

LIFE SCIENCES REPORT

Medical Affairs
Labour Market Trends

April 2021

INTRODUCTION



The greatest danger in turbulent times is not the turbulence – it's acting with yesterday's logic

Medical affairs is central to the success of biopharma companies as healthcare becomes more complex, specialised and global. It continues its metamorphosis in tandem with the global shift towards evidence-based care. Its growing importance in generating value, particularly as medicines are more targeted and personalised, and the evidence base becomes more nuanced, present new challenges for the function to play a more strategic biopharma role.

And as healthcare professionals need deeper understanding of the increasingly complex science, they are turning to Medical Science Liaisons (MSLs) to enhance their knowledge. With the pandemic enhancing virtual communication, there's now even greater opportunity for more innovative methods to emerge, with MSLs leading the way.

Medical affairs functions across industry are stepping up rapidly, becoming integrators of evidence and influencers of internal and external stakeholders. The real-time changes drive the review, reassessment and change that ambassadors use to deliver these enhancements to skills, processes, structures and systems. These are the foundation of the medical affairs function and ensure they are future-ready and future-proofed.

In light of the rapid change within medical affairs, highly skilled talent is essential to the success of this core strategic function. Ultimately the prize is to consistently support patients and their access to medicines of profound value to them, the industry developing them and the healthcare system funding them.

Our specialist medical affairs team is seeing open vacancies surge at every level. Consistent with this, the findings in this report show a 27% increase in medical affairs vacancies. And for the first time in three years, vacancies have grown consecutively month-on-month. The South East remains the leading region for hiring with a particular spike in not just biotech but within contract research organisations.

Cpl Life Sciences has been at the forefront of supporting biopharma organisations to attract world-class talent for the past 15 years. We understand that the next wave of medical affairs leaders must have the skills and vision for this paradigm shift — and look forward to supporting our customers through the next evolution of this truly innovative sector.

For more details on how the RA apprenticeship scheme works and how it can support your growth, please do not hesitate to contact me on Yvette.cleland@cpl.com for further guidance on how to play your part in making our industry more sustainable.

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Britain

Vacancies for UK medical affairs professionals in Q1 2021, following two consecutive months of decline at the end of 2020, picked up and finished the first quarter with a monthly hiring level not seen in at least three years.

The biggest firms in the life sciences sector sought a record 92 medical affairs specialists in March 2021, a 16.4% month-on-month rise — pushing quarterly growth up 27.6%. Compared to the same quarter last year, recruitment was 42.4% higher.

It's also the first time in over two years that monthly vacancies have grown for three consecutive months. This resulted in a quarterly total of 245 vacancies, the first time levels reached over 200 vacancies.

The South East remains the leading region for medical affairs vacancies, with 267 vacancies published last year, despite that constituting a 9.2% year-on-year fall — the only dip out of the top three regions. Its Q1 2021 total shows promise, with hiring levels (93 vacancies) already at 34.8% of last year's total.

London recorded 7.9% year-on-year growth in vacancies while the East of England published 6.1% more roles in 2020 compared to the year earlier. Both regions also made a good start to 2021 with hiring for medical affairs specialists; the 74 and 61 vacancies published constitute 36.2% and 44.2% of 2020 totals, respectively. Noteworthy is North West England's increase in overall labour market share, which grew from 1.3% in 2018 to 3.8% in Q1 2021.

A glance across the sectors leading recruitment for medical affairs professionals shows that although pharma naturally dominates (515 vacancies in 2020; -2.8% year-on-year), it has been losing labour market share.

In 2018, it published 80% of vacancies for these specialists. Since then, this figure has dropped nearly eight percentage points to 72.2% in Q1. The highest growth was experienced by biotech, where year-on-year vacancies rose by 50% in 2020.

