

Staffing Industry Report Webinar

Speakers:

Matt Norton, Senior Research Analyst

John Nurthen, Executive Director, Global Research

David Papapostolou, Senior Research Analyst

Adam Pode, Research Director EMEA & Asia Pac

Francesca Vassallo-Todaro, Research Analyst & Coordinator



21 February 2018

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Staffing Industry Report Webinar

Latest European Research Showcase



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Senior
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Staffing Industry Report Webinar

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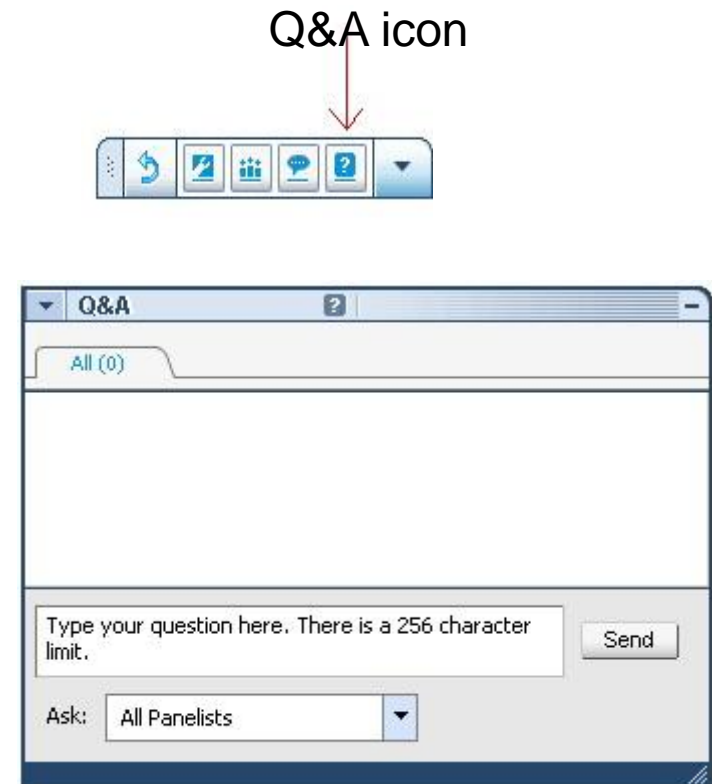
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This will open the Q&A window on your system only

Type your question into the small dialog box and click the Send Button



Agenda

- Distribution of Industries in Great Britain
- UK Market Reports
- Professional Recruitment Trends
- Quarterly Europe Employment (Eurostat) Report
- Clinical/Scientific Sector Overview
- Compliance and Risk Update
- Impact of Blockchain on Talent Acquisition

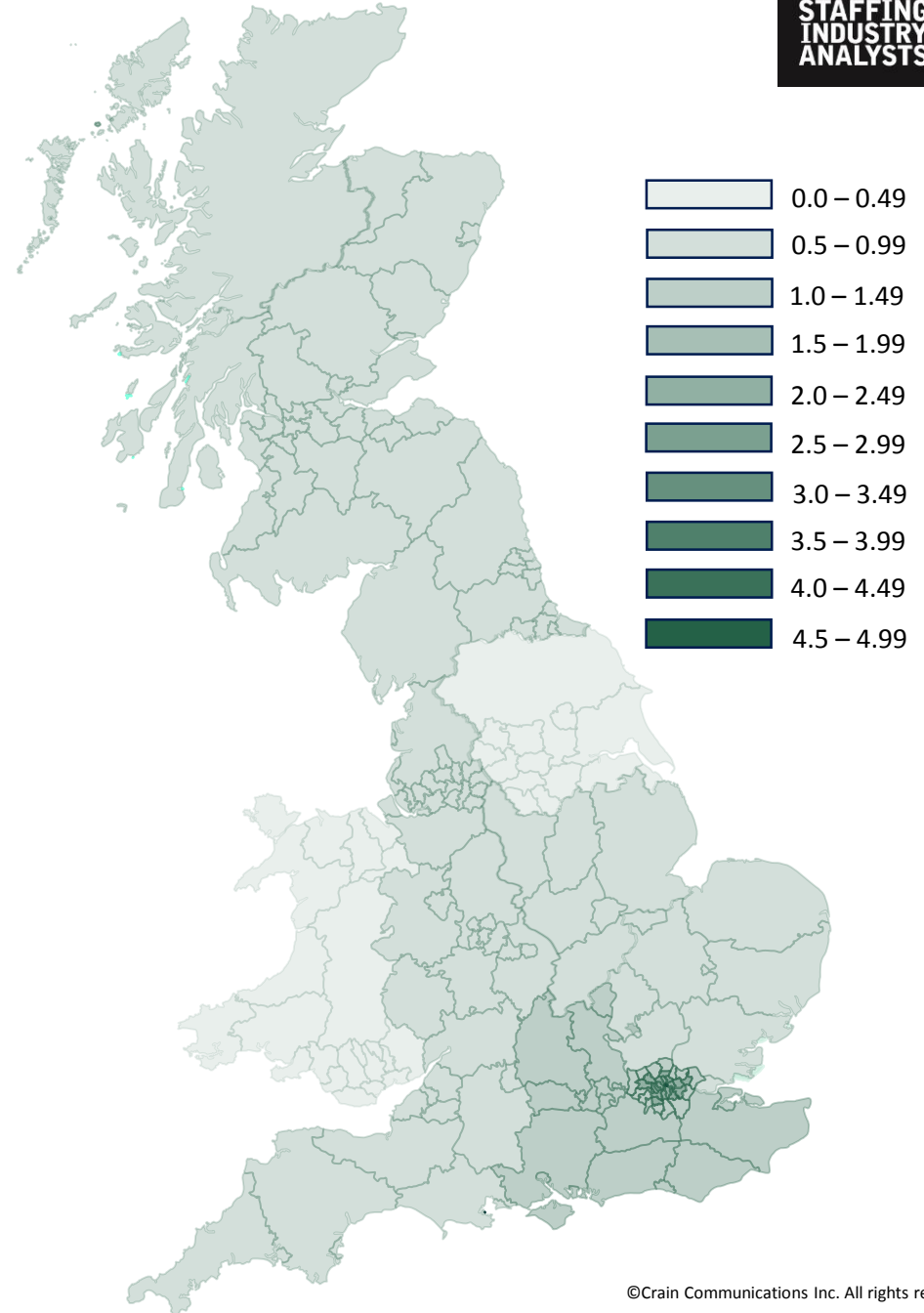
Distribution of Industries in Great Britain



[Corporate Members in EMEA can download the report here](#)

