

Vacancysoft/Clinical Professionals

Pharmaceuticals Report

UK AND IRELAND

2016

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About Vacancysoft Data

Our data set for this report contains information on 11 800 vacancies. These vacancies were found during normal Vacancysoft operations; duplicates were eliminated and the vacancies were processed according to our proprietary rules.

All of the vacancies in the data set were found between March 2014 and February 2016, and they all came from companies that had posted at least one job before the start of that period. All of the vacancies were in the UK or Ireland. Vacancies from some companies were excluded because it was not possible to produce a consistent data set.



We are delighted to be partnering with Vacancysoft to provide insight on recruitment activity in the Pharmaceuticals sector.

For this report we have been analysing activity in the UK and Ireland over the last two years, identifying key trends we are witnessing.

I hope you find it interesting and should you like to know more about current market activity please do contact me on yvette.cleland@clinicalprofessionals.eu

Yvette Cleland
CEO
Clinical Professionals



Overview

In this report we are taking a closer look at Pharmaceutical vacancies in the UK and Ireland. These two countries have recently been outperforming much of the rest of Europe in CRO vacancies; here we see that growth in the traditional pharmaceutical segment has also been strong.

A snapshot of vacancy activity over the last twelve months (*first graph*) shows clearly that the UK is a much bigger vacancy market than Ireland is. Also, at 27% of UK vacancies in the period, CROs form a larger portion of the UK market than they do of the Irish market, where they were responsible for only 10% of new roles.

Overall growth has been strong in the last two years; like-for-like, we have seen 41% more vacancies in the period March '15 to February '16 than in the 12 months preceding. Not only have vacancies grown, but the rate of growth has actually slightly increased as well.

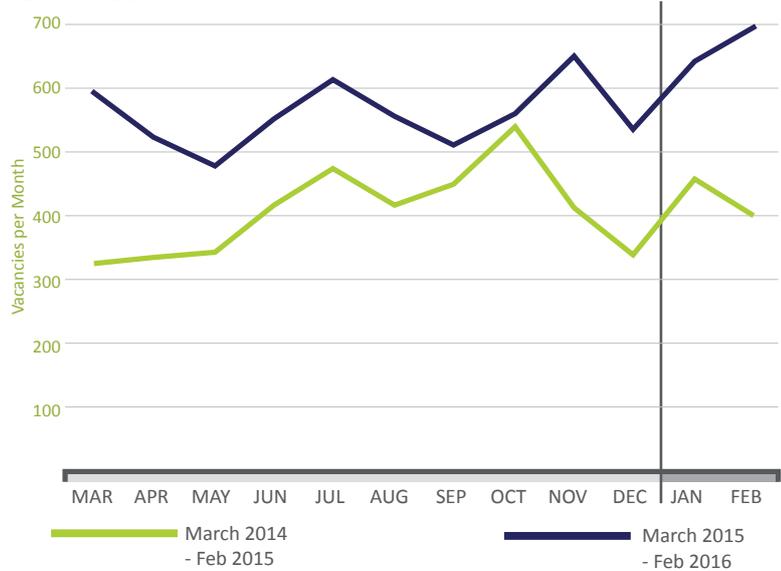
Although the UK has more additional vacancies in the past 12 months than Ireland does, it is Ireland's vacancy growth which is more impressive. At over 80% vacancy growth, year-over-year, among the companies we covered, Ireland's growth rate is more than double the UK's 34%.

Ireland is now seen as the number one location in the EU for Life Sciences projects. Already 18 of the top 20 Pharmaceutical businesses and 15 of the globe's top 25 MedTech businesses are operating in Ireland, and we have seen a raft of new US-based businesses set up operations in Ireland in the last few years. The Irish Government's investment into FDI has worked well to extol the business virtues of being in Ireland, with its highly-skilled work force and growing population, and as such Ireland continues to secure an increasing percentage of the Life Sciences market. There are currently over 33 FDA-approved pharma / biopharma sites in Ireland and with its excellent regulatory record and superb life sciences infrastructure we envisage the current rise in vacancies in Ireland will continue, particularly in light of the growing nutraceuticals market, convergent technologies and personalised medicines making much noise in this already busy space.

Vacancies by Country and Sector
TRAILING TWELVE MONTHS



Vacancies
YEAR-ON-YEAR



Year-on-Year Vacancy Change by Country



Geography Analysis

Within the UK, vacancies from Pharmaceutical companies have been concentrated in the traditionally strong south of the country. The three regions of Greater London, the South East and the East of England had over 80% of all vacancies in the last twelve months, so the concentration here may be even stronger than in some other industries.

