

Vacancysoft/Clinical Professionals Pharmaceuticals Report

MEDICAL AFFAIRS

SEPTEMBER 2016

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About Vacancysoft Data

Our core data set for this report contains information on 2 300 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 September 2014 and August 2016, and they all came from companies that had posted at least one job before the start of that period. Vacancies from some companies were excluded because it was not possible to produce a consistent data set. We filtered our core data set from 48 500 vacancies issued by companies in the pharmaceutical industry.



Yvette Cleland
CEO
Clinical Professionals

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 Medical Affairs recruitment 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



Overview

The vacancy market for Medical Affairs staff is up over the last two years, but volatile. The most recent twelve months saw 24% more vacancies than the previous year (a monthly average of 107 vacancies versus 87 vacancies a year earlier), but results for the last five months have been disappointing. November 2015 was the busiest month in the last year, but in April and May vacancies were down over 30% compared to March, and since then only about half of the lost activity has been regained.

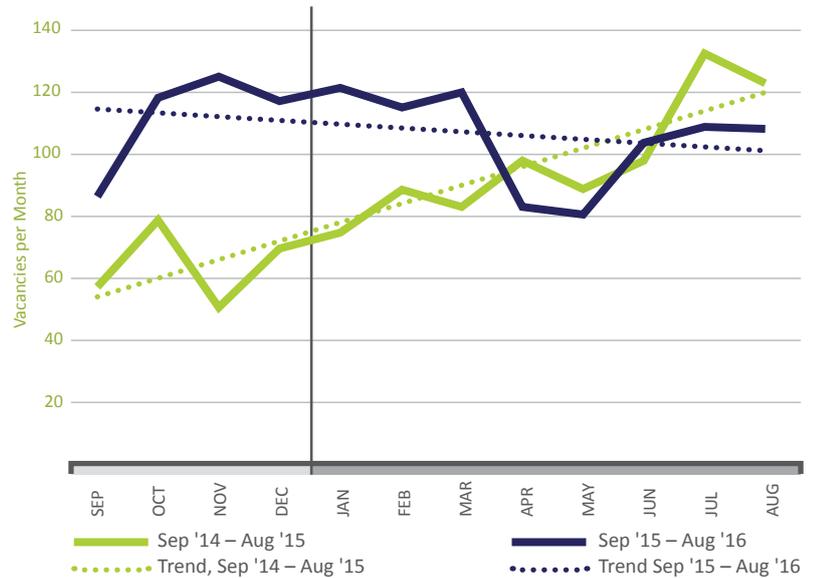
Overall, the UK had the most Medical Affairs vacancies, but it shared a pattern with the second- and third-busiest countries, Germany and Switzerland, as well. In all three, although there has been some year-on-year growth, monthly vacancy rates are now lower than they were six months ago.

On the level of specialised roles within Medical Affairs, there was a diverging movement between vacancies for Medical Advisory staff and vacancies for generalist Medical Affairs staff. The two had mostly moved in tandem until January of this year. Medical Advisory vacancies fell first, by over a third, but it was not until April that generalist Medical Affairs vacancies tumbled as well.

