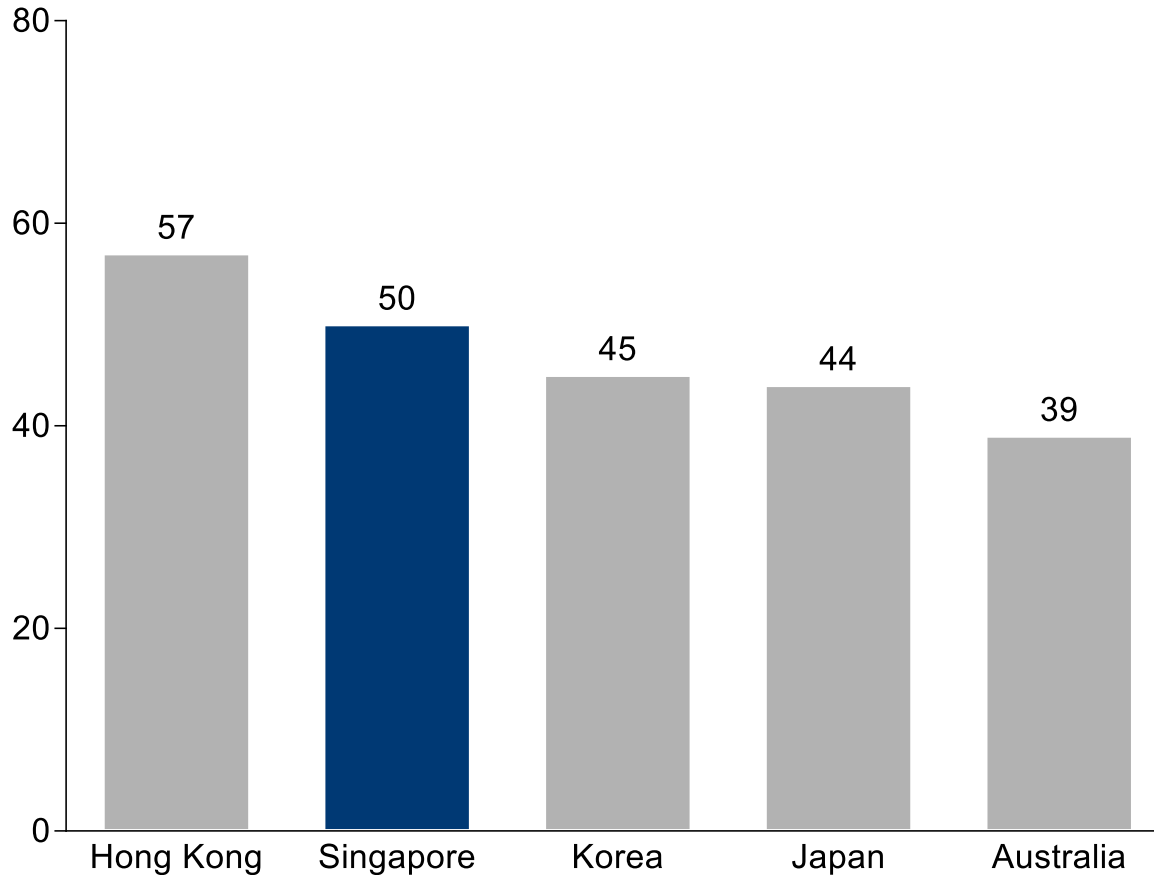
*“I’m working in eldercare because I love take care of old people. However the **working conditions are not very good** and I am always very busy... I am likely to look for a new job in healthcare and would consider moving to Canada as I feel it is **much safer**.”*  
Foreign Healthcare Assistant, LTC

*“There is an especially strong stigma for home care – as you are working in the client’s house, it could be **dangerous and you could be assaulted**. Some Indian nurses actually lie to their family that they’re working at the Singapore General Hospital... this is the image of the long-term care sector worldwide.”*  
CEO, Home Care Operator, Singapore

