

# Route to the Top

*A comparison of today's top General Managers in France, Germany and Europe.*

*December 2016*

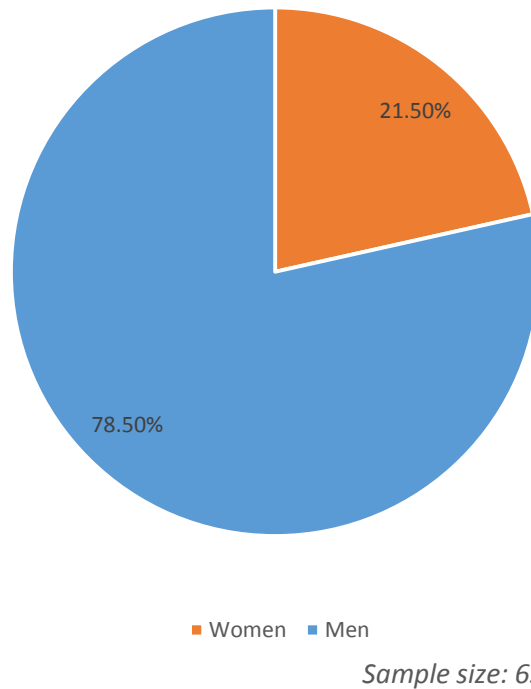
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## Overall Pharma

# Gender Split – General

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Gender Split - Overall Pharma

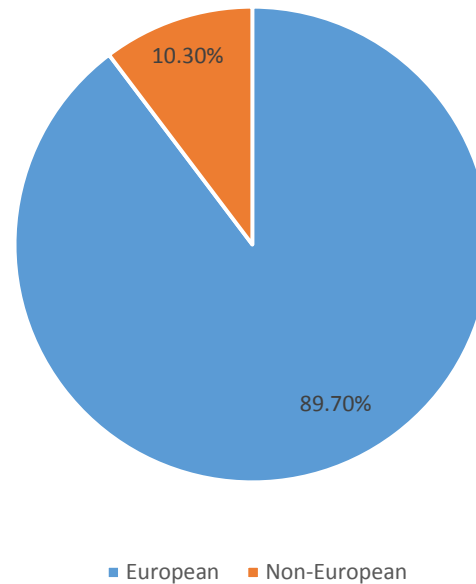


- Most GM positions are occupied by men with only 21.5% of women managing a geographic area in our sample.

# Nationality – General

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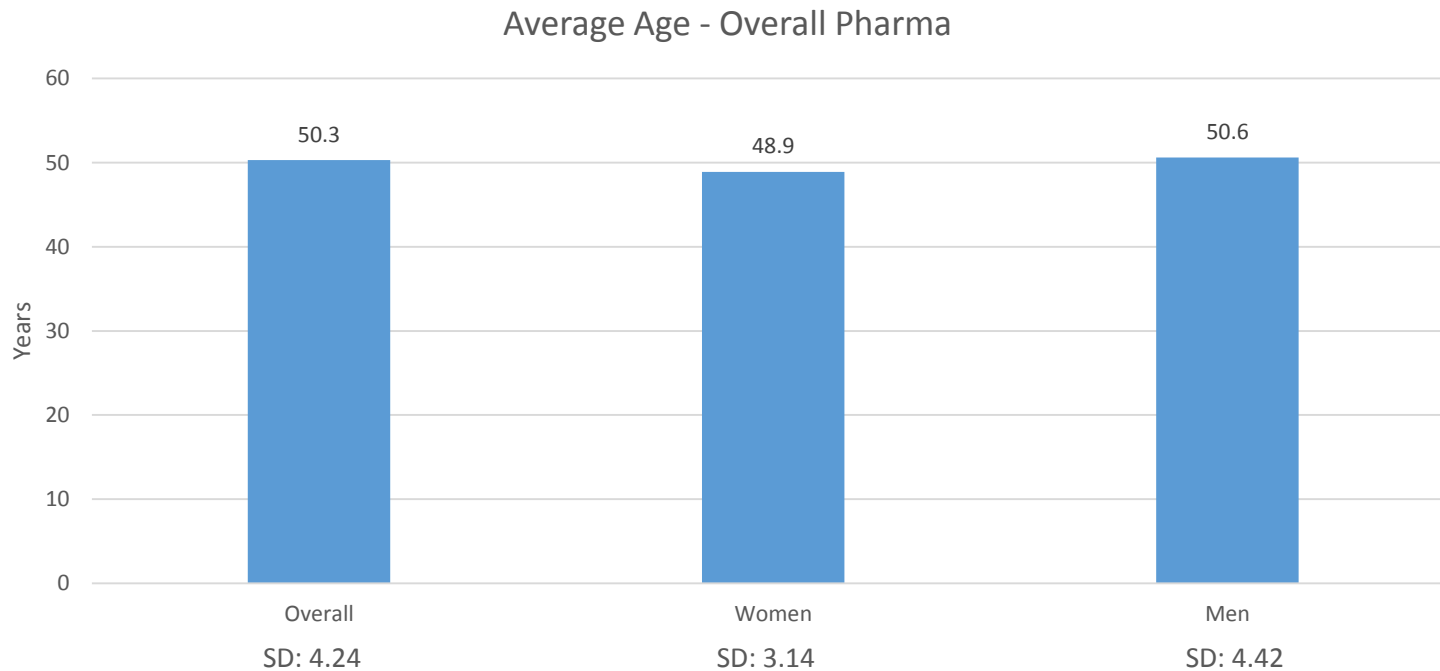
Nationality - Overall Pharma



- European nationalities dominate with only 6 non-European GMs in our sample.
- France is the most common nationality with 17 French GMs (27.4% of all GMs).
- The US is the most common non-European nationality with 3 American GMs. Other common nationalities are Brazilian, Australian, and Canadian.

# Age – General

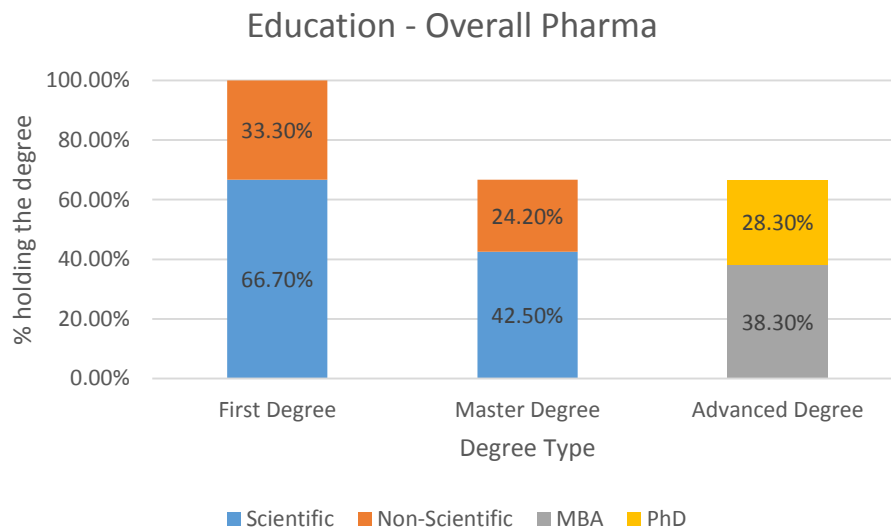
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*Sample size: 47*

- Women are slightly younger than men with an average age of 48.9 years while men have an average age of 50.6 years.

