VACANCYSOFT
Business Intelligence through Vacancy Data

Only Medics

Clinical
PROFESSIONALS

LIFE SCIENCES REPORT

MEDICAL AFFAIRS

VACANCYSOFT
Business Intelligence through Vacancy Data

Introduction - Seeking Nirvana in a post

The emerging healthcare landscape has a core focus on meeting the obligations to its patients and customers alike. Innovation is now transforming the life sciences industry and in the midst of this evolution, medical affairs (MA) finds itself an ever-increasing strategic pillar alongside R&D and commercial. Exceptional science and data are becoming the bedrock of pharma as advances in digital technology and biosciences develop at an ever-increasing pace and the sheer volume of data can seem bewildering. With Brexit now looking to be in full swing, our latest report on the vacancy landscape in the UK and Europe for Medical Affairs (MA) is indicating some changes ahead.

Our most recent MA report maps the current vacancy landscape across Europe and highlights some changes within current hiring patterns and volumes. Perhaps not a total surprise based on Brexit and the ongoing Swiss/EU issues. Accepting that Medical Affairs is a critical pillar in an industry that gathers momentum (literally) daily, in 2017 to 2018 the demand for MA professionals in the UK grew by 22% and the indicators are this growth coincided with the increasing and changing skill requirements in certain areas of MA. In 2019 we saw only 11% growth in MA vacancies in the UK. As a business we saw a general slowdown of opportunity throughout 2019 with an unusual spike in vacancies in December after the General Election. However, in terms of an overall trend, this would be of very little note as December can often see a seasonal increase in roles coming in, albeit we normally see this increased activity in early December as the calendar Year End approaches. Early market indicators around MA for 2020 in the UK are already predicting a further fall of opportunities; currently estimated to be at around a 4% drop on last year. To context this, in 2018 the UK held over 18% of all European MA new live positions, in 2019 this dropped to 16%.

The geographical winner for growth in MA live vacancies in 2019 now sits with Germany who experienced a 5% increase over 2018 in volume of vacancies. New roles in 2019 also increased in France with a substantial 13% rise making it the fastest growing country in Europe for new MA career opportunities.

So, is this now a major worry for the UK and is the proverbial writing on the wall for Medical Affairs in a post Brexit world? My personal opinion would be no, I believe uncertainty can create major turbulence and that the continued growth and investment in the UK Biotech sector will make up some of the MA vacancy shortfall from large pharma. Anecdotally, what I hear from the coal face differs from the data, but we would not expect growth in vacancies in 2020 but a steady state or slight reduction. It is also worth noting that many MA professionals that were considering a move stayed put whilst Brexit played out, and many UK contractors held their breath and decided to remain in contract roles due to IR35, looking to see if any changes in this legislation coming into force in April 2020 would take place.

Two years ago, The Clinical Professionals Group went on a journey as a business looking to add proper value to our UK/US/EU client base whose business we value deeply. One of our 4 key strategic pillars for the business was to "give back" to the life sciences community in which we are privileged to work. We started in Harvard, Massachusetts, under our US brand Cpl Physicians and brought together a group of Chief Medical Officer's. A group of 15 handpicked professionals to have dinner, debate and peer to peer exchange around the challenges in Medical Affairs, changing technology and the issues that are currently "keeping us up at night". The sharing of experiences, innovation and solutions under Chatham House Rules led that first event to be a resounding success. The most valuable element of this evening being a rare opportunity to spend time in a peer group of aligned professionals and competitors and have honest and (at times) a robust exchange of experiences.

In the last two years we have sponsored and facilitated over 7 events that, by invitation only, bring together VP's, senior directors and CMO's from both biotech and large pharma in the UK and the US. In the safety of an exceptional peer group we have facilitated new relationships, solution gathering and different approaches to difficult issues through peer to peer exchange. Feedback from the UK group is that their hiring requirements continue to grow, but the continued uncertainty was flowing through and impacting sign off in the UK, this coupled with a UK skill shortage in key roles could account for some of the loss of growth. Brexit in fact did not feature in the issues keeping MA professionals awake at night, the lack of training in industry, the shift in skill requirement in MA and the below par onboarding and support of new starters were considered more of a concern.

