

Vacancysoft & Clinical Professionals Pharmaceuticals Report

Research and Development

September 2017

Contents

Overview	Page 03
Breakdown by Country	Page 04
Analysis by Role	Page 05
Top Companies	Page 06
About Clinical Professionals	Page 07
About Vacancysoft	Page 07

About Vacancysoft Data

Our data set for this report contains information on 9,062 vacancies for R&D posts in the Life Sciences industry. These vacancies were found during normal Vacancysoft operations, duplicates were eliminated and the vacancies were processed according to Vacancysoft's proprietary rules. All of the vacancies in the data set were found between 1 January 2015 and 1 September 2017, and they all came from companies that had posted at least one job before the start of that period. All of the regulatory vacancies were based in the EEA or five other European nations (Norway, Russia, Serbia, Switzerland, Turkey, and). Excluded from the data are vacancies which were new to Vacancysoft during the period under review and those from companies for which it was not possible to produce a consistent data set.



Despite there being a suggestion that the trend for R&D vacancies decreasing as we get towards the end of 2017, Scientific Professionals have not experienced such a slow-down. Only focussing on the UK market means that we cannot confidently comment on patterns across mainland Europe, however the small to medium sized biotech/pharma industry is absolutely thriving here and candidates with a strong industrial and academic background will always be able to find 2-3 exciting opportunities.

The main area of focus for recruitment within UK R&D, as supported by the statistics, is immunology, pharmacology and immune diseases. This is the result of a number of small biotechs and academic spin-off companies securing significant funding to accelerate research within these vital areas. Large pharmas and CROs do obviously still dominate when it comes to volume vacancies within R&D, as demonstrated by the Top 20 companies, but many candidates are now looking for an environment where they can get a greater level of exposure and responsibility.

The results from the survey do support the commonly understood belief that there are fluctuations in vacancy openings throughout the year. Scientific Professionals does experience a noticeable rise in vacancies through January, February and March then towards the end of September through to November.

Yvette Cleland
CEO | Clinical Professionals Ltd

The number of Research and Development vacancies in Life Sciences companies in Europe in the 12 months ended 31 August 2017 was 5.3% higher than it had been in the previous 12-month period. However, optimism for the future should be more limited than that result might suggest: the growth trend over the last 12 months is noticeably less positive than the trend over the previous 12-month period.

The volume of R&D openings shows fairly considerable variations from month to month. Figure 1 opposite gives both the monthly number of vacancies and a rolling three-month average to smooth out the effects of seasonality. One interesting aspect of change in vacancies for R&D staff in the Life Sciences industry is that monthly variations are often the reverse of what one might expect. For example, December is usually a fairly quiet month for new hiring, due to the holiday period and expended budgets; however, December 2016 had 4.9% more new R&D openings than the previous month. January is often busy, as companies look to catch up on hiring that wasn't done in December and to make use of that year's budget. However, January 2016 had 1.3% fewer newly announced R&D vacancies than December 2015.

Breaking down the data into three-month periods gives some interesting, and slightly worrying, results. The months from December 2016 to February 2017 saw good growth 12-month period on 12-month period and three-month period to three-month period, with 15.6% more new openings than December 2015 to February 2016 and 15.8% more than September to November 2016. Vacancies in March to May 2017 were even better, up 3.5% on the previous three-month period. However, the situation changed in the summer: June to August 2017 had 4.0% fewer new openings than the previous three months and 3.5% fewer than summer 2016.

