

# UK Focus

## UK Life Sciences Labour Market Trends

September 2022

## INTRODUCTION



The global life sciences industry is expected to reach >\$2 trillion in gross value by 2023 (approximately \$1.6 trillion today). Given its importance to the innovation economy in the UK and its potential for growth there are few, if any, sectors more important to support as part of the industrial strategy. It is vital that the underlying UK policy and regulatory landscape continues to incentivise investment at a time when industry is dealing with the challenges presented by the Covid-19 pandemic and Brexit. Strengthening our R&D system, attracting and developing top research talent, unlocking investment from the private sector and utilising R&D funding to support levelling up across the UK is now more crucial than ever. There is so much at stake currently and in the UK, as political uncertainty continues, global financial pressures prevail, and we enter a period that sees the world under varying degrees of financial uncertainty, the current stakes for the life sciences industry in the UK seem uncertain and high.

If we reflect on 2021/2022 from a “live active jobs” perspective, we have also seen differing sectors of the UK life sciences industry undergo change. Much of this driven by the dramatic effect of the global pandemic and changing technologies. Currently the forecasts are still predicting the requirement for 133,000 new workers for jobs being created by 2030. This stems from a mixture of newly created roles and individuals retiring from industry. Around two-thirds of these positions will be required for R&D and manufacturing. Regarding performance, last year was record-breaking for UK’s pharma and biotech sectors after a slowdown in 2020. As 2022 progresses, it is evident that vacancies are still growing, but in a minor capacity than in 2021.

In 2022 scientific vacancies saw 9809 jobs between January and August, a significant number considering it surpasses 2020’s results. We forecast 14,714 vacancies by the end of the year, which means an insubstantial decrease year-on-year of -0.33% compared to the 14,762 totals from 2021. This represents a considerable difference from 2021’s 64% year-on-year growth. The most significant change occurred from May to June, when scientific positions experienced a dip of -27% month-on-month, with vacancies dropping from 1335 to 974. To highlight some of the key sectors we have seen a 10% growth in 2022 v 2021 in QA roles, but a continued decline in Medical Affairs over the same period of -16%. Bids & Proposals has this year seen a significant surge in growth of roles at 42% versus 2021. PV & Drug Safety saw an unprecedented 92% growth in roles in 2021 but coming into 2022 we have seen a decrease in these live roles by 34%.

The UK of course has its own pretty unique set of challenges as they still navigate a post Brexit landscape and ensure the UK can still attract and gain visas for life sciences best talent. They must also step up and ensure new to industry graduates are getting trained and developed in the numbers required across STEM. After peaking in 2021, venture funding to biotech start-ups slowed in 2022, with investment on pace to come in at least a third lower than last year’s levels. Venture capital firms are now more selective in their biotech investments for 2022 compared to 2021. Watching this emerging landscape will be interesting as we enter 2023 and the impact of global financial instability. The UK has an exceptional science base. The hope is as the current and potentially new governments in the coming years continue to recognise the importance of investment, regulation and the long term need to both protect and support this critical industry.

**Yvette Cleland** - CEO | Cpl UK

**CONTENTS**

Overview	Page 03
Sector Breakdown	Page 04
Division & Role	Page 05
Top Firms	Page 06
About Cpl Life Sciences   Vacancysoft	Page 07

**Overview**

The pandemic brought biotechnology to the fore in a way not seen before, highlighting the capabilities that firms like BionTech have. After all, historically to have a vaccine ready for mass release would take upwards of two years, where in this case it was done in 6 months. However, today, with most of the talent flying to EEA countries and ongoing challenges such as the cost of living crisis, there is undoubtedly a skills shortage for scientific jobs in the UK, particularly those concerning STEM (science, technology, engineering and maths).

Quoting The Pharma Letter, “the Science Industry Partnership projects the sector will need to fill 133,000 jobs by 2030, with around two-thirds required for R&D and manufacturing roles”. With talents going away, the current scenario raises concern in the biopharmaceutical industry.

Regarding performance, last year was record-breaking for UK’s pharma and biotech sectors after a slowdown in 2020. As 2022 progresses, it is evident that vacancies are still growing, but in a minor capacity than in 2021.