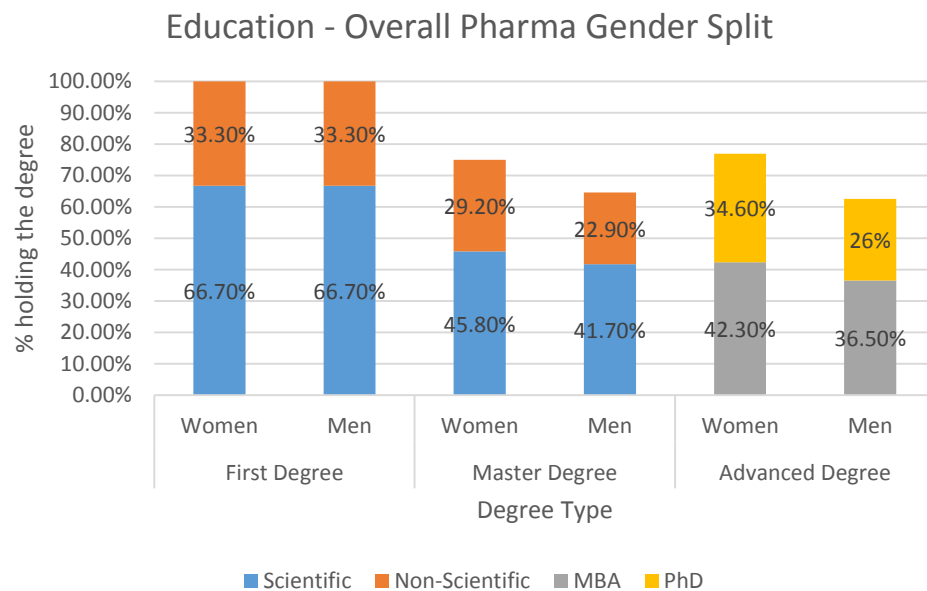
# Education – General



Sample sizes: 60

- Having a university degree appears to be mandatory to obtain a GM position as all GMs hold a first degree and the majority, 66.7%, hold a master degree.
- GMs' education is mostly scientific as 66.7% of first degrees and 42.5% of master degrees are scientific.
- Most GMs, 66.7%, also have an advanced degree.
- Most advanced degrees held by GMs are MBAs (they constitute 65% of all advanced degrees held by GMs).

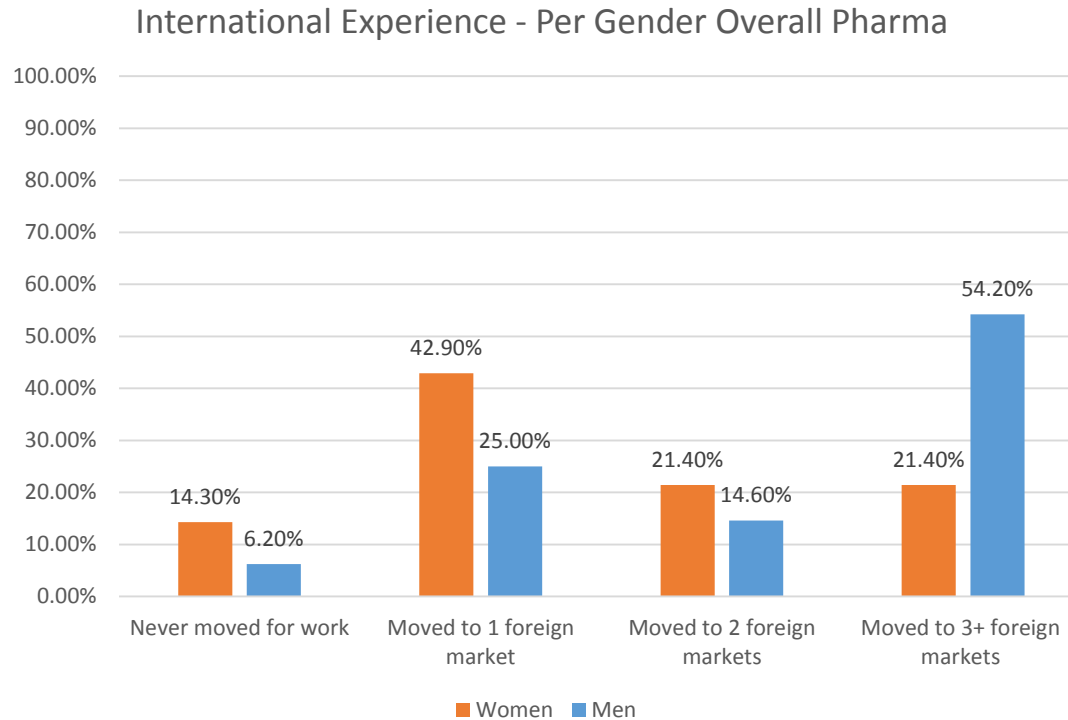
# Education – General



Sample sizes: Women: 12  
 Men: 48

- Women in our sample are more educated than men as more women GMs hold a master degree and an advanced degree than men.
- Women also appear to have a more scientific background as more women GMs have a scientific master degree and PhD than men.
- Scientific first and master degrees and MBAs dominate for both genders.

# International Experience – General



Sample size: 62

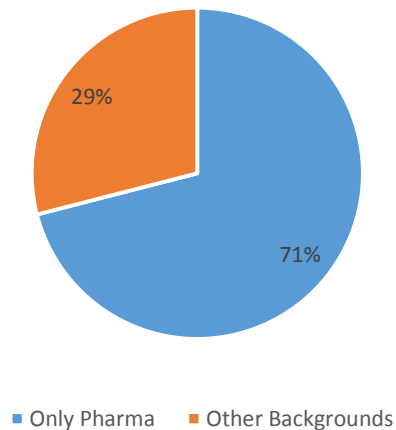
- More men than women have moved to 3 or more countries for work and more women than men have never moved for work.
- There are more women than men that have moved to one or two foreign countries for work.
- Men still represent the largest percentage of people with international experience.



# Company Backgrounds - General

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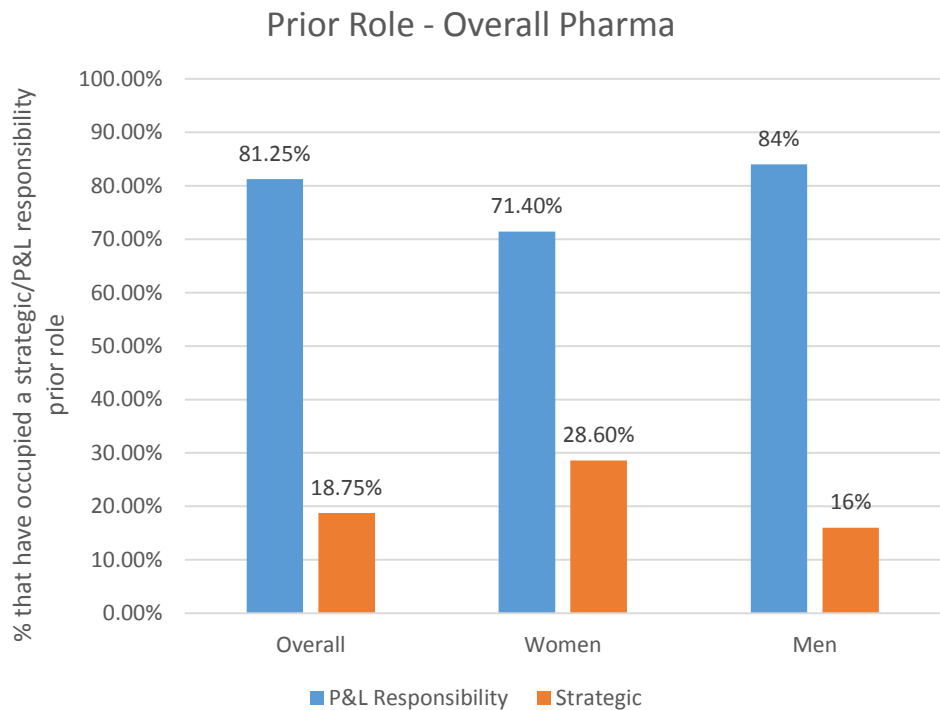
Company Backgrounds - Overall Pharma



Sample size: 62

- Most GMs come from an only-pharma company background, meaning that they have worked for pharmaceutical companies during their entire career.
- There are slightly more women coming from an only-pharma company background than men (78.60% of women as opposed to 68.70% of men).
- Pharma appears to be a very conservative sector, mainly recruiting or promoting individuals with an extensive pharma background.