Life Sciences R&D Vacancies

Europe, Sep '15 - Aug '16 vs Sep '16 - Aug '17

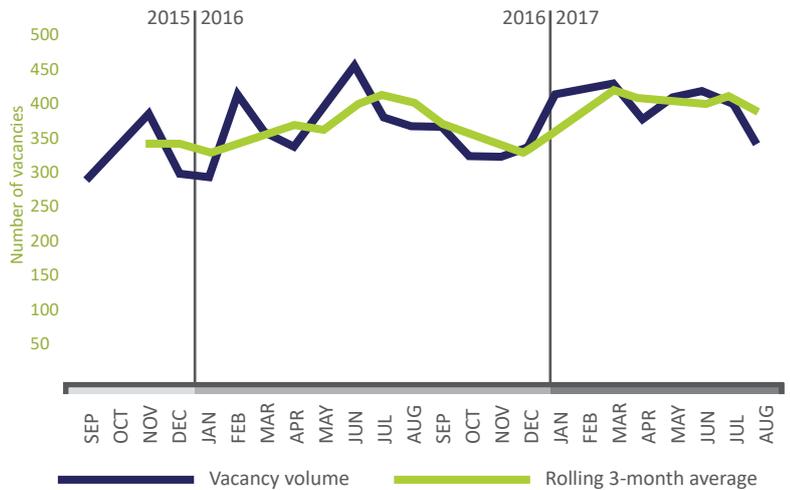


Fig. 01

Life Sciences R&D Vacancies

Europe, Sep '15 - Aug '16 vs Sep '16 - Aug '17

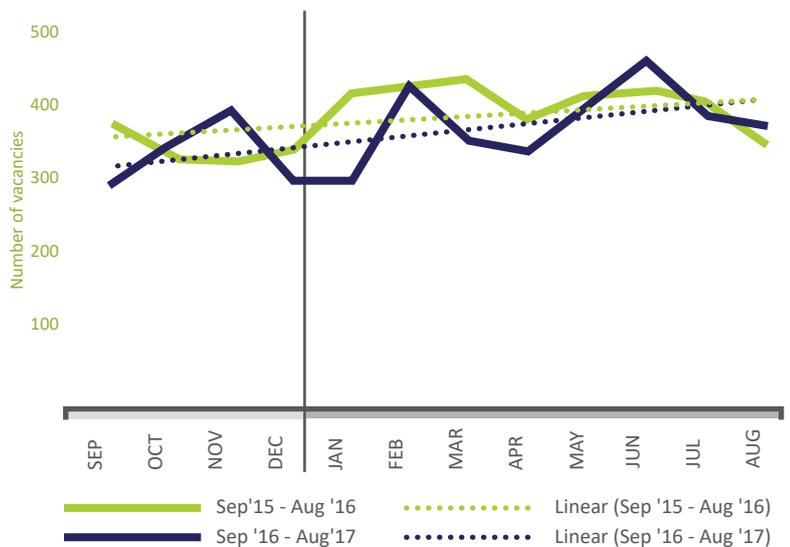


Fig. 02

Life Sciences R&D Vacancies

Europe, Sep '15 - Aug '16 vs Sep '16 - Aug '17

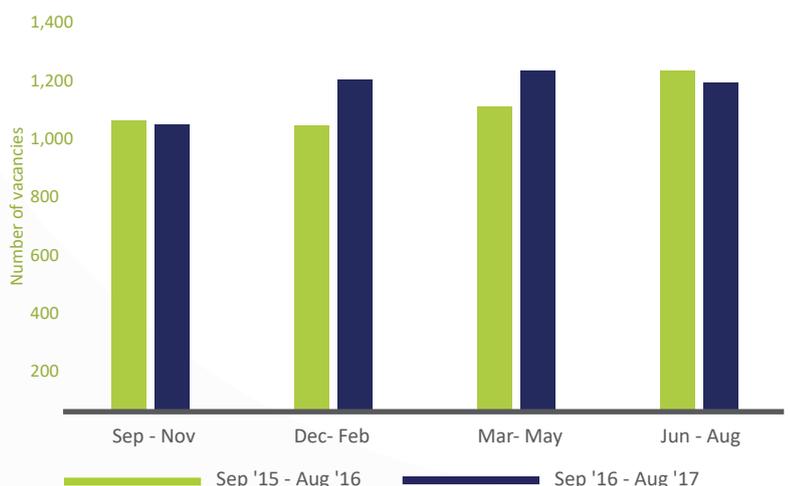


Fig. 03

Breakdown by Country

04

Of the 32 countries represented in the dataset, the top 10 in terms of number of new R&D openings accounted for a total of 93.3% of all new openings in the 24-month period under review. It is also notable that the top three are, between them, the locations for very nearly two thirds (i.e. 66.5%) of all R&D vacancies across the continent.

The largest source of R&D openings in Europe is now Germany. Firms in that country announced 299 more vacancies in the 12-month period ended 31 August 2017 than they had in the previous 12 months, which equated to growth of 26.5%. That growth caused Germany's share in all R&D openings in Europe to rise from 25.5% in the 12 months ended 31 August 2016 to 30.7% in the next 12-month period. By contrast, the UK, which until recently had been the top nation in terms of volume of R&D vacancies, saw a contraction in the number of newly announced openings. The amount of new R&D posts in the UK in the 12 months ended 31 August 2017 was 3.9% lower than in the previous 12-month period. That fall, combined with the growth recorded by the rest of Europe, resulted in the UK accounting for only 26.3% of all the continent's R&D vacancies in the last 12 months, compared to the 28.7% it had had in the previous 12-month period.

