

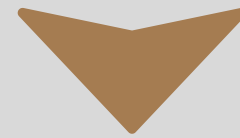


Haybury

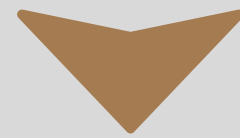
MARKET MAP CASE STUDY
(TOP 20 GLOBAL PHARMA)

PURPOSE & KEY OBJECTIVES OF MARKET MAP

Market segmentation aiming to provide clients with detailed insights to the target talent group(s) that could efficiently support the CNS & EA Global Marketing division.



The acquired information will help to understand the quality and quantity of relevant capabilities and talent pools, in therapeutic area space, on a truly global scale.



Facilitate the future search & recruitment processes based on real time evidence.

METHODOLOGY AND PRACTICES



Identify the key leaders



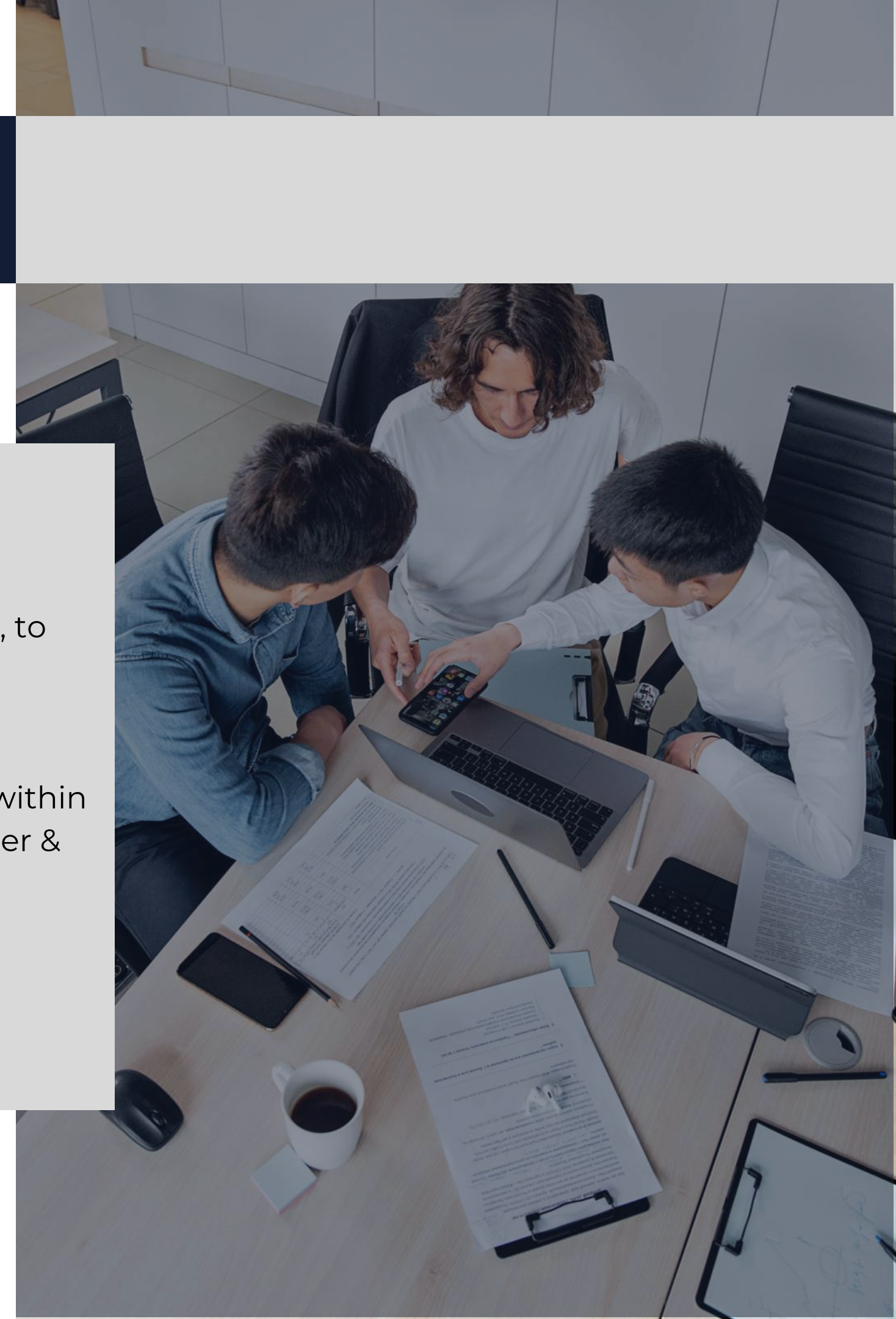
Obtain live insights and information from our own network of industry experts, to ensure the market map is completed with maximum accuracy