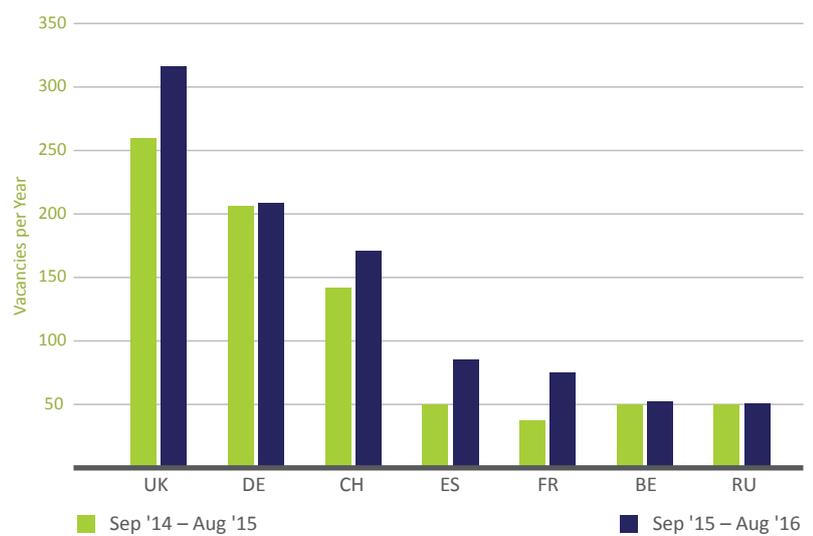
At a company level, the market is still dominated by the big traditional pharma companies, and they also produced most of the year-on-year growth we saw. They are also expanding their hiring most in countries where they already have a substantial presence.

Brexit fears alone aren't driving the UK market's recent behaviour, but they are certainly a strong factor. Earlier this year, Reuters quoted high-tier pharmaceutical representatives and the ABPI on the damage Vote Leave would have on Life Sciences not only in the UK, but across Europe overall.

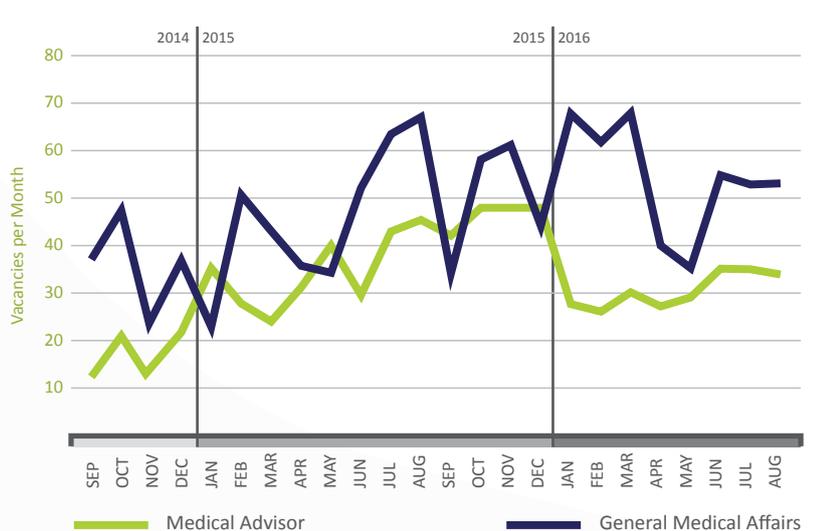
Medical Affairs Vacancies, Year-on-Year
SEP 2014 – AUG 2016