Medical Affairs Scientific Vacancies in Life Sciences, UK



Fig. 01

Med Affairs Scientific Quarterly Average Vacancies, UK

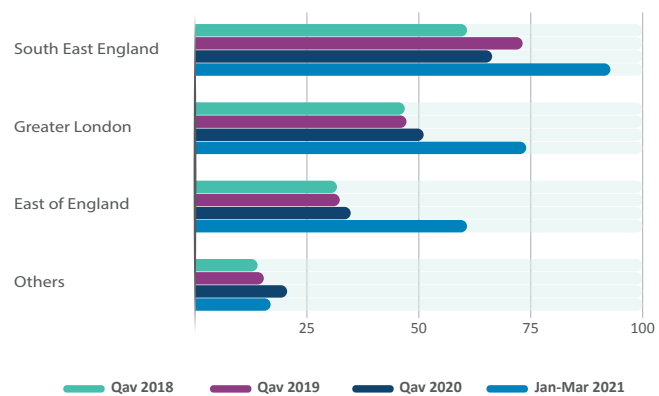


Fig. 02

Med Affairs Scientist Vacancies by Sector, UK

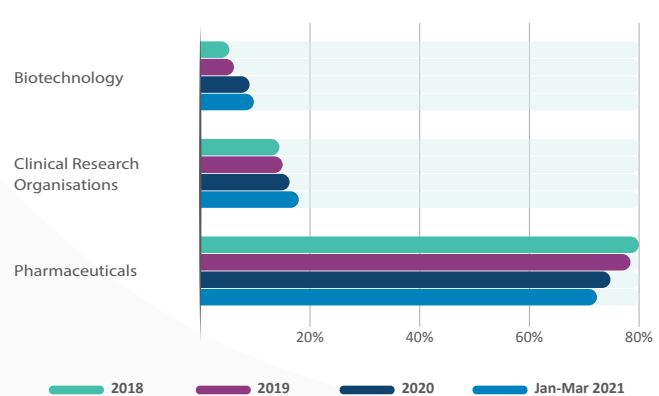


Fig. 03

Second to the UK regarding most published vacancies for medical affairs experts is Germany. In 2020, it posted around the same year-on-year growth in hiring levels for these specialists compared to the UK, a rise of 2.2%.

In 2021, life sciences companies in the country experienced two consecutive months of growth before month-on-month hiring levels dipped by 19.3% in March 2021 — a year-on-year fall of 4.1%. However, the growth in January (+20%) and February (+35.7%) meant that recruitment in Q1 2021 finished as the highest quarterly total in just over a year — at +10.7% year-on-year.

More than 75% of all the sub-specialisations within medical affairs in Germany are either for generalists or medical advisors. Hiring levels among the latter experienced two consecutive annual declines since 2018, -7% in 2019 and -17% in 2020.

Other sub-specialisations with nominal national recruitment levels that experienced growth in the last couple of years include vacancies for medical information experts, up +20% in 2019 and +66.6% in 2020; and medical communications specialists (+12.5% and 133.3%, respectively).

This also resulted in the two sub-specialisms increasing their shares within the group of roles — from 3% to 6.2% for medical information experts, and 1.6% to 4.8% for medical communications experts.

Benelux and Nordics

Last year the Benelux region saw a total of 245 medical affairs vacancies, corresponding to 26.3% year-on-year growth. Across the Nordics, meanwhile, recruitment for medical affairs specialists rose by 5% year-on-year, comprising a total 231 vacancies. Both experienced quarter-on-quarter falls, -18.8% in Benelux and -1.4 in the Nordics. However, the 70 vacancies in the Nordics represents a 20.6% rise in Q1 compared to the same quarter a year earlier, while the 56 recorded in Benelux is 23.2% lower.