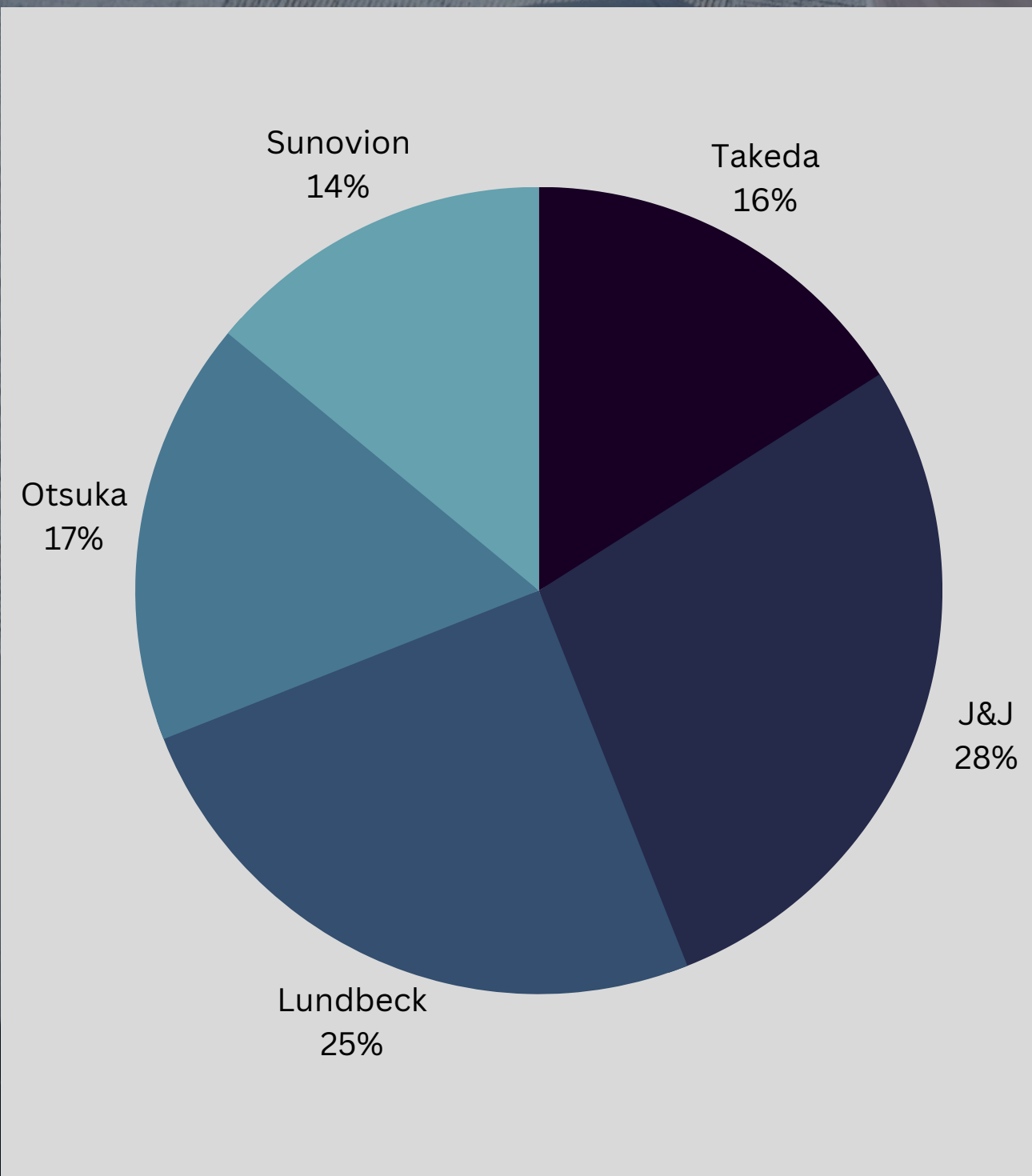
Engage our established network of leaders, professional and industry experts within this space to collect live market information, reinforced with Key Opinion Leader & Influencer insights



