

 UK Insights  
Healthcare,  
Social Care &  
Life Sciences  
World of Work  
2023 Outlook

**BROOK STREET  
SOCIAL CARE**

**30  
YEARS**

Dedicated specialists in your community



**83%**

OF EMPLOYERS HAVE  
DIFFICULTY FILLING ROLES  
BECAUSE OF LACK OF SKILLS

**£2 Billion**

FUNDED FOR DIGITAL  
TRANSFORMATION

**78x**

TELEHEALTH USAGE  
INCREASE DURING THE  
PEAK OF COVID-19

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As the world begins to recover from the COVID-19 pandemic, leaders in the healthcare and life sciences industries are facing many of the same pre-pandemic challenges, but the pace of change is accelerating. **This Insights report examines the top five key trends to help C-suite leaders answer the big questions.**

- What is changing in the consumer and business landscape, and how are the industry leaders positioning themselves for differentiation and improved patient outcomes?
- Which areas of digital transformation show the greatest opportunities for ROI when deploying limited IT resources?
- How are social care providers working to overcome the challenge of persistent talent scarcity?



# A Prescription for New Technology



Digital transformation innovation and adoption is accelerating within the healthcare, social care & the life sciences industry as key players throughout the value chain seek to improve the effectiveness and efficiency of their value propositions.

- **Increasing Investment in Digital Transformation:** The UK Government is making investments in the digital underpinnings needed for a sector-wide digital transformation, in particular £2 billion to digitise the NHS, and at least £150 million to support digital transformation in social care, including laying crucial cyber and connectivity foundation – [GOV UK](#)
- **Growing Consensus on AI Potential:** New diagnostics capacity is being developed to enable image-sharing and clinical decision support based on artificial intelligence (AI). These technologies support testing at or close to home, streamlining pathways, triaging waiting lists, faster diagnoses and levelling up under-served areas – [GOV UK](#)
- **Robotic Process Automation (RPA):** Organisations report a 20-30% cost reduction with RPA, completing tasks 4-10x faster than a person, eliminating human error and better staff satisfaction in reduced attrition – [NHS](#)

## Workforce Implications:

- **Employee satisfaction:** By giving robots mundane tasks, employees focus on the things that people do best (thinking, deciding, producing, and creating). This improves staff resilience – more time to do transformational work and adopt new ways of working
- **Reduced attrition:** Better staff satisfaction results in reduced attrition across organisations. Increasingly, companies are focusing on this as the main benefit they seek from RPA



**ROBOTICS AND AI COULD IMPROVE EMPLOYEE SATISFACTION BY TAKING AWAY THE REPETITIVE TASKS**

# The Digital Doctor Is In

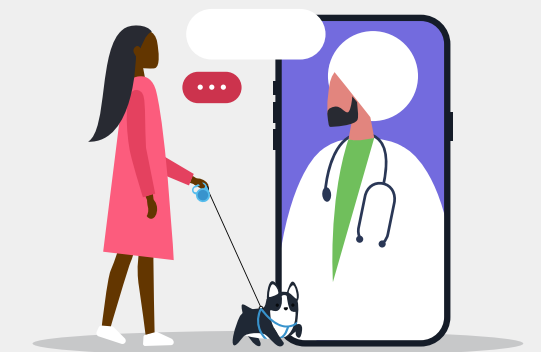
The COVID-19 pandemic dramatically accelerated the growth of new forms of digital patient care. This is still a new and evolving opportunity for business growth and more accessible care for patients.

- **Exponential Growth in Telemedicine:** The market size, measured by revenue, of the Telehealth Services industry was £563.2m and increased by 19% in 2022. Telehealth services can reduce pressure on healthcare services by preventing the need to be admitted to hospital – [ibisworld.com](https://www.ibisworld.com)
- **Virtual Patient Record:** The digital transformation of the NHS is expected to have a strong focus on telehealth, with the Department of Health and Social Care plans published in June 2022 including £2 billion allocated to help digitise the sector through the rollout of electronic patient records. Industry revenue is expected to rise at a compound annual rate of 9.7% over the five years through 2027-28 to reach £995.6 million – [ibisworld.com](https://www.ibisworld.com)
- **More Focus on Improving Digital Patient Experience (PX):** A recent report on patient experience found that 48% prefer digital communication with healthcare providers. Additionally, 71% of patients were satisfied with their digital consultation, whilst 21% were dissatisfied – [Healthcare Communications](https://www.healthcarecommunications.com)



## Workforce Implications:

- Need for skilled talent to continue scaling and improving telemedicine solutions that emerged during the COVID-19 pandemic
- Growing industry need for talent in software/app development, user experience (UX), cyber security, and quality assurance (QA)
- Upskilling/reskilling support needed to help current workforce fully leverage emerging technology and continue driving innovation



**TELEHEALTH USAGE  
INCREASED 78X DURING  
THE PEAK OF COVID-19 PANDEMIC**



# The Diagnosis is Talent Scarcity

The COVID-19 pandemic also helped to bring a greater focus on social care workers. The pressures on many parts of the social care workforce have been and remain very high. The structural challenges facing the care workforce include limited career progression opportunities. However, it has also raised greater awareness of the shortage and increasing burnout that is even driving some workers to leave.