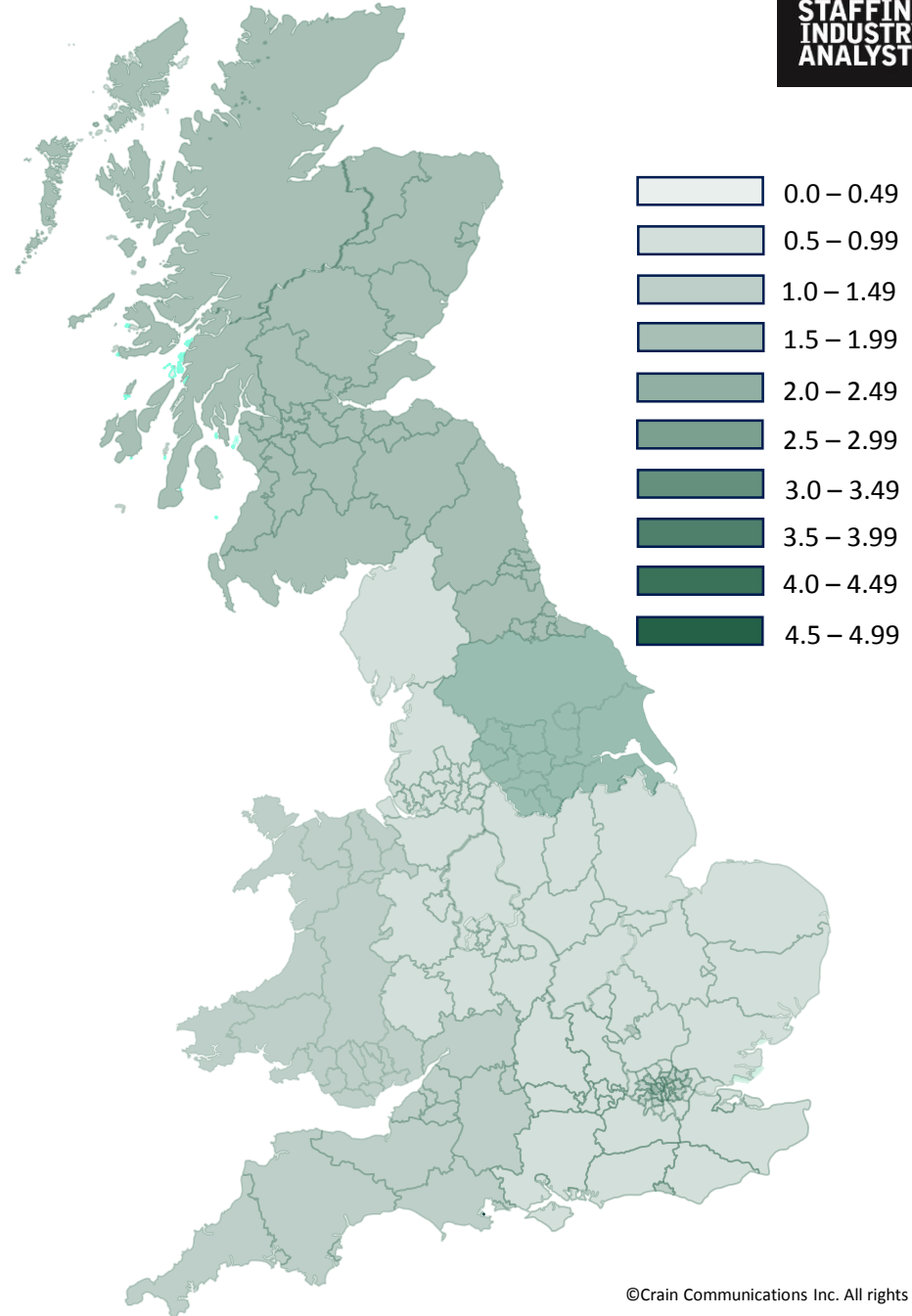
IT Industry

- The IT sector is concentrated in London
- London had over two times the share of employee jobs in IT compared with London's share of total employee jobs
- Strong focus in other parts of the South-East



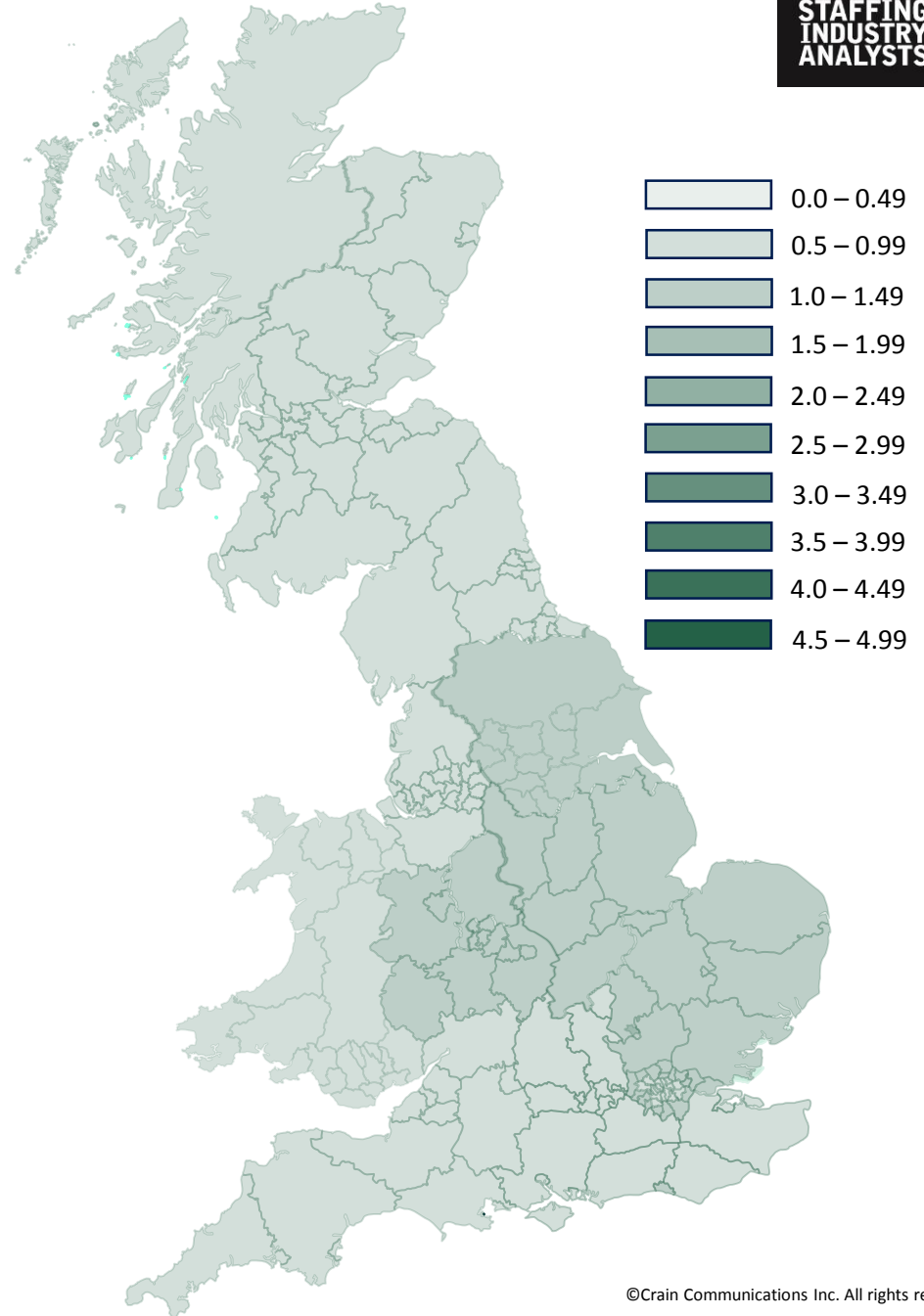
Engineering

- At a regional level, employee jobs in engineering were concentrated in Scotland and North East
- Low relative shares of employee jobs in engineering in Outer London and South East



Employment Activities

- Small range of concentration across Great Britain
- Highest concentration in Derbyshire and Nottinghamshire and lowest in Cumbria



UK Market Reports



Market Information and Forecasts

An Overview of the UK Market 2018

28th February, 2018 | Adam Pode, Head of Research EMEA & APAC | apode@staffingindustry.com



Market Information and Forecasts

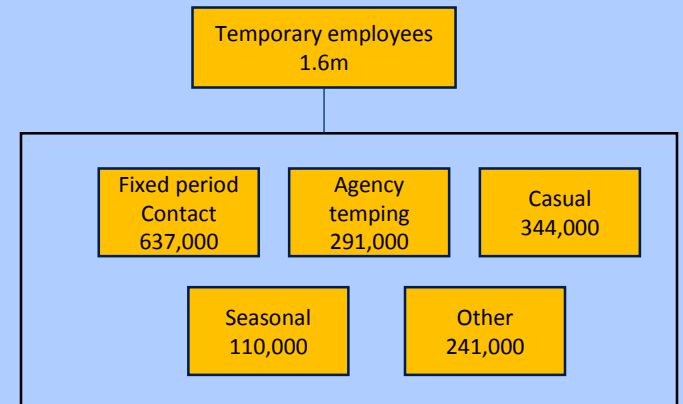
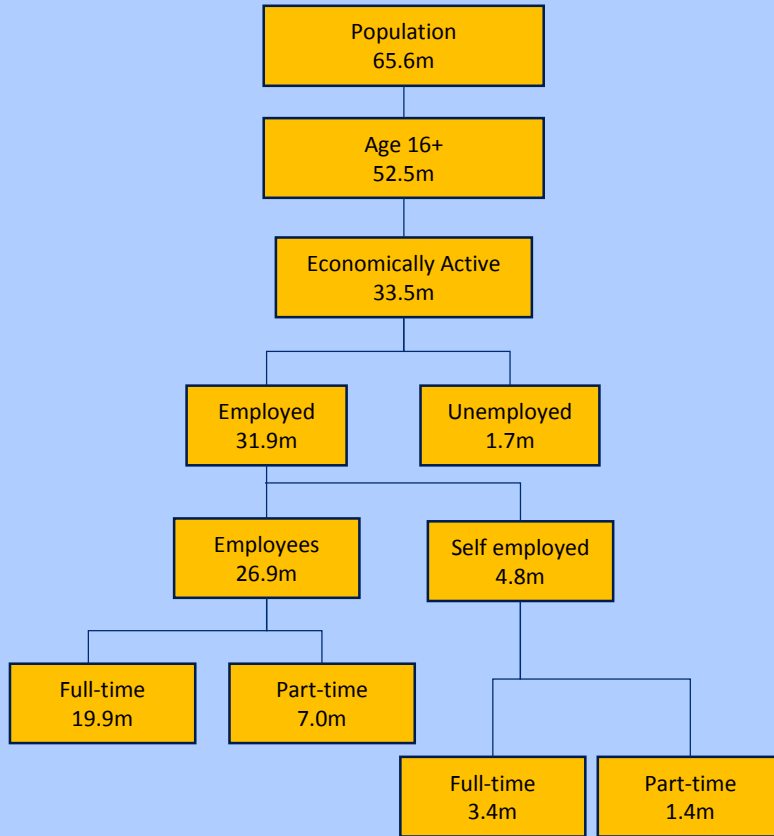
Largest Staffing Firms in the UK 2018