# Prior Role – General

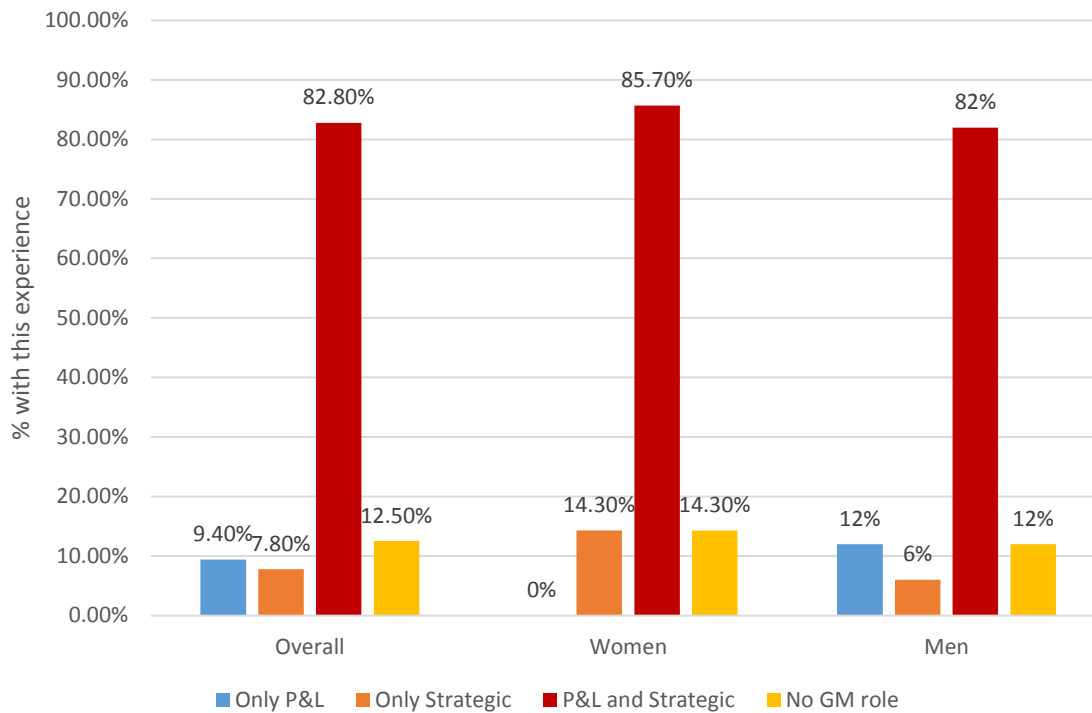


Sample:  
Overall: 64  
Women: 14  
Men: 50

- Most GMs have had P&L responsibilities prior to their current position as opposed to strategic ones.
- Recurrent P&L responsibility roles include General Managers of a Geographic Region and Heads of Business Units.
- Recurrent strategic roles include commercial and marketing positions.
- A higher proportion of women have occupied a prior strategic role than men.

# Career Experiences – General

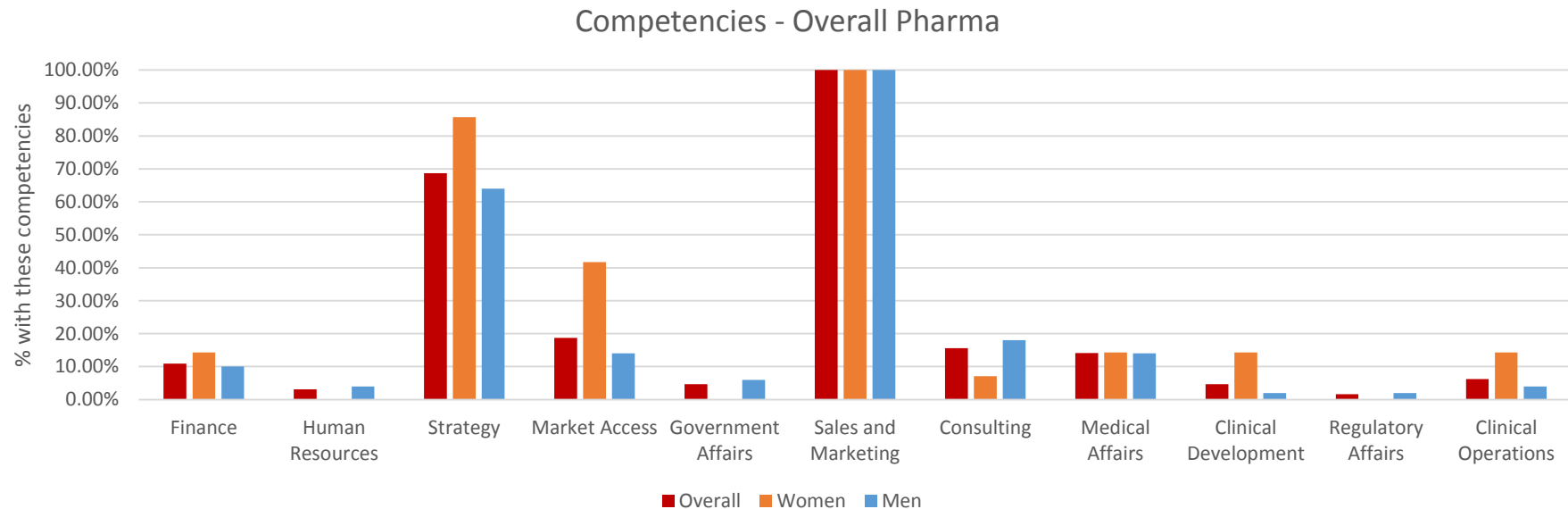
Career Experience - Overall Pharma



Sample:  
 Overall: 64  
 Women: 14  
 Men: 50

- Most GMs have occupied combined strategic and P&L responsibility roles in the course of their careers and only 12.50% have never had a GM position prior to their current role.
- No woman has occupied only P&L responsibility positions while there are more men having only occupied P&L responsibility positions than strategic ones.

# Competencies - General



Sample sizes: Overall: 64  
Women: 14  
Men: 50

- The GMs' functional experiences are not very diverse with sales, marketing, and strategy largely dominating all other functional experiences.
- Other noteworthy functional experiences include market access, consulting, and medical affairs.
- More specifically, there are very few GMs that possess HR, government affairs, and regulatory affairs experience.

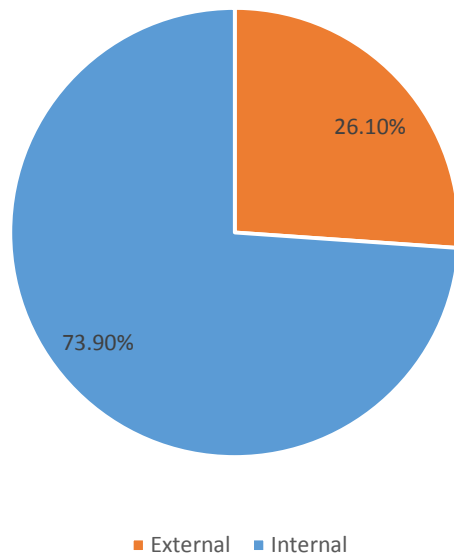
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## Type of Recruitment Comparison

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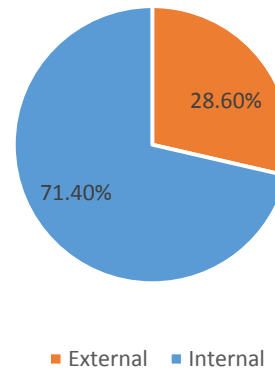
# General & Gender Split – Type of Recruitment