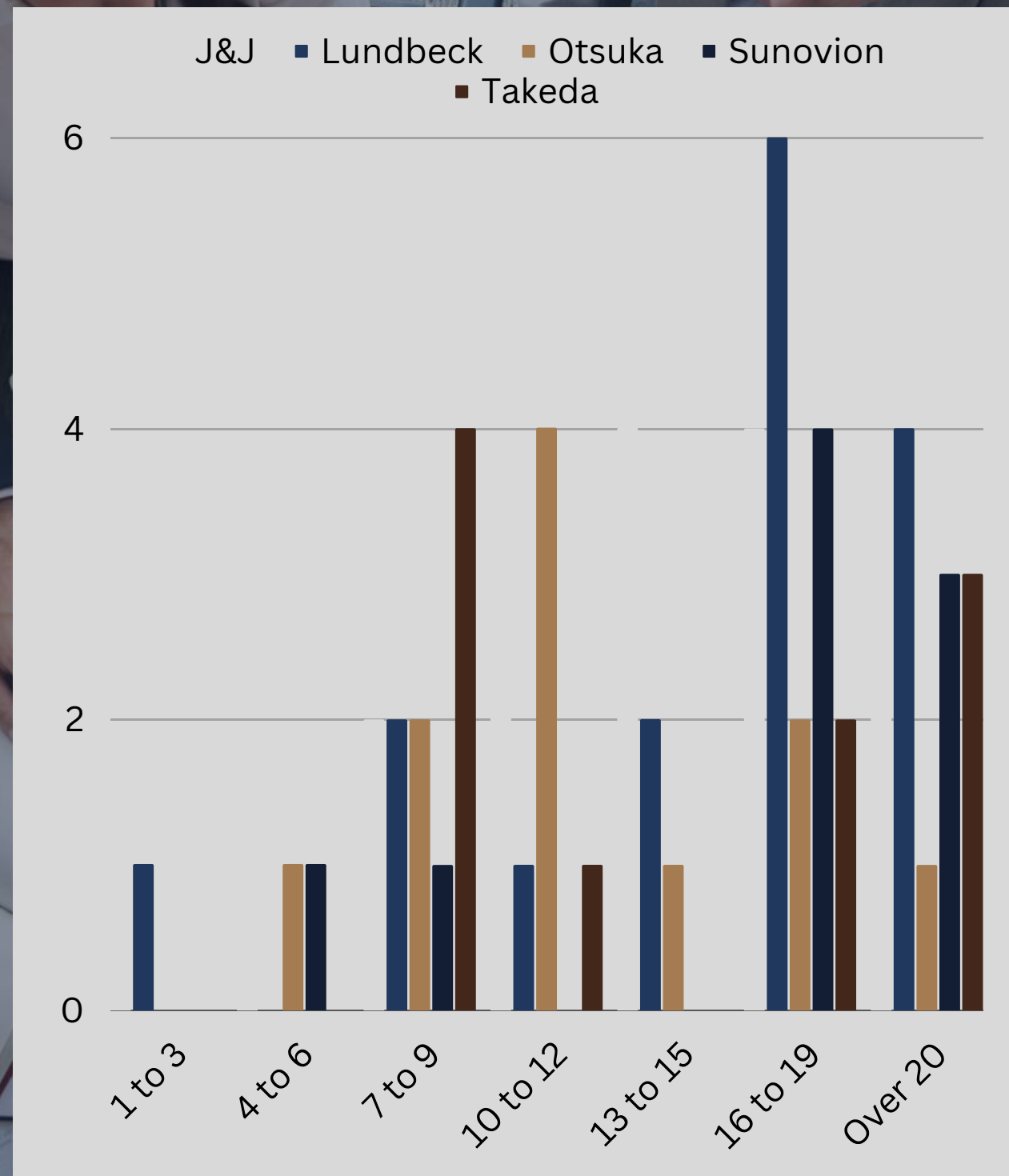
Proactively utilise additional tools to conduct further global analysis of the candidate market within psychiatric disorders and rare disease



COMPETITOR TALENT POOL



COMPETITOR TALENT POOL



MARKETING TENURE VS COMPETITOR POOL

COMPETITOR ANALYSIS

The left chart shows source of talent from the competitor market.

The right hand chart compares the talent source with their years tenure within marketing. Here we can see the greatest volume of talent comes from J&J and Lundbeck.