Year-on-Year Vacancy Growth in Busiest Countries
SEP 2014 - AUG 2016



Medical Affairs Vacancies in Chosen Specialisms
EUROPE, TRAILING 24 MONTHS



Geography Analysis

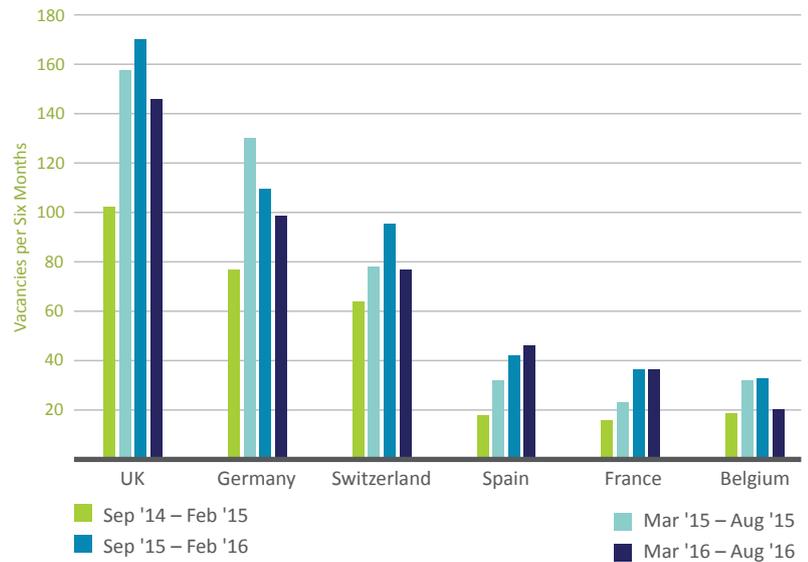
The UK had the most Medical Affairs vacancies in Europe, and UK vacancy volume was up 22% year-on-year. Almost all of those roles – over 90% – were in Greater London, the South East, or the East of England. As you can see from the country-by-country breakdown (right), the three busiest countries had over half (56%) of the European vacancies by themselves. As mentioned in the Overview (preceding page), Medical Affairs vacancies in all three of the busiest countries have declined slightly within the last year. Spain and France, by comparison, have had growth over the last two years without also having a recent decline.

When we break the industry down into sectors, the distribution of Medical Affairs vacancies looks quite different. Traditional pharma companies have advertised more jobs than the CROs, of course, but they are more active in different locations. The UK tops the table for vacancies in both sectors, but while Germany and Switzerland are the next most important countries for traditional pharma vacancies, it is Bulgaria and Italy that follow the UK in CRO vacancies.

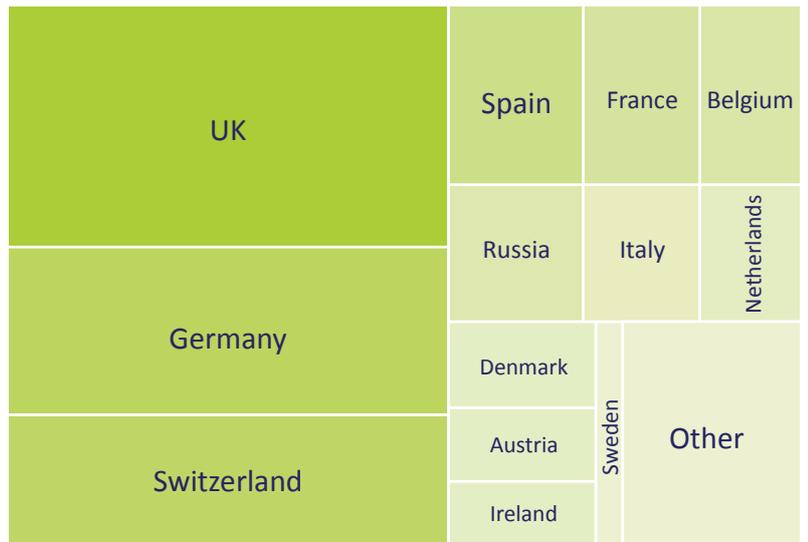
On a city level, Basel is the most important location in Europe for Medical Affairs vacancies, and it had far more of them over the last two years (135) than the next most important cities, Moscow (83 vacancies), London (82), and Munich (80). Roche and Novartis both advertised over 50 vacancies in Basel, and only four other companies advertised there. In contrast, over 20 different companies sought Medical Affairs staff in London, which is currently home to Europe’s central pharmaceutical regulator, the European Medicines Agency. The agency must be expected to move following the referendum result, and this will surely affect staffing levels.