Type of Recruitment – Overall Pharma



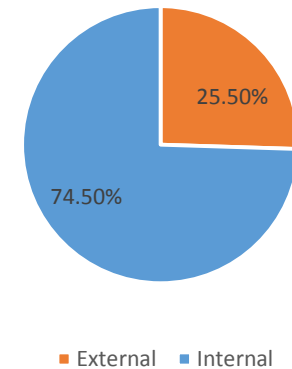
Sample size: 65

Women



Sample size: 14

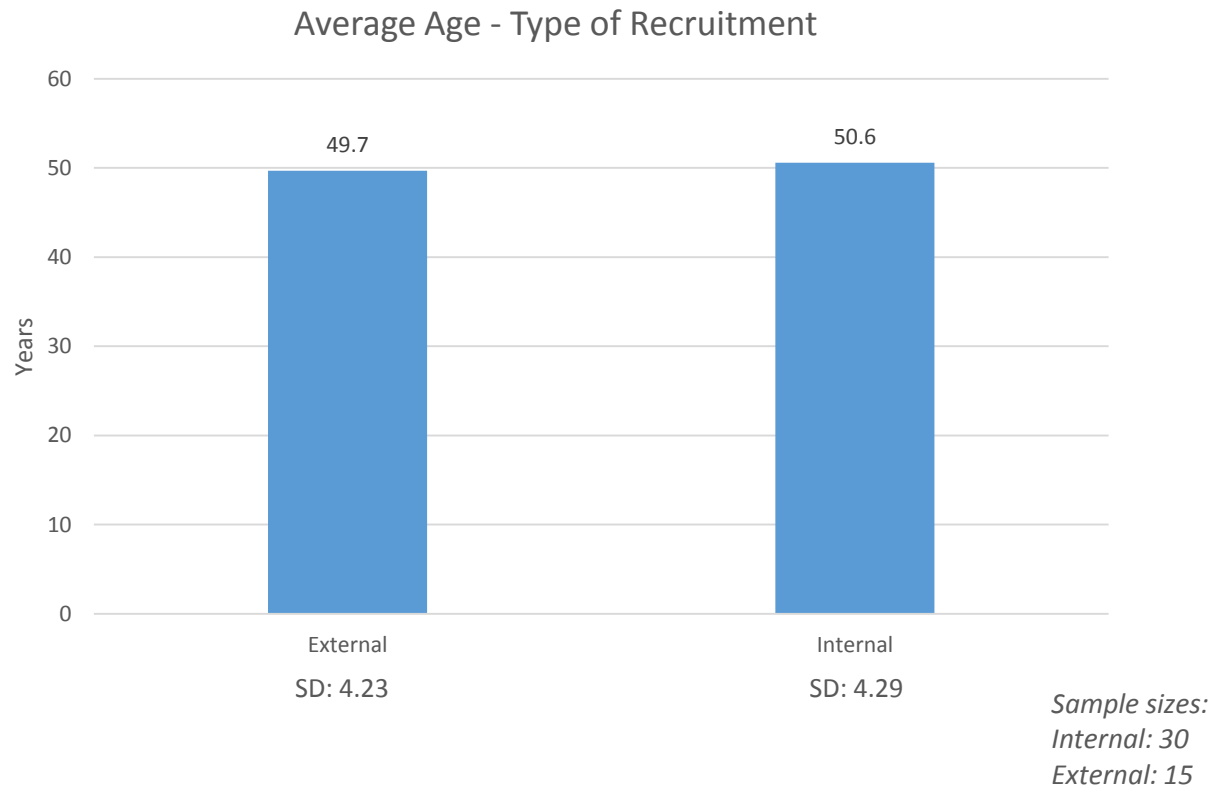
Men



Sample size: 51

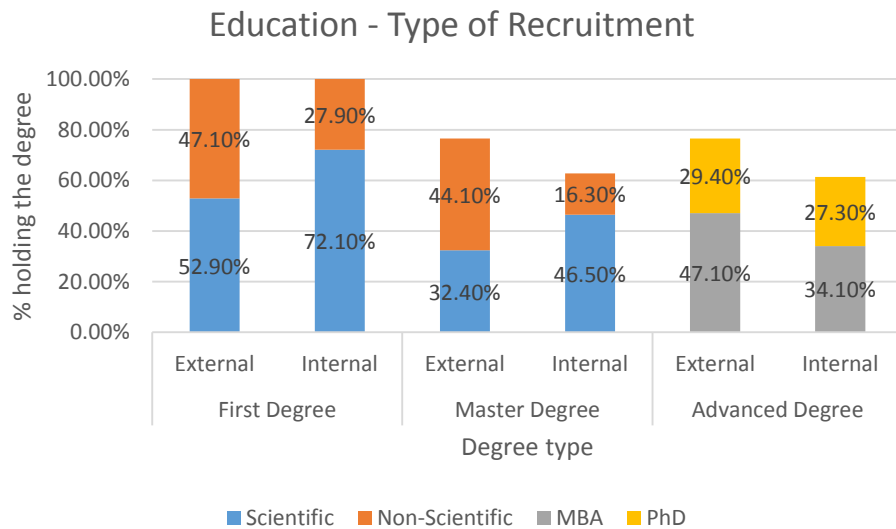
- Internal promotions dominate with only 26.10% of externally recruited GMs.
- There are slightly more women being externally recruited than men, potentially demonstrating a trend of bringing more women into these roles.

# Age – Type of Recruitment



- The age difference between externally and internally recruited GMs is not significant with internally recruited GMs only being 0.9 years older than externally recruited ones.

# Education – Type of Recruitment

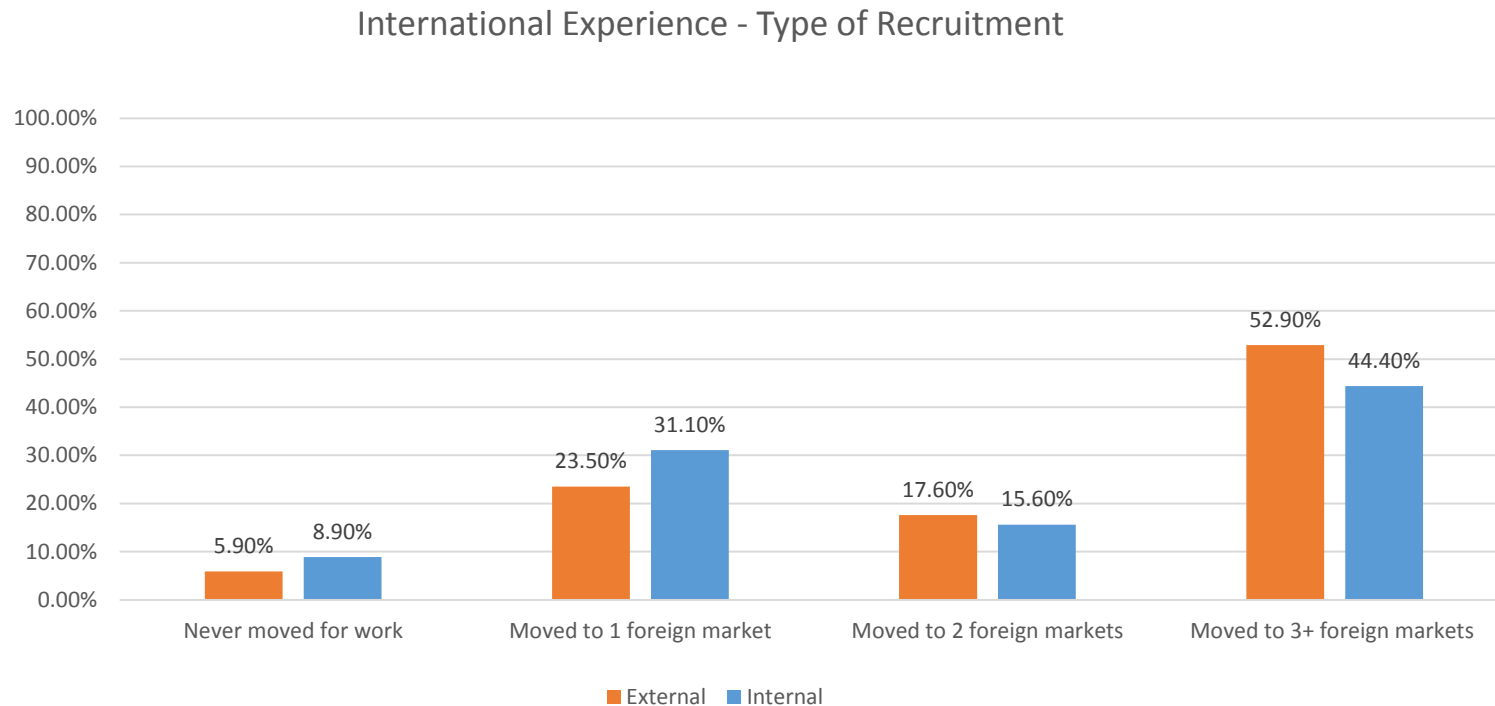


- Externally recruited GMs are more educated than internally recruited ones as 76.5% hold a master degree and 76.5% an advanced degree, compared to 62.8% of internally recruited GMs holding a master degree and 61.4% an advanced degree.
- Scientific first degrees dominate for both types of recruitment, however, non-scientific master degrees dominate for externally recruited GMs, going against the general trend.

