

Clinical

UK Life Sciences Labour Market Trends

June 2022

INTRODUCTION



If careful attention is paid to the reality, we will see clearly, the real shortage is of the right skills, rather than of jobs. In the last 12 months we have seen a positively thriving European life sciences market whilst still navigating the Brexit transition and the continuing aftermath of the COVID-19 pandemic. We have witnessed what can only be described as quite remarkable growth in M&A/VC activity. UK digital health has been a beneficiary of significant funding into UK digital health.

In 2021 Europe saw its highest recorded vacancies within life sciences. A particular highlight across the continent was in scientist vacancies with over 12500 newly created roles. This represented a 71% rise YOY and already in 2022, this trend continues with 37% growth versus 2021. It is very clear that investors have also been attracted to the booming biotech sector that has been riding high on the crest of innovation. In the UK last year, by far the fastest growth in vacancies however was seen in clinical start-up which, only 4 months into this year the trend is already at 75% growth. This would indicate a surge in new trials coming through.

We are seeing within clinical trials specifically the trend to become more uniform. With the use of technology throughout the industry becoming more widely adopted & accepted we see the recognition rise in the benefits of tech. With the increase in deidentified real-world patient data becoming more available therefore increasing the use of data analytics platforms, the work of researchers and academics is being revolutionised.

There has always been an ambition for the UK to be a leading global centre of excellence in life sciences. The industry itself has shown incredible resilience in a post Brexit world, a testament to the talent and determination of the industry to remain firmly on that stage. The main area that will hold the UK back considerably in achieving further ambition is the lack of new talent coming through.

Yvette Cleland - CEO | Cpl UK

CONTENTS

Overview	Page 03
Contract Research Organisations	Page 04
Pharmaceuticals	Page 05
Top Firms	Page 06
About Cpl Life Sciences Vacancysoft	Page 07

Overview

The European life sciences industry experienced a record year in 2021, when recruitment levels for scientists reached over 12,500 new jobs, representing a 71.8% year-on-year rise and an uplift of 59.8% in relation to 2019. In early 2022, hiring is on course to rise even further with firms already publishing 37% of last year’s vacancies in just the first four months of the year. On the current trajectory, recruitment is set to rise by 11.4% and reach a total of over 14,000 annual vacancies.

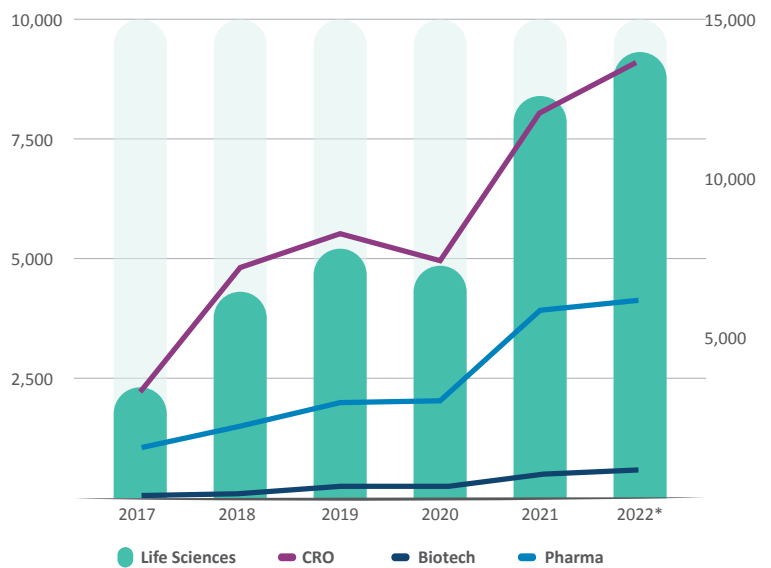
Contract research organisations (CROs) are responsible for the bulk of new scientific jobs in the industry across the continent. However, as a share of all life sciences vacancies — which includes the pharma and biotech sectors — they are dropping. In 2018, 74.7% of all clinical vacancies were in CROs, whereas by 2021 that had slipped to 64.3%. In 2022 volumes, however, are slightly up on the industry average, with the year set for a 13.3% year-on-year increase.

In contrast, hiring levels have been more muted in pharmaceutical firms in 2022, rising at 5.8%. Last year, new jobs in the sector were up 92.2% year-on-year and 93.9% up compared to 2019. As a share of total vacancies, recruitment levels in pharmaceuticals constituted 28.3% of all jobs in 2020, a proportion that rose to 31.6% in 2021.

Vacancies in biotech are also increasing in share. In 2021, total new jobs rose by 89.2% year-on-year and were up 98.8% on pre-pandemic levels. In 2022 so far, with vacancies already at 41.8% of last year’s levels (the fastest growth out of the life sciences sectors), the proportion has grown to account for 4.5% of total industry hiring — up from 1.7% in 2018.