By far the biggest fall in the number of R&D vacancies by any nation was recorded for Denmark. The number of new openings in that country over the last 12 months was 39.0% lower than it had been in the previous 12-month period. However, the situation was very different on the other side of the Øresund: firms in Sweden announced 65.2% more R&D openings 12-month period on 12-month period.

Life Sciences R&D Vacancies by Nation
Europe, Sep '15 - Aug '16 vs Sep '16 - Aug '17

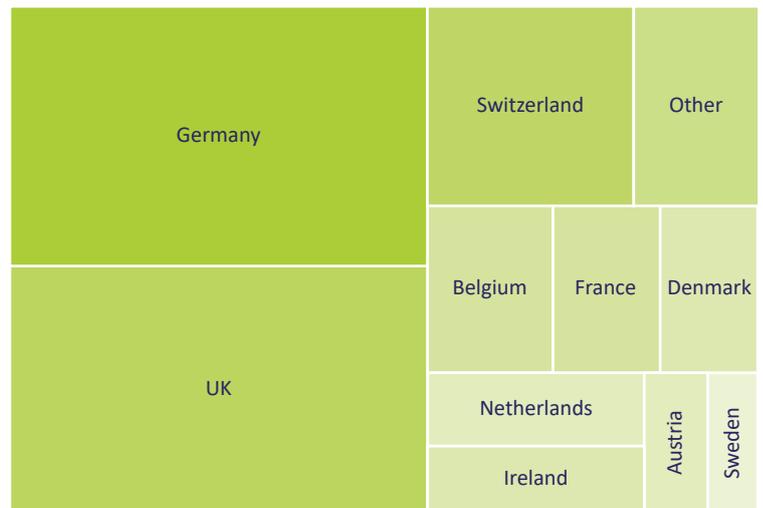


Fig. 04

Life Sciences R&D Vacancies, Top Nations
Europe, Sep '15 - Aug '16 vs Sep '16 - Aug '17

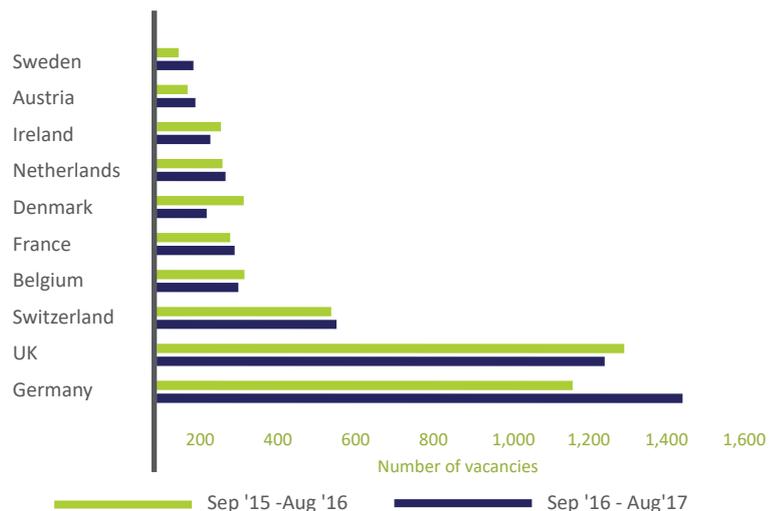


Fig. 05

UK Life Sciences R&D Vacancies by Region
The UK, Sep '15 - Aug '16 vs Sep '16 - Aug '17

