

pharmaceutical marketing
industry career survey

career survey 2009

Report compiled by ICM Research

Ben Gibbons

ben.gibbons@icmresearch.co.uk

Laurence Olding

laurence@icmresearch.co.uk

ICM Research

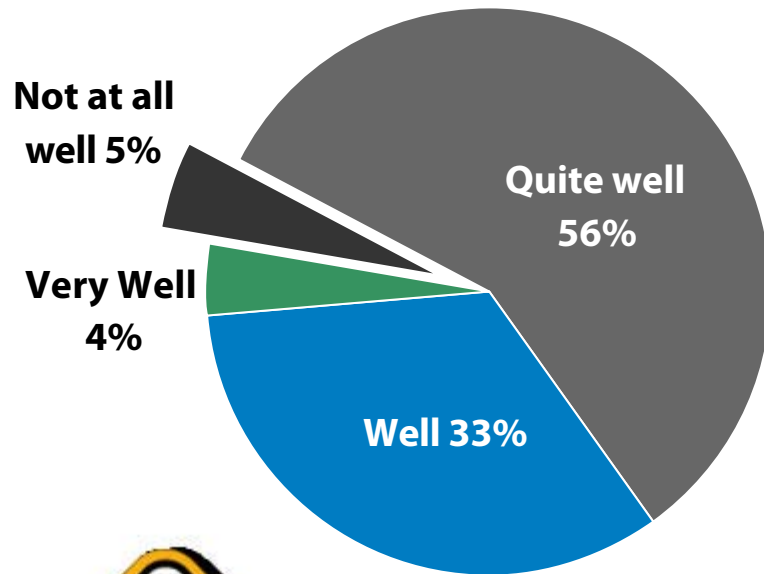
Berkshire House, 168-173 High Holborn, London, WC1V 7AA

www.icmresearch.co.uk



the recession

How well do you think the pharmaceutical industry is coping in the current business and economic climate?



9% had personally experienced redundancy in the last year

61%

said they felt their role had changed due to the current business and economic climate

The majority of industry professionals believe the industry is coping 'quite well' in the current economic climate

Under 34s were more likely to feel the industry was coping 'well' than those of older ages, who tended towards 'quite well'

Base: All respondents 2009 (257)

optimism and the future

4 in 5 professionals are quite or very optimistic about the future of the industry

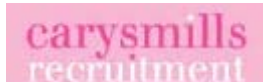
How optimistic are you about the future of the pharmaceutical industry?



51%

Half intend to stay in the pharmaceutical / healthcare industry for the remainder of their careers