Sample sizes: External: 17  
 Internal: 43



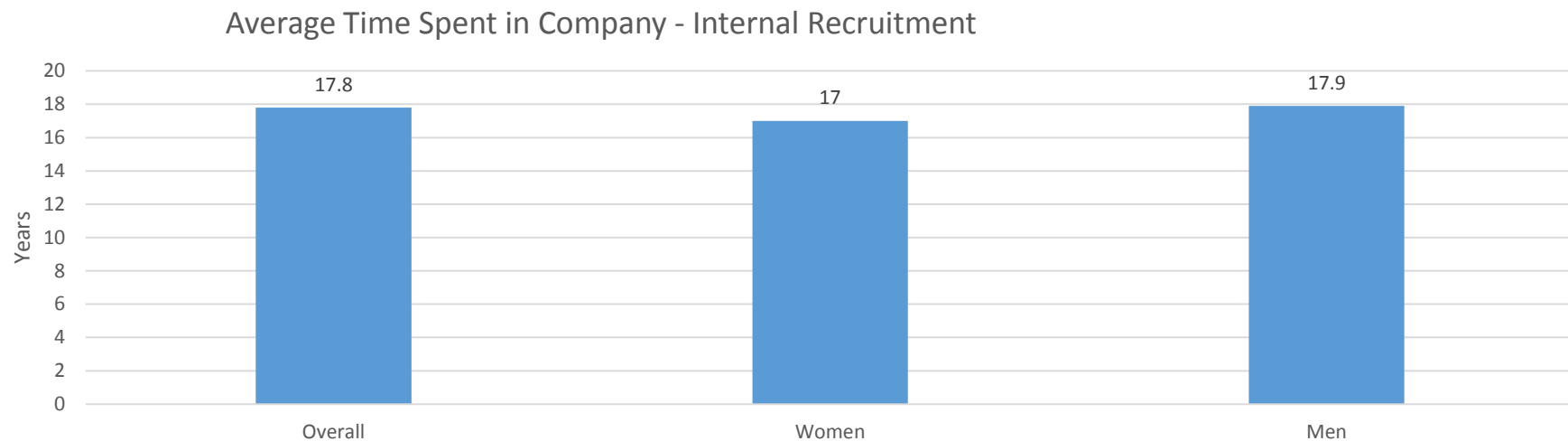
# International Experience – Type of Recruitment



Sample size:  
External: 17  
Internal: 45

- Externally recruited GMs appear to have moved to foreign countries more often than internally recruited ones.
- Indeed, there are more externally recruited GMs that have moved to 2 or 3+ countries than internally recruited ones while more internal GMs have never moved or moved to a single country for work.

# Time Spent in Company – Type of Recruitment

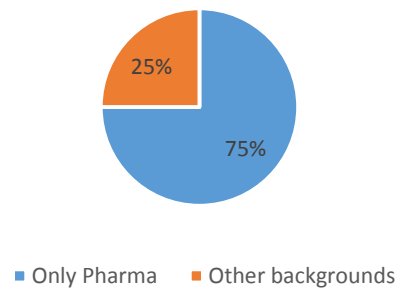


Sample sizes:  
Pharma: 46  
FTSE 100 & Fortune 100: ?

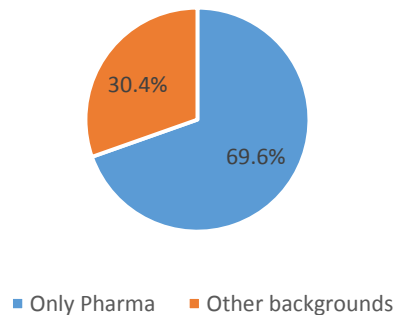
- Internally recruited GMs have spent an average of 17.8 years in their current company with a slight difference between men and women.

# Company Backgrounds – Type of Recruitment

Company Backgrounds - External Recruitment



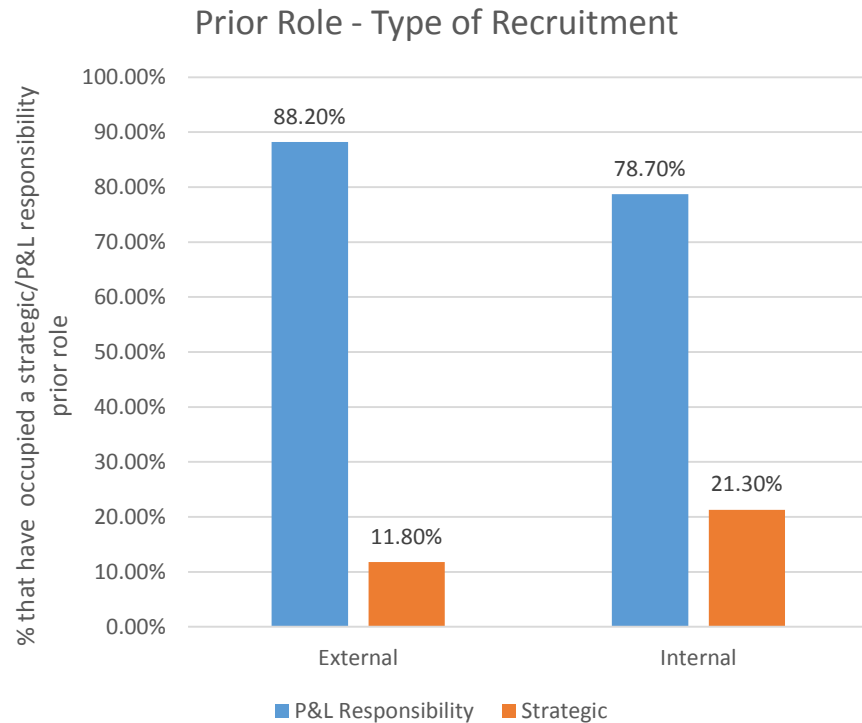
Company Backgrounds - Internal Recruitment



- Only pharmaceutical company backgrounds dominate for both types of recruitment.
- Internally recruited GMs have a slightly more diverse professional background.

Sample size:  
External: 16  
Internal: 46

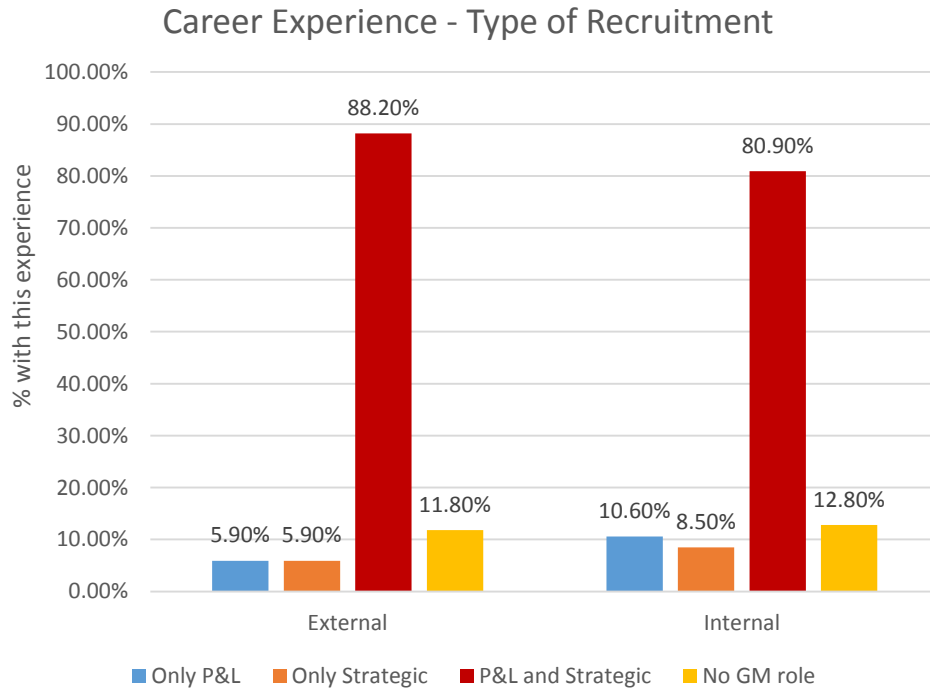
# Prior Role – Type of Recruitment



- More externally recruited GMs have had a P&L responsibility in the role prior to their current position than internally recruited ones.