In terms of vacancy numbers, the UK continues to dominate the EU market within Medical Affairs. Brexit to date has had little effect on the market

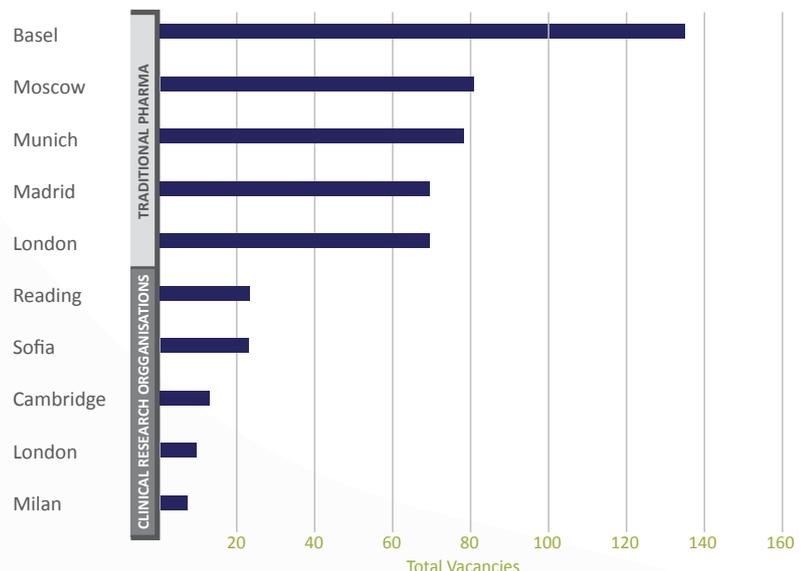
Medical Affairs Vacancies in Busiest Countries



Top Countries for Medical Vacancies EUROPE, SEP 2014 - AUG 2016



Medical Affairs Vacancies by City and Sector BY SECTOR, EUROPE, SEP 2014 - AUG 2016



Role and Seniority Analysis

Companies looking for Medical Affairs staff are looking for generalists nearly half (49%) of the time. Of the remaining 51% of all vacancies, most are for Medical Advisors.

As we noted in the Overview (p3), these Medical Advisory roles became much less common at the start of 2016, when they fell from around 50 vacancies per month to around 30. They've climbed back a little since then, but in August they were still over 25% down versus 12 months earlier.

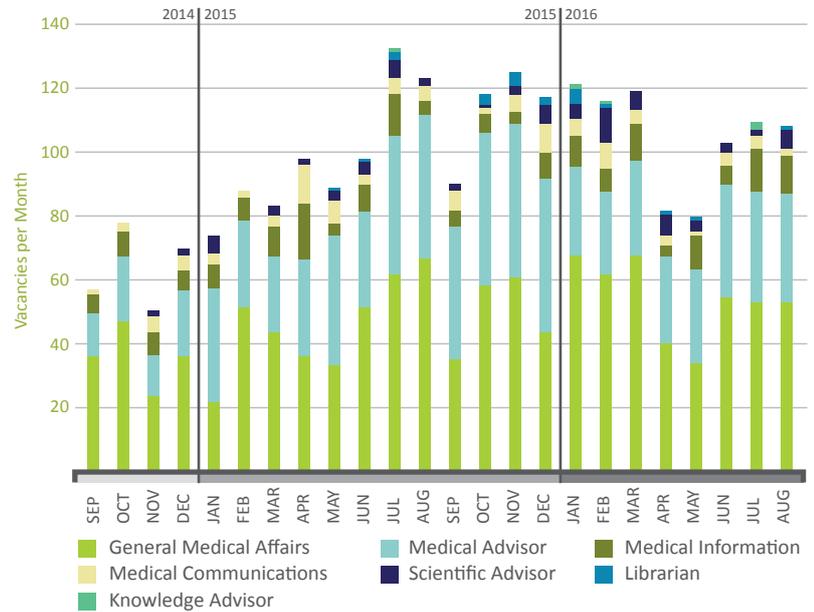
Medical Information specialists are the next most common type of vacancy, but with an average of just nine roles per month over 2016 so far, this specialism remains much less significant than Medical Advisory roles or generalists.