Note: N does not tally across questions as respondents have the option of choosing not to answer certain questions  
Source: Survey of Singapore LTC Workers (n = 251)

# Working conditions: Working hours of LTC workers in Singapore among highest across benchmarked countries

Average weekly working hours of LTC workers



*"We often require our staff to work **12-14h a day**. We also pay additional salary for overtime work."*  
CEO, Local Homecare Operator, Singapore



*"Night shift or weekend shift workers are usually fixed when they join, they also get paid a lot higher."*  
HR GM, Nursing Home, Australia



*"Many of the nurses and care workers who left Japan cite working conditions and long hours"*  
Nippon, 13<sup>th</sup> Feb 2017, Japan



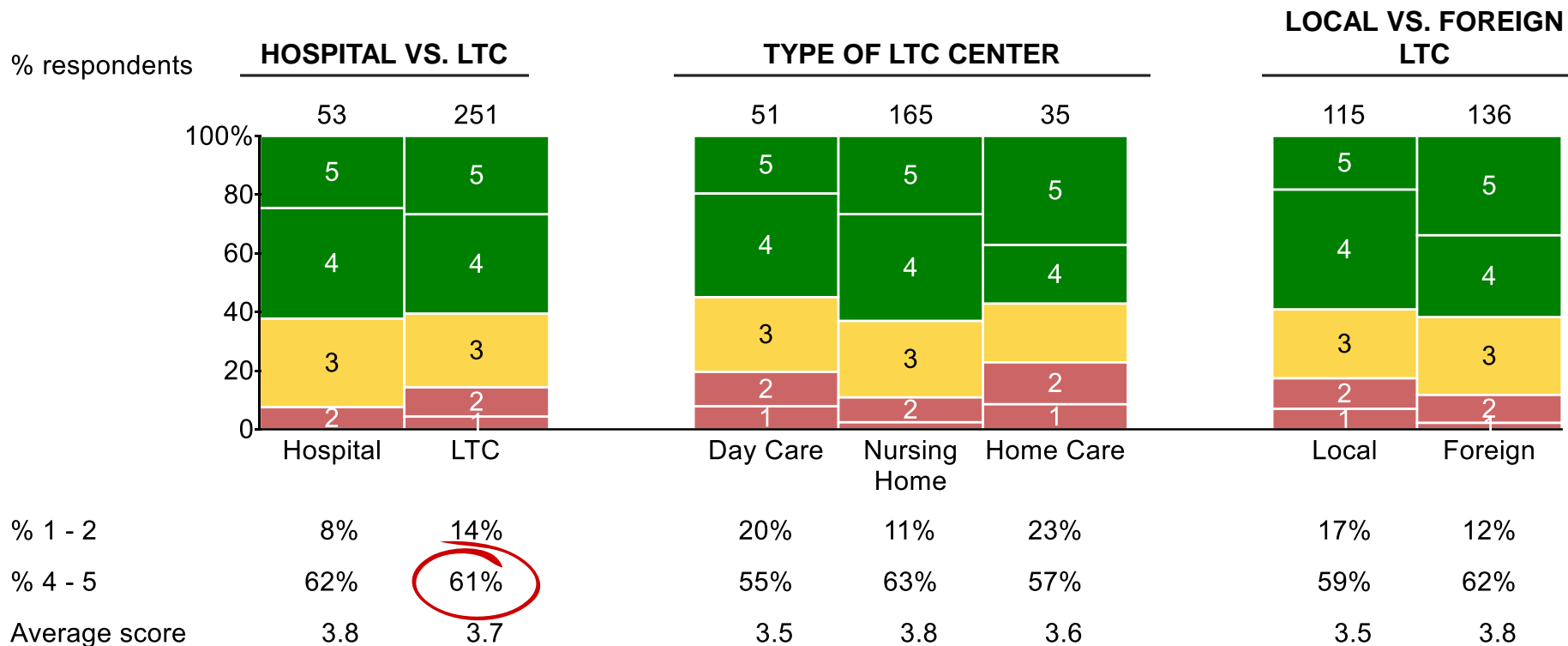
*"Workers are treated fairly. For example, if you work during weekends, you get two days off later in the week."*  
Director, LTC Consultancy, Korea



