

Clinical

UK Life Sciences Labour Market Trends

November 2022

INTRODUCTION



Clinical trials are an essential part of the research and development (R&D) of new medicines and vaccines. During the Covid-19 pandemic, the value of clinical trials made a significant impact on global communities. During that time of global upheaval, many trials were paused. Entering 2022 we saw some interesting trends continue in terms of vacancy analysis and how several years into Covid-19, how the industry and most pertinently clinical trials have recovered.

Our latest data reveals seven out of ten jobs in clinical research in 2022 sit within Contract Research Organisations (CROs), showing a sustained and strong level of growth across Europe. In 2021, we saw a rapid increase in the number of vacancies for clinical research jobs; however by 2022, although we saw continued growth, the numbers stabilised to a rate of about 9% YOY increase. Biotechnology clinical research has seen the slowest growth of all areas in life sciences at only 4%. Studying emerging trends and roles most impacting talent requirements, clinical project roles saw the highest growth in terms of open vacancies, with a 71% increase compared to 2021.

The pandemic significantly influenced the type of clinical trials that were conducted, as well as how those trials were designed and delivered. We have seen regulatory flexibilities introduced, digital and remote approaches adopted, and innovative design and delivery models implemented. However, we have also seen the negative effect that a focus on COVID-19 has had on research into other conditions.

Efforts in 2022 to restart and recover activity have seen some major increases in clinical trials. The emerging trends at the beginning of 2022 have seen substantial increases in trials within diabetes, with a round 80 clinical trials starting at the beginning of 2022 and a further 300 planned trials going live in 2022 and 2023. Trial activity in hypertension and respiratory tract infections is also on track to have the largest boost in 2022, in cardiovascular and respiratory disease categories, respectively. While the pandemic shifted resources away from non-Covid-19 respiratory infections, we have seen a resurgence in this space in 2022. These areas of growth, alongside the continued increase in oncology trials, have been at the forefront of the increase in hiring trends. Overall, trends show a move toward adopting emerging technologies to discover drugs, adapting existing scientific techniques to find new therapeutic approaches within the RNA field, and decentralising clinical trials.

With a growing trend toward decentralised trials, 2022 has seen an increase of 28% compared to 2021. The progress made in using remote monitoring and diagnostics, home health providers, local labs, digital capture of consent data, and direct-to-patient drug distribution is gaining momentum every month. The Covid-19 pandemic has driven the growth in decentralised trials, eliminating or significantly reducing the need for participants to come into contact with researchers face-to-face. Decentralised trials can help make research studies more accessible to a wider demographic of participants. This can result in improved recruitment and retention rates, greater engagement and diversity among participants, and a reduction in the costs required to run trials, which has shown some exceptional benefits compared to conventional trials.

Early indicators for 2023 show a continued trend in growth across the clinical trial landscape. As always, one of the greatest obstacles to growth in Europe is not a lack of phenomenal science but a shortage of people with the talent to fill the roles.

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

Data so far in Q4 confirms that the life sciences industry in Europe is performing well on the jobs front. And although we haven't seen major increases in vacancies, growth in 2022 has remained consistently steady. When reviewing annual numbers, we find that 11,403 new jobs have been created for scientific clinical vacancies within life sciences from January-October, which is fast approaching the 2021 mark (12,555).

Our yearly forecast shows that vacancies could reach around 13,684 by the end of 2022, a year-on-year growth of 9% compared to 2021. However, the most notable change for vacancies within life sciences in Europe occurred in 2021, with vacancy numbers up 72% on 2020. Unsurprisingly, we did see a significant slowdown in hiring during the first year of the pandemic, with vacancies just exceeding the 7,000 mark.

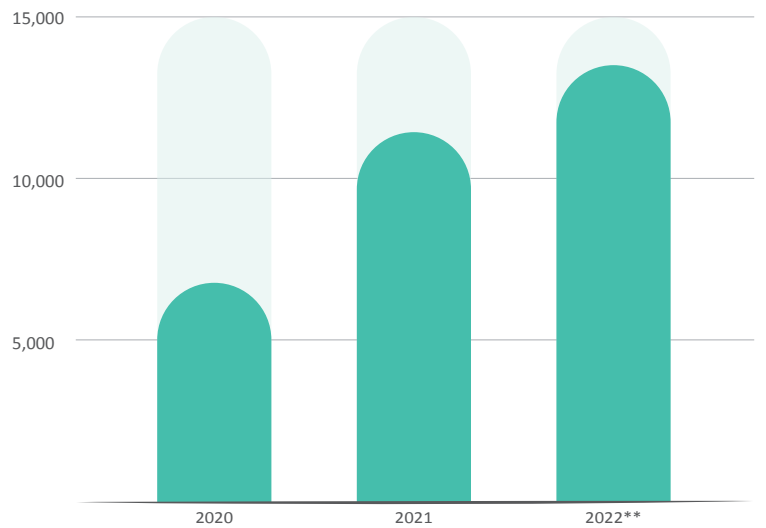
A breakdown of vacancies by sector shows that Contract Research Organisations (CROs) head the charts. We expect CROs to account for almost 7 in 10 (69%) vacancies by the end of 2022, the largest slice of the scientific clinical vacancy share. The lowest market share that we've seen for CROs was a still very respectable 64% recorded in 2021, with numbers for 2020 and 2022 higher at around 68-69%.