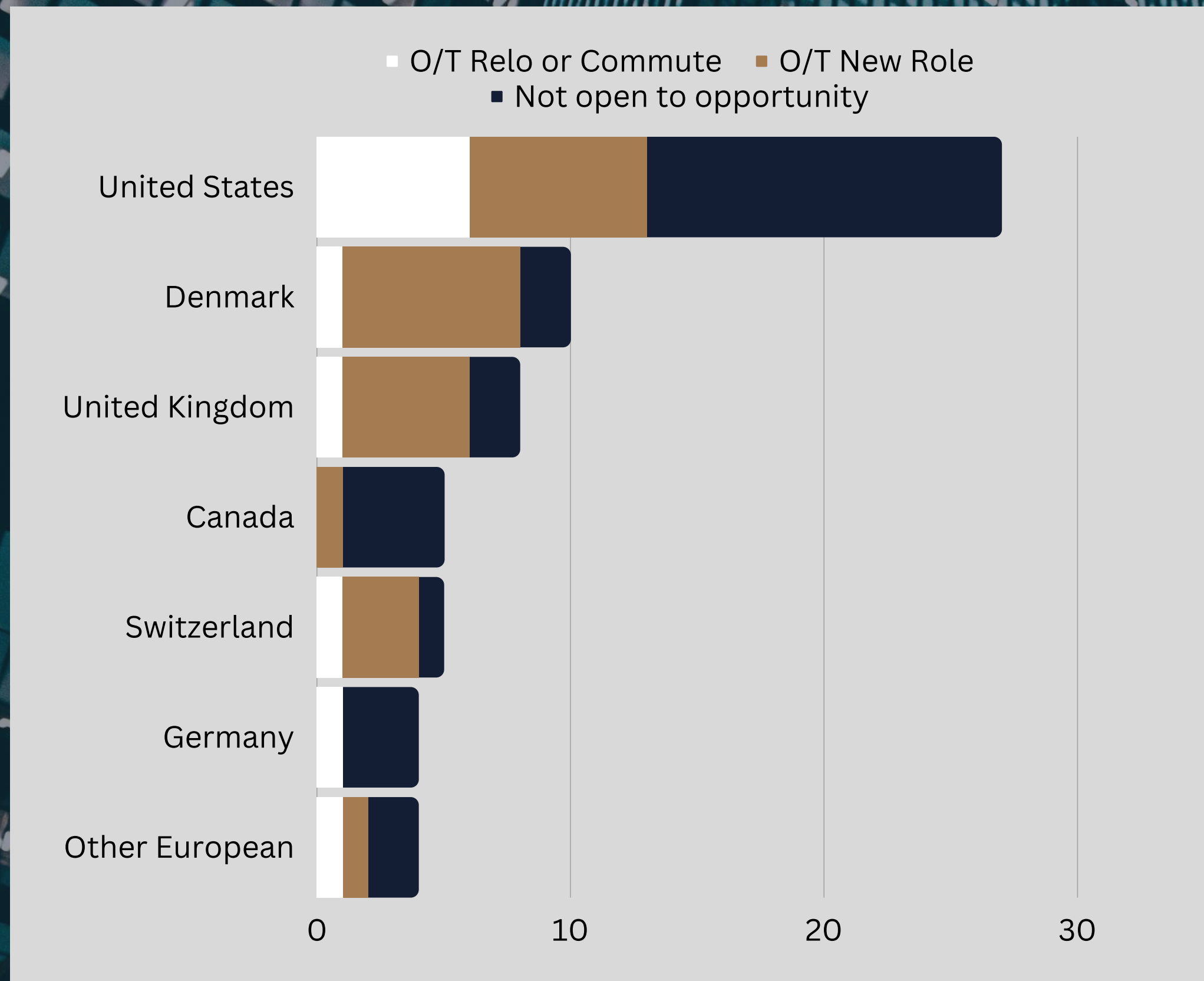
If you were to specifically look for talent for 15+ Years talent, the best competitors to source from would be J&J, Lundbeck and Sunovion.

GEOGRAPHY



COUNTRY	PERCENTAGE
United States (All East Coast)	43%
Denmark	15%
United Kingdom	12%
Canada	8%
Switzerland	8%
Germany	6%
Other European (Hungary, Italy, Netherlands, Spain)	8%