Med Affairs Scientific Vacancies in Life Sciences, Germany

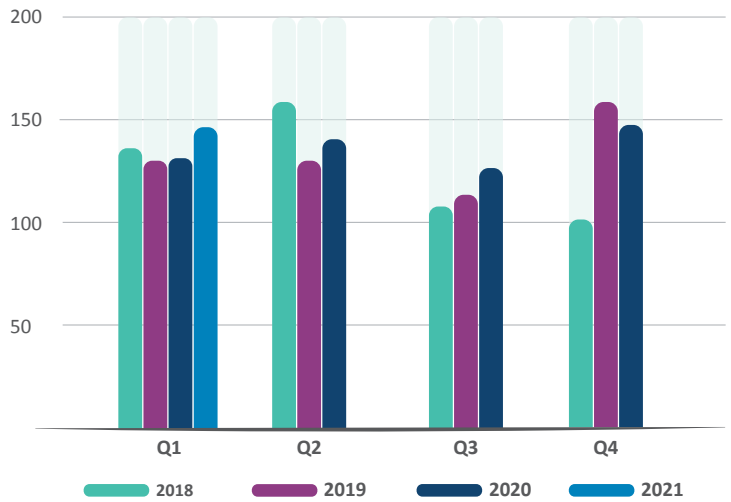


Fig. 04

Med Affairs Scientist Vacancies by Role, Germany

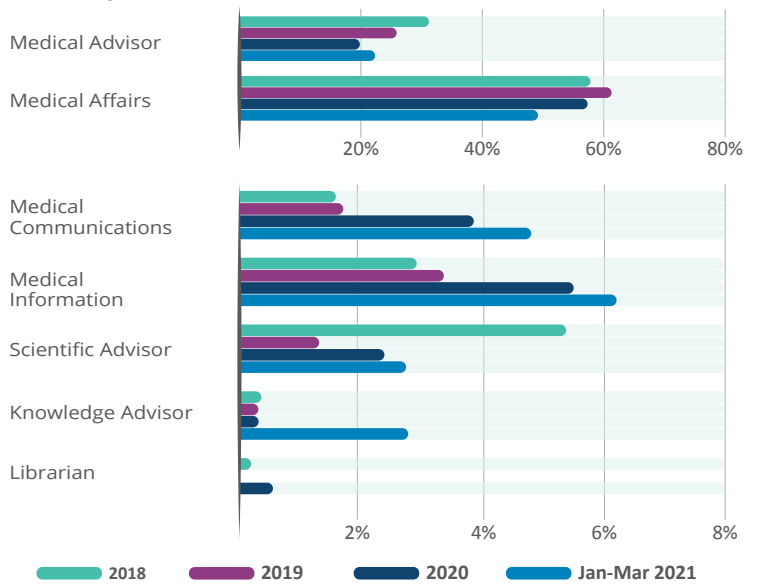


Fig. 05

Med Affairs Scientific Quarterly Average Vacancies, Benelux v Nordics

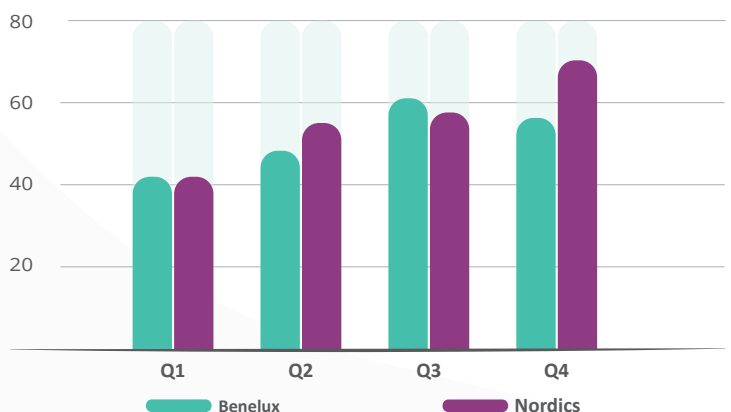


Fig. 06

Switzerland

The country with the third-highest number of medical affairs vacancies is Switzerland, where hiring levels in Q1 were the second-lowest since January 2018. Although March's total of 27 vacancies constitutes a 50% month-on-month rise, the first quarter as a whole finished -13.5% quarter-on-quarter and was 19% down on the same quarter a year earlier.

The no.1 city in Switzerland for medical affairs vacancies is Basel, where 97 new vacancies were published last year — although representing a 33.1% year-on-year decrease. In Q1 2021, the life sciences industry in the city published 17 vacancies, which is 17.5% of the total vacancies recorded in 2020.

Zurich, in contrast, experienced year-on-year growth in hiring for medical affairs specialists in 2020, with hiring levels up 13.5% compared to the year previous. Recruitment in the first three months of 2021 is already at 28.6% of last year's total, and so vacancies are on course to finish another year with growth. This drove its share of the labour market up from 13.8% in 2020 to 18.7% in Q1.