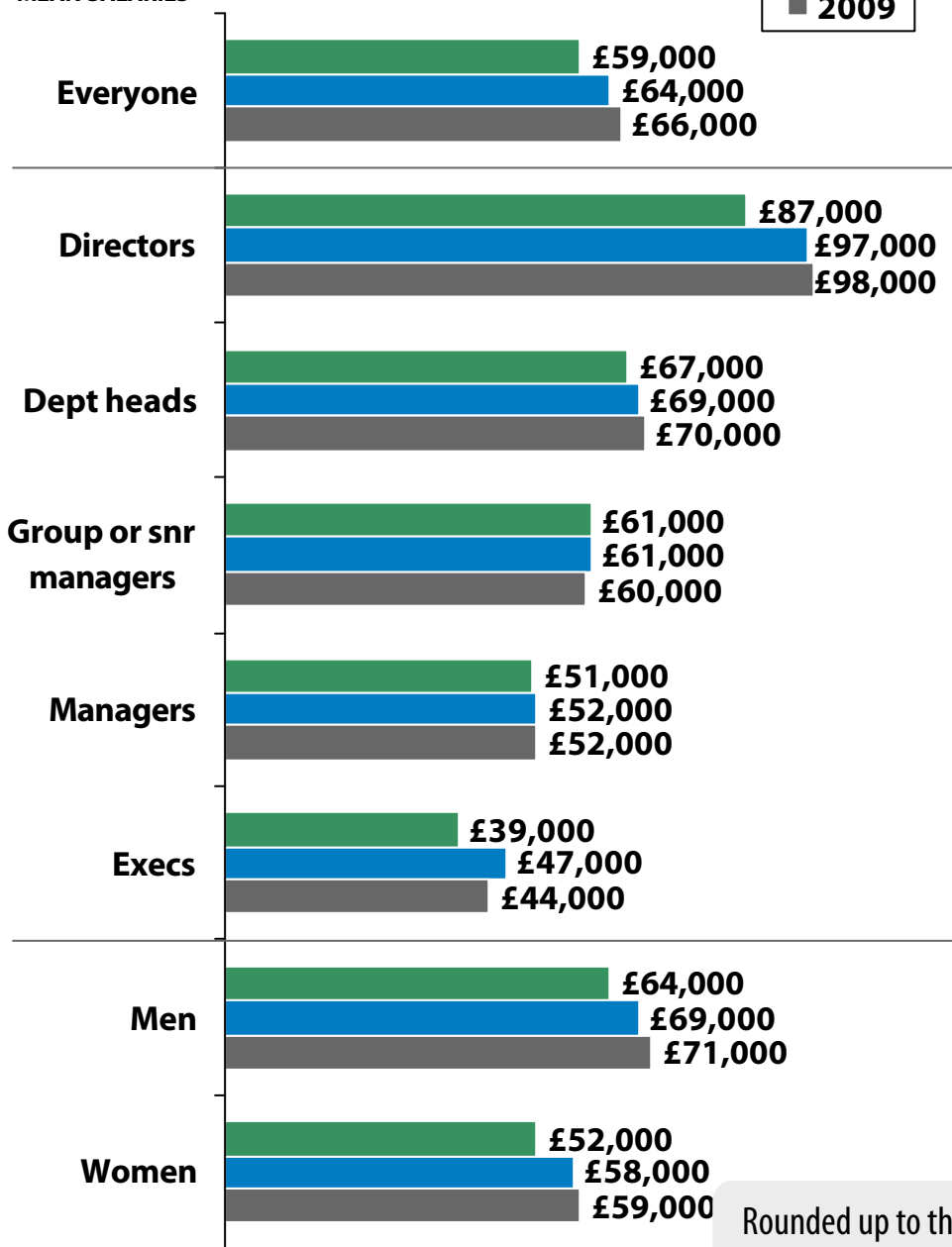
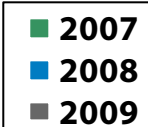
Base: All respondents 2009 (257)



average salaries

What is your basic salary excluding bonus?

MEAN SALARIES



“Salary increases appear to have been largely unaffected by the current economic climate” PM