GLOBAL MOBILITY



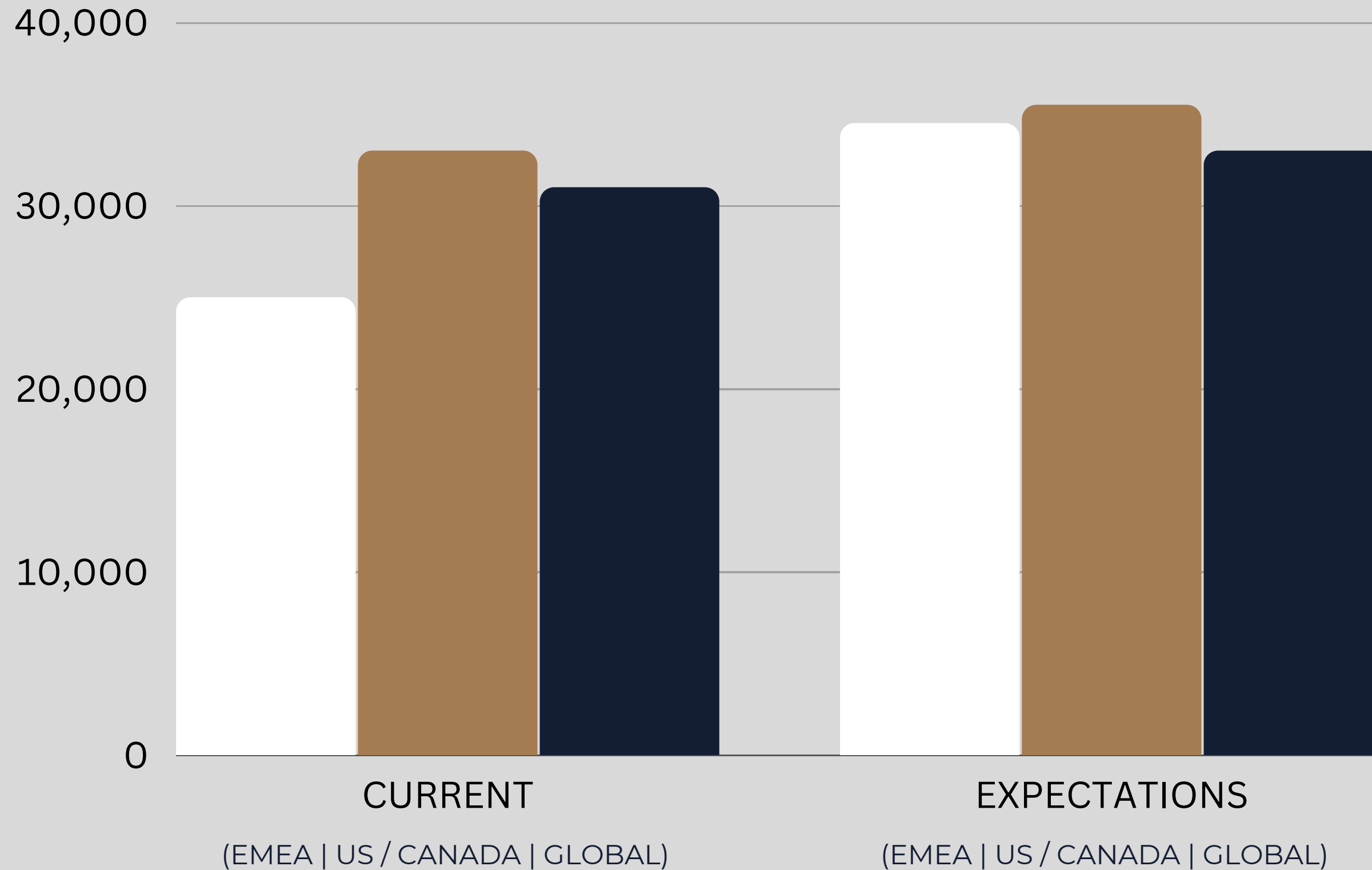
GLOBAL MOBILITY

This chart shows a breakdown of candidates open to new opportunities (O/T new role), those open to relocation or commuting (O/T relo or commute) and those not open to a new role compared with their current geographic. (not open to opportunity)

Despite being the largest market, the US has one of the lowest (comparable) percentages of interested candidates.

There is a clear lack of interested to relocate or commute domestically.