When we look at vacancies across the pharmaceutical industry, we can see that overall Medical Affairs hiring has suffered compared to other hiring. Over the last two years, almost exactly half of pharma vacancies have been for scientists, and half for non-scientists. And over the same period, an average of 10% of scientific vacancies were for Medical Affairs roles. From April to June of this year, however, no more than 8% of scientific vacancies were for Medical Affairs roles. So the downturn earlier this year was not an industry-wide problem – it was very narrowly focused on Medical Affairs hiring.

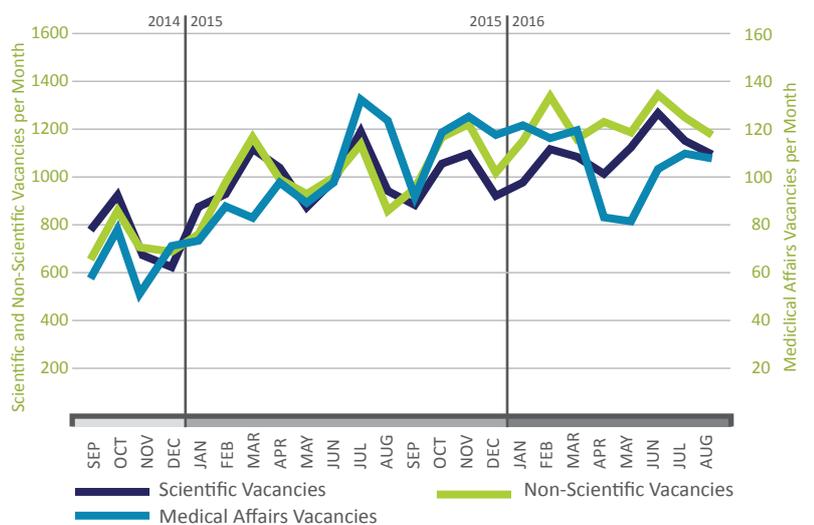
Breaking down vacancies by seniority shows that senior-level openings have made up an average of 31% of Medical Affairs vacancies over the last two years. These senior openings have been stable at a slightly lower level, around 28%, for the last six months.

The medical affairs market, after a small dip, continues to be buoyant both in terms of permanent and contract vacancies. We have noted more vacancies over the last three months than during the same period in 2015, with a particular glut in the £65 – £95k salary bracket

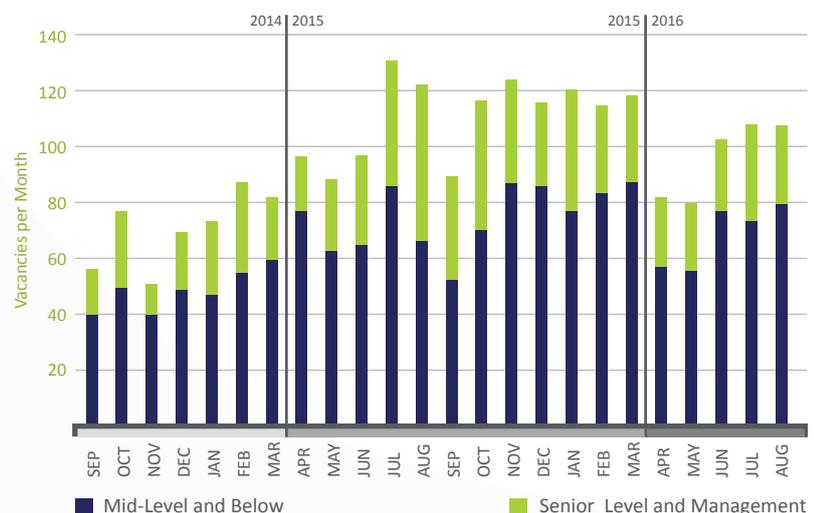
Medical Affairs Vacancies by Specialism
EUROPE, SEP 2014 - AUG 2016



Medical Affairs Vacancies versus All Scientific and Non-Scientific Vacancies
EUROPE, SEP 2014 - AUG 2016



Medical Affairs Vacancies by Seniority
EUROPE, SEP 2014 - AUG 2016



Company Analysis

Novartis and Roche are the largest players in the European market, and together they offered a quarter of all Medical Affairs vacancies. The next four companies by vacancy offering (Johnson & Johnson, MSD, GlaxoSmithKline, and Amgen) made up another quarter of the total market.

