

2021 Life Sciences Workforce Trends Report: California

Bay Area Hub Analysis

5 key trends emerged from our data sets that are impacting the California life sciences industry's demand for talent:

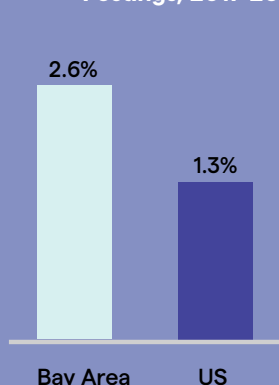
1. California's Life Sciences Industry remains resilient, demonstrating stability and growth amidst a global pandemic
2. COVID-19 changed the way we think about work and the workplace: companies evaluate remote work and other workforce management innovation
3. "Soft skills" are increasingly viewed as predictors of career success: adaptability, resilience, and communication rise to top of desired skills as we navigate uncharted economic and industry transitions
4. An array of new or amplified initiatives pushes Diversity, Equity and Inclusion (DEI) into the spotlight with broad recognition within the industry that we must and can do more
5. New energy behind industry-academic collaborations addresses shifting demands for talent

The nearly 3,800 life science companies in California are concentrated in three major geographic hubs:

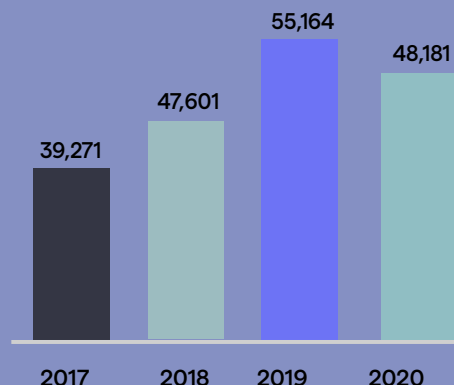
1. **The Bay Area**, defined here as the region of 10 contingent Northern California counties of Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, and Sonoma
2. **Los Angeles and Orange Counties**
3. **San Diego County**

California's life sciences industry is a strong driver of economic growth and job creation in each of these geographic hubs, with life sciences industry job postings as a percentage of total job postings across industries in each region exceeding the national number.

Life Sciences' Share Across All Industries of Total Unique Job Postings, 2017-20



Trend in Total Unique Job Postings from Bay Area Life Sciences Companies, 2017-20



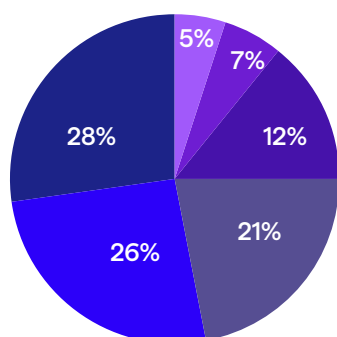
For the period of 2017 – 2020, 83% of the total life sciences industry job posting for California were associated with these three geographic hubs. The Bay Area still dominates the state, with 44% of that total number of job postings. The individual years in trend analysis will not sum to cumulative totals due to unique (non-duplicative) postings that span across individual years.

168,268

Number of unique job postings from the period January 2017 - December 2020 for this region. (44% of the total life sciences industry job postings for California)

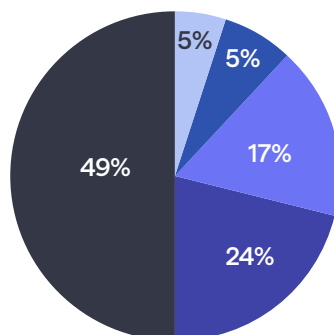
BAY AREA

Experience Requirements



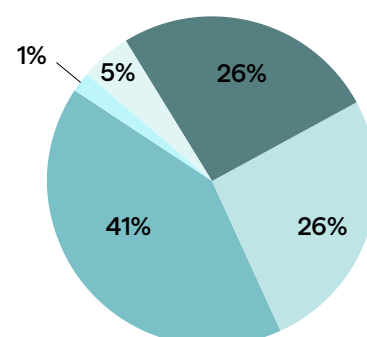
- No Experience Listed
- 0-1 Years
- 2-3 Years
- 4-6 Years
- 7-9 Years
- 10+ Years

Degree Requirements



- High School or GED
- Associate's Degree
- Bachelor's Degree
- Master's Degree
- Ph.D. or Professional Degree

Share of Industry Jobs by Major Life Sciences Sector



- Ag Feedstock & Industrial Bio
- Bio-Related Distribution
- Research, Testing and Medical Labs
- Medical Devices & Equip.
- Drugs & Pharmaceuticals