Annual Totals

All Clinical Vacancies, Europe, Life Sciences, 2017-22

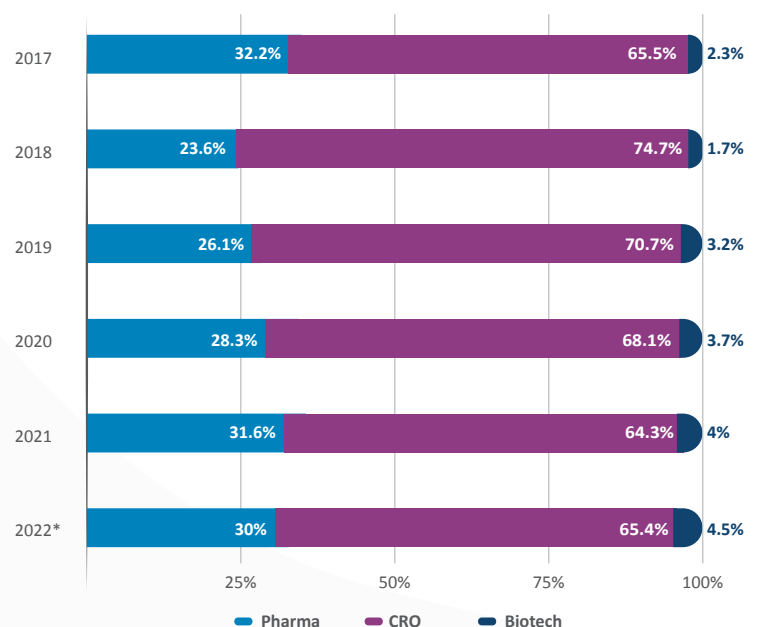


* Jan-Apr 2022

Source: Vacancysoft Analytics
Fig. 01

Annual % Breakdown

All Clinical Vacancies as % by sector, Europe, Life Sciences, 2017-22



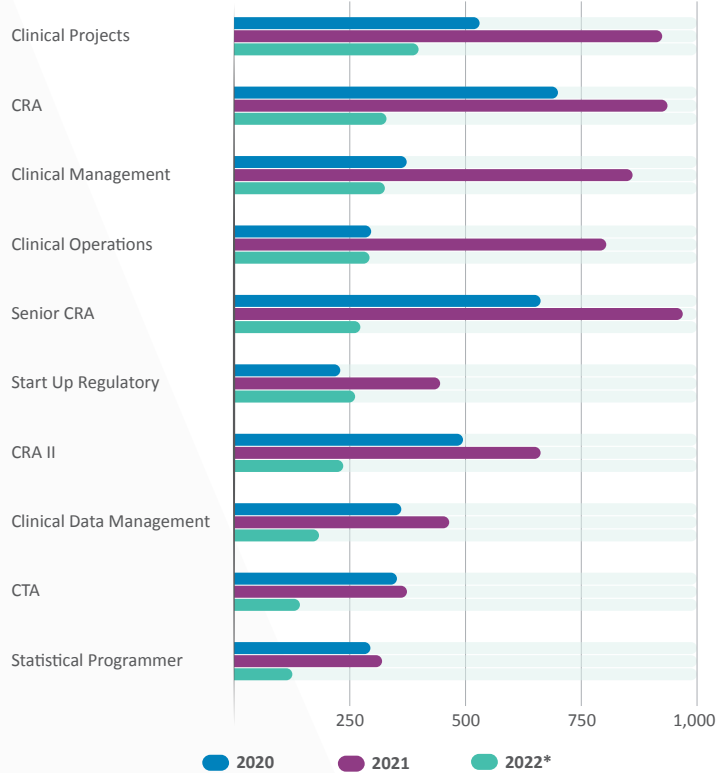
* Jan-Apr 2022

Source: Vacancysoft Analytics
Fig. 02

Contract Research Organisations

Annual Totals by Role

All Clinical Vacancies, Europe, Clinical Research Organisations, 2020-22



Source: Vacancysoft Analytics

* Jan-Apr 2022

Fig. 03

Annual Totals by Country

All Clinical Vacancies, Europe, Clinical Research Organisations, 2020-22



Source: Vacancysoft Analytics

* Jan-Apr 2022

Fig. 04

A look across vacancies for specific clinical functions within contract research organisations (CROs) in Europe shows that roles in clinical projects are most sought after. The 400 vacancies published in 2022 represent a rise of 29.1% in relation to the same period in 2021. This growth increases this function's share by 1.6 percentage points to account for 13.1% of overall sector hiring.

By far the fastest growing area for recruitment is for clinical start up regulatory roles (currently up 75% in the first four months of the year), indicating that a flurry of new trials are set to commence.