*"Government employed workers work approximately 8h/day, but private sector workers can work up to 12h"*  
Consultant, LTC Association, Hong Kong

# Training: ~61% of LTC staff are satisfied with their training, though it tends to focus on skills (e.g. CPR) vs. qualifications

**Question:** To what extent do you agree with the following statements? – I am satisfied with the training my company provides (1 = Significantly disagree, 5 = Significantly agree)



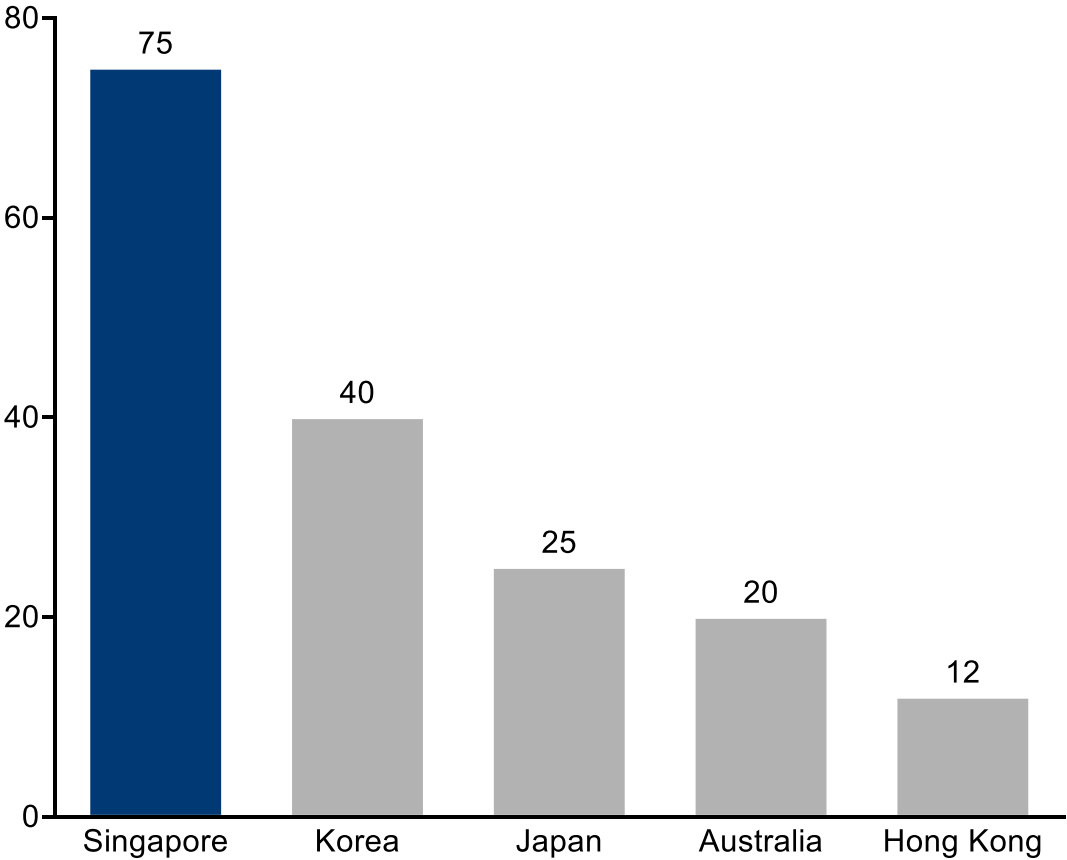
**“Trainings are usually related to the job scope.** First aid, hand-washing techniques and infection control for example – dementia training is a must for everyone.”  
Former Manager, Nursing Home, Singapore

**“There are opportunities available for further learning, such as seminars and training, but it is not really accessible for us foreign workers as it tends to be expensive.”**  
Foreign Allied Health Professional, LTC