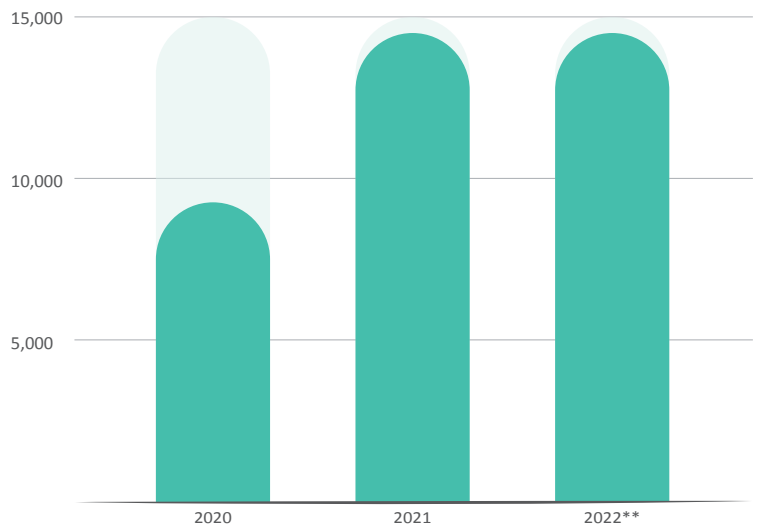
This year, scientific vacancies collected 9809 jobs between January and August, a significant number considering it surpasses 2020’s results. We forecast 14,714 vacancies by the end of the year, which means an insubstantial decrease year-on-year of -0.33% compared to the 14,762 totals from 2021. This represents a considerable difference from 2021’s 64% year-on-year growth.

Examining the vacancies on a monthly average, we find the peak in 2022 being March, with 1473 jobs, followed by January with 1,353. The most significant change occurred from May to June, when scientific positions experienced a dip of -27% month-on-month, with vacancies dropping from 1335 to 974. Moreover, early 2022 was also noteworthy, with vacancies jumping from 1079 to 1353 in January, resulting in a month-on-month change of 25%.

Overall, numbers are growing and therefore is safe to say that there is a demand for these specialists in the market. Still, with the current war for talent, it is yet to see how it will progress in 2023, with a key question being how the industry will manage to both attract new talent and keep its best employees.