The average salary in 2009 was £66,000, showing a continuing increase since 2007

Incomes are highest for those aged 45-49 - averaging at £79,000

One in five execs earn less than £20k a year

On average, men earn £12,000 a year more than women, up from £9,000 more in 2007

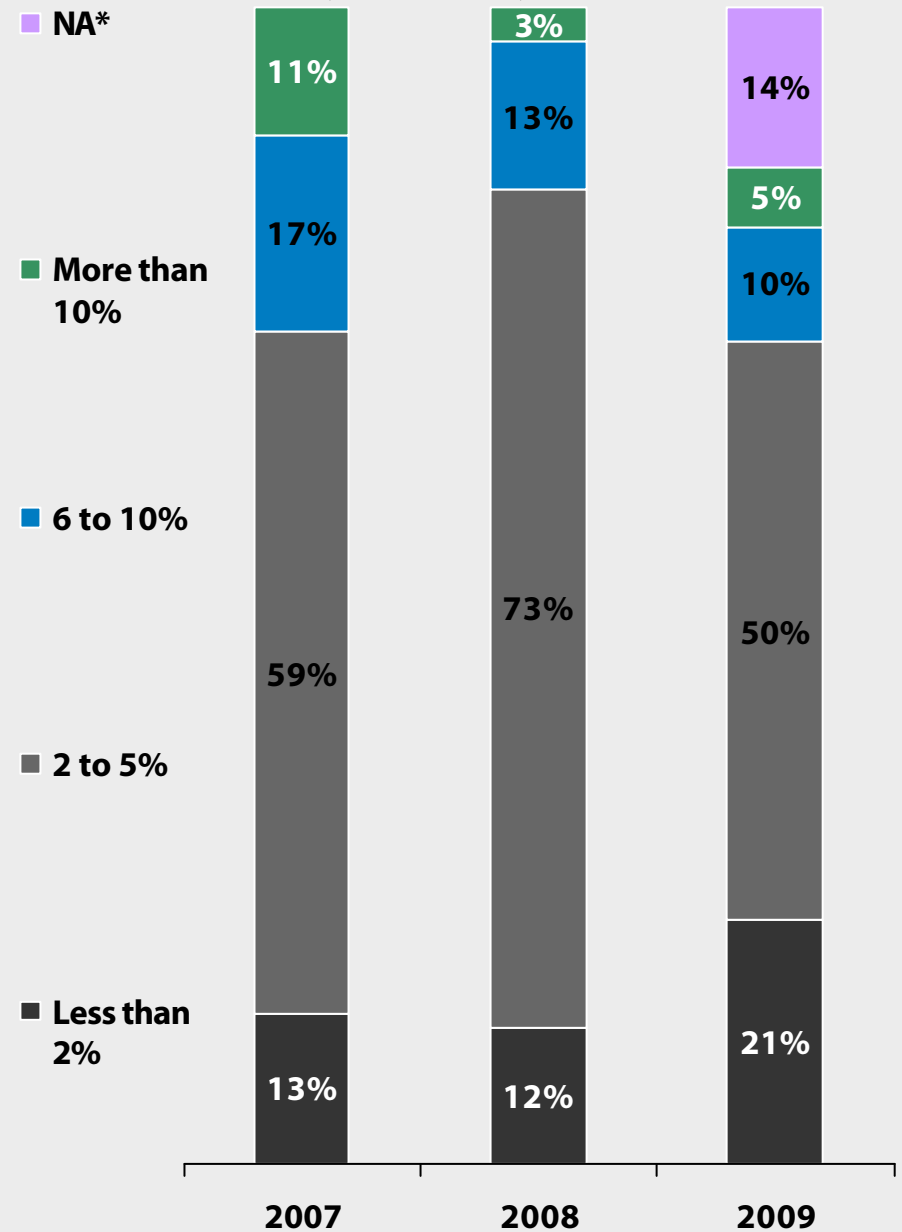
Base: All respondents 2007 (461), 2008 (484), 2009 (257)

Rounded up to the nearest thousand, the mean is the average of all salaries



salary rises (past 12 months)

As a percentage, what basic salary increase have you had over the last 12 months?



Base: All respondents 2007 (461), 2008 (484), 2009 (257)

*NA not an option or included in pre2009 studies (see methodology notes)

In 2009 respondents reported lower salary increases than in previous years with little difference between men and women

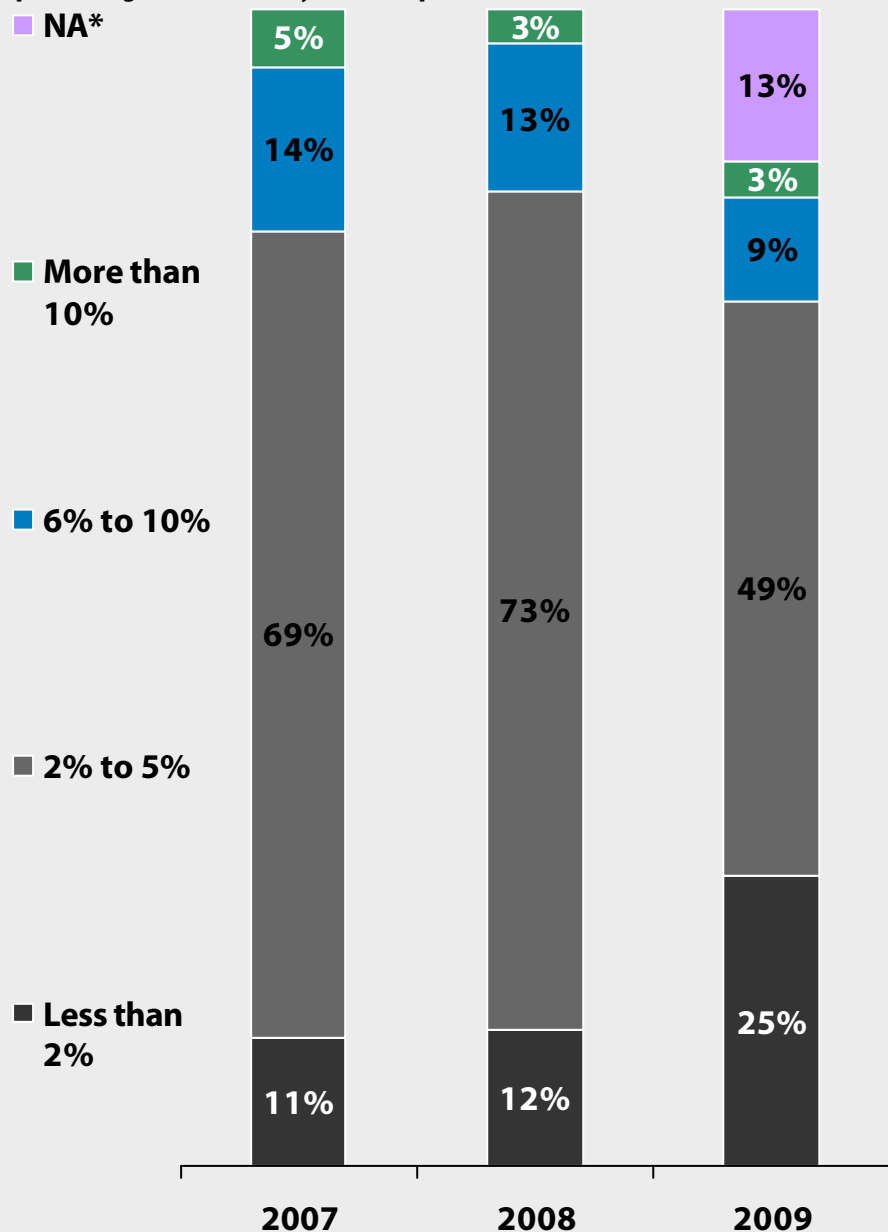
50% received a salary increase of between 2 and 5 per cent