28th February, 2018 | Adam Pode, Head of Research EMEA & APAC | apode@staffingindustry.com

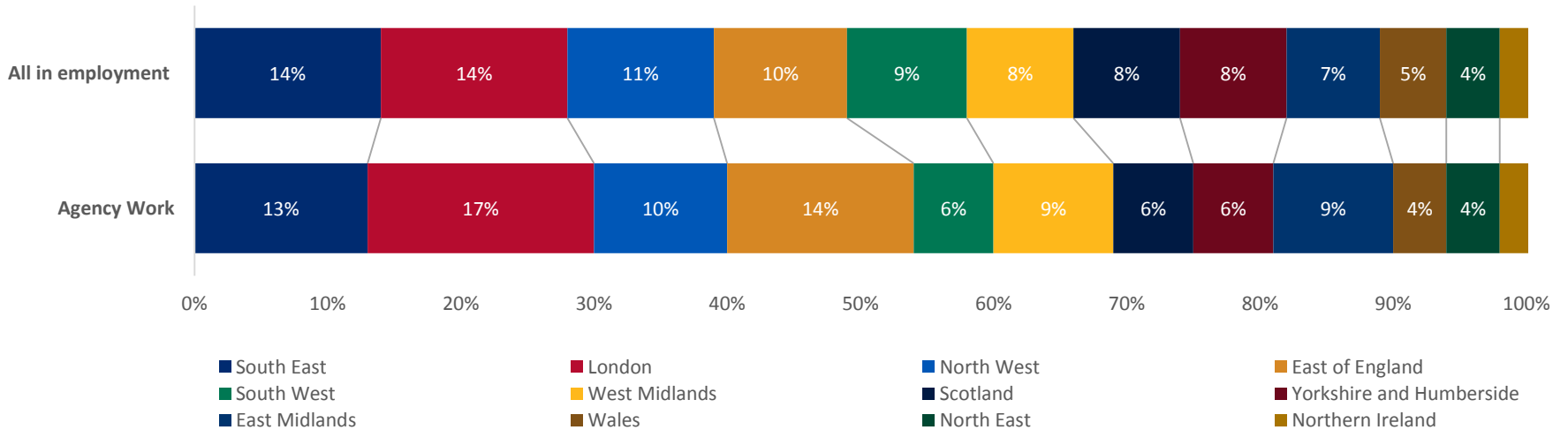
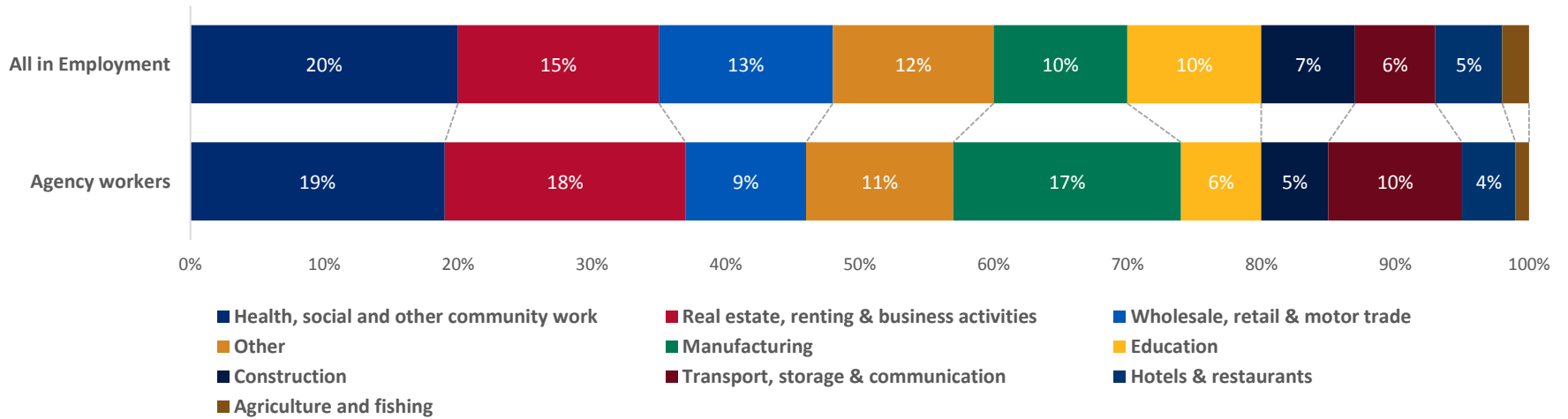


SALARY GUIDE FOR THE UK

An Overview of the UK Market

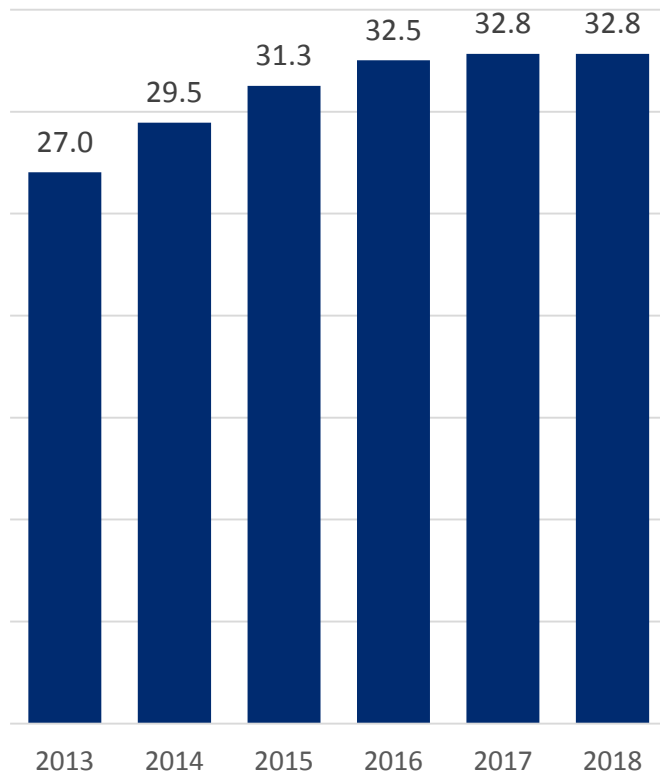


An Overview of the UK Market

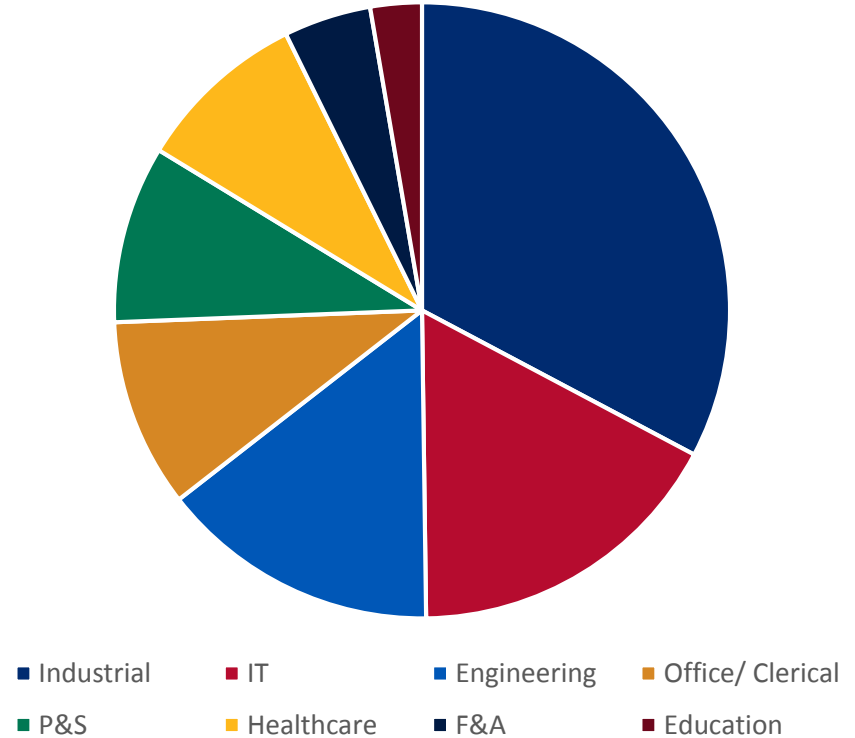


Largest Staffing Firms in the UK

Market Size 2013-18 (£bn)