Bay Area, CA: Leading Technical & Production-Related Job Titles/Groupings for Life Sciences Hiring Over Last 4 Years



Top 15 Companies by Unique Job Posting Totals

Thermo Fisher Scientific, Inc.
Genentech
Roche Laboratories, Inc.
Gilead Sciences, Inc.
Abbott Laboratories
Danaher Corporation
Biomarin Pharmaceutical, Inc.
Bio-RAD Laboratories, Inc.
Medtronic, Inc.
Agilent Technologies, Inc.
Stryker Corporation
AbbVie, Inc.
Varian Medical Systems, Inc.
Jazz Pharmaceuticals PLC
IQVIA

The report analyzes three data sets from January 2017 to December 2020, including approximately 385,203 California life science job postings, survey responses from 334 human resource and hiring managers and interviews with 23 leading life sciences employers across the state.

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San Diego County Analysis

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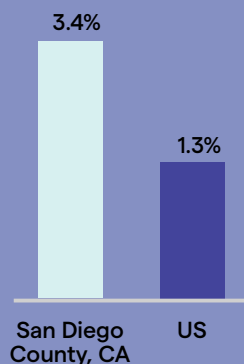
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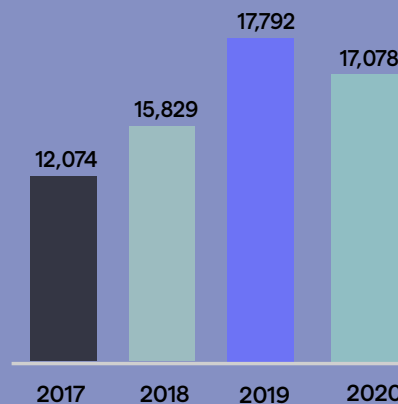
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Life Sciences' Share Across All Industries of Total Unique Job Postings, 2017-20



Trend in Total Unique Job Postings from San Diego County Life Sciences Companies, 2017-20



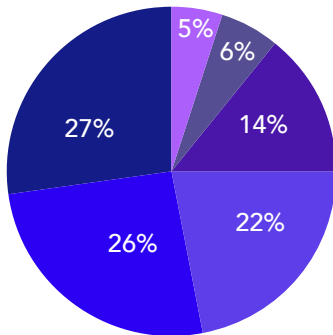
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55,659

Number of unique job postings from the period January 2017 - December 2020 for this region. (17% of the total life sciences industry job postings for California)

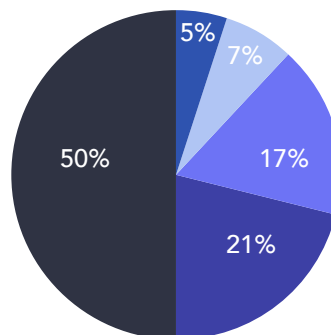
SAN DIEGO COUNTY

Experience Requirements



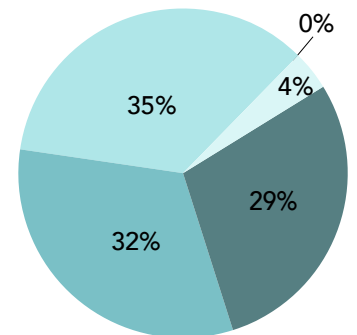
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Degree Requirements



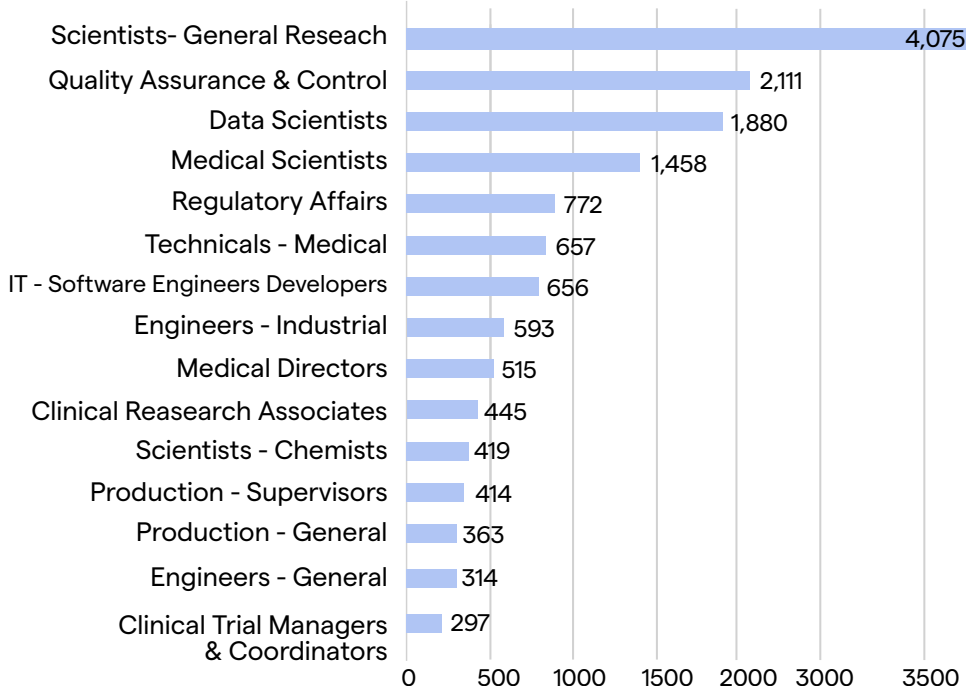
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Share of Industry Jobs by Major Lifes Sciences Sector