**Annual Totals**

Scientist Vacancies, Pharma, Biotech, CROs , UK 2020-22



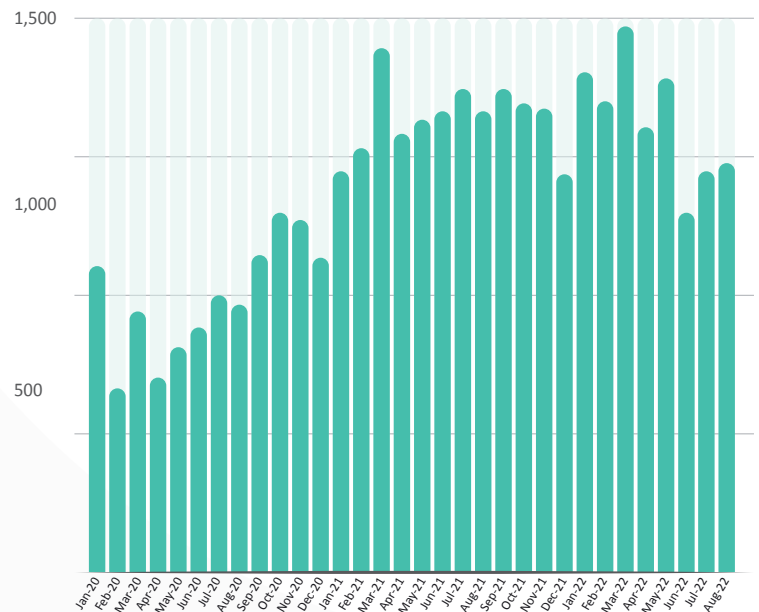
\*\* Forecast 2022

Source: Vacancysoft Analytics

Fig. 01

**Monthly Totals**

Scientist Vacancies, Pharma, Biotech, CROs , UK 2020-22



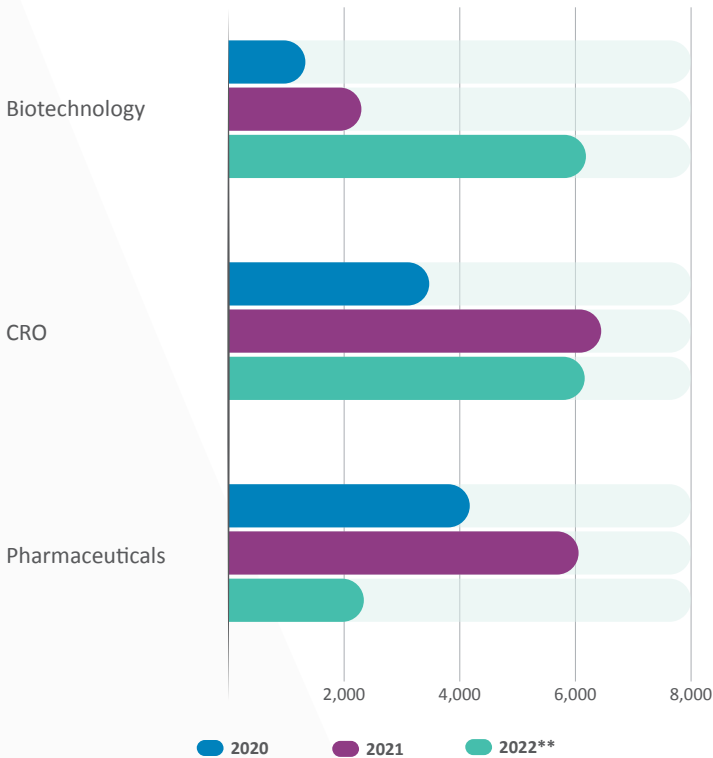
Source: Vacancysoft Analytics

Fig. 02

## Sector Breakdown

### Sector Breakdown

Scientist Vacancies, Pharma, Biotech, CROs , UK 2020-22

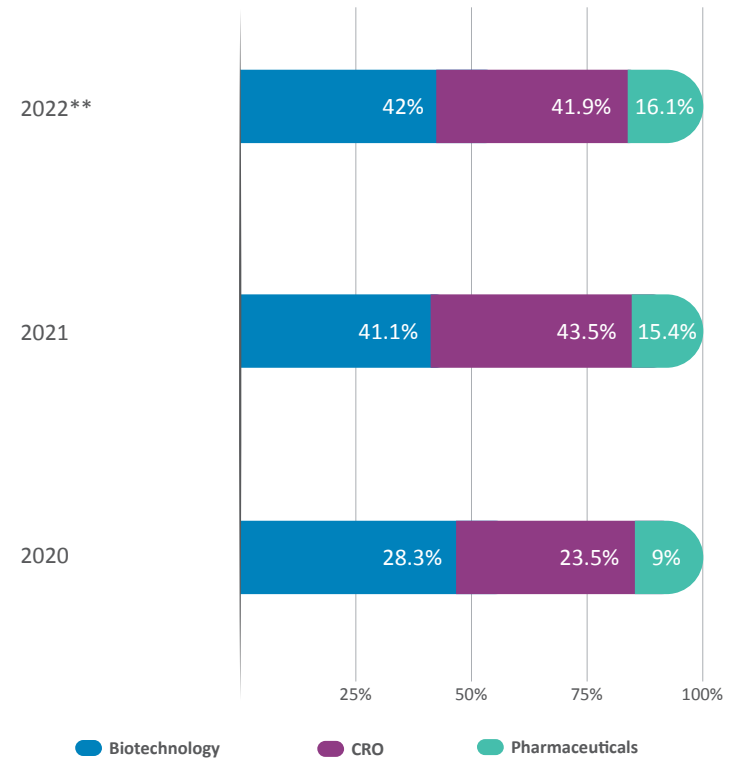


\*\* Forecast 2022

Source: Vacancysoft Analytics  
Fig. 03

### Sector breakdown as %

Scientist Vacancies, Pharma, Biotech, CROs , UK 2020-22



\*\* Forecast 2022

Source: Vacancysoft Analytics  
Fig. 04

A breakdown of the scientific vacancies by sector in the UK shows that specialist scientific recruitment is increasing every year. Pharmaceuticals is the sector that constitutes the majority of the vacancies with 4121, the highest numbers from January to August. According to our forecast, Pharmaceuticals will reach 6182 new jobs by the end of 2022, which means an approximate 42% share of vacancies.