1 in 10 Directors rec'd a raise of more than 10%, compared to 1 in 20, Dept Heads, Group/Senior Managers and Managers



salary rises (next 12 months)

What percentage increase do you anticipate to receive over the next 12 months?



Base: All respondents 2007 (461), 2008 (484), 2009 (257)

*NA not an option or included in pre2009 studies (see methodology notes)

Expected salary changes tend to reflect those gained over the previous 12 months, with a quarter expecting to get a rise of less than 2%

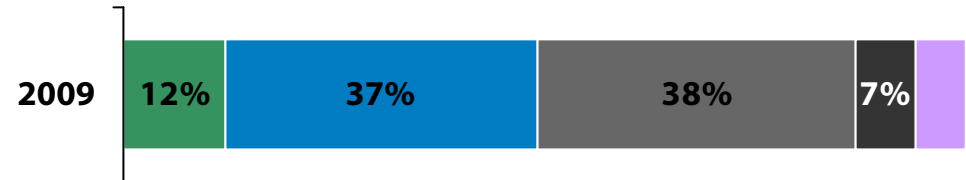
Managers were amongst the most pessimistic – with 35% expecting a raise of less than 2% – whilst 7% of Dept Heads were still confident of a raise of 7%, compared to just 3% overall



the working day

How long is your working day?

■ 8 hours ■ 8 to 9 hrs ■ 10 to 11 hrs ■ 12 to 13 hrs ■ 14+ hours ■ NA



Nearly 4 in 5 work an average day of between 8-9 hours and 10-11 hours

1 in 10 Directors (12%) and Dept Heads (11%) work average days of 12-13 hours, compared to 7% overall

Directors are also most likely to be taking work home in the evening, with 71% doing this

Base: All respondents 2009 (257), working more hours (108) less hours (25)

42%

have worked longer days in past 12 months

<i>Increased business</i>	49%
<i>Change of role</i>	28%
<i>Restructuring</i>	11%

10%

have been working shorter days

<i>Change of role</i>	44%
<i>Change in personal circumstance (e.g. part-time working)</i>	28%

Working from home

43%

work at weekends

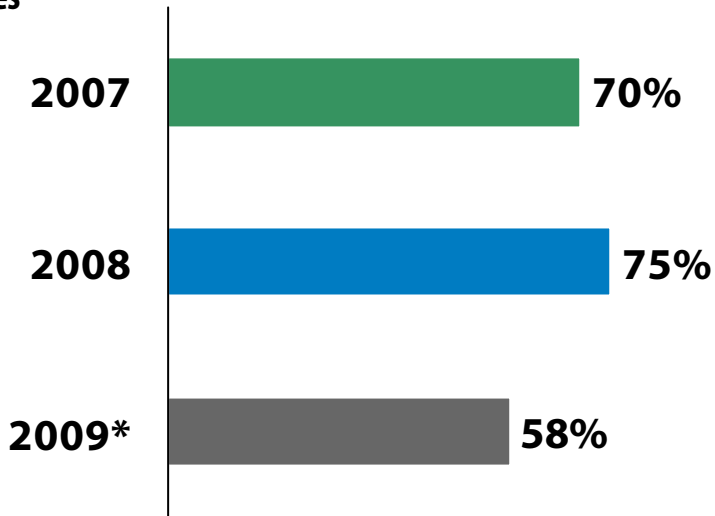
58%

work in the evenings

performance related pay

Does your company operate a performance related-pay scheme?