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- Bio-Related Distribution
- Research, Testing and Medical Labs
- Medical Devices & Equip.
- Drugs & Pharmaceuticals

Bay Area, CA: Leading Technical & Production-Related Job Titles/Groupings for Life Sciences Hiring Over Last 4 Years



Top 15 Companies by Unique Job Posting Totals

Thermo Fisher Scientific, Inc.
 Illumina, Inc.
 Pfizer, Inc.
 Becton, Dickinson and Company
 Laboratory Corporation of America Holdings
 IQVIA
 Danaher Corporation
 Neurocrine Biosciences, Inc.
 Johnson & Johnson
 Hologic, Inc.
 Covance, Inc.
 Abbot Laboratories
 Quidel Corporation
 Acadia Pharmaceuticals, Inc.

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2021 Life Sciences Workforce Trends Report: California

Los Angeles &
Orange Counties Analysis

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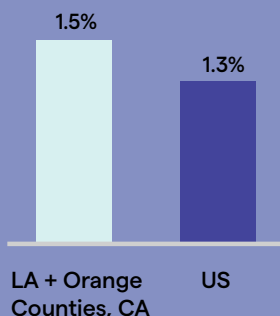
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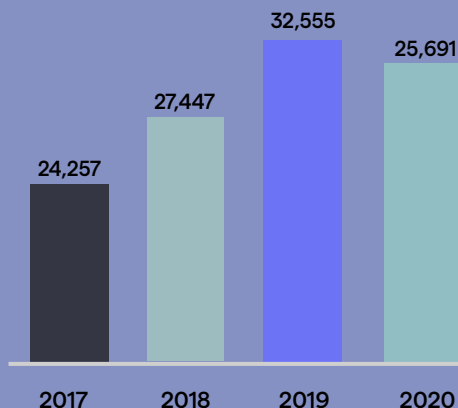
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Trend in Total Unique Job Postings from Los Angeles & Orange County Life Sciences Companies, 2017-20



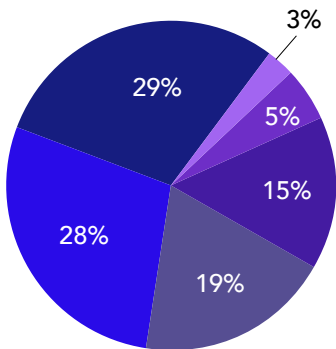
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97,371

Number of unique job postings from the period January 2017 - December 2020 for this region. (25% of the total life sciences industry job postings for California)

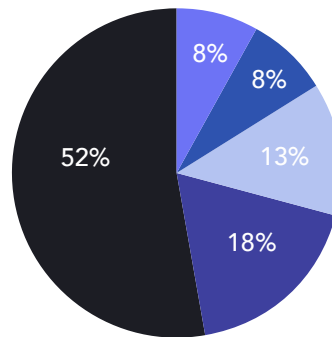
LOS ANGELES & ORANGE COUNTIES

Experience Requirements



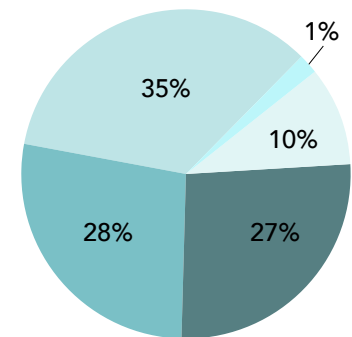
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Degree Requirements