2016 Sector Breakdown



Largest Staffing Firms in the UK

	Company	Country HQ	City HQ	Branches	2016 Revenue (€m)	2015 Revenue (€m)	Other staffing markets 2016	Staffing Revenue Abroad 2016	Listed
1	Adecco	CH	London	83	1,781.8	1,659.8	59	14,898.3	Y
2	Impellam	UK	Luton	tbc	1,587.3	1,551.1	13	368.6	Y
3	Hays	UK	London	94	1,461.5	1,495.4	30	4,243.6	Y
4	Manpower	USA	Uxbridge	28	1,347.1	1,386.0	74	12,860.9	Y
5	Hays	UK	London	97	1027.84	1,213.5	33	4,672.0	Y
6	Reed Specialist Recruitment	Malta	London	88	tbc	960.6	9	tbc	
7	Randstad	Netherlands	Luton	87	776.3	864.0	39	16,161.0	Y
8	Morson	UK	Manchester	51	776.3	745.7			
9	Pertemps Network	UK	Meriden	250	743.1	614.5			
10	Staffline	UK	Nottingham	395*	686.3	537.6	2	54.5	Y

Salary Guide for the UK

[Deloitte's European Salary Survey 2016](#) Salary comparison for 19 countries, sorted by net income, net cost ratio, employer costs, summary of highest tax rates and summary of social security rates and gross minimum wage

[GIS Jobs.com](#) Database of salaries by profession. (Italian)

[Hays Salary Guide](#) (Salari e Nuove Tendenze Occupazionali in Italia) Data by profession sectors covered: Banking, Engineering, Finance, IT, Insurance, Life Sciences, Oil & Gas and Sales and Marketing. (Italian)

[JobPricing.it](#) a variety of research reports on compensation and benefits in Italy. Some free to download such as the [Salary Outlook 2016](#) (Analisi Mercato Retributivo 2016) others payable. (Italian)

Laurence Simons' [Global Legal & Compliance Salary Survey 2016](#) includes; UK, France, Italy, Benelux, Germany, Switzerland, Brazil, Russia, Middle East, Africa, Turkey, India and North America.

[Michael Page](#) (Studi di retribuzione dell'anno 2017) Study is broken down by the following sectors: Banking, Digital & New Media, Engineering and Manufacturing, Finance, Health & Life Sciences, Human Resources, Procurement & Supply Chain, Property & Construction, Retail, Sales & Marketing, Tax & Legal and Technology. (Italian)

OD&M Consulting (Gi Group) [Rapporto sulle Retribuzioni di OD&M](#) Executive summary on salary trends and sectors available to download. (Italian)

Spring Salary Guide (Adecco) Data for Italy by sectors: Administration, Finance, Sales and Customer services including regional differences. (Italian)

Taylor Root – [In-house & Private Practice Salary Guide 2017](#) – Italy. An annual report for the legal and compliance sector in Italy in partnership with, the Italian Association of In-house Counsel (AIGI).

According to Willis Towers Watson's, [2016 Global 50 Remuneration Planning Report](#) which ranked the average salaries paid for full-time, entry-level jobs - aimed at recent graduates or people who have recently finished specific training courses. Among the 15 western European nations ranked, Italy came last, paying an average gross salary of €27,400 a year. There is a big difference as you can see with Switzerland, which ranked in first place, paying an average pre-tax salary of €83,600. Italy's closest counterparts were Spain, where entry-level workers can expect to take home €30,700, and France, where average earnings were slightly better at €33,400.

Professional Recruitment Trends

Professional Recruitment Trends **APSCo** UK Edition

January 2018



- Placements ... 2
- Demand ... 3
- Salaries ... 4
- Skills ... 5
- Economy ... 7

Professional Recruitment Trends is a monthly publication produced by Staffing Industry Analysts for APSCo to provide the most comprehensive, dedicated insight into the recruitment of professional talent available.

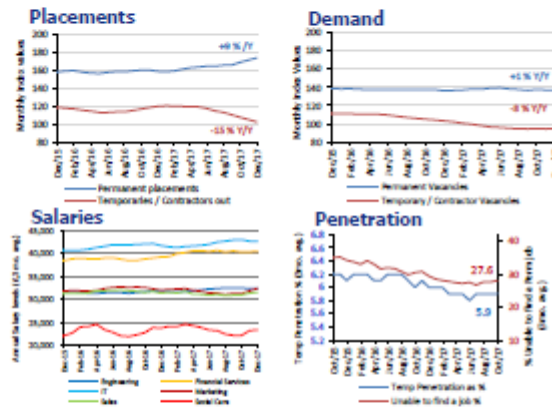
The Association of Professional Staffing Companies (APSCo) is the only trade body dedicated to representing and supporting professional recruitment. The APSCo logo is now recognised as a trusted badge of quality in the UK, Germany and Asia.

T: 08458 997 388
www.apsco.org



Permanent Placements End 2017 on New High.

Talent Dashboard



Key points from survey of December activity

- Placements growth—both perm and flexible placements up in Engineering while both down in IT and Marketing.
- Vacancies trends—Perm vacancies up in Social work, Finance and IT.
- Salaries for December increased in five major industries—Financial services, IT, Engineering, Marketing and Sales.

Commenting on the latest survey results, Ann Swain, APSCo Chief Executive, said: "The robust growth in permanent placements seen in December has been accompanied by a weakening in contractor markets as hiring companies opt for security of talent, against a backdrop of growing skills shortages in professional markets".

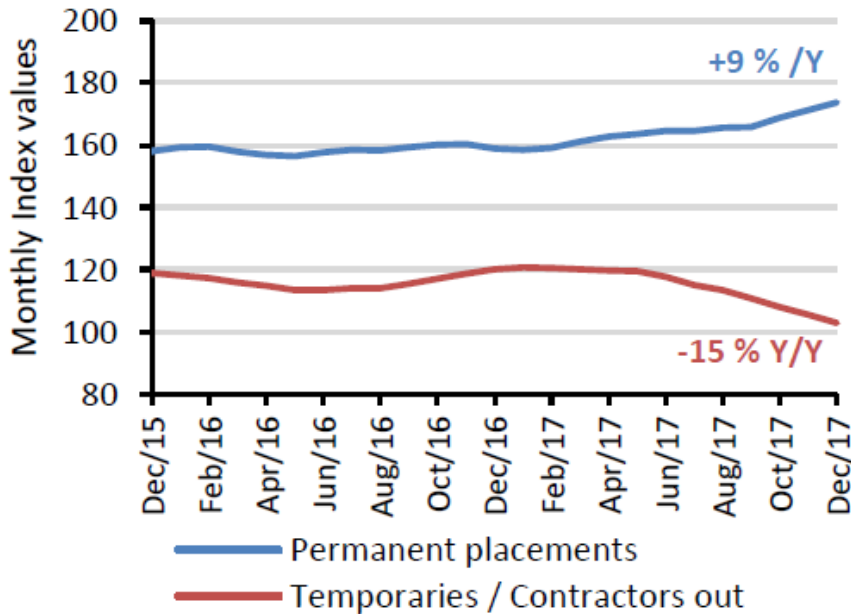
John Nurthen, Staffing Industry Analysts' Executive Director of Global Research commented: "While it is not unusual that hiring decisions take longer in December due to end-of-year budgets, staffing firms are reporting that employers are definitely waiting to see what might happen with the economy before committing to making a job offer. During 2018, we can be certain that the two factors that influenced the market so much in 2017 will continue to dominate; business uncertainty due to Brexit and a severe shortage of skilled candidates."