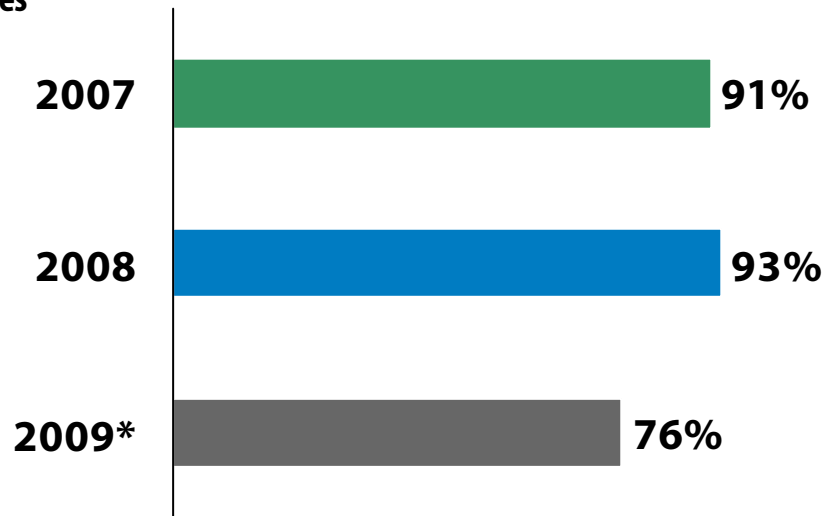
% Yes



For 2009, respondents report themselves as less likely to work in companies that offer performance related pay schemes than in previous years or to receive bonuses

Do you receive a bonus?

% Yes



92%

of Directors in the 2009 survey said they received a bonus

Base: All respondents 2007 (461), 2008 (484), 2009 (257)

*NA not an option / included in pre2009 studies (see methodology notes)