**“I gain confidence because my company provides good training, like how to work with difficult elderly, how to teach them how to carry out daily personal care activities and so on.”**  
Foreign Healthcare Assistant, LTC

# Training: Singapore LTC workers spend more time in training than benchmarked countries; training primarily on skills

# of training hours/year per worker




## TYPES OF TRAINING

- 

*“Weeks of theory in the morning (e.g. infection control) and on-the-job training in the afternoon; focused on ‘leveling up’ foreigners to SG standards”*


HR Director, LTC Provider, Singapore

Skills
- 

*“Mandatory In-Service courses (Medication dispensation, customer service, soft skills) & Cert. 3 & 4”*


Director, Recruitment firm, Australia

Certification

Skills
- 


*“Hard skills (how to care for the elderly) and soft skills (how to relate to the elderly)”*

Manager, LTC Provider, Japan

Skills
- 

*“In house training (treatment, cleaning procedures, emergency response, diet) as well as seminars”*

Director, LTC Consulting firm, Korea

Skills
- 

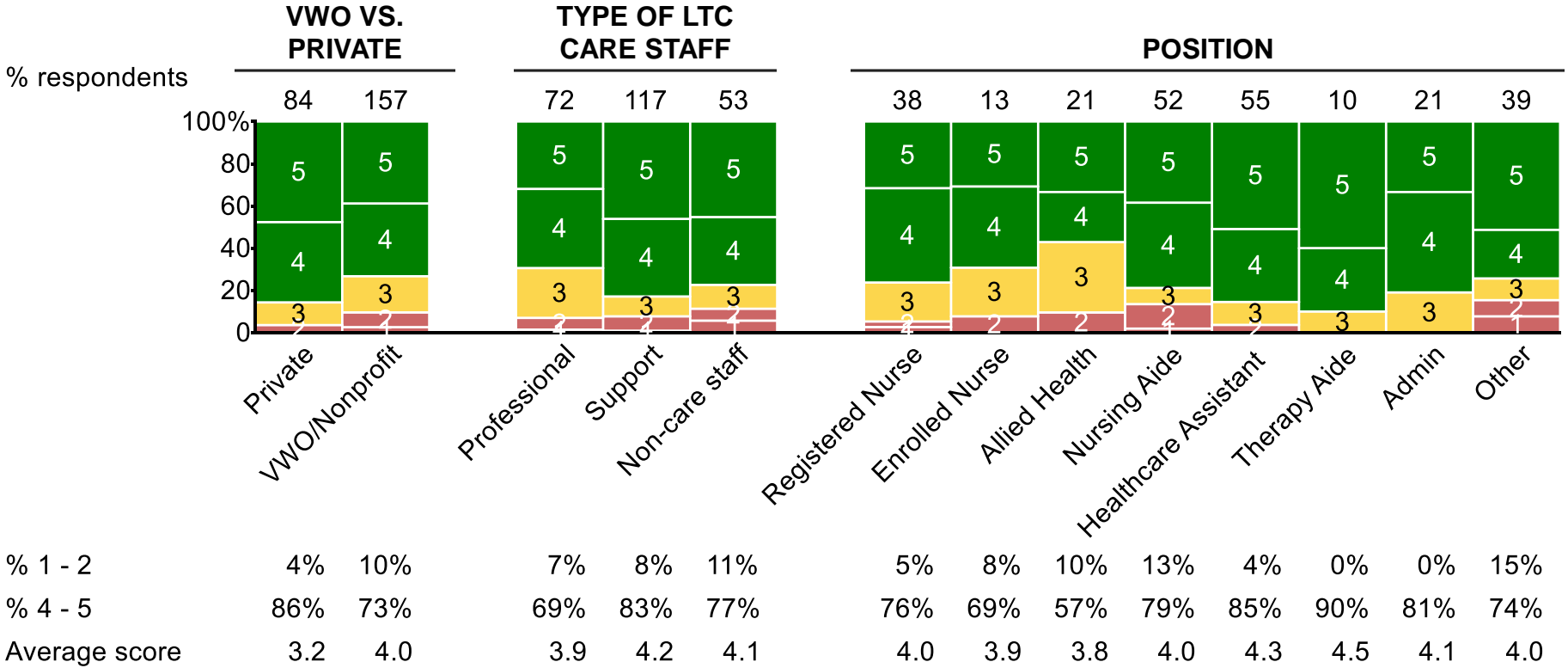
*“In-house training (caring, ethics, other related nursing skills), seminars and talks once a month; special programs as required for worker profile”*