Interestingly, the leading sector experienced strong, consistent growth across the last three years, meeting its biggest share during 2020 with 47%. Shares dropped to -6% in 2021, resulting in 41%, which seems to be growing throughout 2022.

Clinical Research Organisations (CRO) ranks second with 4111 jobs year-to-date and a forecast of 6167 by the end of 2022, almost equaling the estimated yearly amount of Pharmaceuticals. Moreover, CRO's share of vacancies is reaching 42% this year, coinciding with Pharmaceuticals.

The slowest growth in vacancies in 2022 is for the Biotechnology sector, publishing 1577 jobs between January and August. We estimate 2366 finishing 2022, which translates into a share of vacancies of

16%, certainly showing growth but far behind the other sectors.

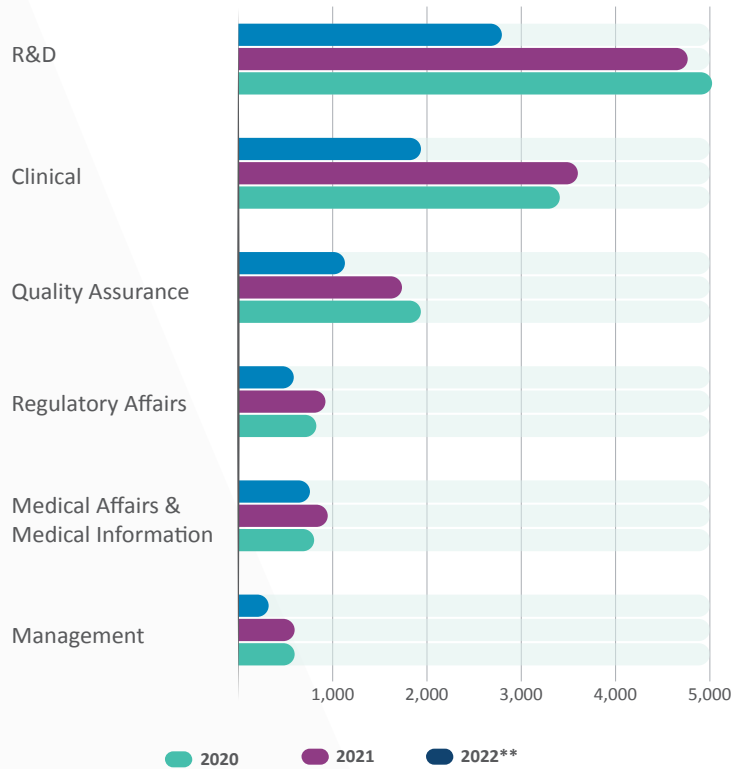
Year-to-date results are worth mentioning concerning previous years. Between January and August, all sectors are yet to meet 2021 totals. However, both CRO and Biotechnology numbers so far surpass 2020 totals, whereas Pharmaceuticals vacancies stay slightly behind the 4177 jobs in 2020.

In terms of yearly results, we forecast the most significant change in recruitments for CRO, whose year-on-year numbers will experience a slight dip, reaching -4% compared to the impressive jump of 85% in 2021.

Besides that, scientific affairs vacancies are not expected to have a substantial change, with Pharmaceuticals and Biotechnology getting through 2022 with changes of around 2% and 4% year-on-year, respectively. Indeed, all top recruiters sectors show more modest growth, reflected in the significant distance between 2022 and 2021 year-on-year changes.