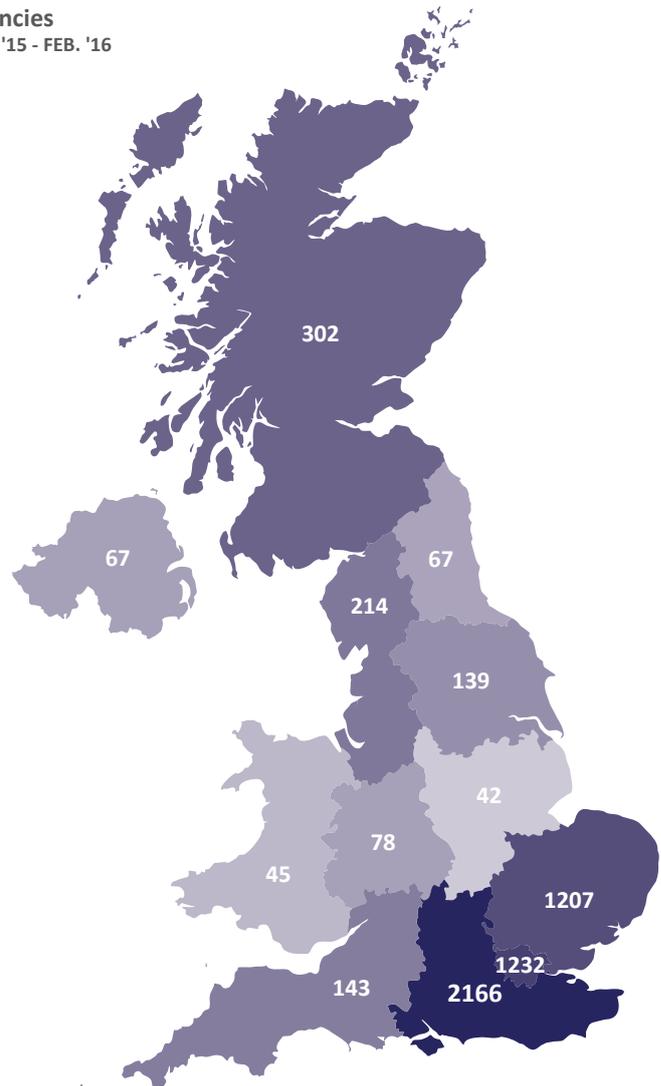
In both regions adjacent to Greater London, it is the areas closest to London that see the most vacancies. In South East England, Reading, Maidenhead, and Slough, along the M4 corridor, are three of the busiest cities. In the East of England, most vacancies are just outside of Greater London, in traditional dormitory towns like Welwyn Garden City and Stevenage. Cambridge is also a significant hub.

While vacancies in Greater London have stalled in the last twelve months (down 5% year-on-year), there has been strong growth in both the South East (73% year-on-year) and the East of England (47%). Every other area of the UK has seen vacancy growth as well, with the exception of the West Midlands.

In Ireland, the Dublin region has been the strongest performer, with both more vacancies than other regions (680 in the last twelve months), and a higher growth rate. Munster, the second busiest region, had 346 vacancies, and grew at over 60%. The biggest concentration in Munster is around the southern city of Cork.

In the South East of England (most pertinently Reading, Maidenhead, and Slough) appear to be three of the busiest cities for vacancy numbers outside Greater London. Of course the very large CROs are clustered into these regions, and there has been a continued rise in vacancies within CROs over the last few years which is reflected in growth of vacancies here. Cambridge has also been cited as a city seeing extraordinary levels of growth, fuelled by companies such as AstraZeneca moving their global HQ and a continued investment in the infrastructure round Cambridge. This continues to attract start up Life Sciences businesses, from high-end research to large sites for commercialisation, from advanced industrial parks to cutting edge R&D Incubators.

Vacancies
MAR. '15 - FEB. '16



Year-on-Year Changes in Selected UK Cities

Region	Net Change	Percentage Change
London	-99	-8% ↓
Cambridge	77	26% ↗
Reading	120	67% ↑
Camberley	159	115% ↑
Maidenhead	102	71% ↑

Year-on-Year Changes in Selected Irish Cities

Region	Net Change	Percentage Change
Dublin	351	120% ↑
Cork	87	79% ↗
Athlone	-20	-28% ↓
Sligo	14	52% ↗

Role Analysis

In our data set, just over half (52%) of all vacancies in the past twelve months were for scientists of one sort or another. Science vacancies grew very slightly faster than the average across all roles (43% versus 41%). Sales was the profession with the next highest demand, followed by Marketing. These grew more slowly than Science did.

The largest profession that grew quickly was Accounting; in the last twelve months there were nearly 200 more Accounting vacancies than in the previous year, an increase of over 60%. This increase was made up of additional vacancies for financial and management accountants, but there were also new vacancies in more niche roles such as compliance and risk management.