Out of the top 10 role types, the only area to drop relatively in demand has been for senior clinical research associates (CRAs), with current vacancy volumes down 15.1% — a fall that resulted in the function losing 3 percentage points in total vacancy share.

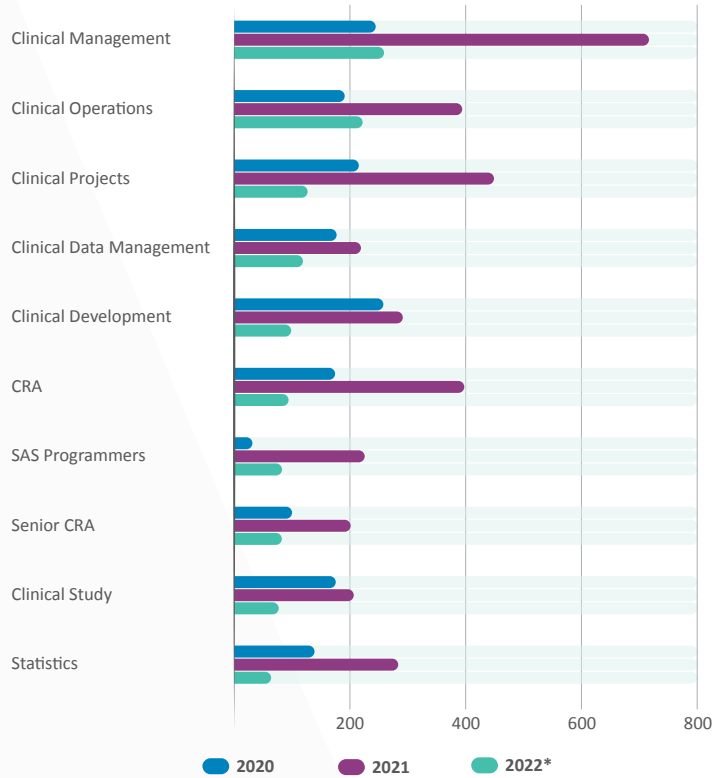
By country, the UK continues to publish the most clinical CRO vacancies, albeit on a relatively flat trajectory in 2022, with no real year-on-year change (0.3%). Nevertheless, as hiring levels in other countries drop, the UK has increased its share of total European vacancies from 18.3% in 2020 to 27.4% in 2022.

Within the top 10 countries, Romania is experiencing the biggest surge in CRO hiring, with clinical vacancies up 87% on 2021. This surge has resulted in the country leap-frogging Czechia for most new jobs.

Ukraine has dropped out of the top 10 in 2022, an area it frequented prior to Russia's invasion. While there remain a number of clinical vacancies being published in the country, volumes are down 55.4% — a big fall, given that clinical hiring levels in Ukraine over the last three years were higher than in Belgium, Bulgaria or the Netherlands.

Annual Totals by Role

All Clinical Vacancies, Europe, Pharmaceuticals, 2020-22



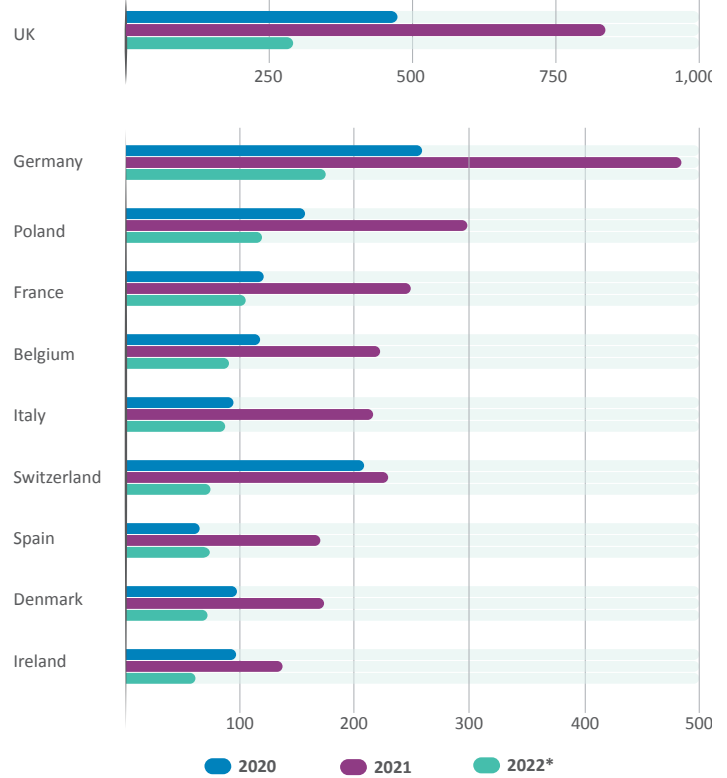
Source: Vacancysoft Analytics

* Jan-Apr 2022

Fig. 03

Annual Totals by Country

All Clinical Vacancies, Europe, Pharmaceuticals, 2020-22



Source: Vacancysoft Analytics

* Jan-Apr 2022

Fig. 04

The largest specialist clinical area being hired from within pharmaceutical companies in Europe is clinical management, with nearly 720 vacancies published in 2021, representing a 197.9% year-on-year rise. In 2022, hiring levels are currently up 7.8% on last year, with the role accounting for 18.4% of all new jobs — up from 11.6% in 2020.