**Skills in demand totals**

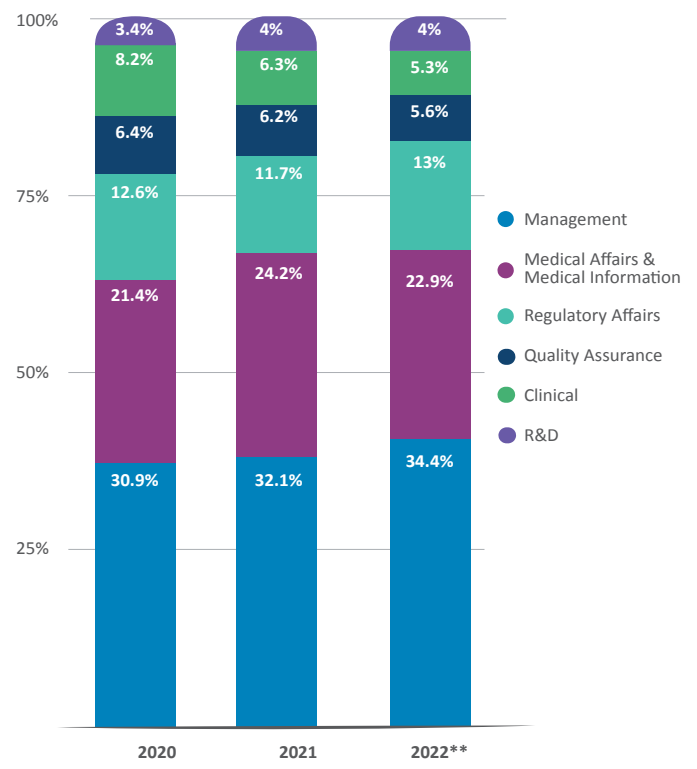
Scientist Vacancies, Pharma, Biotech, CROs , UK 2020-



\*\* Forecast 2022 Source: Vacancysoft Analytics Fig. 05

**Skills in demands %**

Scientist Vacancies, Pharma, Biotech, CROs , UK 2020-



\*\* Forecast 2022 Source: Vacancysoft Analytics Fig. 06

When analysing scientific vacancies by divisions, we find R&D leading the pack with 10,887 jobs gathered since 2020 and 3374 between January to August. We forecast approximately 5061 new jobs, leading to a year-on-year growth of 7%. Furthermore, R&D specialists could meet an estimated 34% share of vacancies, resulting in the highest in all the 2020-2022 period, perhaps unsurprisingly, as vacancies for R&D have always been consistently growing and above 30%.

The second specialisation in the list is Clinical, with 2246 vacancies year-to-date. We forecast 3369 by the end of 2022, representing a slight dip from its 2021 totals, leading to a year-on-year surge of approximately -6%.

Quality Assurance is the third-largest specialisation concerning vacancies, with numbers reaching so far 1273 jobs. We expect 1910 by the end of the year, which constitutes a year-on-year growth of 10% in relation to 2021.

The distance in the performance is more evident for Medical Affairs & Medical Information, with 523 jobs collected from January to August, and we expect 785 by the end of the year. Moreover, they have a notable decrease year-on-year, with a change of -16% compared to the previous year. Interestingly, starting those specialists, vacancy levels continue growing for all divisions but go below 1000.

Similarly, Bids & Proposals lie at the end of the scale but is experiencing the most significant year-on-year change, hitting over 400 vacancies according to our forecast, which means an impressive rise of 42% compared to 2021.

In contrast, Pharmacovigilance and Drug Safety specialists could see a considerable decrease in their vacancies, with numbers expected to go down to 300 by the end of the year. This would mean a year-on-year change of -34%, the biggest dip among all divisions and a relevant change from its auspicious 92% jump in 2021.

A closer look at the UK's top recruiters for scientific vacancies shows AstraZeneca as the busiest recruiter, with 2648 new jobs gathered from 2020 to August 2022. The firm has reached 904 vacancies so far this year, and we forecast 1356 by finishing 2022, which indicates a year-on-year growth of 29% compared to 2021. The pharmaceutical and biotech giant is looking to open a new centre of excellence for the Internet of things (IoT) at its facility in Chennai.