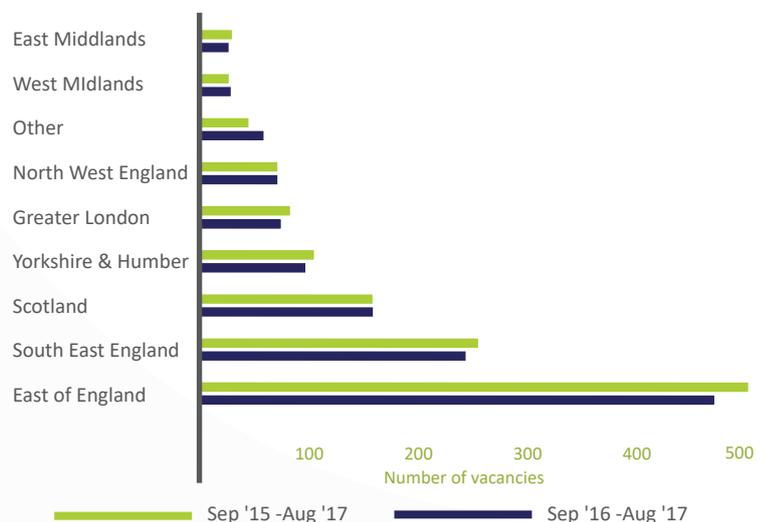


Fig. 06

Analysis by Role

Looking at the data for the various sub-specialisms covered by the data, the result which is most obvious is the slump in demand for Bioanalytics staff. The number of newly announced Bioanalytics roles fell by 55.6% over the 12 months ended 31 August 2017 compared to the previous 12-month period, meaning that there were 277 fewer Bioanalytics openings 12-month period on 12-month period. That fall was mirrored by the share of all R&D vacancies which the Bioanalytics sub-specialism accounted for, which fell from 11.3% in the 12 months ended 31 August 2106 to 4.8% in the last 12 months.

But it wasn't all doom and gloom, some sub-specialisms recorded excellent growth in vacancy volumes. The number of openings for Pharmacology staff more than doubled, jumping by 101.6% 12-month period on 12-month period, a rise of 64 posts. The rate of growth in opportunities for Bioinformaticians was even faster, up by 117.0%, which resulted in 55 more posts for those staff. The best growth in number of new openings was recorded for Immunology specialists, where a period-on-period increase of 74 posts equated to growth of 64.9%.

Breaking down the data by seniority, it is noticeable that the number of vacancies for two of the three largest levels fell. There were 4.3% fewer newly announced openings for Junior Associates/Managers 12-month period on 12-month period, while the number of posts for Senior Associates/Managers was down by 3.3%. However, those falls were more than made up for by growth in vacancy volume at other levels. The bulk of the increase (221 of the 281 additional posts) came from openings for Middle Associates/Managers, although that is very much what one would expect, given that 65.2% of all vacancies in the dataset were for staff from that level. Openings for Department/Divisional Heads also rose up by 30.2%.

Life Sciences R&D Vacancies, Top Specialisms
Europe, Sep '15 - Aug '16 vs Sep '16 - Aug '17

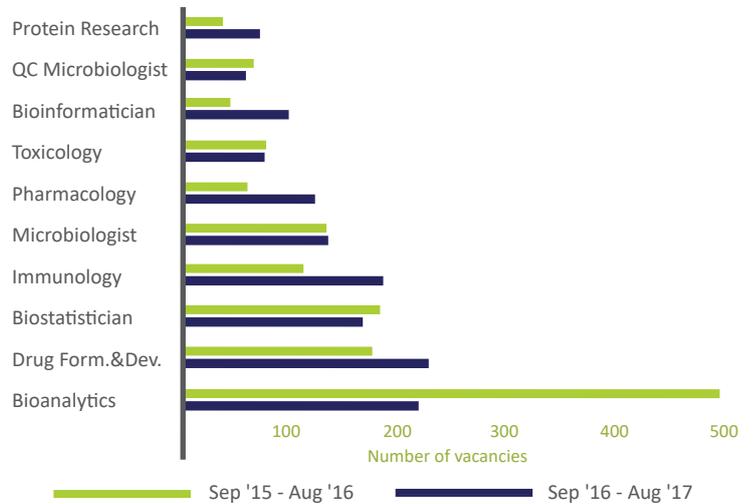


Fig. 07

Life Sciences R&D Vacancies by Seniority
Europe, Sep '15 - Aug '16 vs Sep '16 - Aug '17



Fig. 08

Life Sciences R&D Vacancies by Company Headcount
Europe, Sep '15 - Aug '16 vs Sep '16 - Aug '17