Sample sizes:  
External: 17  
Internal: 47

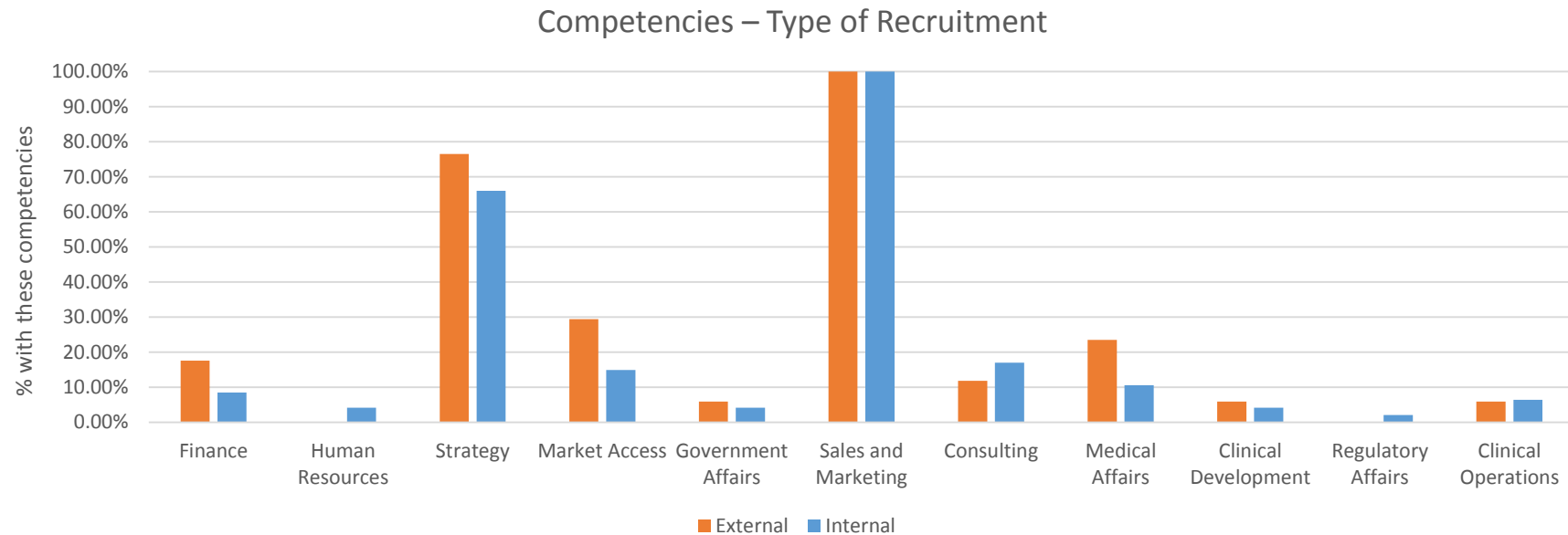
# Career Experience – Type of Recruitment



Sample size:  
External: 17  
Internal: 47

- Both types of recruitment follow the same trend as overall pharma.
- Combined P&L and strategic experiences dominate for both types of recruitment with very few GMs having had only P&L responsibility or only strategic experiences in the course of their careers.
- The percentage of GMs that have not had prior GM experience is roughly the same for both types of recruitment.

# Competencies – Type of Recruitment



Sample sizes: External: 17  
Internal: 47

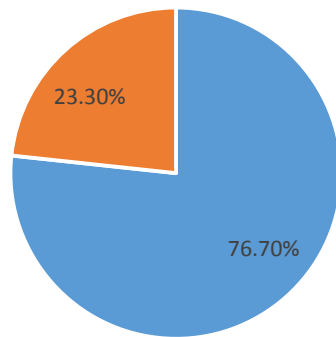
- Externally recruited GMs appear to have more scientific competencies than internally recruited ones as they possess more experience in medical affairs, clinical development, and market access.

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# Functions Comparison

# Gender Split – Function

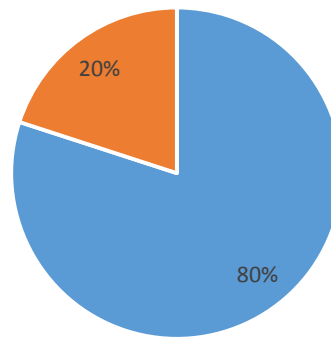
Gender Split - Country GMs



■ Men ■ Women

Sample size: 43

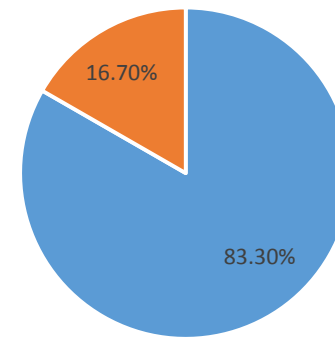
Gender Split - Heads of Europe



■ Men ■ Women

Sample size: 10

Gender Split - Regional Heads



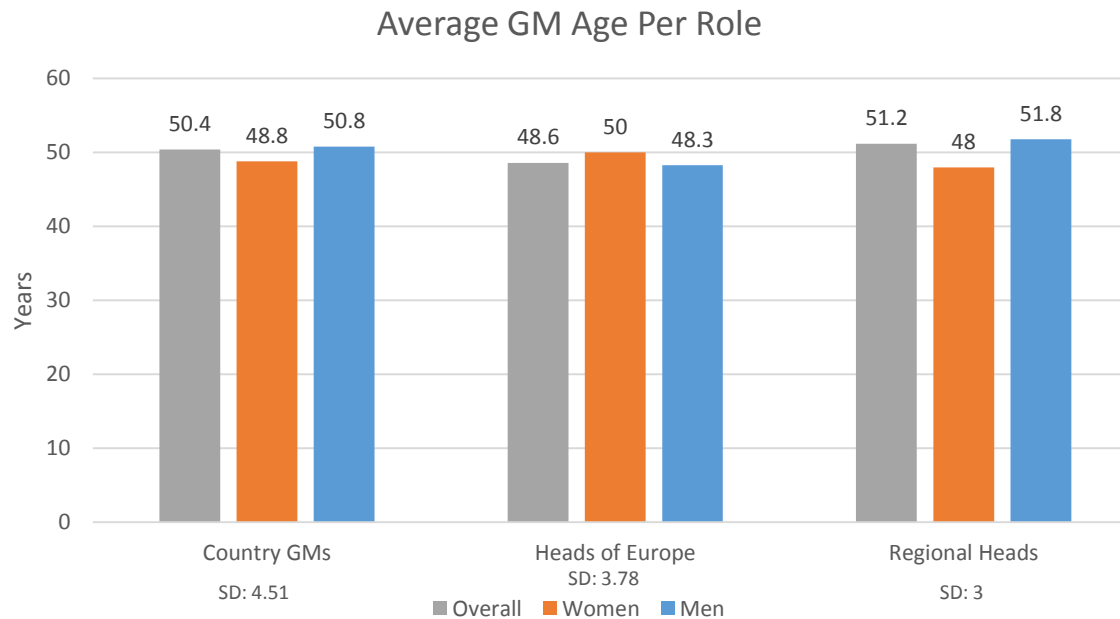
■ Men ■ Women

Sample size: 12

- The role with the highest percentage of women is Country GMs, the smallest geographic scope.



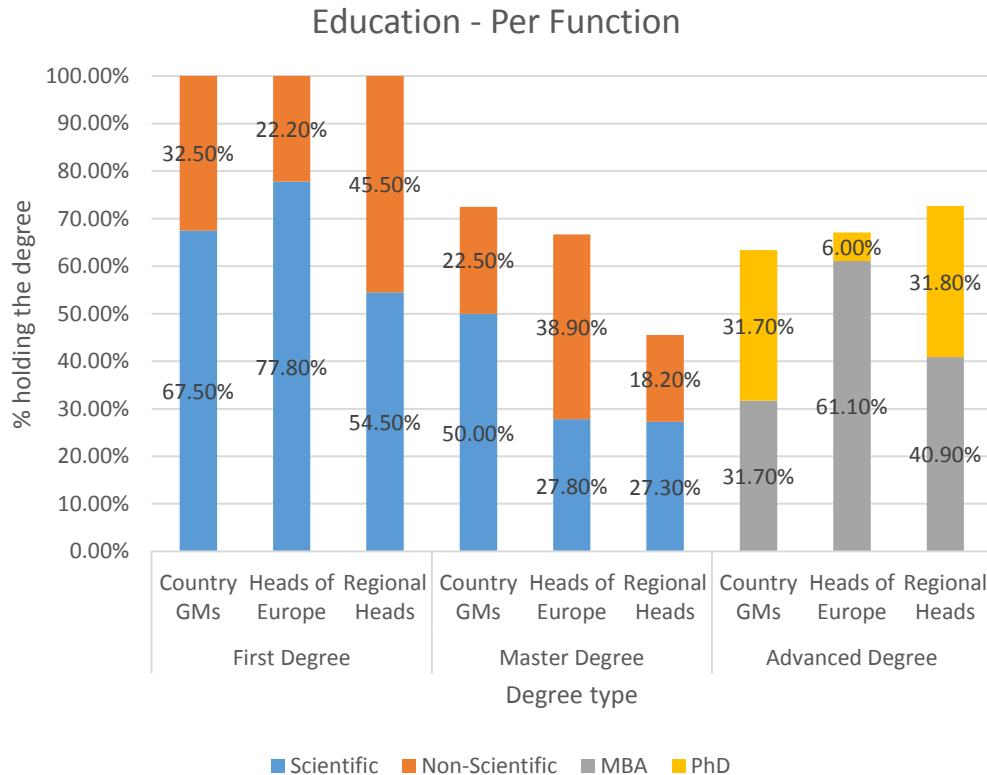
# Age – Function



Sample size:  
Country GMs: 34  
Heads of Europe: 5  
Regional Heads: 6

- Heads of Europe are the youngest out of all positions with an average age of 48.6 years while Country GMs are 50.4 years old and Regional Heads 51.2 years old on average.
- Contrary to the overall trend, women Heads of Europe are older than men with an average age of 50 versus 48.3 for men.