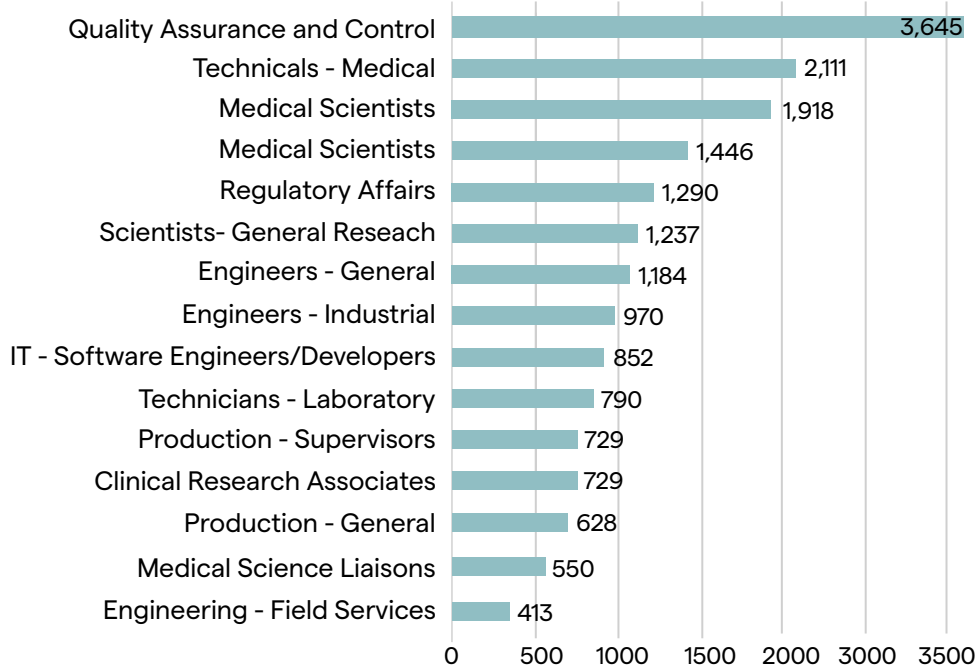
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Top 15 Companies by Unique Job Posting Totals

Edwards Lifesciences Corporation
 Medtronic, Inc.
 Quest Diagnostics Incorporated
 Danaher Corporation
 Johnson & Johnson
 Abbot Laboratories
 Thermo Fisher Scientific, Inc.
 Allergan PLC
 Kite Pharma, Inc.
 IQVIA
 Laboratory Corporation of America Holdings
 Grifols Biologicals Inc.
 B. Braun Medical, Inc.
 Masimo Corporation
 Boston Scientific Corporation

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2021

California Analysis

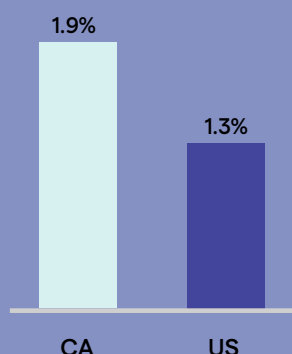
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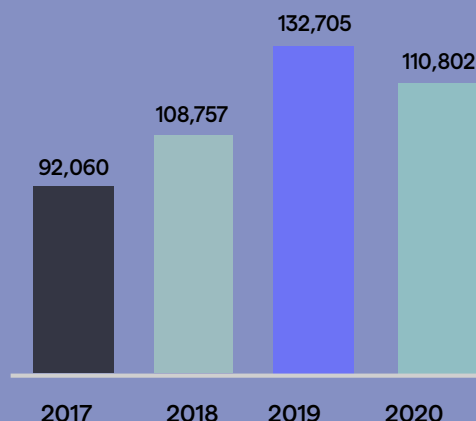
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This fact sheet, excerpted from the 2021 California Workforce Trends Report presents summary information on industry job postings for California from January 2017 – December 2020. This data is also included in aggregate in the national 2021 CSBI/TEconomy Life Sciences Workforce Trends report. The individual years in trend analysis will not sum to cumulative totals due to unique (non-duplicative) postings that span across individual years.

Life Sciences' Share Across All Industries of Total Unique Job Postings, 2017-20



Trend in Total Unique Job Postings from California Life Sciences Companies, 2017-20



Growth

Despite the disruptions of the past year, California's life sciences industry continues as a consistent engine of economic growth and high-quality job creation for the state and across the industry. Over 50% of the CA companies surveyed (n=277) for the report indicated that the COVID pandemic had little to no impact on their hiring, and a small percentage (5%) indicated they hired at a faster pace.