IQVIA is the runner-up with 462 vacancies year-to-date. We forecast 693 new scientific posts by the end of the year, constituting a year-on-year decrease of -18% in relation to 2021. This is a relevant difference compared to last year's favourable rise of 92%. The Durham-headquartered firm has recently launched HCP/O Engagement Management, a comprehensive solution that allows the management, planning, payment, and contracting of healthcare professional/organisation globally.

Meanwhile, Labcorp Drug Development ranks third, recording 319 vacancies year-to-date with a forecast of 479. We expect a dip in relation to 2021, which means a year-on-year growth of -46%, the largest yearly decrease in the top. In July, the life sciences firm announced it would separate its Clinical Development business into an independent, publicly traded company.

Syneos Health recorded the fourth-highest volume of scientific vacancies, with 613 jobs so far and an estimated 920 by the end of this year. The multinational would have an impressive year-on-year change of 63% compared to 2021.

Other firms with buoyant year-on-year results concerning 2021 are Eurofins Scientific, with an estimated growth of 26% and reaching 860 vacancies by the end of 2022. This shows a positive rise but not as high as its abrupt change of 137% year-on-year in 2021. GSK is also growing, with a year-on-year rise of 31%. Conversely, we expect Almac to meet a decrease, with a year-on-year change of -40% and vacancies hitting above 200, less than its 2021 totals.

### Top 20 Companies

Scientist Vacancies, Pharma, Biotech, CROs , UK 2020-22

Organization	2021	2022**	YOY %
AstraZeneca	1049	1356	29.3%
IQVIA	842	693	-17.7%
Labcorp Drug Development	894	479	-46.5%
Syneos Health	564	920	63.0%
Eurofins	684	860	25.7%
GSK	599	788	31.5%
PRA Health Sciences	640	459	-28.3%
Merck	336	327	-2.7%
PPD	386	281	-27.3%
Parexel	319	302	-5.5%
ICON	250	411	64.4%
Almac	339	204	-39.8%
Lonza	238	197	-17.4%
Charles River	232	195	-15.9%
Randox	177	164	-7.6%
Johnson & Johnson	176	134	-24.1%
Adaptimmune	202	182	-10.1%
Pfizer	176	147	-16.5%
UCB	123	108	-12.2%
Fujifilm Diosynth Biotechnologies	142	149	4.6%

\*\* Forecast 2022

Source: Vacancysoft Analytics



**Cpl Life Sciences have an international presence, recruiting across Europe, supplying Pharmaceutical, Biotechnology and Clinical Services industries with the talent they require for success.**

Cpl UK is a group of specialist talent businesses which service the Science, Technology, Engineering, Mathematics (STEM), Professional Services and Healthcare sectors across the UK.

Together we form the UK footprint for **Cpl Resources Plc** which is one of the largest staffing companies in Europe. As a group we've been powering businesses by providing transformational talent solutions for over 30 years and have been listed on the London Stock Exchange since 1999.

Our mission is to be the UK's best transformational talent partner across all our core markets and add meaningful value to lives of our clients, candidates and colleagues.

### **What we do:**

Our Service Capabilities across all European Countries include:

- Contingency permanent recruitment
- Contract recruitment – freelance and PAYE via Cpl UK
- Search and selection permanent recruitment
- Specialist 'project-based' interims via Cpl UK
- FSP outsourced teams across Europe
- European Salary Survey to determine the salary and benefits for each sector of the UK Life Science industry.

For more information or to speak to one of our team please contact us on **+44118 959 4990** or email [UK@CPL.COM](mailto:UK@CPL.COM)

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Vacancysoft's products helps firms to optimise their businesses. Established in 2006, we have thousands of clients worldwide, ranging from FTSE-listed businesses to industry specialists.

### **How we gather data**

The data contained within this report is gathered solely and specifically from the career centres of company websites, not job boards.

Before publication, job postings are de-duplicated and verified as unique. Every vacancy is assigned up to 20 data points through Vacancysoft's proprietary algorithm, which is double-checked for validity by a data quality control team.

The data showcased here is available within the Vacancy Analytics platform, where users can create and customise their own reports. To find out more please contact a member of the team or email [support@vacancysoft.com](mailto:support@vacancysoft.com).

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