

Vacancysoft/Clinical Professionals Pharmaceuticals Report

CLINICAL

DECEMBER 2017

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About Vacancysoft

Data

Every day Vacancysoft monitors careers centres on thousands of company websites, and gathers links where there is change. These links are then categorised automatically, and in the case of relevant content, by Vacancysoft staff.



In the last five years Europe has seen a 150% increase in clinical trials, with over 30,000 currently ongoing today. Interestingly, an underlying trend within the Biotech sector is a growing strategy to keep trials within house, rather than outsource them. This, along with a 7% year-on-year growth within Biotech, is very interesting.

Traditionally, the highest concentration of vacancies within clinical trials has been clustered within the UK, and in 2016 the UK had 32% of all vacancies within clinical research, with MHRA playing a significant role in early stage trials. Interestingly, a more recent analysis of activity in 2017, particularly within pharma, found a 17% decrease in vacancies within the UK and a 166% increase in vacancies now going to the Netherlands, which is of course the new home for the

European Medicines Agency (EMA). Having said that, the UK is still the largest market across Europe for Contract Research Organisations (CRO's), followed by Germany, with CRO vacancies rising by 3% within the UK in 2017.

A constant challenge across Europe, however, is continual skill shortages and a decline in investment for training and development in core skills. Our most recent analysis of skills found a massive 87% rise in vacancies within Clinical Management and a 33% increase in Clinical Research Associates (CRAs) and Senior CRAs vacancies. This is contrasted by a huge decline in Clinical Trial Associates (CTAs) of 31%. More interestingly, several recent global skills studies have identified that many clinical professionals will retire in the next ten years, and the CTA route was often the starting point of a career, bringing new talent into the industry. Thus, if there is a decline in such roles, as well as development and training of CTAs, this could provide even greater challenges and escalating costs for the industry.

Some light at the end of the tunnel may be the apprenticeship levy and associated trailblazer in clinical research. If enough pharmaceutical companies and CROs begin to play their part, by utilising such programmes, we would gain the skill development we require within a post-Brexit landscape, making the UK PLC Life Sciences Industrial Strategy sustainable.

The Clinical Professionals Group has invested in the funding, training and deployment to industry of talented life sciences graduates, playing its part in supporting the industry's skill challenges. Over the last 18 months, more than 80 graduates have been trained and placed within industry.

We continue to work within the clinical research trailblazer and in January will be publishing our 2018 salary survey, now a recognised pan European benchmark within industry. If you would like a copy of our new edition please contact: salariesurvey@clinicalprofessionals.co.uk.

Yvette Cleland
CEO | Clinical Professionals Ltd

Overview

Clinical vacancies have traditionally concentrated in the UK, equally now with Brexit, it is worth analysing how and where activity has been concentrating over the past twelve months. According to the European Commission, there are over 30,000 clinical trials ongoing in Europe, which is an increase of over 150% on five years ago.

Therefore when analysed from a pan European perspective, vacancies for clinical roles are up considerably. At the same time the sector has been hiring across all areas, meaning that the increase in vacancies for clinical professionals has been mirrored by higher demand for other areas. Put another way, this year will see overall scientific vacancies up 23% across Europe, where Clinical roles constitute approximately 20%, which is the same as last year.

With this in mind, we can see the growth has been happening across both CRO's and pharmaceuticals companies, equally the percentage of roles year on year in CRO's is slightly higher than in 2016.

It is worth noting that as biotechnology companies continue to develop, they are launching their own clinical trials, where the trend suggests that next year will be even busier than this one. It is estimated that the biotechnology sector is growing at an annualised rate of 7.4% with Germany and the UK being the two largest centres.

With the UK, the MHRA is seen as having played a big part in the success of early stage trials. Biomedical research centres set up across the country also allow for collaboration between smaller biotech companies and big pharma, where over the past ten years, the NHIR has helped cut trial approval times and quadrupled industry investment to over £120m. As a result of this, the UK is able to claim 'first patient enrolled' in increasing numbers of global clinical trials.