CEO, Nursing Home, Hong Kong

Skills

# Learning and growing: 78% of LTC workers feel that they are learning and growing in their roles

**Question:** To what extent do you agree with the following statements? – I am learning and growing in my current job (1 = Significantly disagree, 5 = Significantly agree)



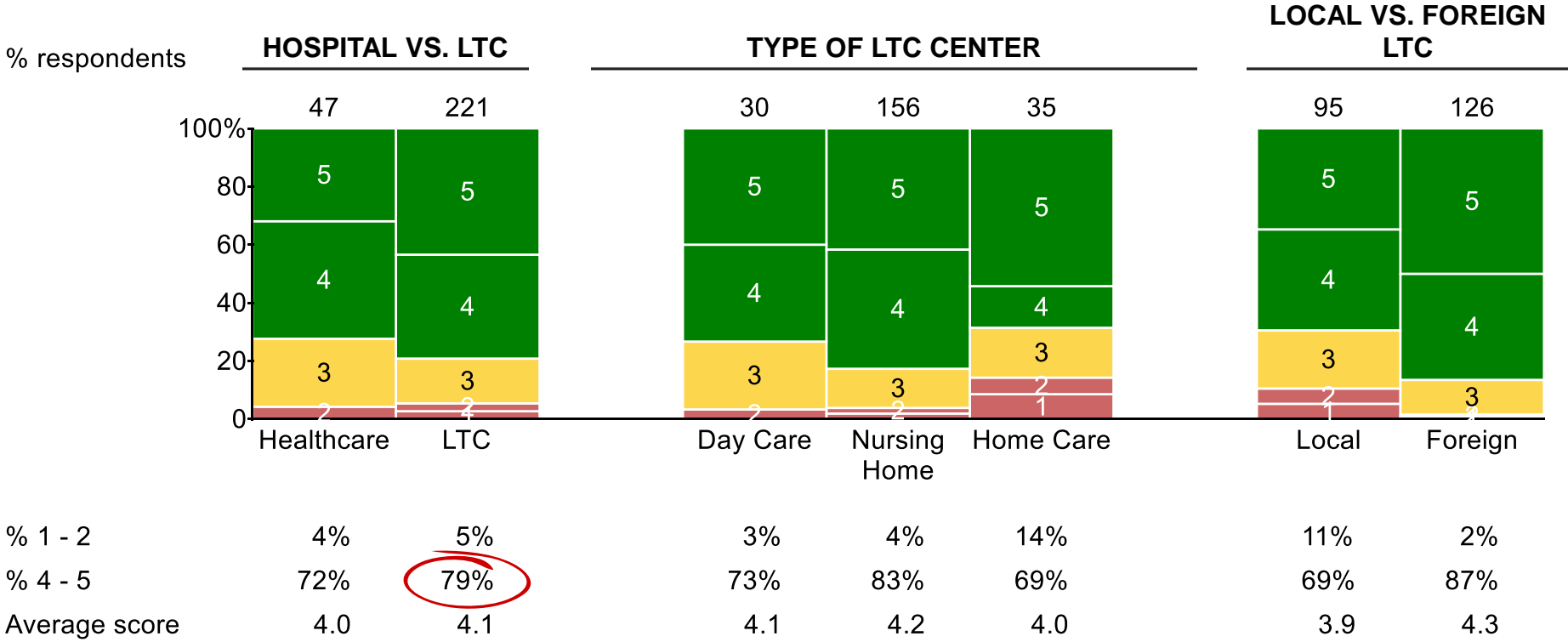
*"I get to learn a lot and they take care of everything; there's a lot of training."*  
Foreign Healthcare Assistant, LTC