Top 15 Companies by Unique Job Posting Totals

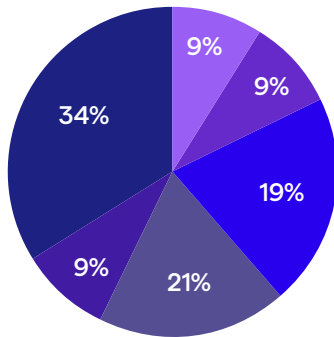
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Amgen Inc.
Abbott Laboratories
Danaher Corporation

Medtronic, Inc.
Gilead Sciences, Inc.
Genentech, Inc.
Roche Laboratories Inc.

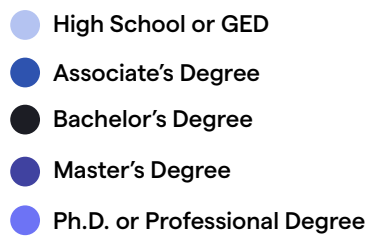
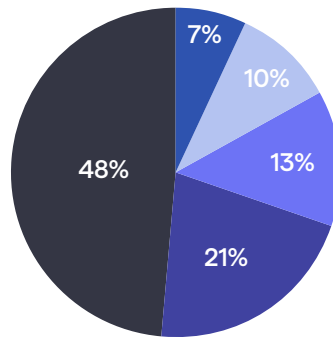
Quest Diagnostics Incorporated
Johnson & Johnson
Edwards Lifesciences Corporation
Laboratory Corporation of America

Illumina
IQVIA
Pfizer Inc.

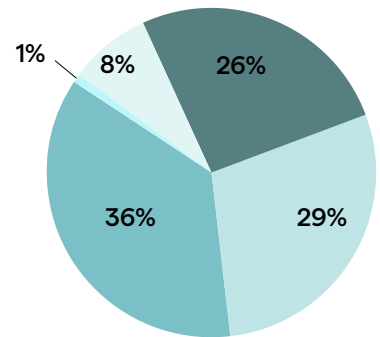
Experience Requirements



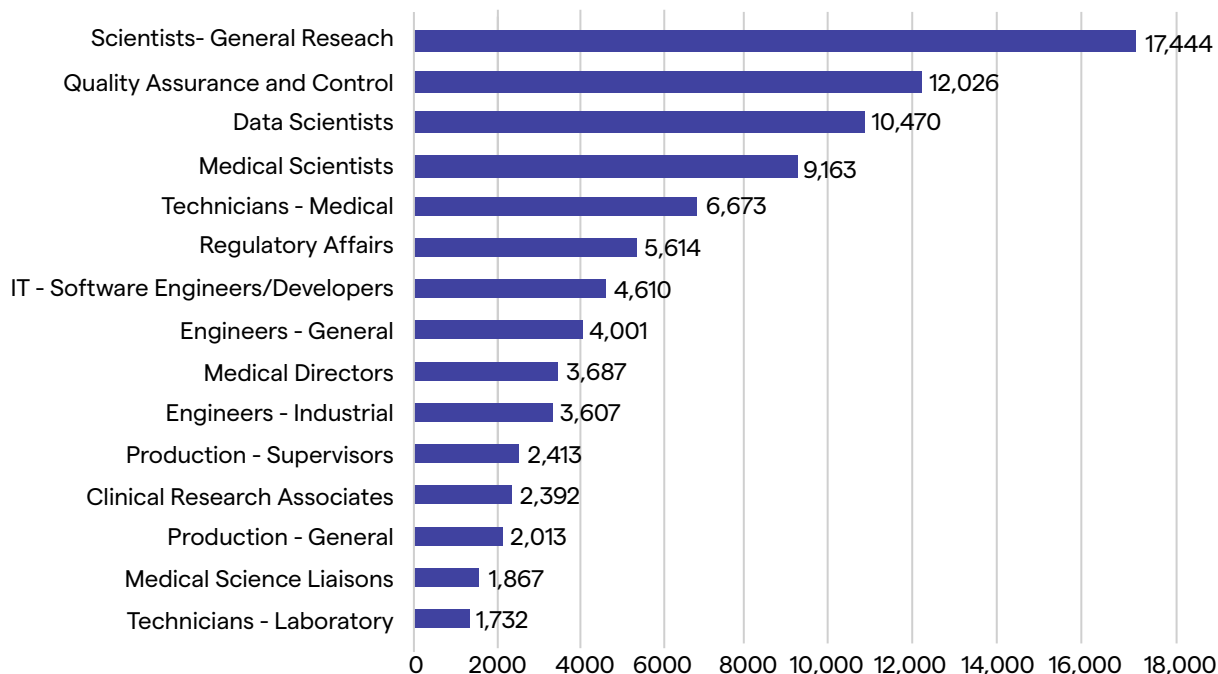
Degree Requirements



Share of Industry Jobs by Major Life Sciences Sector



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