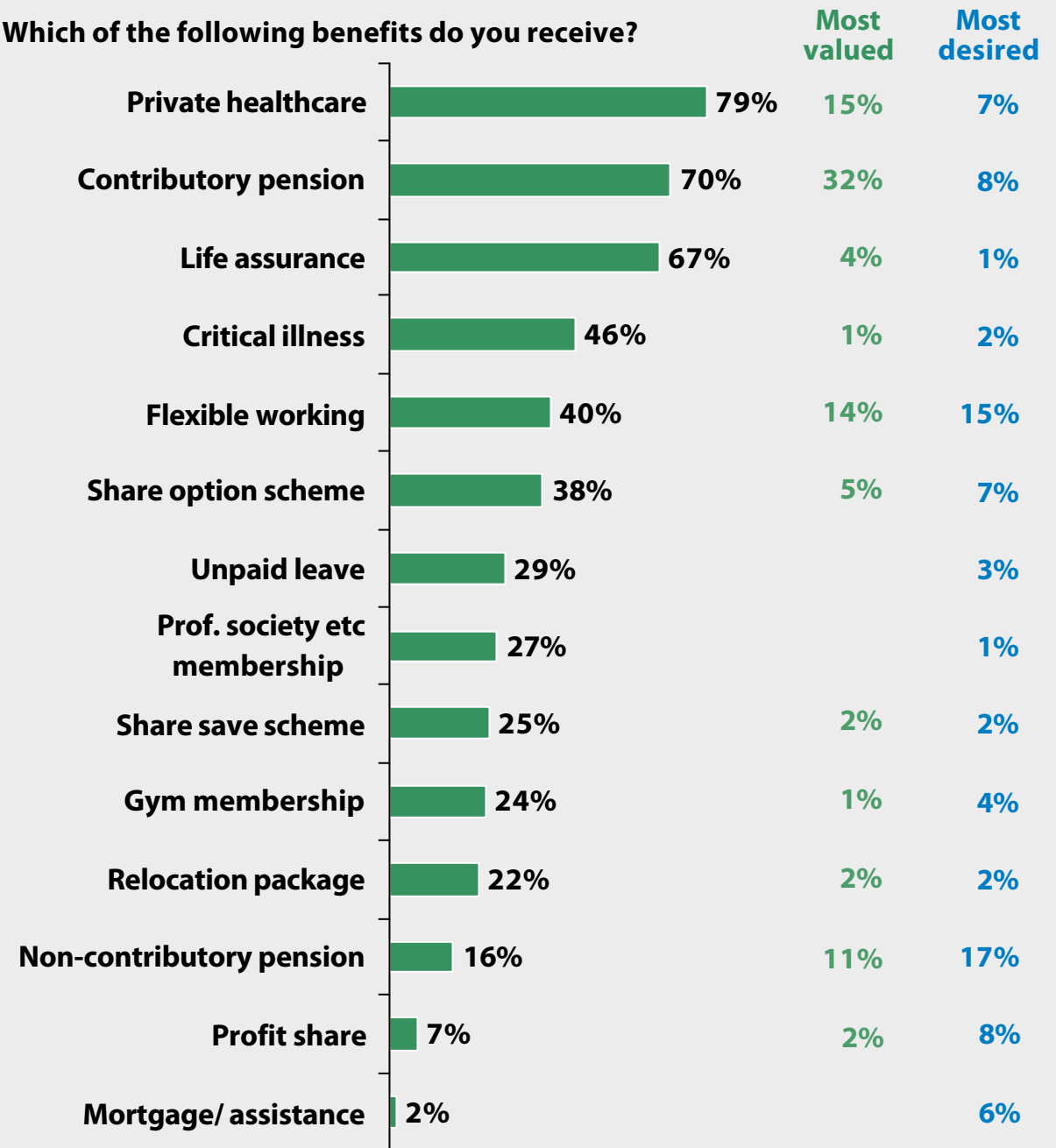
benefits

Private healthcare was the most widespread benefit in 2009 and also amongst the most valued

The most valued benefit was the contributory company pension scheme, which 70% receive

A non-contributory scheme was the most sought after benefit amongst those who didn't receive it, notably amongst men, with females (and 30-34 yr olds) favouring flexible working as a desired benefit

Which of the following benefits do you receive?

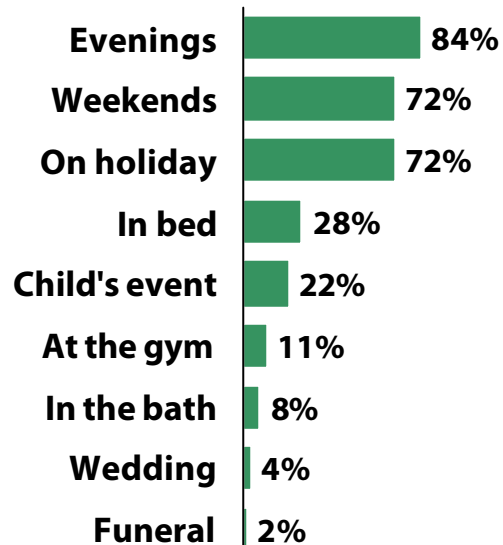


Base: All respondents 2009 (257)

mobiles

Whilst saying they don't "work" out of hours, the majority stated they use their mobile devices for business purposes during the evenings, on weekends and while on holiday. Some even admitted to using them in bed, at a child's event (such as a birthday or school play), at the gym and in the bath. Use at weddings (4%), and funerals (2%), reveals the increasing invasiveness of work into personal time.

mobile device used for business purposes



37%

take mobile calls in meetings

50%

think mobiles should be banned from meetings

Base: All respondents 2009 (257)

air travel

Number of flights taken past 12 months compared to previous years...



NA, 4%

Increased,
20%

Stayed the
same, 38%

Decreased
, 38%

2009

58%

have changed the number of flights taken since previous years – 38% decreased, 20% increased

Role has changed

47%

*Company cut back due to **credit crisis***

26%

Technology developments mean face-to-face meetings less needed

11%

Our business is now more internationally focused

9%

*Encouraged to use alternative forms of transport to reduce **carbon footprint***

3%

Change has been driven largely by most prominently by changing job roles – rather than by ecological concerns

“Despite the initiatives governments are taking to tackle environmental issues and the current global financial crisis, pharmaceutical companies have not made this a priority consideration yet.”