[Corporate Members in EMEA can download the report here](#)

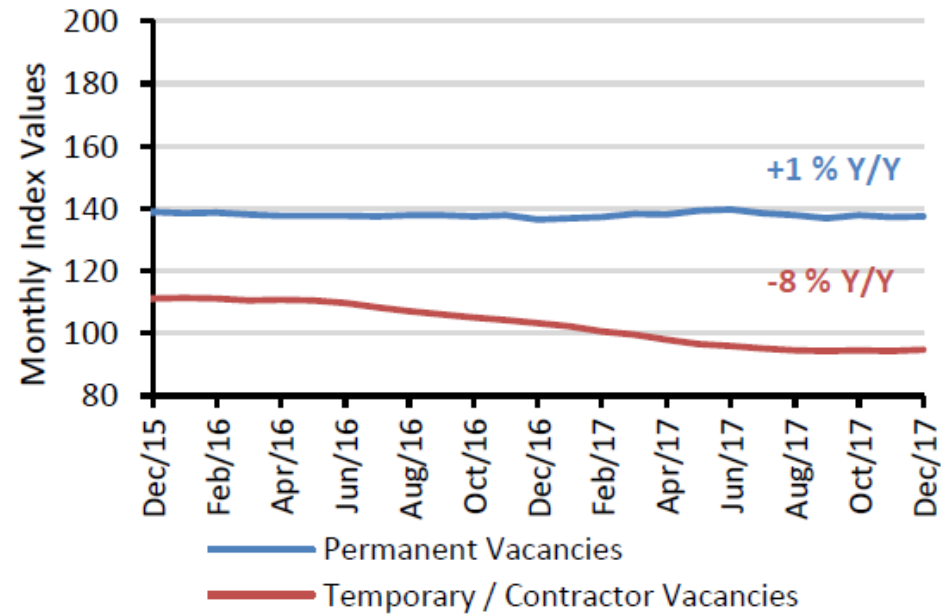
Professional Recruitment Trends

Talent Dashboard

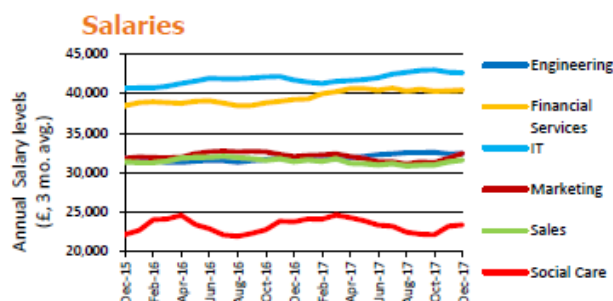
Placements



Demand



Professional Recruitment Trends



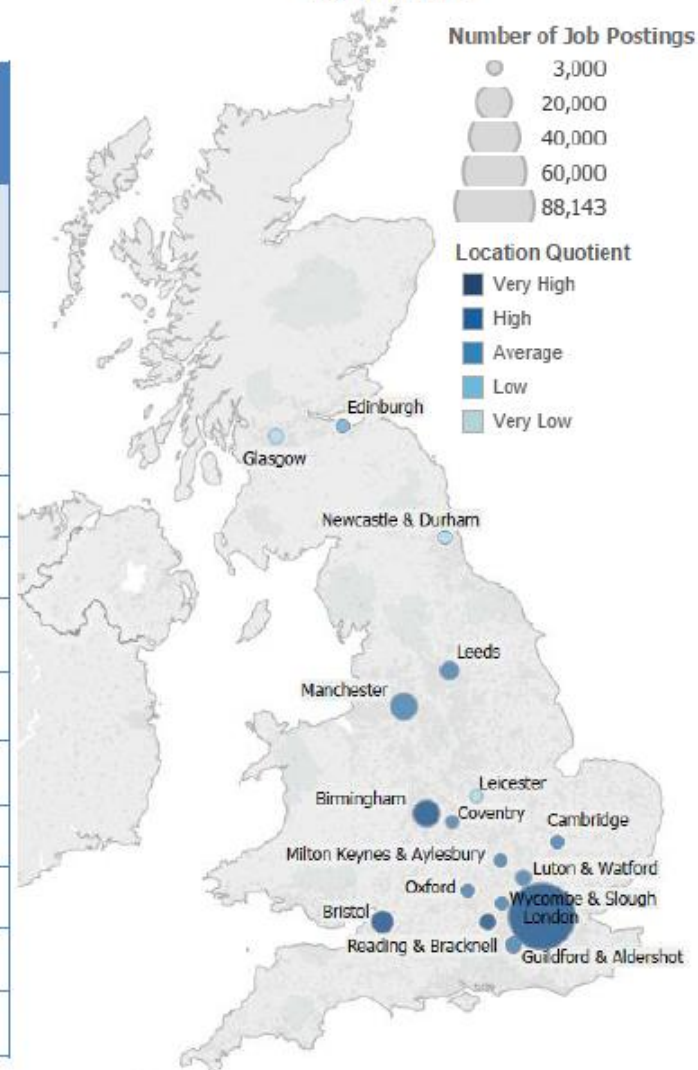
Industry Verticals: December 2017 (3 mo. avg.)	M/M % Change	Y/Y % Change	Industry Verticals: December 2017 (3 mo. avg.)	M/M % Change	Y/Y % Change
Accountancy	0.1%	0.8%	Marketing	1.8%	1.2%
Admin and Secretarial	-0.5%	-0.2%	Media	-1.5%	-0.8%
Advertising and PR	3.3%	2.9%	Medical and Nursing	2.5%	-0.6%
Aerospace	3.5%	-7.5%	Pharmaceuticals	2.1%	4.5%
Automotive	1.9%	5.0%	Property and Housing	-0.4%	-4.6%
Banking	-0.2%	-0.9%	Public Sector and Government	-2.4%	-3.6%
Building and Construction	1.4%	2.8%	Purchasing and Procurement	-0.2%	-3.2%
Consultancy	1.2%	-5.4%	Recruitment Consultancy	0.6%	6.9%
Defence and Military	-0.9%	6.5%	Retail	1.7%	-0.9%
Design and Creative	1.1%	0.7%	Sales	0.6%	0.6%
Education and Training	-0.6%	3.5%	Science and Research	0.3%	4.6%
Engineering	0.2%	2.1%	Senior Appointments	5.5%	3.1%
Financial Services	0.3%	3.1%	Social Care	0.7%	-1.6%
Human Resources and Personnel	0.0%	1.3%	Telecommunications	1.9%	-0.6%
Insurance	2.2%	5.3%	Transport and Rail	1.5%	1.2%
IT	-0.1%	2.2%	Utilities	0.2%	4.4%
Manufacturing and Production	2.7%	1.0%	All Sectors (median)	1.1%	0.7%

Professional Recruitment Trends



Sales Postings by Region/Nation (last 12 months*)		
Region/Nation	Number of Postings	Percentage of Postings
Greater London	83,983	23.5%
South East	58,645	16.4%
West Midlands	42,560	11.9%
South West	34,050	9.5%
North West	32,505	9.1%
East of England	30,340	8.5%
Yorkshire & The Humber	20,676	5.8%
East Midlands	19,175	5.4%
Scotland	17,051	4.8%
Wales	7,633	2.1%
North East	7,086	2.0%
Northern Ireland	3,936	1.1%