Clinical vs Scientific Vacancies, 2015/17



Fig. 01

European Clinical Vacancies, 2015/17

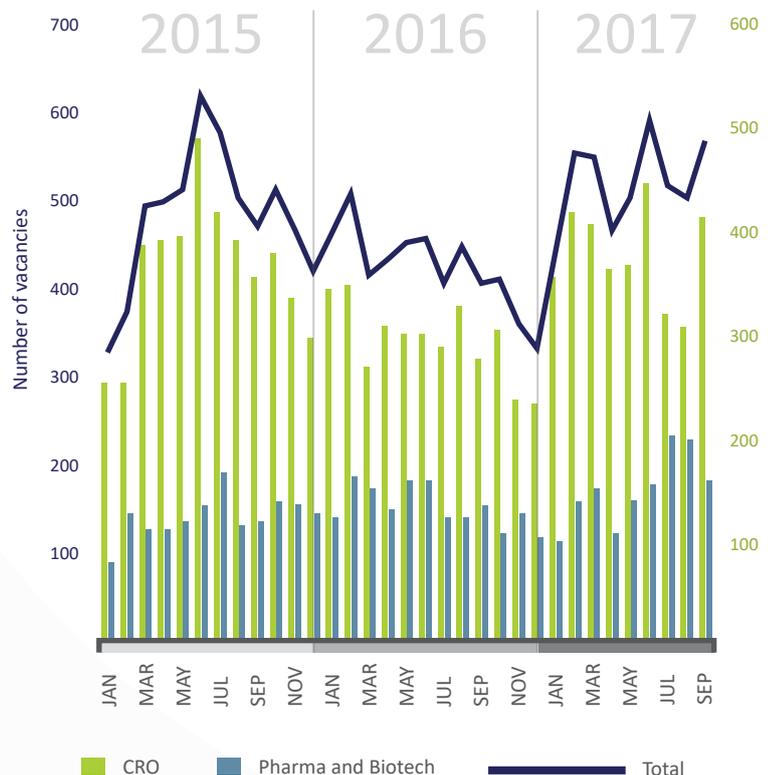


Fig. 02



Breakdown by Country

04

When analysing clinical vacancies by country, we have analysed separately the activity between the pharmaceuticals companies and the CRO's.

Therefore when analysing the activity in the Pharmaceuticals companies the most startling statistic is that whilst activity in the UK has dropped by 17%, resulting in the country's share falling. With 32% of all clinical vacancies in 2016, the nearest country was Germany, with 19% of the total. However so far this year, the UK has shrunk proportionately to 26% of the total vacancies.

There are concerns that with the UK leaving the EU, it may become a less attractive country to launch new products especially if it is no longer a part of the EU regulatory framework. With new regulations governing clinical trials due to be implemented, it is not clear if the UK will be able to participate in this new streamlined approval process.

Countries with increased activity proportionately include Switzerland, Denmark and the Netherlands. With the Netherlands specifically, vacancies for clinical roles have increased by 166% compared to 2016, the largest year on year increase in the EU.

Amongst the CRO's, the picture is more nuanced for the UK. Activity is slightly up on last year (3.4%), equally in other countries, there has been a greater increase in vacancy activity, resulting in the UK share dropping from 31% last year, to 28% in 2017 so far.

Germany is the second largest market for CRO's and has seen activity increase by 9%, resulting in the share of the total remaining at 10% overall. The biggest year on year change has come from France, where clinical vacancies in CRO's have increased by 50%, whilst in Belgium, year on year activity is up 42%, finally in Italy, the increase is 35%.