# Education – Function

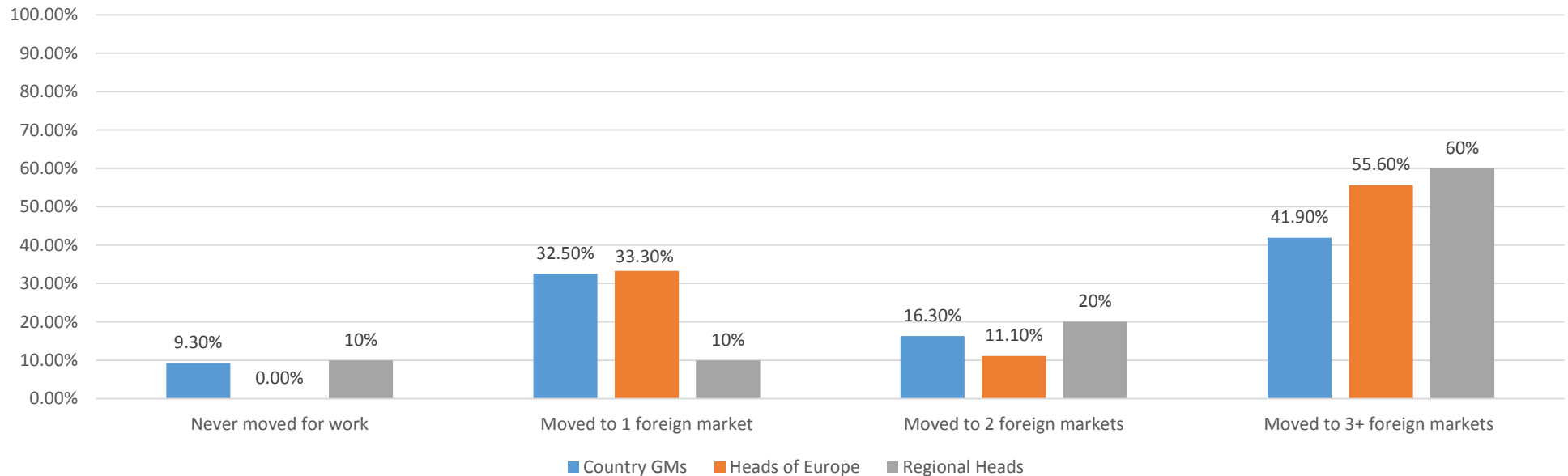


Sample sizes:  
 Country GMs: 40  
 Heads of Europe: 9  
 Regional Heads: 9

- Scientific first degrees dominate in the three functions.
- Country GMs' master degrees are mostly scientific while Heads of Europe and Regional Heads have a majority of non-scientific masters.
- MBAs are the most common advanced degrees for Heads of Europe and Regional Heads while there are equally as many Country GMs with an MBA than with a PhD.
- Country GMs appear to have a more scientific profile while Heads of Europe and Regional Heads have a more management focused one.

# International Experience – Function

International Experience – Per Function

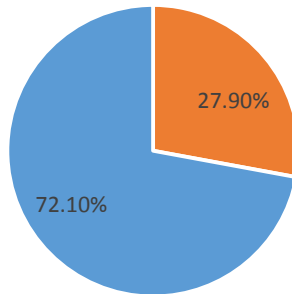


Sample sizes: Country GMs: 43  
Heads of Europe: 9  
Regional Heads: 10

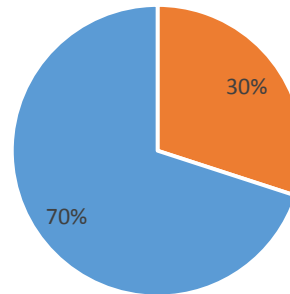
- All Heads of Europe have moved at least once and most of them have lived in three or more countries (55.6%).
- Regional Heads also have substantial international experience with 80% of them having moved to two foreign countries or more for their work.
- Country GMs are more uniformly distributed with 40.9% of them having worked in three or more countries and 32.5% having lived in one foreign country.

# External Recruitment – Function

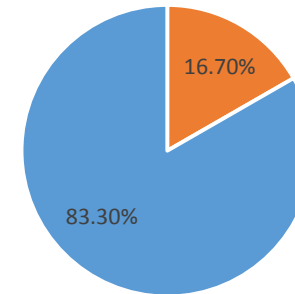
Country GMs



Heads of Europe



Regional Heads

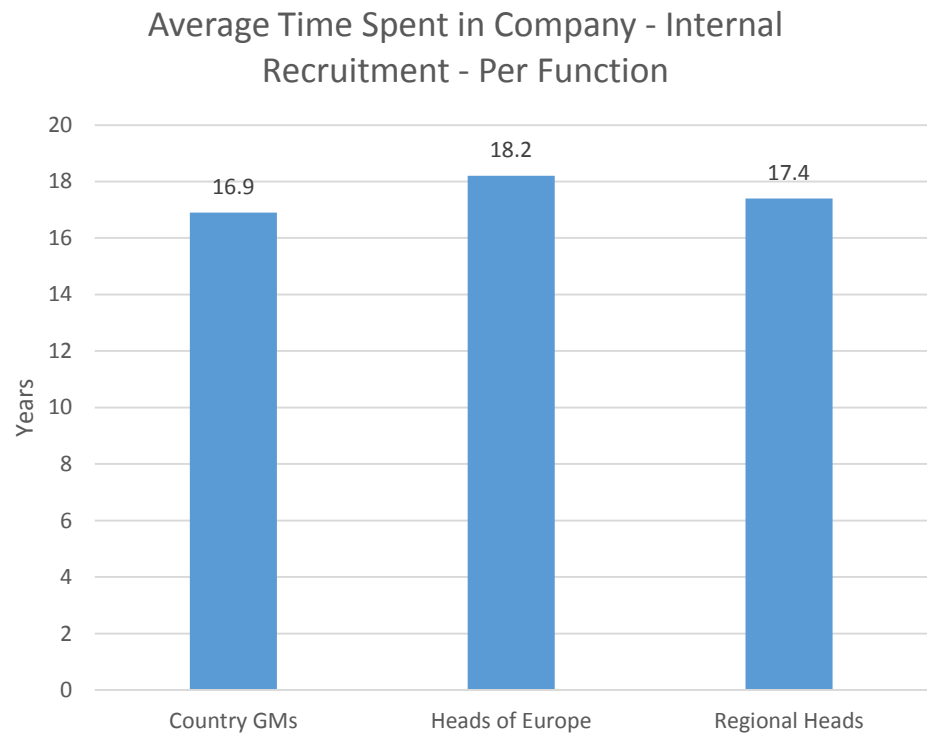


■ % externally recruited ■ % internally recruited ■ % externally recruited ■ % internally recruited ■ % externally recruited ■ % internally recruited

Sample sizes:  
Country GMs: 43  
Heads of Europe: 10  
Regional heads: 12

- The position which has the most externally recruited GMs is Head of Europe with 30% of its GMs recruited from outside the company.
- On the other hand, Regional Heads are mostly internally recruited with only 16.7% of them recruited externally.

# Time Spent in Company – Function

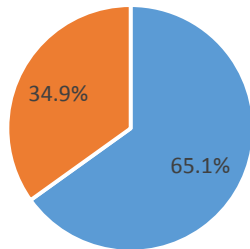


- Country GMs are the ones that seem to be the most quickly promoted, having spent an average of 16.9 years in their current company.
- Heads of Europe have been in their current company for 18.2 years on average.