The share of Pharmaceutical vacancies is predicted to decrease to approximately 27%, slightly higher than in 2020. The sector experienced a better year in 2021, accounting for just under a third (32%) of the total.

At the other end of the scale, the Biotechnology sector recorded the slowest rate of growth in 2022. According to our forecast, the sector is estimated to account for the smallest proportion – around 4% – of scientific clinical vacancies. Nonetheless, it is enjoying its best year since 2020 when its share was 3.6%.

Annual Totals

All Clinical Vacancies, Europe, Life Sciences, 2020-22

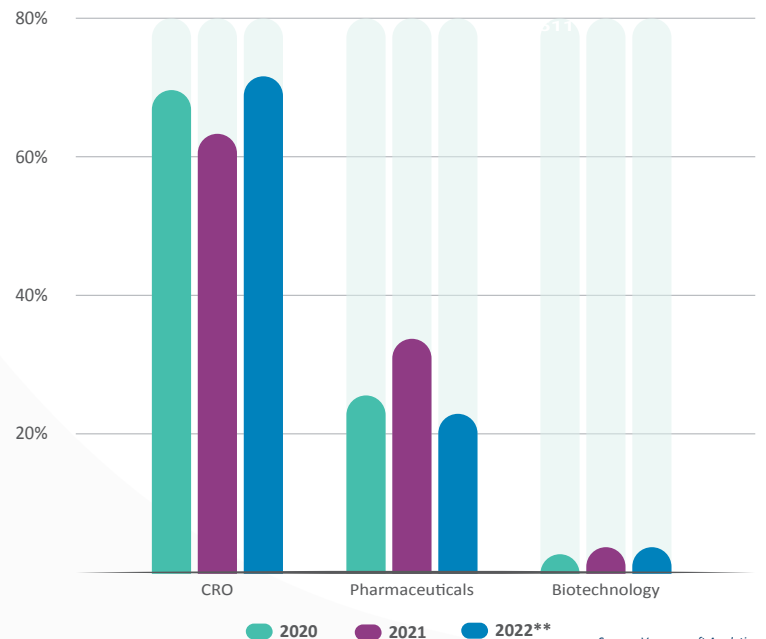


** - Forecast 2022

Source: Vacancysoft Analytics
Fig. 01

Annual % Breakdown

All Clinical Vacancies as % by sector, Europe, Life Sciences, 2020-22*Est



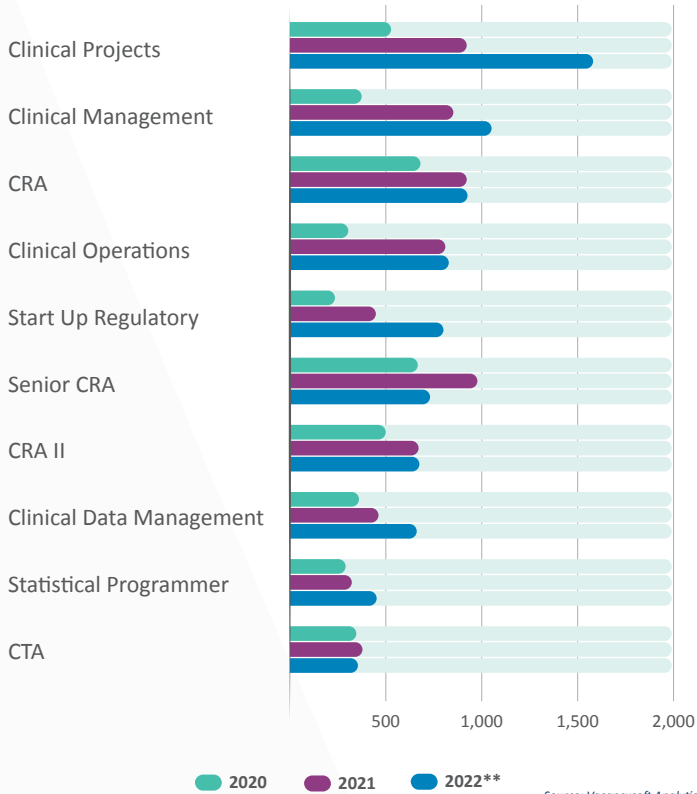
** - Forecast 2022

Source: Vacancysoft Analytics
Fig. 02

Contract Research Organisations

Annual Totals by Role

All Clinical Vacancies, Europe, CRO, 2020-22



** Forecast 2022

Source: Vacancysoft Analytics
Fig. 03

Annual Totals by Country

All Clinical Vacancies, Europe, CRO, 2020-22



** Forecast 2022

Source: Vacancysoft Analytics
Fig. 04

Looking at scientific clinical vacancies in the CRO sector, we observe that Clinical Projects roles are the most in demand, with 2,770 jobs in the 2020-2022 period. We predict there to be approximately 1,579 vacancies by the end of 2022, a year-on-year growth of 71% in relation to 2021. The important nature of the work is further evidenced by an increase of 74% the previous year, making it the best performing role in 2021 compared to 2020.