Clinical Vacancies in Pharma by Country

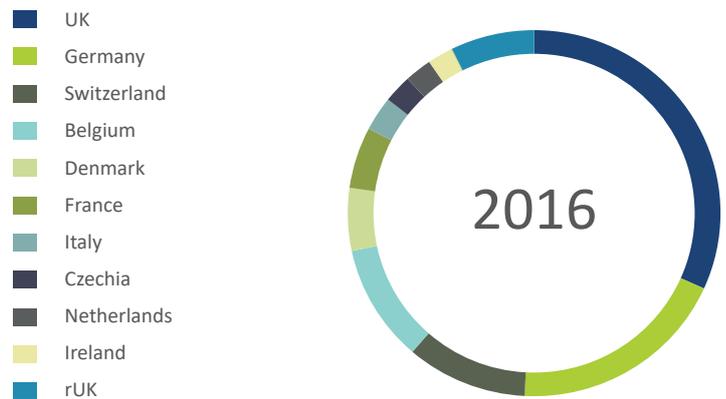


Fig. 03

Clinical Vacancies in CRO's by Country

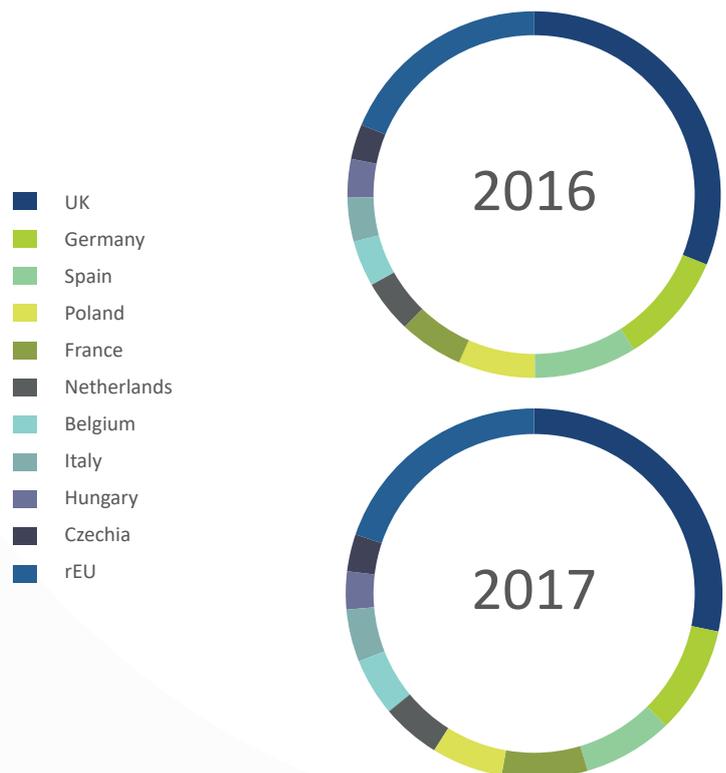


Fig. 04

What is immediately visible when analysing by role is the divergence by sector. Within CRO's, the largest areas of vacancies are for CRA's, CTA's and Clinical Projects. By comparison, with Pharmaceuticals companies, Clinical Management, Data Management, Development and Study take precedence. As mentioned previously, given that overall volumes within the CRA's has risen, this has translated into significant year on year increases by role.

Out of the top five roles, the most noticeable increase has been for clinical management positions, where year on year, activity is up 87%. Similarly, with Clinical Projects, there has been a year on year increase of 27%. With CRA's the year on year change is 14%, Senior CRA's 19%. However one area in decline year on year is CTA's, where demand for these roles has fallen year on year by 31%. Outside the top five roles, the other most noticeable change is the surge in roles for start-up clinical roles, up 67% year on year.

Within the pharmaceuticals companies a different picture emerges. Firstly, Clinical Management roles are both the most in demand and have had the greatest increase year on year, with total vacancies up 47% on 2016. Demand for Clinical Development has increased also, with vacancies up 45% on last year. Clinical Study is up 23% on 2016 whilst for Clinical Data Management, activity has been more muted, 1% on last year. Interestingly, Statistics is now a top five area for hiring, up 32% on last year. By comparison demand for Clinical Projects has fallen significantly, down 35% on last year.

This segmentation of role by sector suggests that CROs are successfully carving out a nice in outsourced services, but also indicates that pharmaceuticals companies still want to retain higher value functions in-house. How will this change as smaller Biotechnology companies start to be more active in instigating clinical trials? Will they look to outsource entirely to CRO's or instead look to partner with Pharmaceuticals companies?