In 2019 big pharma requirements accounted for 86% of MA roles on the market versus 90% in 2017. In 2019 we saw the greatest proportionate increase in MA roles coming from the Biotech industry where the relative increase year on year was 71%. The UK has a strong and ever-growing presence in Biotech and interestingly when we are working with large pharma candidates in MA, they are asking us to identify roles in up and coming, well-funded biotech's versus pharma.

So, the one thing I have learned through my attendance at our MA dinner and debate evenings in the UK and US is the exceptional talent and innovation that is seeded throughout MA professionals in both regions. What will really impact MA in the UK in the coming years? Will it be those innovative businesses that succeed in really positioning their science with their ability to both combine, analyse and interpret disparate data sets? Improving patient outcomes is the Nirvana of MA so the growing skills and knowledge around real-world evidence (RWE), electronic medical records (EMR) and novel sources of data with innovative ways of mining and interpreting data could enhance massively stakeholder engagement and ultimately improve patient outcomes.

We have a challenge ahead in a post-Brexit UK, but we really have no understanding of what that will really be. When you label anything, as many commentators within science have in the UK as an "impending disaster that is Brexit" and with this labelling are we saying this is the only way it can be? Or could these negative undertones be what will limit us and our understanding or could we as a country and science community in fact decide to be free from those negative constraints? Of these belief systems? And instead decide we can constantly change our views, talk up our opportunities and seek some new truths for the UK life science industry? Perhaps that is our true Nirvana?

Yvette Cleland - CEO | Clinical Professionals Ltd

VACANCYSOFT
Business Intelligence through Vacancy Data

Contents

Overview

As the healthcare industry changes, so the role of medical affairs is expanding. The fact that 50% of all new drug launches fail to meet company expectations, mean companies are upgrading medical affairs teams to address this. Given they have the detailed product knowledge and understanding of the relevant diseases, increasingly they are benefiting from the rise of big data, meaning that this is one function directly being impacted by the increase in data and digital technologies.

However whilst recruitment of medical affairs professionals has increased year on year, the growth in vacancies is less than that for scientists overall. In 2019, there was an increase of 22.9% for scientific roles, where the increase for Medical Affairs was almost half with it being 11.3% up. With this we see the share of scientific vacancies being for medical falling from 4.8% to 4.2% so far this year.

Looking back further, we see that when analysing the year on year change within vacancies for Medical affairs in the period from 2017 to 2018 the demand for professionals has increased by 22%, compared to 11.3% from this year.

Broken down by specific role, we see that Medical Affairs specialists account for 55% of the total jobs. The second biggest area of hiring is for Medical Advisors, where this is representing 30% of the vacancies. Finally it is worth mentioning, the considerable growth in vacancies for Medical Information roles, resulting in the proportionate share increasing from 7% in 2018 to 8.9% so far this year.