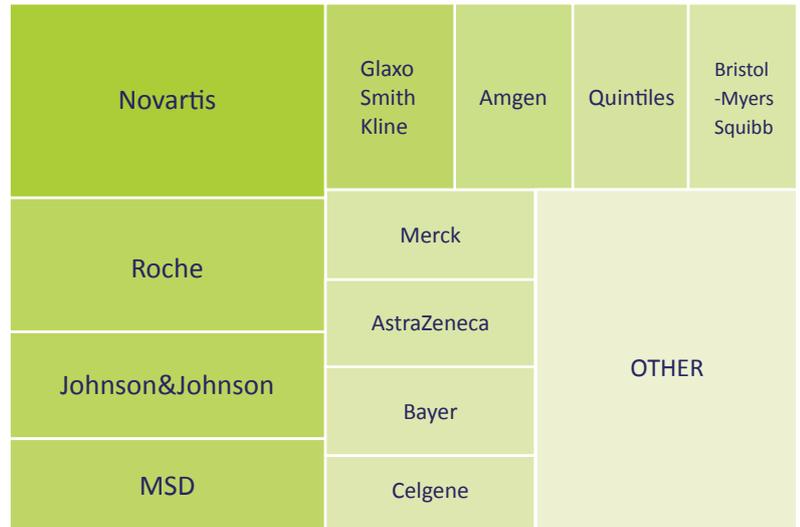
Some of the largest companies were also the fastest growing over the period. The fastest growing companies proportionately were Johnson & Johnson (84%) and MSD (80%), and the companies advertising the largest number of new vacancies were Novartis (77 new new vacancies) and Johnson & Johnson (56). The largest companies to reduce their hiring were Amgen, down by 12% year-on-year, and Bayer, which was down by 40%.

Different companies focused their hiring in different countries. Novartis, for instance, has done most of its Medical Affairs hiring in the traditionally strong countries of Switzerland, the UK, and Germany. But recently it has grown fastest in Spain, which is now its fourth-busiest country. Roche, and most of the other larger Medical Affairs employers, grew their hiring most in Germany, the UK, or Switzerland, where they have already done much of their hiring. Bristol-Myers Squibb was the largest employer to buck this trend; it kept low levels of hiring in Germany and Switzerland, but expanded in France and Belgium.

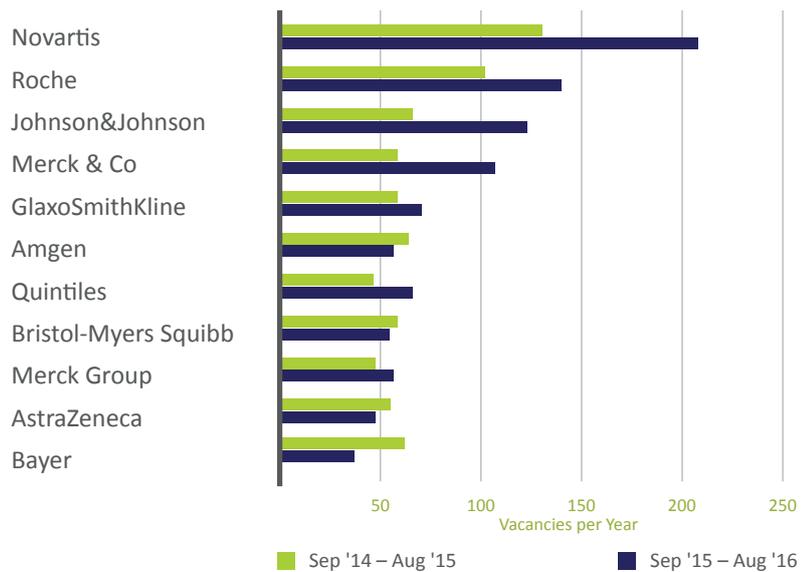
The largest CRO, Quintiles, hired heavily in the UK in 2015. More recently it has expanded its hiring in Spain and especially Italy.