Top 5 Clinical Roles in CRO's

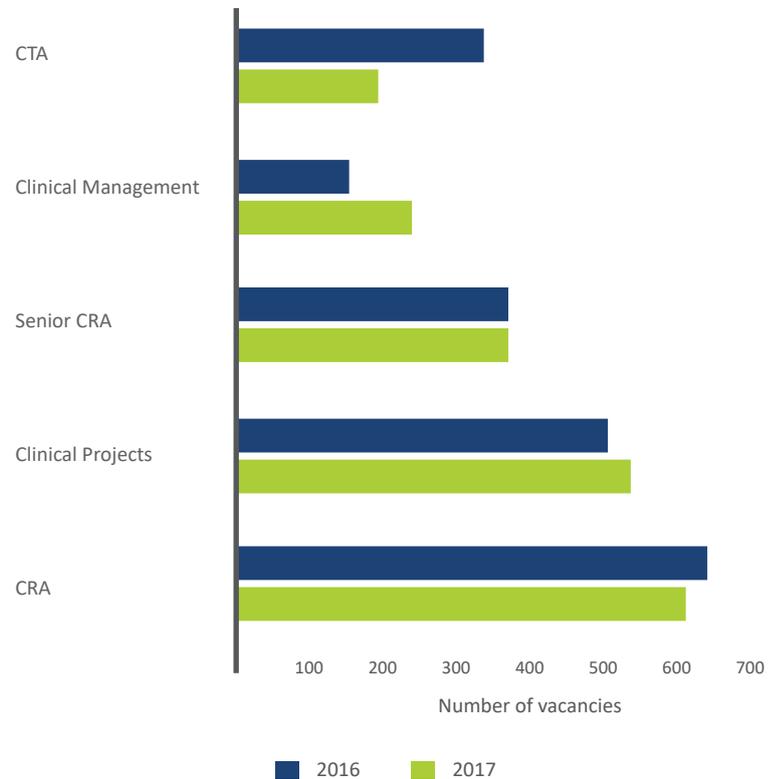


Fig. 05

Top 5 Clinical Roles in Pharma



Fig. 06

Top Companies

06

Unsurprisingly, the CRO's dominate the top of the list of companies hiring for clinical positions, constituting four of the top five and twelve of the top twenty overall. PRA had the most active hiring this year for clinical roles, with overall activity up 32% on 2016. With net profitability up 16% year on year, PRA have also diversified, with 30% of new projects coming from the Biotech sector.

Second overall is Covance, which has also seen the largest year on year growth (up 157% YOY) out of any of the top ten companies in the list. However it will be interesting to see whether this hiring continues now the merger with Chiltern has gone ahead. INC research have been the third most active, with 424 clinical vacancies so far this year followed by Quintiles, who have been the fourth most active. Parexel are also worth mentioning, as they are the only CRO in the top twenty list to have reduced clinical vacancies year on year, which probably can be attributed to their acquisition by Pamplona Capital which was announced in June this year. It will be interesting to see whether their activity picks up now that has completed.

Out of the pharmaceuticals companies, the most active by some way has been Johnson & Johnson, where activity has increased 173% on 2016 resulting in them being the fifth ranked company by vacancy volume. Other pharmaceutical companies with big year on year increases include Astrazeneca (up 104%) Bayer (up 86%) and Novo Nordisk (up 75%.) Conversely the only Pharmaceutical company out of the top twenty to reduce vacancies for Clinical roles over the period was GSK, with volumes down 46% on last year, a sign of a different strategy perhaps?

Top 20 Companies for Clinical Vacancies, 2017

	2017	YOY %
PRA Health Sciences Inc	595	32%
Covance Inc	538	157%
INC Research LLC	424	69%
Quintiles Inc	292	81%
J&J	273	152%
ICON PLC	189	32%
PPD	177	-2%
Parexel International Corp	164	-47%
Clintec International Ltd	119	8%
Roche	117	32%
Inventiv Health Clinical LLC	113	-2%
Astrazeneca PLC	103	104%
Novartis AG	98	10%
Novo Nordisk AS	75	75%
Bayer AG	56	86%
GSK	55	-46%
Synteract Harrison Clinical Research Inc	53	107%
Worldwide Clinical Trials Inc	48	25%
Merck and Co Inc	42	55%
Chiltern International Ltd	40	384%



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