Available roles for medical affairs specialists in Zug, meanwhile, suffered the most, falling 44% year-on-year in 2020. It started 2021 well, the 11 vacancies the equivalent of 47.8% of its total vacancies across the previous year. On this trajectory, hiring levels should comfortably surpass 2020's total.

In Baar vacancies for medical affairs specialists experienced explosive growth in 2020, up by 360% year-on-year. This drove its share of this total labour market in Switzerland up from 4.3% in 2019 to 22.7% — jumping above Zug (7.6%) and Zurich (13.8%). In Q1, however, it fell to 9.4%.

Medical Affairs Scientific Vacancies in Life Sciences, Switzerland

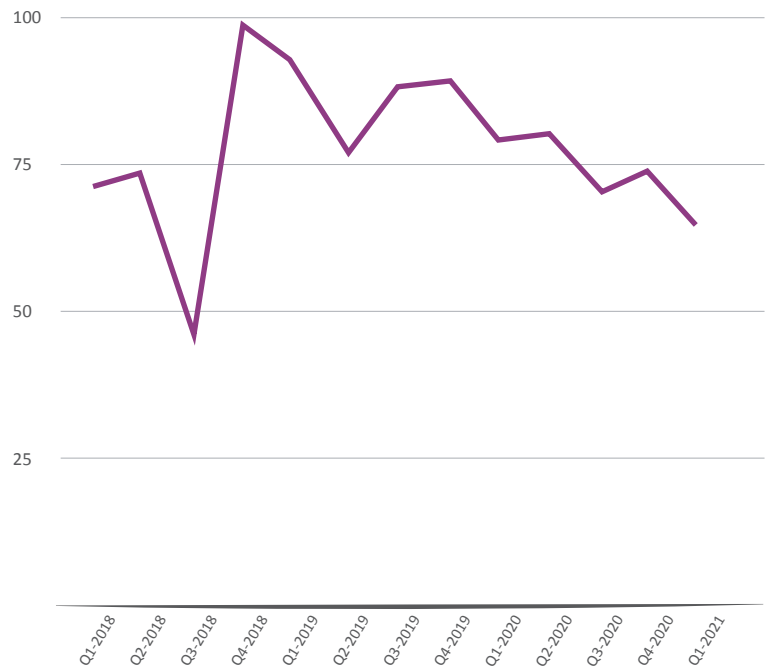


Fig. 07

Top Cities, Med Affairs Scientist Vacancies, Switzerland

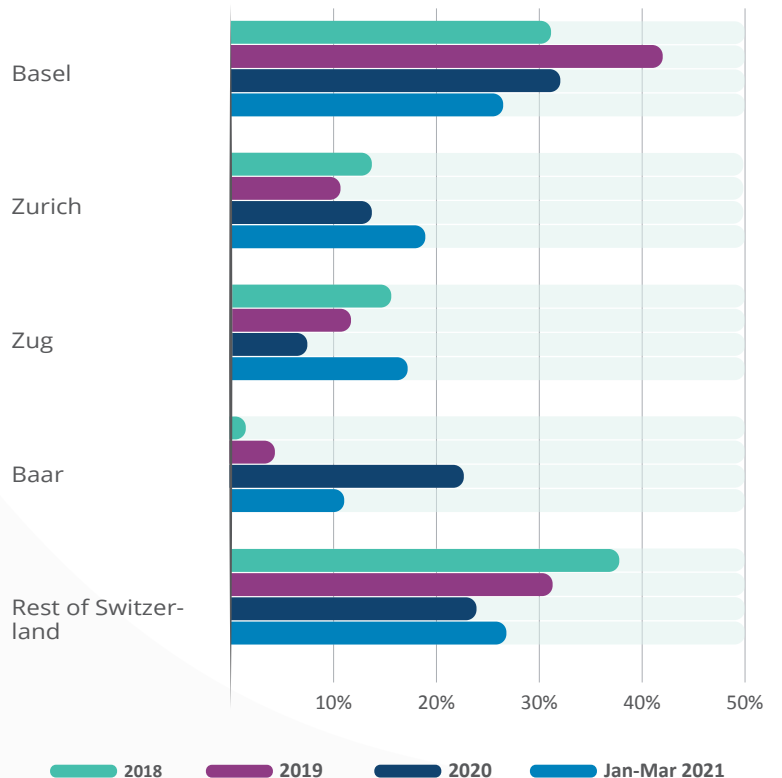


Fig. 08

Top Firms

06

AstraZeneca, which is the source of constant criticism for its distribution and data difficulties surrounding its covid-19 vaccine, is the current leading firm for medical affairs vacancies in Europe. Publishing 258 vacancies in 2020 (a 17.8% year-on-year rise) its 89 vacancies in Q1 2021 represents already 34.5% of last year's total.

The highest growth in recruitment for these specialists came from IQVIA, which recently reported that global spending on medicines (excluding covid-19 vaccines) is set to grow at 3-6% CAGR through 2025. European hiring levels at the American multinational in 2020 (297 vacancies) represented a 212.6% year-on-year surge.

Recruitment at Novartis for medical affairs professionals started well in 2021, despite the company experiencing the largest year-on-year fall in vacancies (-40.8%) out of the top 10 life sciences firms. Its 73 vacancies puts it second to AstraZeneca, and constitutes 39.6% of its 2020 vacancy total only three months into the year. It did however miss financial expectations in the first quarter as the pandemic hit demand for drugs for breast cancer, skin and eye conditions.

GSK fared better, with 32.8% more vacancies for medical affairs experts in 2020 compared to a year earlier. In March the British drugmaker agreed to be part of the manufacturing process for 60 million doses of Novovax's covid-19 vaccine to boost UK production of coronavirus jabs. The 63 vacancies published across Europe represents already over a third of its total 2020 recorded number of roles.