Jobs for clinical projects professionals, meanwhile, are down 15.6%, suggesting that pharma companies are increasingly pushing these projects back to clinical research organisations (CROs). As a share of overall vacancies, the function has dropped 2.3 percentage points since 2021 to now account for 9% of total industry hiring for clinical specialists.

Vacancy volumes for clinical research associates (CRAs) are also slipping, falling by nearly a third (29.4%) so far this year in relation to 2021, after surging by 128.3% year-on-year in 2021.

The fastest-growing area is clinical operations, with new jobs for this function in European

pharmaceuticals up 69.6%. This lifted its share of overall vacancies from 9.8% in 2021 to 15.8% in 2022.

By country, while the UK is the publisher of the most vacancies — accounting for 20.2% of all new clinical jobs in Europe — it's not as dominant for recruitment within pharma as it is in CROs. Overall vacancies in UK pharma are broadly flat across the country, with volumes currently up 3.3% year-on-year.

Out of the top 10 countries, Switzerland has seen a decline so far in 2022, with clinical hiring down 1.3% over the first four months of the year compared to the same period in 2021. Ireland, meanwhile, is experiencing a surge, with new clinical jobs in pharma up 33%. This pushes its proportion of total European life sciences clinical hiring up by one percentage point to account for 4.4% of all vacancies.

Syneos Health is the leading life sciences industry hirer of clinical specialists in Europe. It topped the table last year with over 1,530 vacancies, and in 2022 makes a rapid start with the publication of 780 vacancies — already more than half of last year’s total. In April, the company named Michelle Keefe as its next chief executive officer, succeeding Alistair Macdonald, who will retire after 20 years at Syneos Health.

New jobs in 2022 are growing the fastest at Cmed Group which — following its publication of only 23 jobs in 2021 — has already recorded 65 clinical vacancies up to and including April. This year’s current tally puts the firm on a year-on-year growth trajectory of 747.8%. Second-fastest are hiring levels at Ergomed, up 99.5% in the first months of 2022. In February, the firm strengthened its consulting arm with the acquisition of pharmaceutical quality assurance specialist ADAMAS for £25.6 million.

Emerging from the data generally is the appearance of regular variance between organisations’ recruitment levels. As covid-19 lockdowns were gradually phased out across the continent most, if not all, companies experienced surges in vacancies. Now, however, while hiring has continued in some firms, others are seeing new jobs slow down. Of the top 20 companies for European clinical vacancies in 2022, six are experiencing slowdowns.

The most extreme drop is at PPD, where clinical vacancies are down 64.8% in relation to 2021. This is followed by Labcorp (-36.8%) and Pharm-Olam (-34.9%) — the latter of which, in May, changed its name to Allucent after it merged with global pharmaceutical services leader CATO SMS. Other firms to keep an eye on include Dublin-headquartered ICON (+54.1%) — which reported a record quarter for net business wins of over €2.3 billion in Q1 2022 — Premier Research International (+53.3%) and Medpace (+91.7%).

Top 20 Organizations

Clinical Vacancies, within Life Sciences 2021-22

Organization	2021	2022*
Syneos Health	1533	779
PRA	1131	377
IQVIA	1241	362
ICON	625	321
Parexel	617	218
Labcorp Drug Development	802	169
Premier Research International	270	138
Ergomed	188	125
Medpace	133	85
Cmed Group	23	65
Eurofins	131	57
Simbec-Orion Group	113	51
PPD	341	40
Trial Form Support	143	32
Pharm-Olam International	106	23
Clinipace Worldwide	56	22
Worldwide Clinical Trials	54	16
Synexus Clinical Research	39	15
CTI Clinical Trial and Consulting Services	27	14
Meditrial Europe	20	13

Source: Vacancysoft Analytics

* Jan-Apr 2022

Fig. 07



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

UK Office

33 Blagrove Street, Reading, Berkshire, RG1 1PW
t | **+44 (0)118 959 4990**

EU Office

5 Old Bailey, London, EC4M 7BA
t | **+44 (0)207 822 1710**



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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.

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**Vicarage House,
58-60 Kensington Church St,
London, W8 4DB
Tel: +44 (0) 20 7193 6850**



vacancysoft.com

cpllifesciences.com