COMPENSATION PACKAGES



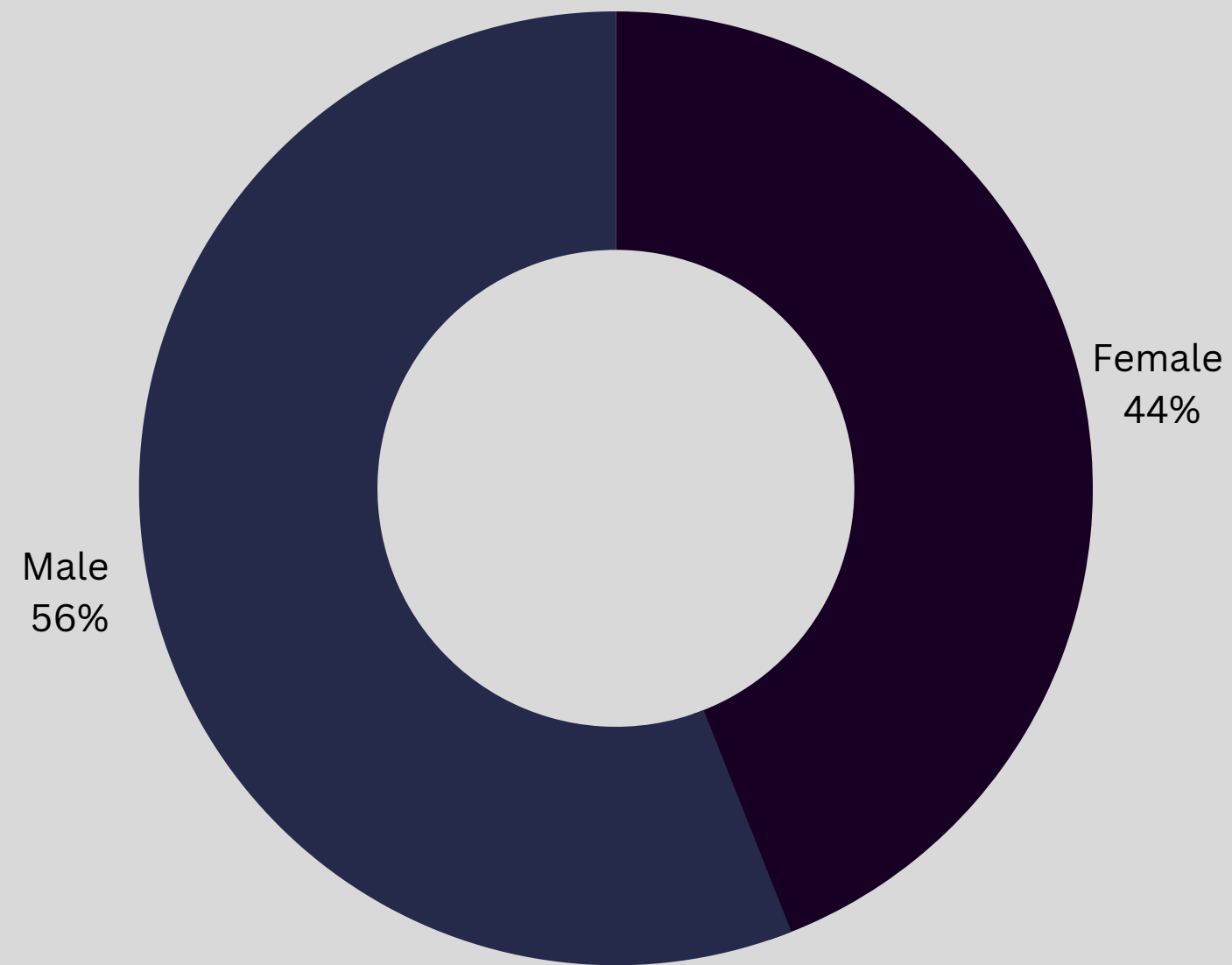
COMPENSATION PACKAGES

This chart shows current & expected TCT from the talent pool (All packages have been converted to €)

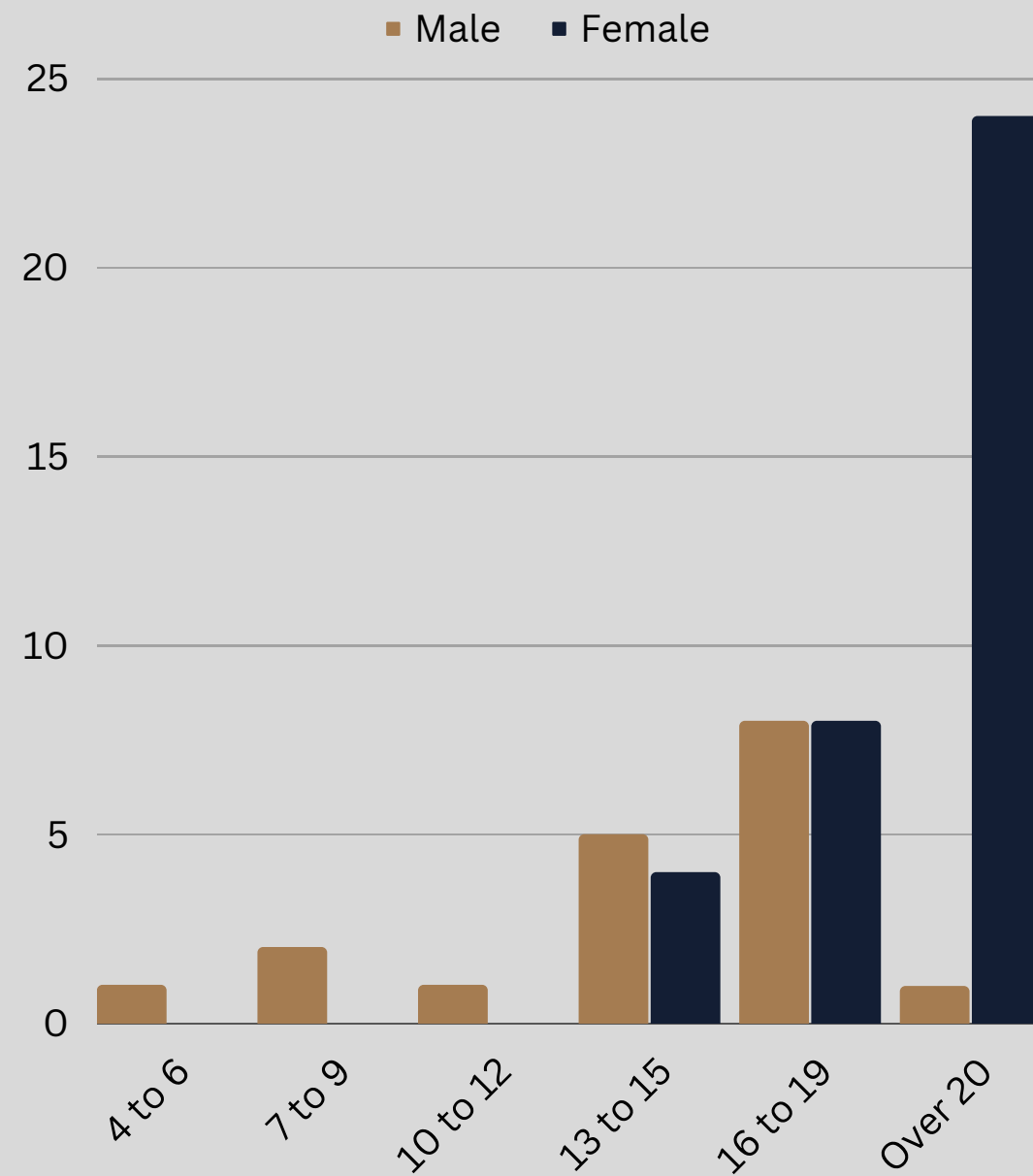
This demonstrates that North American markets have higher TCT expectations than EMEA Markets when directly converted, which in turn increase global averages.