The fastest year-on-year growth is expected for Start-Up Regulatory vacancies, which are forecast to reach almost 800 (794) jobs, constituting an impressive rise of around 78% on 2021. However, the highest growth for vacancies in CROs throughout the period was experienced by Clinical Operations in 2021, equating to a notable 170% rise compared to 2020.

In terms of hiring activity by country, the UK leads the way with 1,538 jobs year to date, accounting

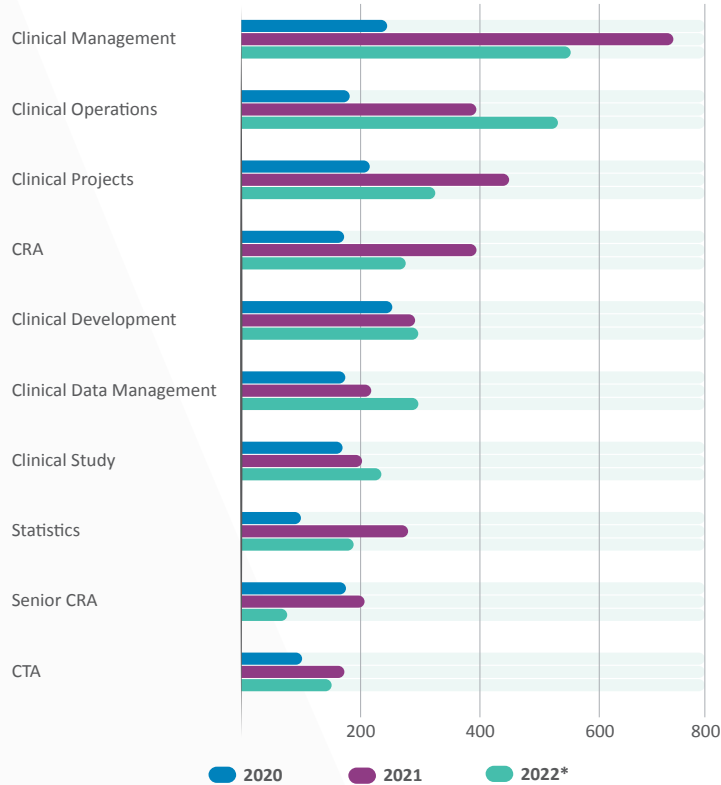
for one fifth of the CRO scientific clinical vacancy share. We predict the UK will achieve an estimated 1,846 new jobs by the end of 2022. This is a lower number than the 2,027 recorded in 2021 and would translate to a year-on-year drop of 9%, a far cry from the 119% uplift in 2021 compared to 2020.

Of note, Spain could almost treble its 2020 total of 315, with around 841 vacancies expected to be posted by the end of 2022, an increase of 47% on 2021, making it its best year to date.

Interestingly, the biggest change in the period was experienced by Bulgaria, which posted an extraordinary increase of approximately 217% compared to 2020. For 2022, that number is set to decrease markedly, with a steady if not stellar 27% rise predicted.