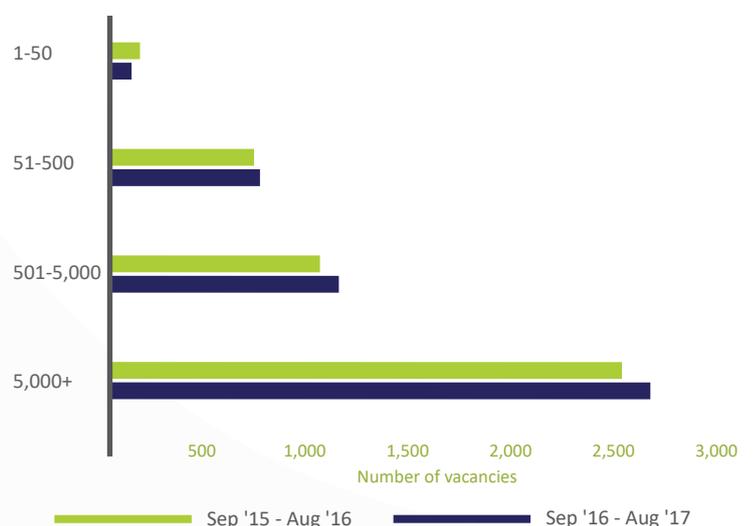


Fig. 09

Top Companies

06

The 20 companies which are the largest sources of life sciences R&D vacancies are shown in figure 10 opposite. It is interesting to note that between them those 20 firms announced 61.6% of all new R&D openings in the life sciences industry in the 24-month period under review, with the remaining 341 firms in the dataset accounting for only 38.4% of those openings. And that dominance is strengthening: the top 20 firms announced 10.4% more R&D vacancies in the 12 months ended 31 August 2017 than they had in the previous 12-month period, a growth rate nearly double that for the industry as a whole (5.3%).

The top 10 firms accounted for the bulk of those openings, with 47.0% of all R&D vacancies in Europe in the 24 months under review, with the firms ranked from 11 to 20 chipping in only 14.6%. However, the firms in the bottom half of the top 20 had a growth rate 12-month period on 12-month period more than twice that of the top 10, 17.0% compared to 8.4%. Outside of the top 20 firms the number of vacancies announced in the 12 months ended 31 August 2017 was lower than it had been in the previous 12-month period, falling by 2.5%. Most of that fall was due to the smallest firms: the companies ranked from 101 to 361 had 10.0% fewer new openings.

Breaking down the top companies by sector, we see that in the top 20 there are four CROs, two biotech firms and 14 'Big Pharma' companies. The Big Pharma operations in the top 20 only had vacancy growth of 6.2% (compared to 2.5% for all Big Pharma firms), while the two Biotech companies grew by 21.9% (vs 11.6% for all Biotech firms) and the four CROs were up 24.2% (compared to 12.3% by all CROs).

Top Twenty Companies

Europe, Sep '15 - Aug '16 vs Sep '16 - Aug '17

	Sep '15 - Aug '16	Sep '16 - Aug '17	% change	+/-
Roche	319	294	-7.8	-25%
Merck Group	205	348	69.8	143%
GSK	309	237	-23.3	-72%
Eurofins Deutschland	222	300	35.1	78%
Novartis	219	292	33.3	73%
Johnson & Johnson	218	146	-33.0	-72%
Astrazeneca	149	211	41.6	62%
Charles River Laboratories International	137	179	30.7	42%
Novo Nordisk	154	91	-40.9	-63%
Covance	110	116	5.5	6%
Boehringer Ingelheim	93	107	15.1	14%
Evotec	76	113	48.7	37%
LGC	93	87	-6.5	-6%
UCB	85	73	-14.1	-12%
Merck & Co	60	73	21.7	13
IDT Biologika	57	58	1.8	1
Qiagen	35	69	97.1	34
PPD	43	41	-4.7	-2
AbbVie	31	53	71.0	22
Richter Gedeon	38	41	7.9	3

Fig. 10

Life Sciences R&D Vacancies by Sector

Europe, Sep '15 - Aug '16 vs Sep '16 - Aug '17

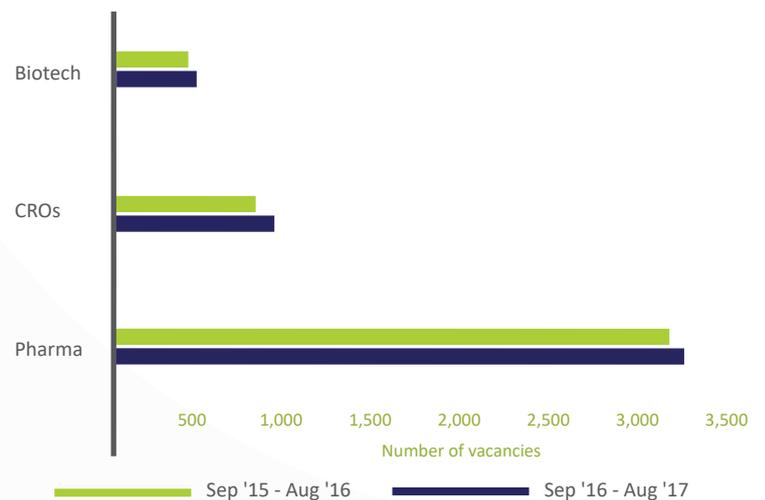


Fig. 11



Clinical

PROFESSIONALS



vacancysoft.com

clinicalprofessionals.co.uk