GENDER BALANCE

GENDER BALANCE



INDUSTRY TENURE VS GENDER



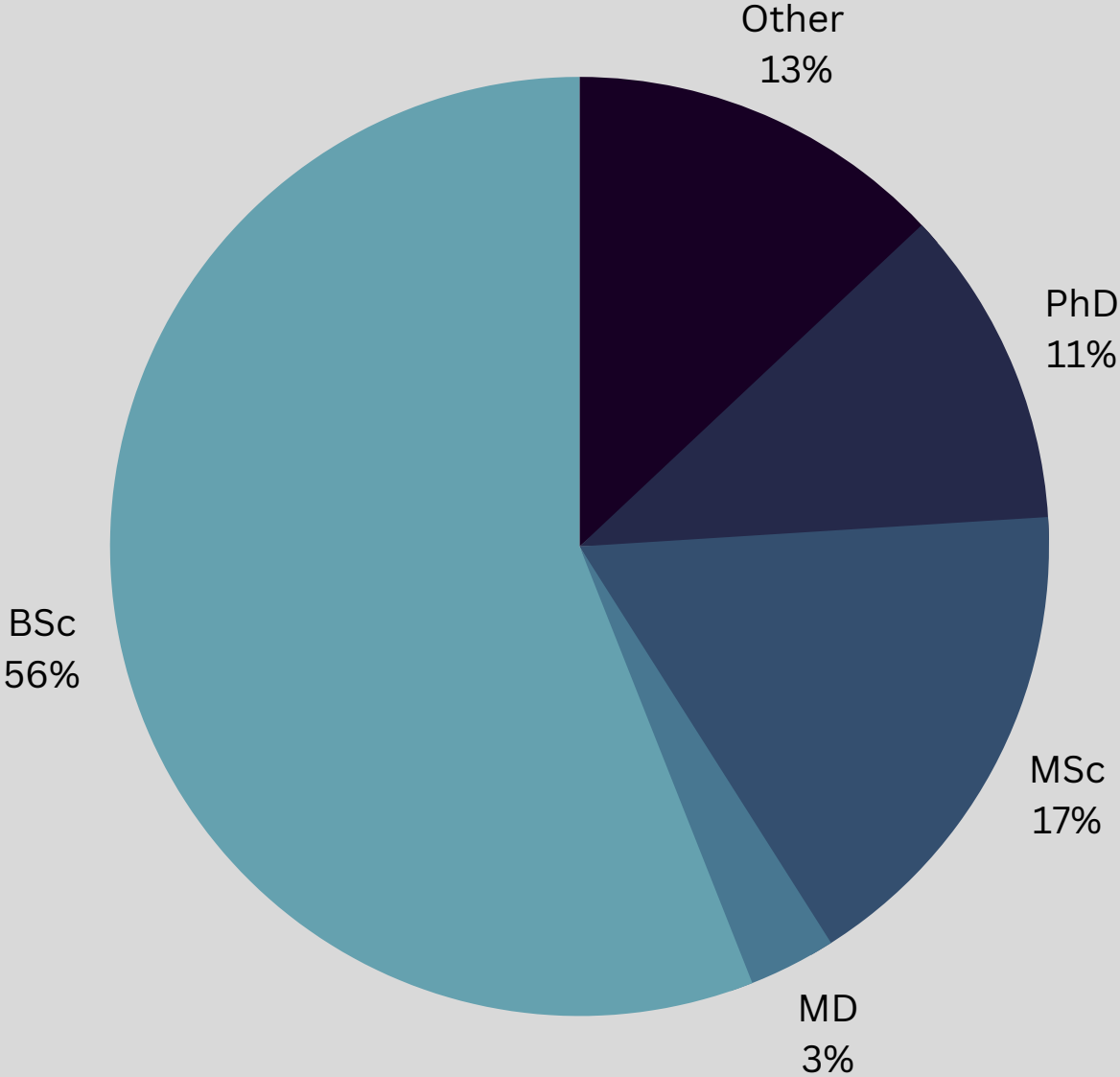
GENDER BALANCE

The left chart shows gender split within the candidate pool, whilst the right chart breaks the gender split down by years in industry