- **Employers Struggling to Find the Talent they Need:** 78% of employers in the Healthcare & Life Sciences industry say they are having difficulty filling jobs due to a lack of skilled talent – [ManpowerGroup Employment Outlook Survey Q2 2023](#)
- **Job Vacancies Expected to Persist:** The total number of job vacancies in adult care in England in 2021/22 was 165,000. In the same period the vacancy rate increased by 52% – [Skills for Care](#)
- **Investments in Adult Care Workers:** The UK Government is making available up to £2.8 billion of additional funding in 2023–24 and up to £4.7bn in 2024-25 to support adult social care - [UK Health and Social Care Commission](#)
- **Frontline Workers are Burnt Out:** In the wake of the COVID-19 pandemic, more than three quarters (78%) of social workers said they had experienced increased stress levels and 77% of respondents were worried about their mental health due to the pressure they're under – [UNISON](#)



78%

## Workforce Implications:

- Explore opportunities to upskill/ reskill new talent more efficiently to close growing gaps
- Women represent 82% of the adult social care workforce, so it is critically important to ensure you offer a differentiated Employer Value Proposition (EVP) to attract and retain them
- Reinforces the importance of strategic workforce planning to optimise recruitment and retention of skilled talent
- An increase of 27% (480,000 extra vacancies) in adult and social care would be required by 2035 if they grow proportionally to the projected number of people aged 65+ in the population between 2021 and 2035

**OF EMPLOYERS IN THE HEALTHCARE & LIFE SCIENCES INDUSTRY SAY THEY ARE HAVING DIFFICULTY FILLING JOBS DUE TO A LACK OF SKILLED TALENT**



# Good M&A Keeps the Doctor Away

As many highly profitable patents expire, a growing number of pharmaceutical industry leaders are pursuing strategic mergers & acquisitions to continue driving innovation. They are also exploring divestitures of non-core business units to cut costs. The trend is characterised by a shift from Big Pharma to Focused Pharma.



- **Need to Offset Growing Cost of Expiring Patents:** By replacing the drug adalimumab with biosimilar versions, NHS hospitals will only pay a quarter of the £400m they currently spend each year on the drug – [Pharmaceutical Journal](#)
- **Using Mergers & Acquisitions to Drive Growth:** The deal with the five manufacturers, including the manufacturer of the originator medicine, AbbVie, means that hospitals will only have to pay a quarter of the more than £400m they currently spend each year on adalimumab
- **Building Focus with Strategic Funding:** The UK will boost life science innovation with £277 million funding. A £277 million grant is being given to four life sciences companies to boost manufacturing capacity and strengthen UK innovation – [Pharmaceutical Technology](#)

## Workforce Implications:

- Continuous strategic workforce planning and change management needed to minimize the impact on employees
- Focusing on innovation will make the recruitment and retention of highly skilled talent a critical business priority
- Accelerating pace of change will create increased need for scaled solutions for upskilling, reskilling, and outplacement



**EXPIRING PATENTS AND THE CHANGING BUSINESS LANDSCAPE WILL CONTINUE TO DRIVE M&A ACTIVITY**

# Keep a Pulse on Changing Consumer Behaviour

In addition to the rapidly changing business megatrends, consumer behaviour is changing. They have seen an increased focus on speed, convenience, transparency, engagement, and digital experience and expect the same from their healthcare experience. They also expect leadership on important Environmental, Social, and Governance (ESG) issues such as sustainability and health equity.



- **Increased Focus on ESG:** The NHS has made considerable progress in reducing their Carbon Footprint, with a commitment to reach a target of 80% reduction in carbon emissions by 2035 – [NHS England](#)
- **Healthcare Service Providers Incorporating Health Equity in their ESG Strategy:** Boots UK strive to provide essential care to the communities in which we are embedded. In 2022, they raised a total of £1M for Macmillan – [Boots UK](#)
- **Digital Experience Impacts Patient Retention:** 39% of consumers are willing to use digital care while 76% say a positive health experience must have two things: communication and efficiency – [Accenture](#)

## Workforce Implications:

- Integrate ESG leadership into your EVP to aid recruitment and retention, particularly with younger workers
- Upskill/reskill frontline workforce to effectively leverage and promote digital patient tools
- Skilled QA and customer service talent needed to continuously improve digital patient experience

**39% OF CONSUMERS SAY THEY ARE WILLING TO USE DIGITAL CARE**







## In Conclusion

With valuable lessons learned from recent years and a global pandemic, Healthcare, Social Care & Life Sciences employers are simultaneously navigating dramatic changes to their businesses and the world of work. Advances in automation and continued digital transformation have the power to significantly improve outcomes for patients, but the industry must first overcome persistent talent scarcity to ensure they have the human capital needed to successfully lead future innovation.



# Workforce Solutions for Social Care



Workforce Consulting  
& Analytics



Workforce  
Management



Talent  
Resourcing



Career  
Management



Career  
Transition



Top Talent  
Attraction

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**About Us -** Brook Street Social Care is part of the leading global workforce solutions company, ManpowerGroup®, that helps organisations transform in a fast-changing world of work by sourcing, assessing, developing, and managing the talent that enables them to win. We develop innovative solutions for hundreds of thousands of organisations every year, providing them with skilled talent while finding meaningful, sustainable employment for millions of people across a wide range of industries and skills. Our expert family of brands – Brook Street, Manpower, Experis, and Talent Solutions – creates substantially more value for candidates and clients across more than 75 countries and territories and has done so for 75 years. We are recognised consistently for our diversity – as a best place to work for Women, Inclusion, Equality, and Disability, and in 2023 ManpowerGroup was named one of the World’s Most Ethical Companies for the 14th year – all confirming our position as the brand of choice for in-demand talent.