Sales Job Postings by TTWA



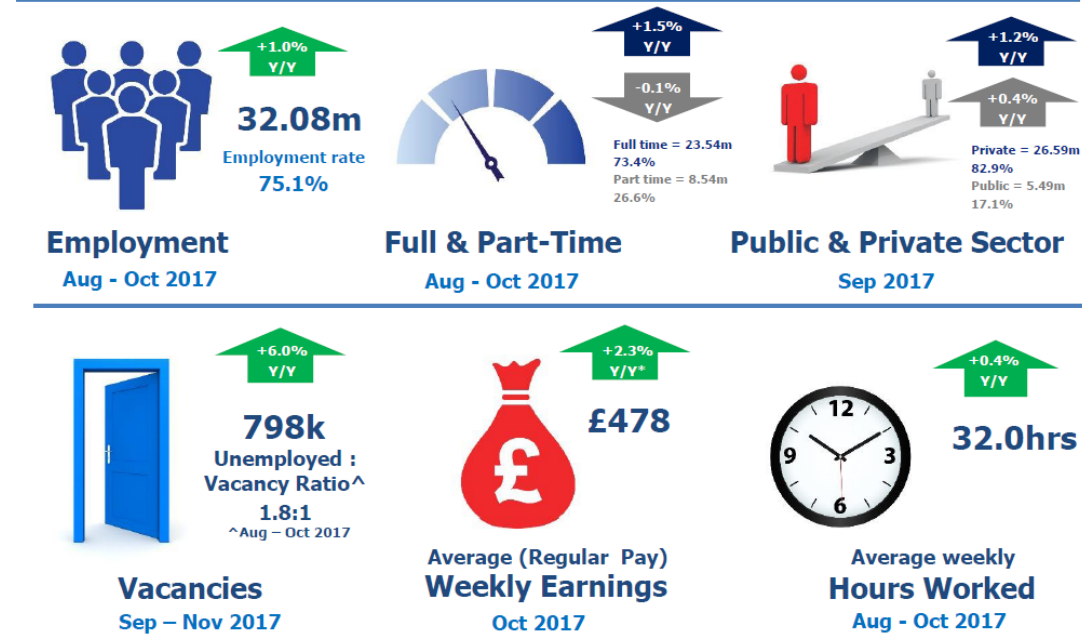
Professional Recruitment Trends

Economic Dashboard

**STAFFING
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Labour Market Dashboard

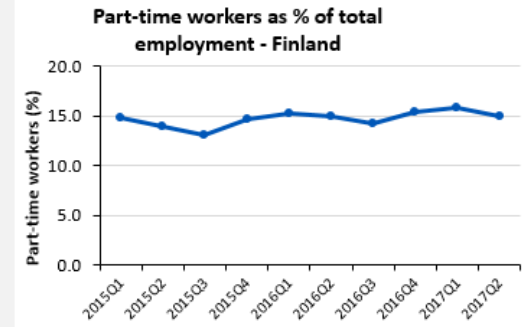
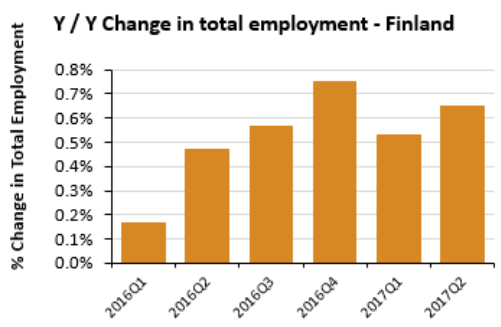


Quarterly Europe Employment Report

Total Employment Trends – Finland

Total Employment Situation, 2015 Q1 - 2017 Q2

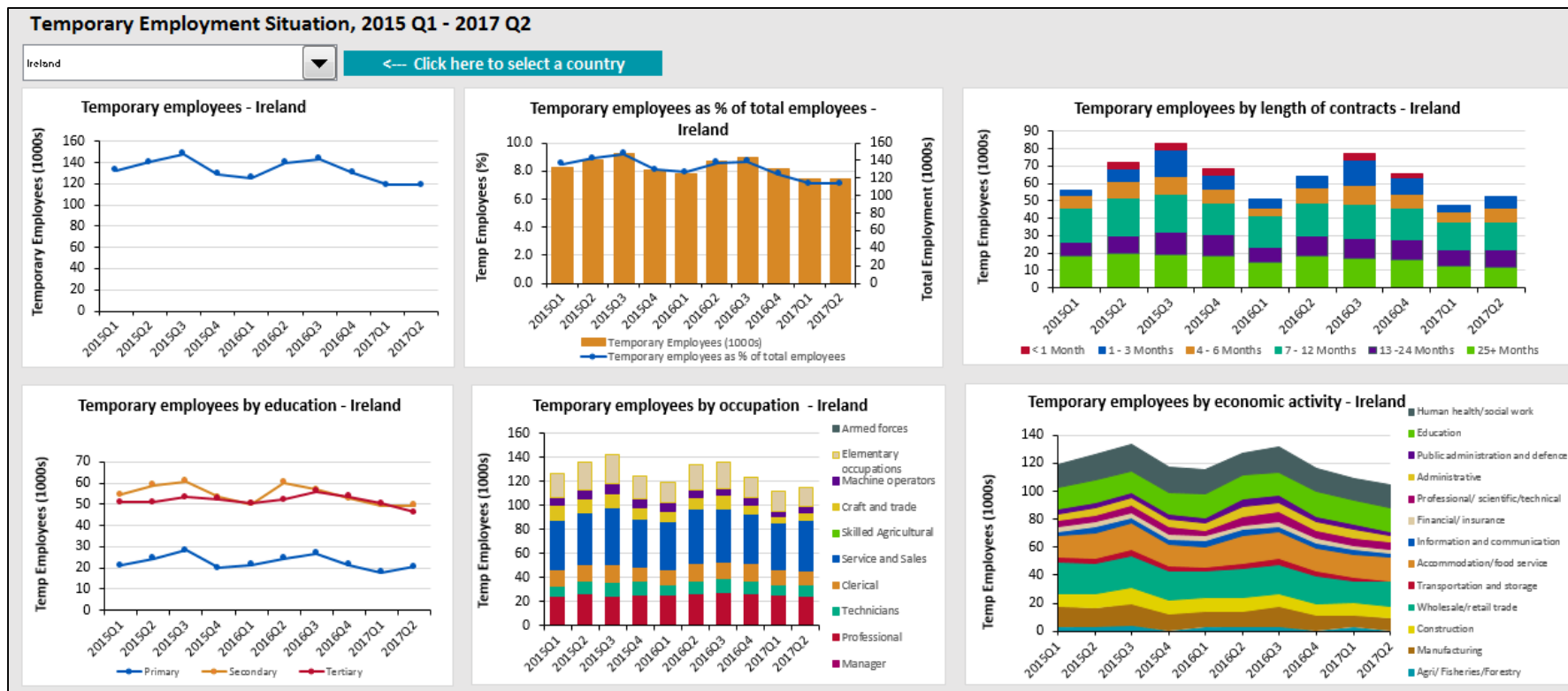
Finland



Source: SIA: Quarterly Europe Employment (Eurostat) Report Q2 2017

Quarterly Europe Employment Report

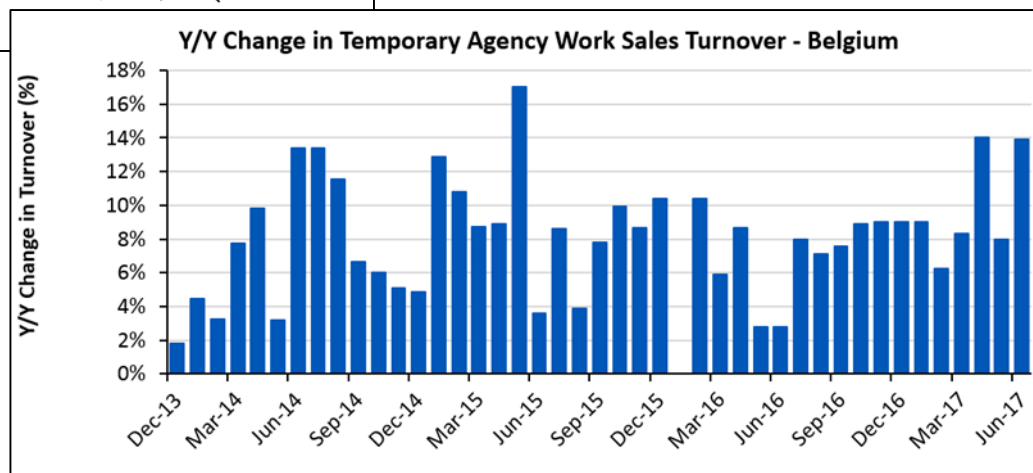
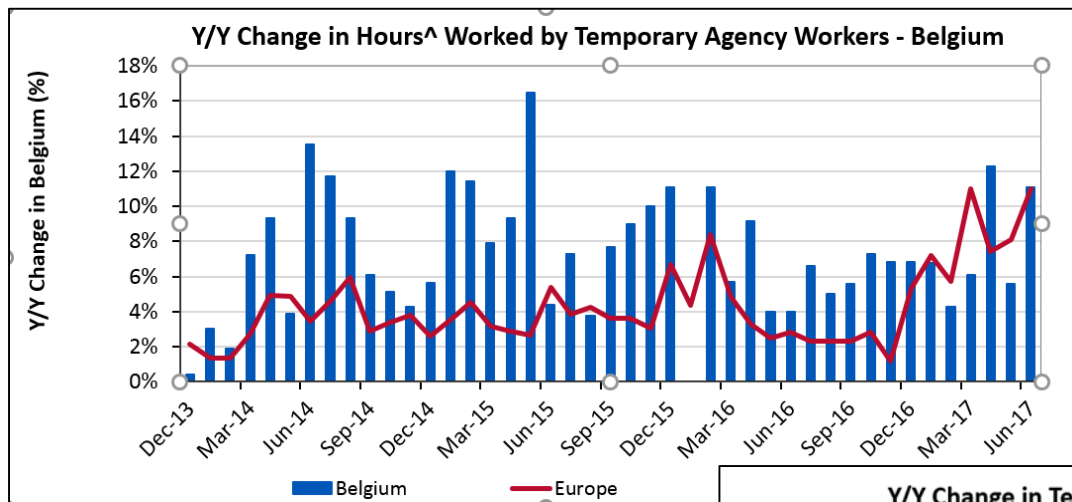
Temporary Employment Trends – Ireland