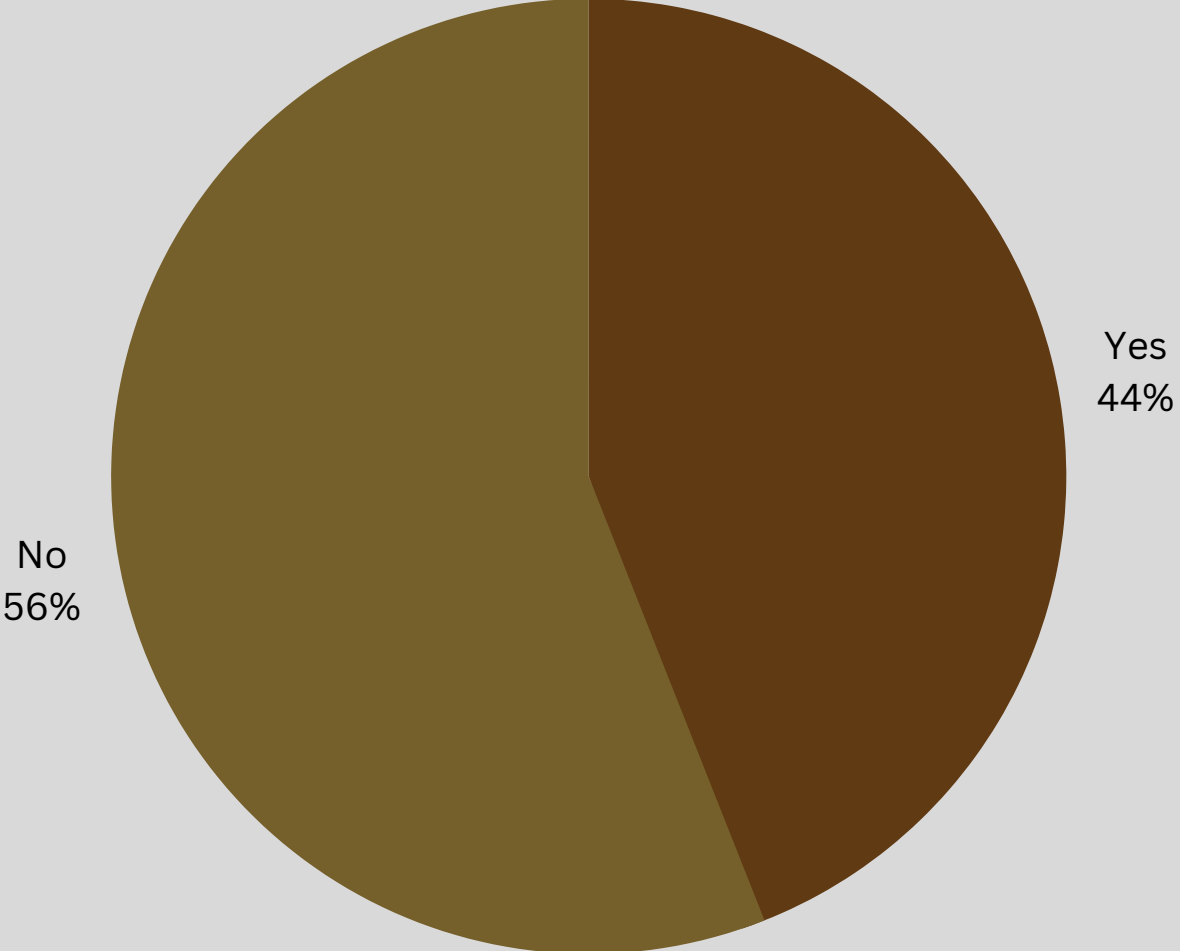
Whilst there is a near equal balance in the industry for gender, there is a greater proportion of females gaining the relevant experience in '<19 years'

EDUCATIONAL BACKGROUND

LEVEL OF DEGREE EDUCATION



HOLDS AN MBA



EDUCATIONAL BACKGROUND

The left chart demonstrates the highest level of education held by each candidate. The chart on the right shows how many candidates also held an MBA in addition to a degree.

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