All Scientist v All Med Affairs 2017 v 2019

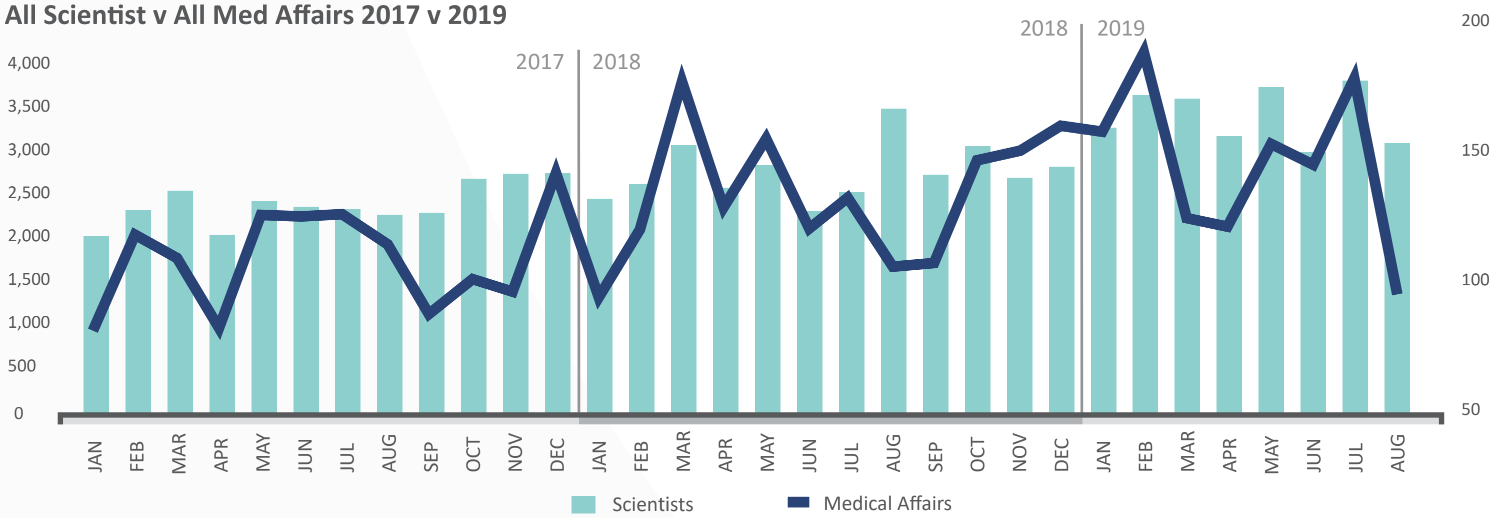

Fig. 01

All Med Affairs Vacancies 2017-2019*

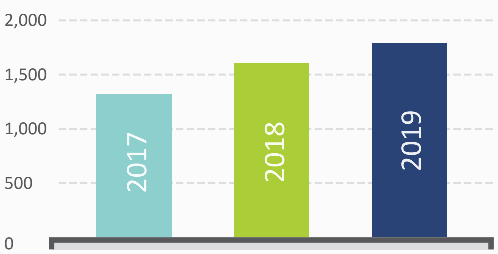

Fig. 02

Types of Medical Affairs

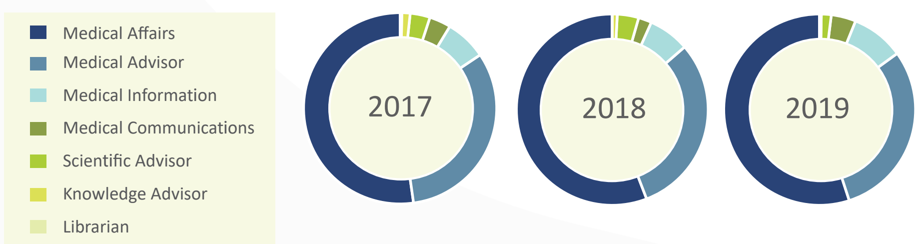

Fig. 03

Top 5 Countries

With the UK's imminent departure from the European Union, the Brexit process is already starting to have implications on recruitment within the UK pharmaceuticals industry. With that we see that as things stand vacancies are forecast to decrease in the UK this year, where with Medical Affairs specifically, this fall is projected to be 4.2%.

As a result of this, when analysing vacancy volumes across Europe (including Switzerland) we see that the UK share has fallen from 18.5% in 2018 to 16.9% this year. With this we see that medical affairs within the UK has dropped from 14.8% to 13.2% of total recruitment for medical affairs across the EU specifically.

In contrast, there has been a significant increase in activity in Germany, with volumes up 5.5% year on year, which constitutes 21.8% of vacancies across Europe. As a result of this Germany has pulled away as the leading point for hiring for Medical Affairs in the continent.

Also worth flagging is the increase in activity within France, where volumes are up 13% for Medical Affairs, making it the fastest growing European country in this area. This has resulted in it becoming the third largest recruitment market by country for Medical Affairs.

With Switzerland, activity has remained flat year on year. The ongoing dispute between the EU and Switzerland has the impact to disrupt the sector heavily, where the latest signs are of the dispute escalating. The question then would be in the event that this is not resolved how will Swiss companies reorganise themselves?