Source: SIA: Quarterly Europe Employment (Eurostat) Report Q2 2017

Quarterly Europe Employment Report

Agency Work Trends – Belgium



Source: SIA: Quarterly Europe Employment (Eurostat) Report Q2 2017

Quarterly Europe Employment Report

Correlation Trends

Country	Y/Y Change in TAW hours worked vs. Y/Y change in total employment	Y/Y Change in TAW hours worked vs. Y/Y change in temp employment	Y/Y Change in TAW hours worked vs. Y/Y change in quarterly GDP growth	Y/Y Change in TAW sales turnover vs. Y/Y change in total employment	Y/Y Change in TAW sales turnover vs. Y/Y change in temp employment	Y/Y Change in TAW sales turnover vs. Y/Y change in quarterly GDP growth
Austria	0.28	0.17	0.20	NA	NA	NA
Belgium	0.57	-0.17	0.24	0.63	-0.28	0.00
Denmark	0.10	0.10	0.17	-0.10	0.46	0.50
Finland	NA	NA	0.30	0.84	0.81	0.33
France	0.62	0.26	0.30	0.60	0.35	0.36
Germany	NA	NA	0.39	NA	NA	NA
Italy	0.00	0.32	0.41	0.52	0.57	0.41
Netherlands	-0.14	0.26	0.47	-0.32	0.33	0.50
Norway	-0.10	0.81	0.26	-0.24	0.82	0.10
Poland	0.45	0.59	0.36	0.73	0.53	0.56
Switzerland	0.00	0.33	0.35	NA	NA	NA
Sweden	NA	NA	NA	0.35	0.70	NA

Correlation coefficient (r)	Correlation Strength
0.80 - 1.0	Very strong positive
0.60 - 0.79	Strong positive
0 - 0.19	Very weak positive
-0.19 - 0	Very weak negative
-0.79 - 0.60	Strong negative
-1.0 - 0.80	Very strong negative

Source: SIA: Quarterly Europe Employment (Eurostat) Report Q2 2017



Core Skill Sectors and Industry Segments

Largest Clinical & Scientific Staffing Firms in Europe 2017

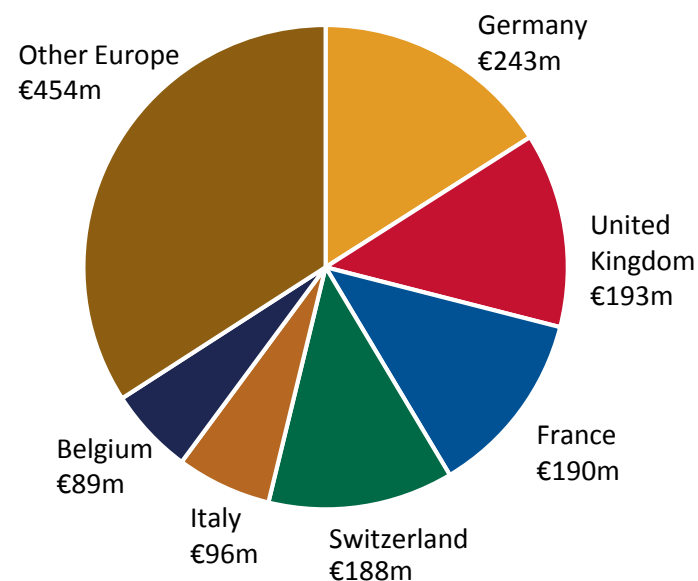
24 November, 2017 | David Papapostolou, Senior Research Analyst | dpapapostolou@staffingindustry.com

[Corporate Members in EMEA can download the report here](#)

Clinical & Scientific Staffing in Europe

- Market size: € 1.5 Bn
- 4% increase in 2016

Geographical breakdown in 2016



Source: SIA

Clinical & Scientific Staffing Trends (2016)

Country/Region	Clinical Trials		2016 Life Sciences Employment (LFS)				Eurostat Indices	
	Count ¹ (Sep 2017)	New trials Y/Y change (%)	Professionals (thousands)	Professionals change ²	Technicians (thousands)	Technicians change ²	Turnover change ²	Production change ²
EU-28	71,274	-2%	652	8%	285	2%	4%	1%
Western Europe								
Austria	4,199	-6%	7	-5%	3	-8%	2%	1%
Belgium	7,428	-7%	15	-12%	4	25%	12%	1%
France	17,963	-17%	19	15%	43	-4%	2%	0%
Germany	16,199	6%	79	1%	57	3%	2%	1%
Netherlands	7,669	5%	17	-4%	8	-11%	-1%	1%
Switzerland	5,181	-3%	20	4%	7	4%	na	na
United Kingdom	13,871	3%	186	11%	9	27%	-2%	0%
Nordics								
Denmark	6,276	6%	6	-7%	0.2	28%	4%	3%
Finland	2,543	-11%	13	1%	8	-7%	na	-1%
Norway	3,129	-3%	3	0%	2	-10%	10%	0%
Sweden	4,934	12%	26	7%	2	0%	na	-1%

Sources: Clinicaltrials.org, Eurostat, SIA

¹: all clinical trials registered on Clinicaltrials.gov since Feb 2000; ²: median annual change between 2012 and 2016

Clinical & Scientific Staffing Trends (2016)

Country/Region	Clinical Trials		2016 Life Sciences Employment (LFS)				Eurostat Indices	
	Count ¹ (Sep 2017)	New trials Y/Y change (%)	Professionals (thousands)	Professionals change ²	Technicians (thousands)	Technicians change ²	Turnover change ²	Production change ²
EU-28	71,274	-2%	652	8%	285	2%	4%	1%
Eastern and Central Europe								
Bulgaria	1,533	-4%	11	14%	2	4%	6%	3%
Croatia	823	20%	8	1%	6	0%	na	1%
Czech Republic	2,486	na	16	13%	24	-1%	1%	3%
Estonia	6,276	-23%	2	-11%	0.3	-25%	3%	3%
Hungary	3,231	26%	12	-10%	6	-3%	-1%	4%
Latvia	718	-25%	1	-2%	1	-21%	8%	4%
Lithuania	777	4%	4	0%	3	-8%	35%	4%
Poland	5,136	11%	38	0%	25	-2%	6%	4%
Romania	2,088	32%	27	-5%	3	-22%	4%	5%
Southern Europe								
Greece	2,222	20%	15	-6%	2	-5%	2%	1%
Italy	9,988	6%	34	-3%	30	-2%	3%	-1%
Portugal	1,554	36%	15	7%	3	-21%	1%	0%
Spain	9,722	3%	62	6%	19	11%	0%	0%

Sources: Clinicaltrials.org, Eurostat, SIA

¹: all clinical trials registered on Clinicaltrials.gov since Feb 2000; ²: median annual change between 2012 and 2016

Top 20 Clinical & Scientific Staffing Suppliers in 2016

	Company	Market share 2016	Annual Growth (%)
1	Hays Life Sciences	16%	8%
2	Randstad	11%	34%
3	Docs Global	8%	27%
4	CPL	7%	5%
5	SRG	7%	-5%
6	Sthree	6%	5%
7	Kelly scientific	5%	11%
8	On Assignment	4%	19%
9	Aerotek	3%	11%
10	Quanta Consultancy	3%	-6%
11	ProClinical	2%	28%
12	Skills Alliance	2%	42%
13	Independent Clinical Services	2%	-6%
14	Chase Search & Selection	2%	-4%
15	Nonstop Pharma	1%	-17%
16	SEC Pharma	1%	25%
17	Volt Europe	1%	22%
18	CK Associates	1%	-16%
19	Pauwels Consulting	1%	28%
20	Barrington James	0.9%	1%
	Top 20	85%	+11%

Source: SIA



Core Skill Sectors and Industry Segments

What's working in Clinical/Scientific staffing?

Insights from successful Clinical/Scientific staffing firms

December 12, 2017 | David Papapostolou, Senior Research Analyst | dpapapostolou@staffingindustry.com

[Corporate Members can download the report here](#)

Insights from Successful Clinical & Scientific Staffing Firms

- Interviewed executives from five of the fastest growing Clinical & Scientific staffing firms in Europe and the US.
- Topics we covered: company profile, business focus and strategy, outlook for the industry.
- Derived trends from perceived competitive differentiators.