*"This job has allowed me to upgrade myself. I learn something new every day."*  
Foreign Registered Nurse, LTC

*"I have a nursing qualification from the Philippines but I feel I have already forgotten a lot of what I learned working in hospitals back home."*  
Foreign Nursing Aide, LTC

# Make a difference: 79% of LTC workers feel they make a difference to the lives of elderly

**Question:** To what extent do you agree with the following statements? – I make a difference to the lives of elderly (1 = Significantly disagree, 5 = Significantly agree)



*"It is a **very meaningful job** and we are able to give the elderly good service."*  
Local Hospice Supervisor, Hospice

*"It is good to **give back to the community** and very **satisfying** to serve the elderly."*  
Local Therapy Aide, LTC




















*"I gain **satisfaction** from overcoming challenges and seeing the elderly improve physically and mentally."*  
Local Healthcare Assistant, LTC

# Agenda

- Overview of LTC in Singapore and other benchmarked countries
- Attracting & retaining LTC workers
- Emerging recommendations



# We benchmarked best-in-class work practices and policies of operators and governments across SG, AU, JP, KR, HK

		ISSUES	EXAMPLES OF PRACTICES
<b>Attracting</b>	1 	Industry Reputation	<ul style="list-style-type: none"> <li> Operators <b>tailor recruitment messages</b> to employees' background, concerns and motivations</li> <li> <b>Government public grading of LTC facilities</b> to create transparency; grading also tied to incentives (e.g. access to subsidies)</li> </ul>
	2 	Talent Sourcing	<ul style="list-style-type: none"> <li> <b>Recruit directly from source countries</b> to eliminate middle man and improve quality</li> <li>• Explore <b>new sources of talent</b> <ul style="list-style-type: none"> <li> E.g. Target <b>university students</b> with structured industry placement program</li> <li> E.g. Create part-time roles that can be integrated into routine of <b>homemakers</b></li> </ul> </li> </ul>
<b>Retaining</b>	3 	Compensation	<ul style="list-style-type: none"> <li> <b>Offset higher pay by redesigning jobs and work processes</b> to increase productivity (e.g. self-organizing teams)</li> <li>   <b>Minimum wage regulations</b> across all other benchmarked countries</li> </ul>
	4 	Promotion Opportunities	<ul style="list-style-type: none"> <li> Invest in <b>training for promotion and/or qualification</b>, not just on-the-job skills training (e.g. CPR)</li> <li> Create and <b>recognize vocational qualification pathways</b> as an alternative to traditional academic qualification</li> <li></li> </ul>
	5 	Work Environment	<ul style="list-style-type: none"> <li> <b>Provide flexible work arrangements</b> / compensate when flexibility is compromised</li> <li> <b>Encourage intrinsic motivation</b> by <b>empowering workers</b> to take ownership and providing <b>autonomy</b></li> </ul>



## **QUALIFICATIONS, ASSUMPTIONS AND LIMITING CONDITIONS**

This study was commissioned by Lien Foundation to examine the state of manpower in the long term care sector in Singapore. The Lien Foundation shall not have any liability to any third party in respect of this report or any actions taken or decisions made as a consequence of the results, advice or recommendations set forth herein.

The opinions expressed herein are valid only for the purpose stated herein and as of the date hereof. Information furnished by others, upon which all or portions of this report are based, is believed to be reliable but has not been verified. No warranty is given as to the accuracy of such information.

Public information and industry and statistical data are from sources that are deemed to be reliable; however, the Lien Foundation makes no representation as to the accuracy or completeness of such information. No responsibility is taken for changes in market conditions or laws or regulations and no obligation is assumed to revise this report to reflect changes, events or conditions, which occur subsequent to the date hereof.