Top 5 Countries for Medical Affairs 2018 v 2019*

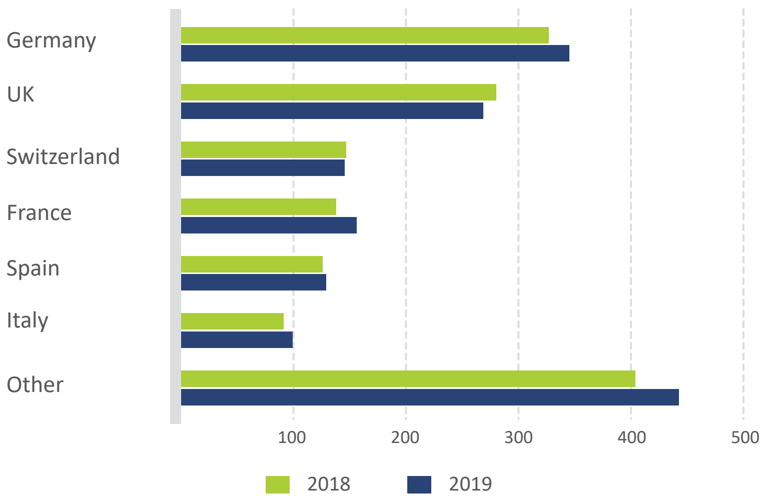

Fig. 04

Top 5 Countries

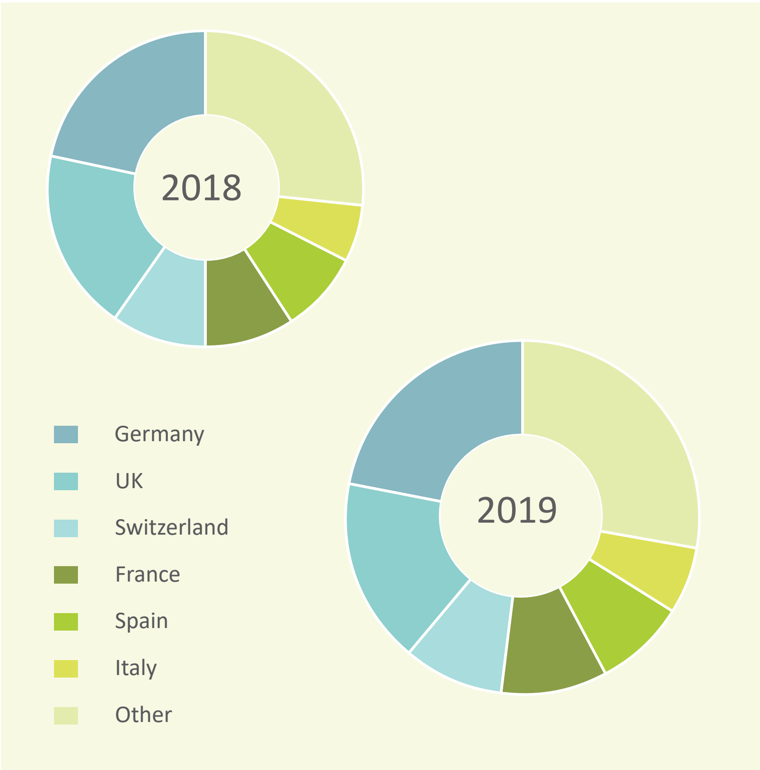

Fig. 05

% Of Medical Affairs Jobs UK v EU

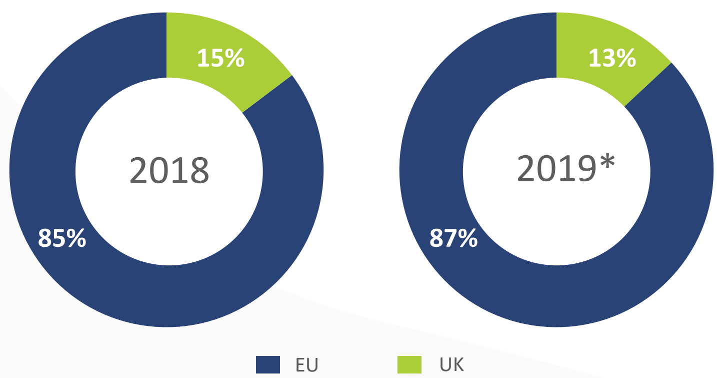

Fig. 06

Analysis by Sectors

Within the Life Sciences industry, as expected, the majority of medical affairs remain within the Big Pharma companies, which account for 86% of all the vacancies so far this year. With this though the following points are worth noting:

- Wheras between 2017 and 2018 volumes of medical affairs vacancies with Big Pharma increased by 30%, this has not continued into 2019, instead the rate of increase has dropped significantly to 6%.