We've seen small- to medium-sized pharma companies driving a significant proportion of the demand for talented Medical Affairs candidates in 2016. Medical Affairs is booming as a career path and an upward rise in salaries reflects this. Demand is especially high for those with niche therapy area experience and candidates with leadership skills.

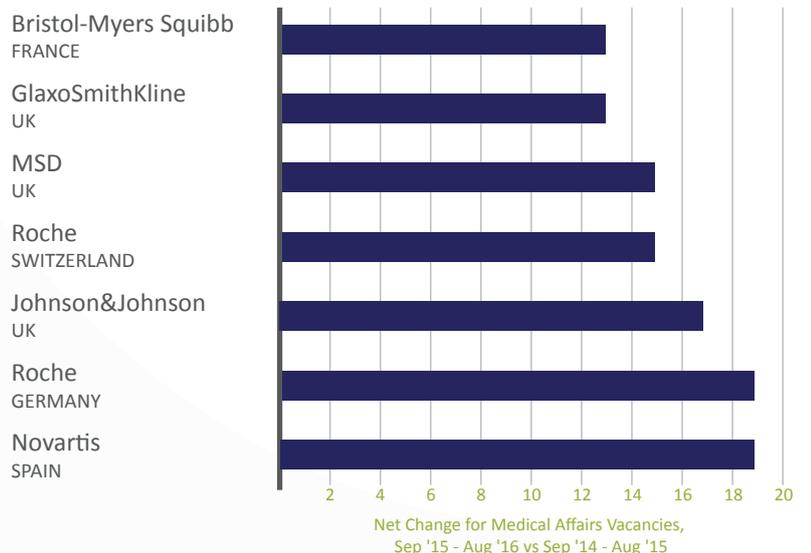
Medical Affairs Vacancies by Company
EUROPE, SEP 2014 - AUG 2016



Medical Affairs Vacancies by Company
EUROPE, SEP 2014 - AUG 2016



Fastest Vacancy Growth for Company-Country Combinations
EUROPE, SEPT 2014 - AUG 2016



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

UK Office
33 Blagrove Street,
Reading, Berkshire,
RG1 1PW
t | +44 (0)118 959 4990

EU Office
Ground Floor,
11-12 Bouverie Street,
London, EC4Y 8DP
t | +44 (0)207 822 1710



About Us

Vacancysoft is a subscription-based data publisher for the Recruitment Industry.

Established in 2006, we now have thousands of subscribers worldwide, clients range from FTSE listed businesses to industry specialists, whereby we optimise business development and client care.

Our **Vacancy Tracker** provides real-time updates of the latest vacancies being published on company websites, with every user having the ability to create their own personalised feed.

Our **Market Reports** are written in partnership with leading organisations in the recruitment industry providing unique analysis and insight on the latest trends and are frequently quoted in leading business media. Please [email our support team](#) if you have any specific questions regarding this report.

Our **Recruitment Industry Insights Newsletter** contains all the reports, along with other analysis we produce and are published to all relevant people in the recruitment industry.

Our **Business Intelligence Unit** then works with clients to provide bespoke solutions enabling greater insight on market trends enhancing strategy and planning. [Contact us to find out more.](#)

Contact Us

Vacancysoft LLP is a limited liability partnership.

Registered in England and Wales.

Partnership no. OC327354.

Registered office:

Vicarage House,

58-60 Kensington Church St,

London, W8 4DB

VAT: GB 886 1961 74