HR professionals were also in much higher demand than in the previous year. There was growth in all monitored specialisms within HR, but employee relations (including Compensation specialists) was the largest specialism that beat the overall growth trend.

Within scientific roles, the largest specialism was in QA. The rise in QA vacancies is in line with the general trend (42% year-on-year), but the rise in Clinical vacancies is much more pronounced. This has been driven mainly by CROs such as Quintiles and INC, and the result is growth of over 100% for specialisms such as Clinical Management, CRAs, and Statisticians.

Other scientific areas beating the overall trend include Regulatory Affairs and Packaging.

It is interesting to see a rise in Compensation specialists. As the Life Sciences industry in the UK continues to expand and grow so of course do the vacancies. One of the greatest challenges facing our industry is the lack of highly-trained supply. A lack of skilled workers of course inflates salaries and remuneration in the “war for talent”. As staff costs can have a significant impact on the cost of (for example) clinical drug development, bringing in “compensation specialists” may be rather short-sighted when in fact addressing the skills gap would address salary inflation.

Snapshot of Vacancies by Profession 2015Q4



Year-on-Year Vacancy Change in Selected Busy Professions

Profession	Net Change	Proportional Change
Sales	82	10% ↗
Marketer / PR	150	36% ↗
Accountant	197	62% ↑
Procurement / Supply Chain	110	36% ↗
IT Professional	130	46% ↑

Year-on-Year Change in Selected Science Specialisms

Specialisms	Net Change	Proportional Change
Quality Assurance	241	42% ↗
R&D	56	9% ↗
Clinical	394	105% ↑
Medical Affairs & Medical Information	91	38% ↗
Regulatory Affairs	110	75% ↑

Company Analysis

In other industries we frequently see a skew when we compare vacancy growth patterns to company headcounts. The Pharmaceutical industry is different, though, and our data shows very similar average growth rates across all sizes of company: the smallest companies grew their vacancies by 37%, and the largest grew them by 41%.

Despite similar growth rates, the largest companies created far more new vacancies than the smallest companies. Over 85% of all additional vacancies in the last twelve months came from companies with headcounts over 5 000.

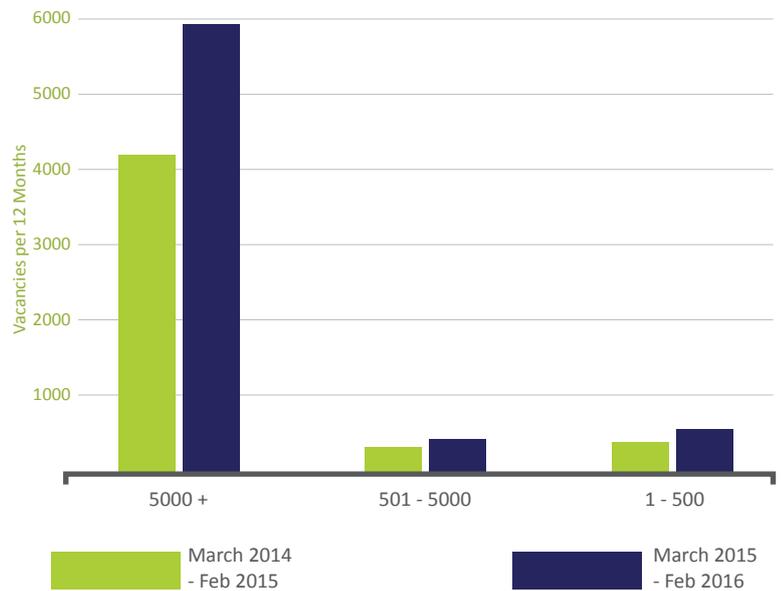
CROs and traditional pharmaceutical companies both had strong year-on-year growth. CROs were up 32%, and had over 400 additional vacancies, while traditional pharmaceutical companies were up 46%, and had over 1 600 additional vacancies. Biotech companies underperformed, but they are only a small part of the overall market.

Among the traditional pharmaceutical companies in our data, GlaxoSmithKline gained the most jobs overall, with an increase of more than 300 year-on-year. Novartis, Merck, Abbott and Eli Lilly all gained at least 100 vacancies in the same period as well.