- This has meant that whilst the share of all vacancies remains by far the highest (86% as mentioned before) this has dropped from 90% in 2017. In contrast, we see the greatest proportionate increase in 2019 coming from Biotechnology companies, where the relative increase year on year is 71%. As a result of this the share of medical affairs vacancies within Biotechnology companies has increased from 5% in 2017 to 8% so far this year.

- Similarly with the CRO's, the volumes of medical affairs since 2017 have nearly doubled, up 82% over the period. This has meant that the share of vacancies within CRO's for Medical Affairs has risen from 4.3% in 2017 to 5.8% this year.

The big question here is to what extent will this trend continue? Whilst Big Pharma will dominate for the foreseeable future, as the Biotechnology sector continues to grow, what will that mean for Medical Affairs professionals? Also, as IT and Medtech becomes more prevalent, to what extent could these roles start to be outsourced in the future to

Medical Affairs Sectors by Quarter, 2017 v 2019

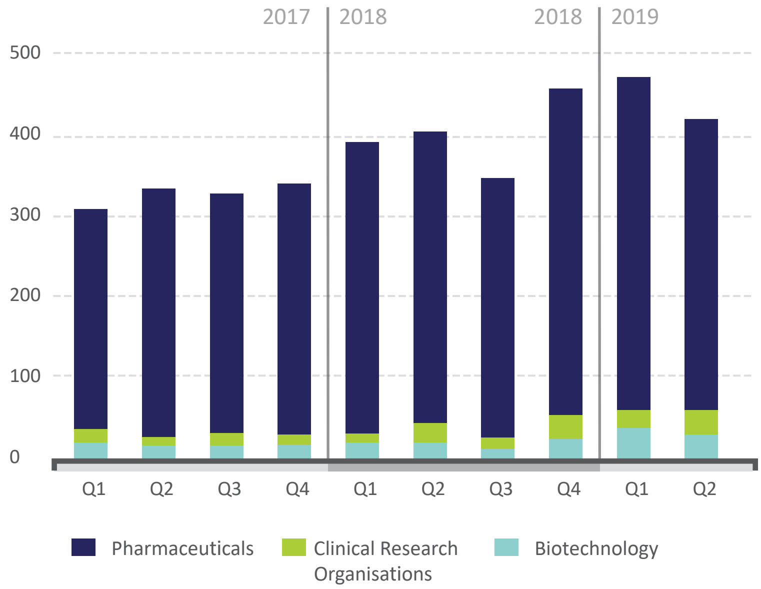

Fig. 07

Medical Affairs Sectors by Quarter, 2017 v 2019 in %

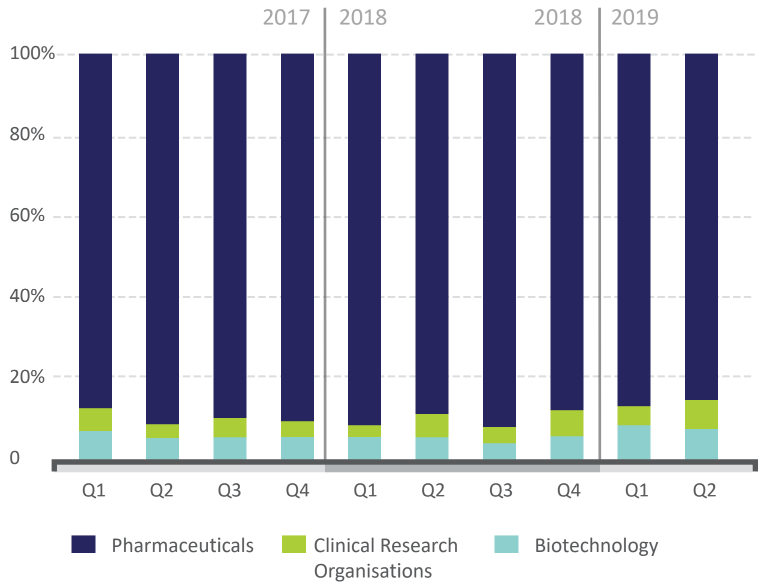

Fig. 08

Medical Affairs by Sector

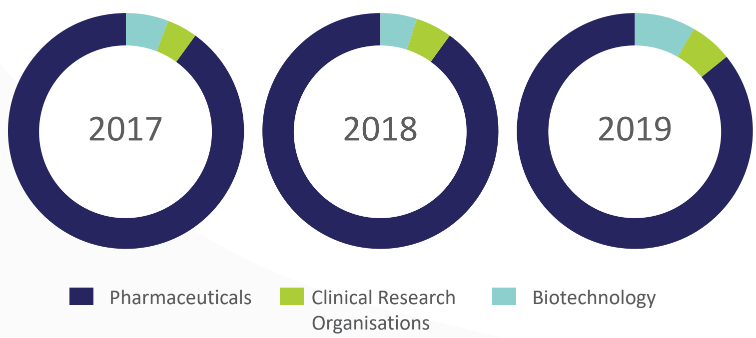

Fig. 09

Top 20 Companies

The fact that Big Pharma dominates the top twenty table is to be expected, with eighteen of the top twenty constituents being Pharma specific. Other than that, only IQVIA and Biogen, the largest CRO and Biotech respectively make the top twenty list.

Similarly, despite muted activity within Switzerland in terms of the recruitment of Medical Affairs professionals, Novartis and Roche are the leading companies recruiting in this space, with volumes up 43% and 84% respectively. Is this a sign they are reorganising their staffing requirements away from Switzerland?