Annual Totals by Role

All Clinical Vacancies, Europe, Pharmaceuticals, 2020-22



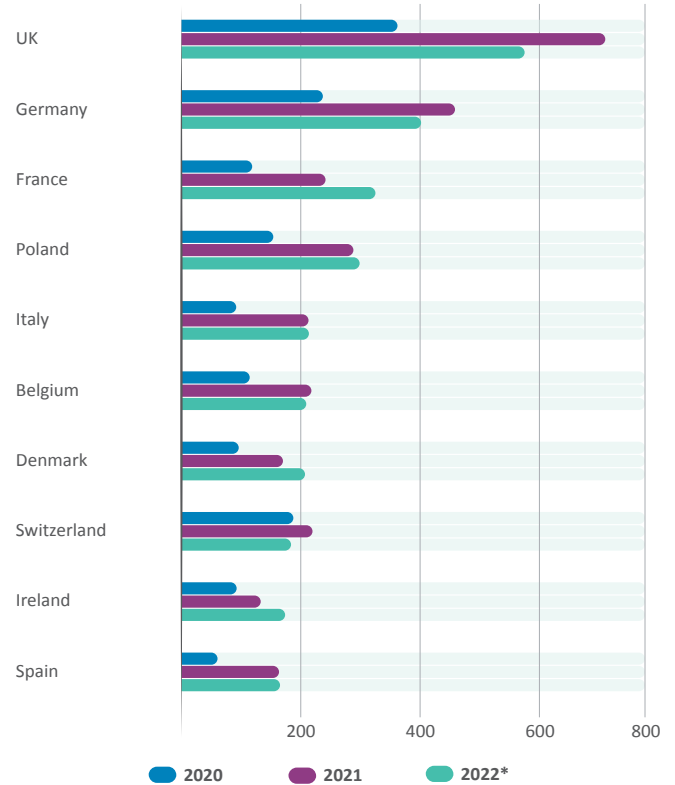
Source: Vacancysoft Analytics

Fig. 05

** Forecast 2022

Annual Totals by Country

All Clinical Vacancies, Europe, Pharmaceuticals, 2020-22



Source: Vacancysoft Analytics

Fig. 06

** Forecast 2022

A comparison of the vacancy numbers for scientific clinical jobs in the Pharmaceutical sector shows that Clinical Management roles top the table. Year to date, numbers have already surpassed the 2020 total with an estimated 552 vacancies expected by the end of 2022. This however represents a year-on-year fall of 23% compared to 2021, when vacancy numbers shot up by 195%!

Clinical Operations is the next best performer with around 535 vacancies predicted by the end of 2022, constituting a year-on-year growth of 37% compared to 2021. Once again, this was some way short of the 2021 figure, when we saw a big jump of 114%.

The most significant negative year-on-year change in 2022 is for Statistics, which we forecast to experience a decrease of 32% compared to 2021. Vacancy numbers for this profession are numbers are estimated to fall below 200.

A breakdown of the vacancies in Pharma by country shows the UK once again taking the top hirer honours for scientific clinical jobs. It has recorded almost 600 jobs to date, accounting for 16% of the overall vacancy share. We predict the UK to experience a drop of 19% compared to 2021, when numbers accelerated upwards by approximately 98%.

Germany, which ranks second, has followed a similar pattern to the UK, posting a decrease of 12% coming after a 94% rise in 2021. Vacancies are estimated to be 413 by the end of 2022, a fall of 12.5% compared to the 472 of 2021.

Scientific clinical vacancies in France are expected to surge and register a year-on-year growth of 35% compared to 2021. This would represent the biggest positive yearly change in 2022, with job postings estimated to top 300.

When analysing the top organisations hiring clinical talent within Life Sciences, Syneos Health has been in number one position the last couple of years, with 5,554 vacancies published from 2020 to October 2022.

If vacancies continue to grow at the current rate, it would be expected to reach more than 3,500 by the end of the year, more than double the 2021 total. The US multinational is on target to record a spectacular year-on-year increase of 132% compared to 2021.

The Morrisville, North Carolina headquartered conglomerate recently announced its partnership with Ride Health to offer patient-centric, technology-enabled solutions aimed at improving the experience of clinical trials for sponsors, sites and patients.

IQVIA takes the runners-up spot, with a total of 2,867 scientific clinical jobs since 2020 and 912 from January-October 2022. We predict around 1,094 vacancies by the end of 2022 for the US multinational, a year-on-year decrease of approximately 12% compared to 2021. The Durham, North Carolina based company recently published a whitepaper analysing the importance to digitalise the patient journey as a way of enhancing overall experience.

Following a buoyant 2021 with 1,088 new job postings, Population Services International (PSI) is forecast to record its biggest year-on-year fall of 45% in 2022 compared to 2021. Vacancy numbers for the US non-profit are estimated to plummet to around 604. The company, which has its HQ in Washington DC, announced a partnership with Babylon to launch a digital service for people on low incomes in Vietnam.

Other company highlights include:

- Medpace has also had a busy hiring year, with 2022 vacancies up by 50% on 2021. The Cincinnati based company can lay claim to the second biggest year-on-year rise (after Syneos Health).
- Ireland’s ICON has published 663 scientific clinical jobs this year, already surpassing its 2021 total. Numbers are expected to reach almost 800 by the end of 2022, representing an uptick of 27%.
- At the other end of the scale, TFS HealthScience is set to experience a drop of 40% in 2022. Vacancies for the Swedish company are estimated to be under 100.

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.

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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.

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