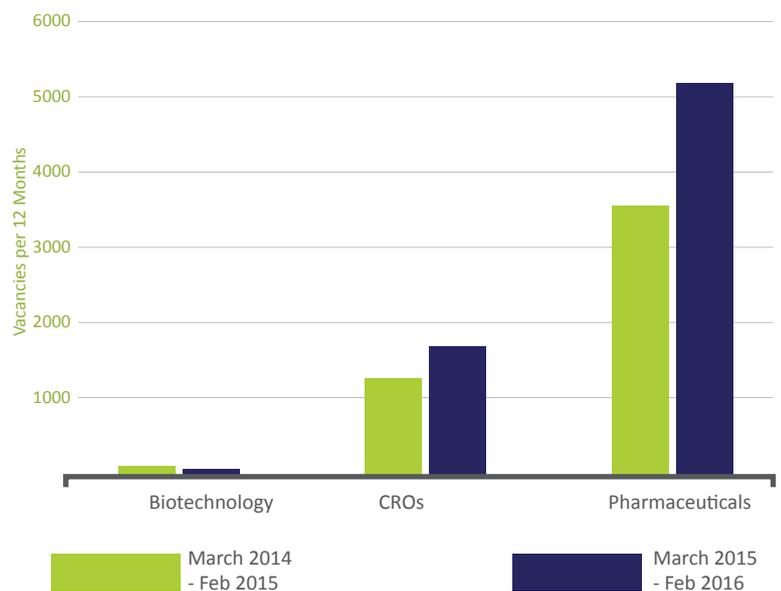
Three-quarters of the CROs in our data increased their vacancy count in the last twelve months, including Quintiles, INC, PPD, and Charles River. Among the largest CROs, it was INC that grew the fastest: it added just over 100 vacancies, giving a growth rate of nearly 60%.

We have seen rapid expansion in CRO headcounts over the last six months as pharma outsourcing models continue to drive the sector. We have also seen a number of SME biotechs increasing headcount with pivotal leadership roles as they grow their UK/EU market presence, so whilst not as large in number of vacancies, it has created interesting movements in the candidate market - they often prefer the niche roles with forward-thinking companies, and packages are often very attractive.

Vacancy Changes by Company Headcount



Vacancy Changes by Company Type



Year-on-Year Vacancy Changes

SELECTED LARGE COMPANIES

Company Headcount	Net Change	Proportional Change
GlaxoSmithKline	307	34% ↗
Quintiles	79	14% ↗
Novartis	122	41% ↗
Johnson & Johnson	92	32% ↗
Roche	79	32% ↗

Clinical

PROFESSIONALS

Clinical Professionals

Clinical Professionals is Europe's leading life science staffing business offering outsourced solutions via Functional Service Provision (FSP) and traditional, high quality staffing solutions. Detailed market research carried out in early 2013 found that 95% of hiring managers rate Clinical Professionals as consistently superior in quality, speed of response, staff retention and communication. In addition to this, nine out of ten customers rate the company as their most trusted partner.

Clinical Professionals have developed a highly comprehensive understanding of a broad range of specialist functional disciplines within the pharmaceutical industry. Our knowledge-base has its foundations in an unrivalled blend of industry experience combined with a commitment to investing in training and development. We have specialist teams dedicated to recruiting within the various pharmaceutical sectors for permanent, contract, interim, FSP and freelance vacancies. Clinical Professionals offer a variety of services for both candidates and clients, including our CP FSP model, offering clients the opportunity to outsource the recruitment of a whole team whilst retaining control of the monitoring function in-house.

What we do:

Our Service Capabilities across all European Countries include:

- Contingency permanent recruitment
- Contract recruitment – freelance and PAYE via Clinical Professionals/Only Medics
- Search and selection permanent recruitment
- Specialist 'project-based' interims via Clinical Professionals/Only Medics
- FSP outsourced teams across Europe

Clinical Professionals has launched their **2016 European Salary Survey** to determine the salary and benefits for each sector of the UK Life Science industry.

The Survey will analyse salary and benefits for each sector of the European Life Science industry, and follows on from the success of our previous pharmaceutical salary surveys.

Contact us for more information on salariesurvey@clinicalprofessionals.co.uk

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About Us

- Launched in 2006, we provide Business Intelligence through Vacancy Data on subscription.
- We publish vacancy data daily, tailored to your needs, so you can be informed of client activity.
- Primarily used by recruiters, our service enables consultants to have a rapid response when Organizations post jobs thus facilitating Business Development and Client Management.
- Our data sets are also used by Executive Search, Consulting Firms, Business Services and Strategy Managers to facilitate a more client centric approach.
- For more information about us please contact James Chaplin by email: james.chaplin@vacancysoft.com

Free Trial

- On a daily basis we monitor over 500,000 companies for change.
- We configure an account for you with filters matching your needs. (So you decide which roles, sectors, locations you want to be kept informed about)
- You start getting daily emails from us with all relevant vacancy data.
- You also get an access to our online database, enabling you to search all activity in the market meeting your needs.
- After you decide which data packages you want our unit based pricing means so you only pay for what you find adds value.
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