PM



ICM

carysmills
recruitment

Base: All respondents 2009 (257)
Changing number of flights over last year (148)

social media – present and future

social media that companies currently engage with...

34% LinkedIn

12% Twitter

12% Facebook

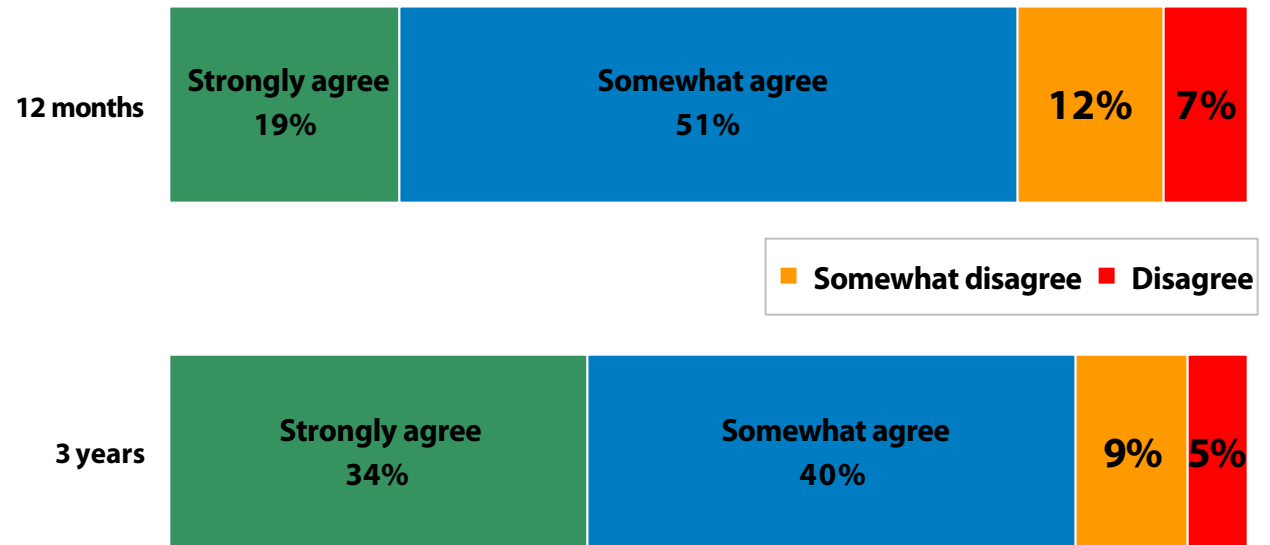
9% YouTube

54% None of these / No answer

Importance of social media in future marketing plans

Most agree digital and social media strategy will play a significant role in marketing plans for the future, growing from 19% strongly agreeing for the next 12 months to a third (34%) strongly agreeing for the next 3 years

Digital & social media strategy will play significant role in marketing plans for the next...