Overview of the Firms featured in this Report

	4-year CAGR	Year founded	Geographical areas of business
ALKU	113%	2008	USA
Hays Life Sciences	27%	2007	30 countries globally (except Africa)
ProClinical	49%	2005	UK, Switzerland, Germany, Belgium, The Netherlands, USA, Singapore, China, South Korea, Indonesia.
Skills Alliance	63%	2005	Europe, South America, USA
US Tech Solutions	42%	2000	USA, UK, Ireland, Australia, India

Source: SIA


Competitive Differentiators and Overall Business Strategy

	Competitive differentiators
ALKU	Life sciences focused team Internal employee engagement
Hays Life Sciences	Global reach Ability to cross-sell across geographies Long term relationships with clients Highly specialised teams Recruiting locally
ProClinical	Life sciences specialists Highly collaborative company culture Flexible pricing approach
Skills Alliance	Deep understanding of the clients culture Technical expertise Internal training scheme High targets for consultants
US Tech Solutions	Customer focus and commitment Industry knowledge Understanding of clients culture Pool of pre-qualified candidates

Outlook for Clinical & Scientific Staffing

	Growing demand	Declining demand
ALKU	Highly skilled professionals with communications skills	Nowhere
Hays Life Sciences	Scientists (genetics, genomics, stem cells), quality assurance and validation	Nowhere; but AI likely to cut roles with little human interaction
ProClinical	Biometrics, clinical, regulatory affairs	Data management, health economics
Skills Alliance	Market access, health economics, computational chemistry, digital health	The CRO space and support functions in general
US Tech Solutions	Strong demand overall	Nowhere; but AI likely to cut roles with repetitive processes

Compliance & Risk Update



SIA is the Global Advisor on Staffing and Workforce Solutions

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Legal Compliance and Risk

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LEGAL COMPLIANCE AND RISK




Legal Calendar 2018: EMEA

15 January 2018

- This report highlights the legal changes and developments expected to impact the workforce environment in 2018 in Europe, the Middle East and Africa including:
 - GDPR: all companies processing the personal data of data subjects residing in the Union, regardless of the company's location, will... [More](#)

Analyst: [Fiona Coombe, CCWP](#)




Europe Legal Update Q4 2017

8 January 2018

- In this report, we round up the legal developments affecting the workforce solutions ecosystem in Europe in Q4 2017:

RESEARCH ANALYST

FIONA COOMBE



Fiona Coombe is Director of Legal and Regulatory Research and is responsible for quarterly regional Legal Updates on the latest legal developments of significance for staffing firms and buyers in Asia Pacific, North America, ... [more](#)

Research for 2018



Legal Compliance and Risk

Implementing GDPR

A Guide

March 2018 | Fiona Coombe, Director of Legal & Regulatory Research | fcoombe@staffingindustry.com

GDPR Checklist – 3 Months to go (25/5/18)

- 1. Information audit** – what data you hold; where it came from; who you share it with; what you (and they) do with it
 - What is your lawful basis for processing? I.e. consent/legitimate interest/contract (N.B. consent must be informed, explicit, require a positive opt-in, and not be a precondition of providing services – so consent may not be appropriate)

GDPR Checklist – 3 Months to go (25/5/18)

2. Internal governance

- Data protection policy & appointment of a data protection officer (DPO)
- Processes for managing data subjects' requests for access to, rectification or erasure of data; data portability; objections to processing
- Process and action plan for breach notification
 - Identify → Investigate → Notify (ICO within 72 hours / individuals affected without undue delay) → Record

GDPR Checklist – 3 Months to go (25/5/18)

3. External governance

- Supply chain contracts need to be explicit about what third parties (buyer, MSP, VMS provider, data management centre i.e. “data processors”) can do with your candidates’ data
- Data processors must be able to give ‘sufficient guarantees’ they will protect the data and only act within the terms of the contract

GDPR Checklist – 3 Months to go (25/5/18)

4. Security

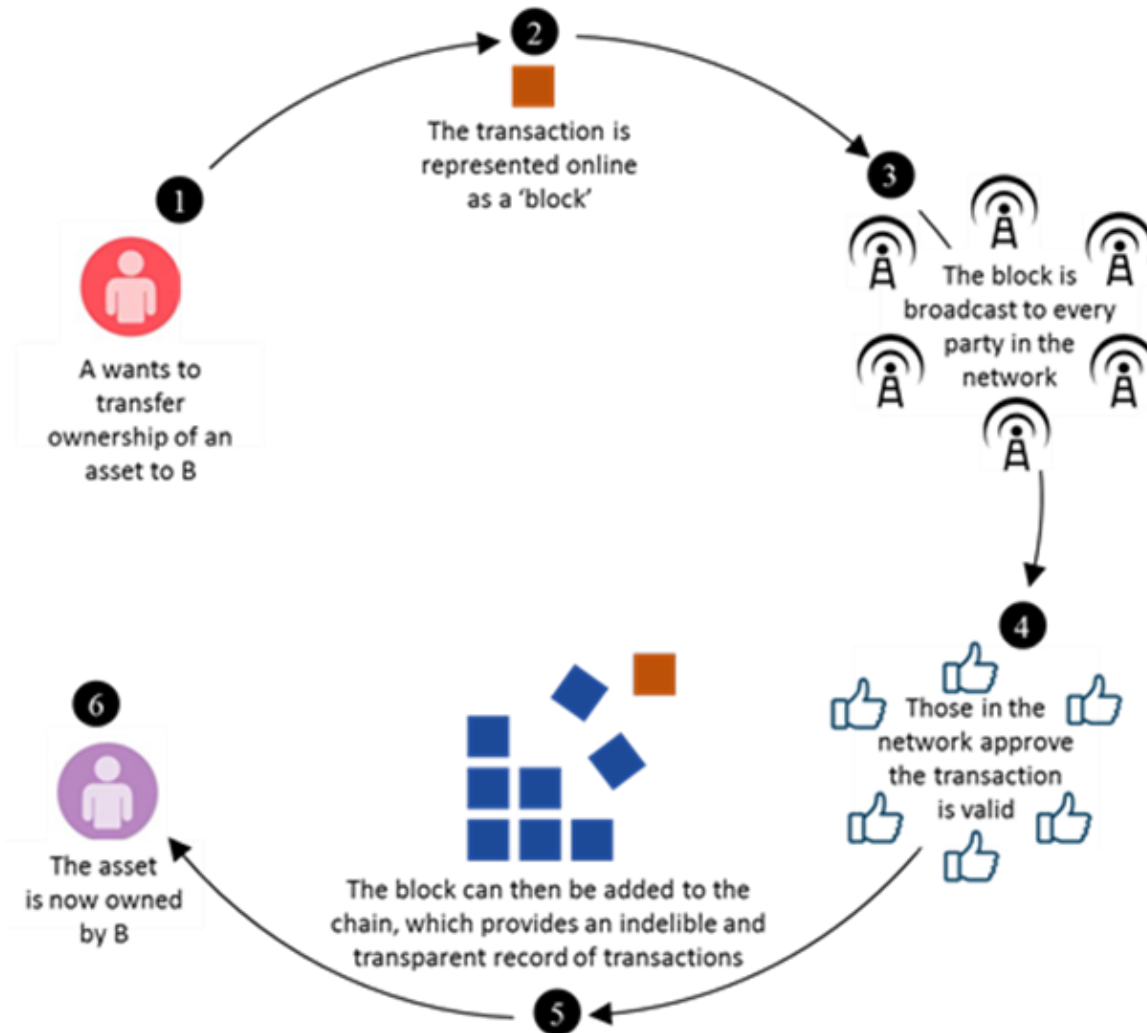
- Security policy & awareness training
- Technology solutions
- Restricted personnel
- Transfers internationally may require specific action: Model contract clauses, binding corporate rules, EU-US Privacy Shield
- Breach notification plan

Impact of Blockchain on Talent Acquisition



[Corporate Members in EMEA can download the report here](#)

Blockchain in Six Easy Steps



Blockchain: Who's Trying to Disrupt Who?

Industry	Incumbent Brands	Example Blockchain Disrupters
Banking	JPMorgan Chase, Bank of America, Wells Fargo, Citigroup	Bitcoin, Ethereum, Ripple
Retail	eBay, Amazon	OpenBazaar, Slock.it
Transport	Uber, Lyft	La'Zooz, Arcade City
Energy	Duke Energy, Dominion Resources, EDF, Centica	LO3, Brooklyn Microgrid, Solar Chane, TransactiveGrid
Data Storage	EMC, NetApp, Dell, IBM, HP	Tierion, Peernova, NXT, Filecoin
Healthcare Data	Optum, Cerner, Cognizant	GemOS
Music	Spotify, Deezer	Mycelia

Blockchain Initiatives in Recruitment

■ Credentialling

- <https://coveidentity.com>
- <https://appii.io/>
- <https://shocard.com/shobadge>

■ Payrolling

- www.etch.work

■ Talent Acquisition

- <https://chronobank.io>
- <https://jobeum.com>
- <https://hirematch.io>
- <https://www.blocklancer.net>
- <http://gigecoin.com>
- <https://ethlance.com>
- <https://bitjob.io>
- www.coinlancer.io/

Any Questions?

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August 22: APAC

September 11: North America

September 25: Europe

November 13: North America

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