Other notable rises in recruitment for medical affairs experts last year came from Bristol-Myers Squibb (+274.1%), Biogen (+271.1%), UCB (+185.7%) and Johnson & Johnson (103.6%). Meanwhile, at Roche, which published 242 vacancies for medical affairs specialists in 2019 — the highest number in Europe that year — hiring levels at the company fell by 60.3% year-on-year in 2020. In Q1 2021, publishing only 13 vacancies, it finds itself in sixteenth place.

Company	2019	2020	2021 Jan-Apr	%YOY 20/19
AstraZeneca	219	258	112	17.81%
Novartis	311	184	91	-40.84%
GSK	125	166	76	32.80%
IQVIA	95	297	69	212.63%
J&J	84	171	69	103.57%
AbbVie	75	113	66	50.67%
Novo Nordisk	52	72	63	38.46%
Merck	186	144	57	-22.58%
Pfizer	146	95	46	-34.93%
Bristol-Myers Squibb	27	101	44	274.07%
Sanofi	130	122	38	-6.15%
Biogen	45	167	29	271.11%
Takeda	79	82	27	3.80%
Bayer	114	57	23	-50.00%
UCB	42	120	22	185.71%
Roche	242	96	18	-60.33%

Fig. 09



Cpl Life Sciences have an international presence, recruiting across Europe, supplying Pharmaceutical, Biotechnology and Clinical Services industries with the talent they require for success.

Cpl UK is a group of specialist talent businesses which service the Science, Technology, Engineering, Mathematics (STEM), Professional Services and Healthcare sectors across the UK.

Together we form the UK footprint for **Cpl Resources Plc** which is one of the largest staffing companies in Europe. As a group we've been powering businesses by providing transformational talent solutions for over 30 years and have been listed on the London Stock Exchange since 1999.

Our mission is to be the UK's best transformational talent partner across all our core markets and add meaningful value to lives of our clients, candidates and colleagues.

What we do:

Our Service Capabilities across all European Countries include:

- Contingency permanent recruitment
- Contract recruitment – freelance and PAYE via Cpl UK
- Search and selection permanent recruitment
- Specialist 'project-based' interims via Cpl UK
- FSP outsourced teams across Europe
- European Salary Survey to determine the salary and benefits for each sector of the UK Life Science industry.

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