attitude to career

41% *have been in their current role for 1-2 years*

56% *have updated their CV in the last year*

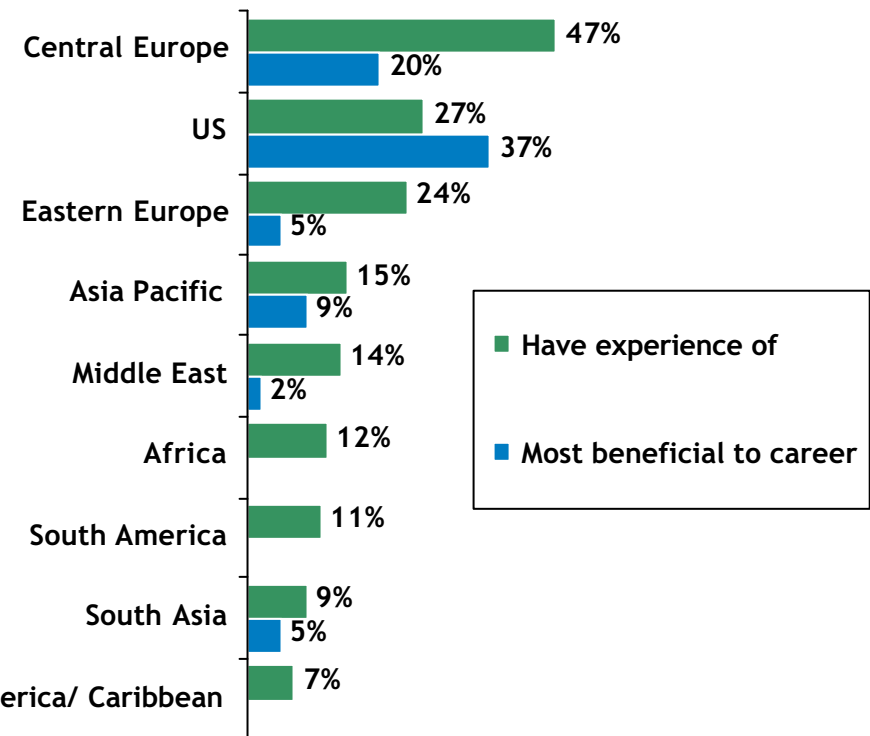
44% *have a 5 year career plan*

33% *intend to gain further qualifications*
- 4% are currently studying

61 *the average age of planned retirement*

“Despite the growth in focus on emerging markets over the past year, most respondents still felt that the US was the region most beneficial to gain experience in for career progression.” PM

Markets with experience of and perceived of most value



Base: All respondents 2009 (257)

ICM

PMLiVE
Intelligence Online

carysmills
recruitment

closing comment

“So, despite seismic shifts in the business and economic environment, it would appear from the findings of this survey that not much has changed in the day-to-day lives of pharma execs. Sentiment towards the industry and how it is navigating its way through tough times is generally positive; earnings are up and work patterns have remained relatively consistent from last year. Perhaps this is because, in this time of change, the one thing that has remained constant is the impending patent expiries and the widely acknowledged need to replace the blockbuster model. Plans to face this challenge have been playing out over a number of years and so it makes sense that members of the industry would not see much change. Perhaps it is because pharma has remained cash strong through the recession, or perhaps it is because we are speaking to a sample where 81 per cent have not experienced a redundancy within the past year. What ever the reason, the results of the 2009 Pharmaceutical Marketing industry career survey imply we are entering 2010 from a positive vantage and with the commitment and energy it takes to build on the achievements of last year.” PM



methodology notes

Goals: To examine the wages and working habits, views and expectations of those working in the pharmaceutical industry

Self-completion questionnaires were completed among those in the pharmaceutical industry

2007 – 461 completes – online and postal

2008 – 484 completes – online and postal

2009 – 257 completes – online only

Results have been compared with results from the previous waves of research in 2007 and 2008 – these should be treated as indicative only – this is due to different survey modes and methodologies and that 2009 results include 'NA/Non answer' responses in the data set

sample breakdown 2009

Age n / %						
Under 29	30-34 yrs old	35-39 yrs old	40-44 yrs old	45-49	50+	NA
22 / 9%	36 / 14%	41 / 16%	60 / 23%	38 / 15%	31 / 12%	29 / 11%

Gender n= / %	
Male	128 / 50%
Female	97 / 38%
NA/No answer	32 / 12%

Qualifications	n	%
BA/BSc	118	46%
Diploma in Marketing	27	11%
MA/MSc	19	7%
PhD	16	6%
MBA	14	5%
Other	25	10%
NA	38	15%

Department	n	%
Product / Brand Team	57	22%
Marketing	54	21%
Sales	32	12%
Commercial	24	9%
PR / Comms	23	9%
Business unit	23	9%
Medical	21	8%
Bus. Intelligence / Market research	18	7%
NHS liasion	9	4%
Financial / procurement	6	2%
Training	5	2%
Personnel / HR	3	1%

Role	n	%
Director	49	19%
Dept Head	27	11%
Group / Senior Mgr	58	23%
Manager	71	28%
Executive	21	8%
NA / No answer	31	13%

Company type	n	%
Ethical	119	46%
Ethical & OTC	42	16%
Biotech	20	8%
Diagnostic	8	3%
OTC	3	1%
Other	33	13%
NA	32	12%

pharmaceutical marketing
industry career survey

career survey 2009

Report compiled by ICM Research

Ben Gibbons

ben.gibbons@icmresearch.co.uk

Laurence Olding

laurence@icmresearch.co.uk

ICM Research

Berkshire House, 168-173 High Holborn, London, WC1V 7AA

www.icmresearch.co.uk