US companies dominate, making up eight of the top twenty, with the most active pharma companies being Merck, Pfizer and Abbvie. With this, in all three cases recruitment activity has been up in 2019, 21%, 11% and 26% respectively.

In contrast Amgen and Celgene have had significant falls year on year in their recruitment activity, down 56% and 51% respectively, the largest drops in the top twenty list amongst the US pharma companies.

With Astrazeneca what is noteworthy is that the proportion of scientific vacancies being for Medical Affairs is significantly higher than in other companies. For context, with say GSK, Medical Affairs makes up 4.3% of the total scientific vacancies, wheras with Astrazeneca this rises to 14.1%. Also worth highlighting is the fact that recruitment for Medical Affairs in Sanofi Aventis is down year on year, despite overall activity in France increasing.

Finally, outside of the two big Swiss giants, Novartis and Roche, the biggest year on year increase for hiring for Med Affairs has come from Bayer, with volumes up 41.6%.

Top 20 companies by Med Affairs vacancies

Company	HQ Country	Sector	2018	2019*	%
Novartis	Switzerland	Pharma	115	165	43.4
Roche	Switzerland	Pharma	82	151	84.1
Astrazeneca	UK	Pharma	123	139	13
Sanofi-Aventis	France	Pharma	73	63	-13.6
Merck	USA	Pharma	47	57	21.2
Takeda Pharmaceutical Co	Japan	Pharma	40	54	35
Bayer	Germany	Pharma	36	51	41.6
Pfizer	USA	Pharma	43	48	11.6
Abbvie	USA	Pharma	38	48	26.3
GSK	UK	Pharma	55	46	-16.3
Iqvia Holdings	USA	CRO	51	45	-11.7
MSD	Germany	Pharma	34	40	17.6
Fresenius SE and Co	Germany	Pharma	38	39	2.6
Janssen Pharmaceutica	Denmark	Pharma	73	37	-49.3
Merck and Co	USA	Pharma	66	37	-43.9
Biogen Idec	USA	Biotechnology	38	24	-36.8
Shire	UK	Pharma	30	24	-20
Celgene	USA	Pharma	45	22	-51.1
Amgen	USA	Pharma	44	19	-56.8
UCB	Belgium	Pharma	41	13	-68.2

Fig. 10

VACANCYSOFT

Business Intelligence through Vacancy Data

Clinical PROFESSIONALS

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.

vacancysoft.com

clinicalprofessionals.co.uk