Sample sizes:  
Country GMs: 30  
Heads of Europe: 6  
Regional Heads: 10

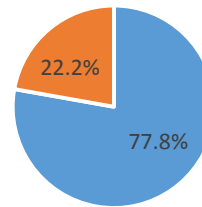
# Company Backgrounds – Function

Company Backgrounds - Country GMs



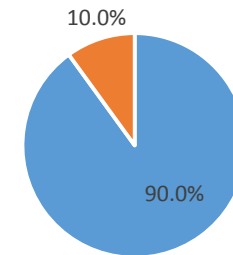
■ Only Pharma ■ Other backgrounds

Company Backgrounds - Heads of Europe



■ Only Pharma ■ Other backgrounds

Company Backgrounds - Regional Heads

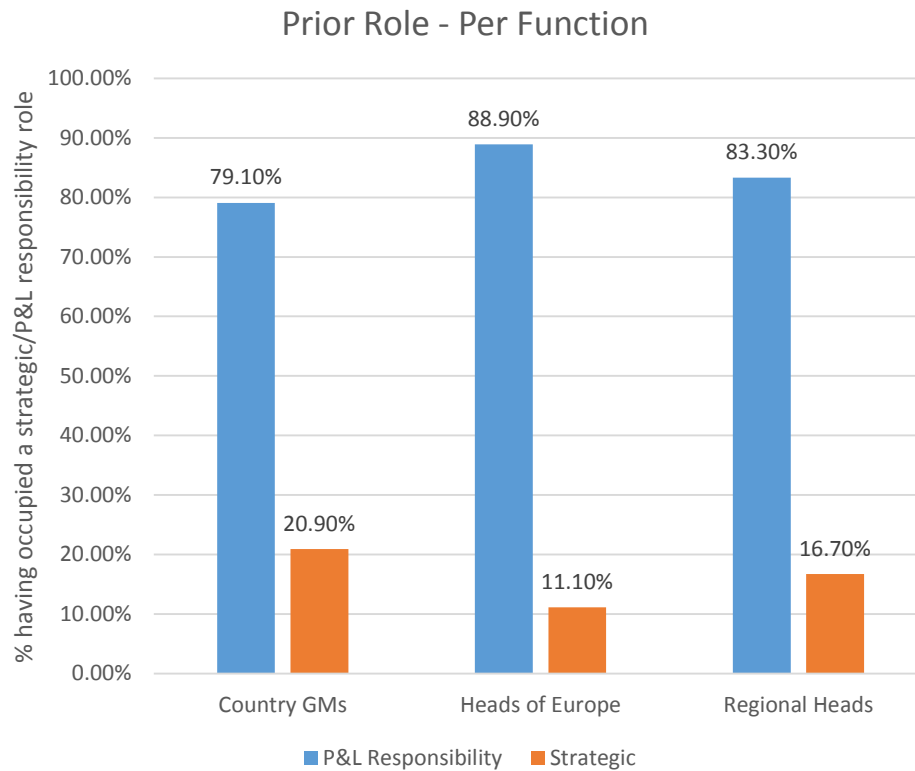


■ Only Pharma ■ Other backgrounds

*Sample sizes:  
Country GMs: 43  
Heads of Europe: 9  
Regional heads: 10*

- Following the general trend, in all three functions individuals come mostly from an only-pharma background.
- Country GMs are those that have the most diverse backgrounds with 34.9% having worked in other sectors.

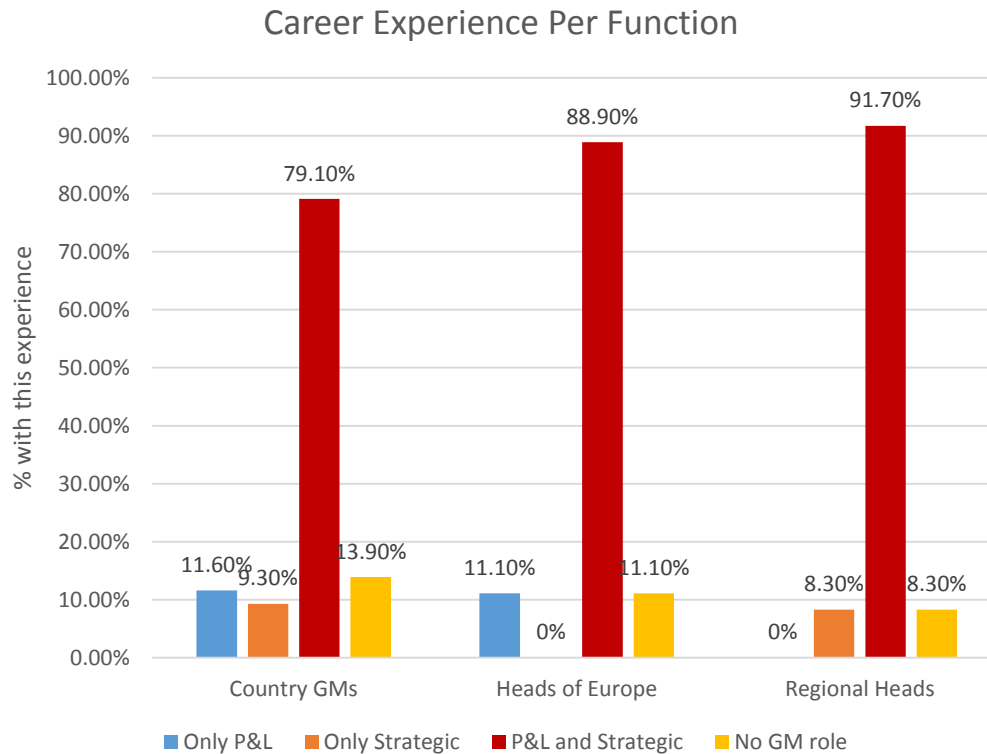
# Prior Role – Function



- P&L responsibility in prior positions are predominant for all functions.
- However, 20.90% of Country GMs have occupied a strategic prior position, which is more than the Heads of Europe with 11.1% and Regional Heads with 16.7%.

*Sample sizes:*  
*Country GMs: 43*  
*Heads of Europe: 9*  
*Regional heads: 12*

# Career Experiences – Function



Sample sizes:

Country GMs: 43

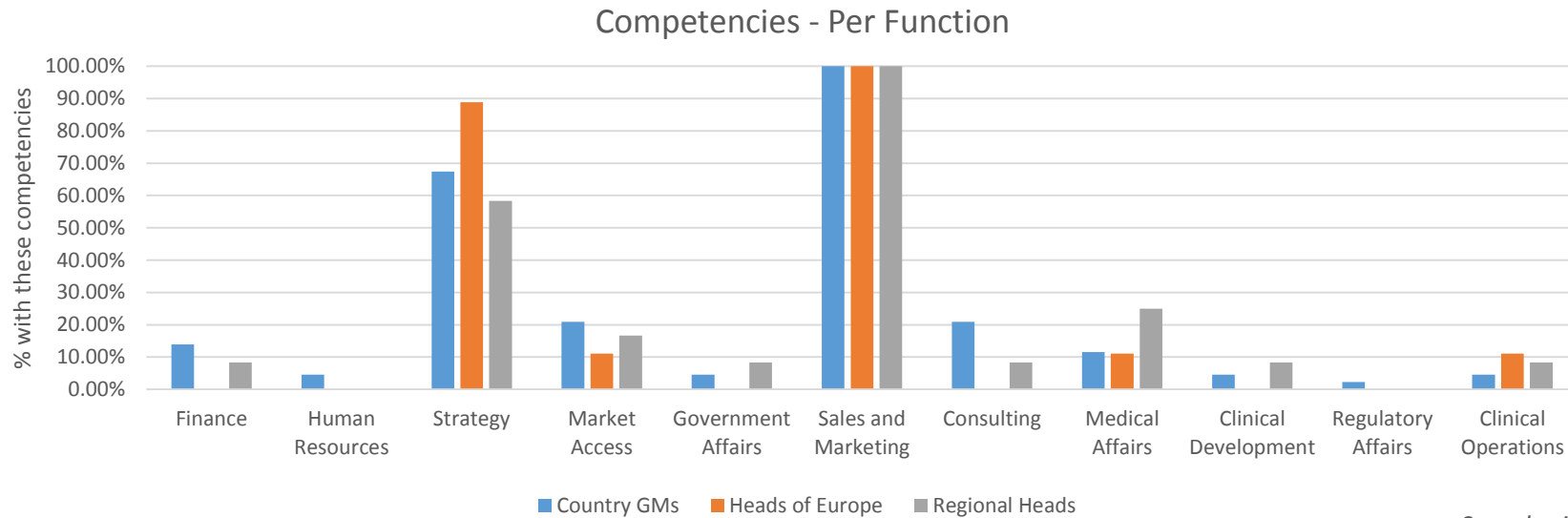
Heads of Europe: 9

Regional heads: 12

- Combined P&L responsibility and strategic experiences dominate for the three functions and are especially high for Regional Heads, representing 91.7% of all their professional experiences.
- While no Head of Europe has ever had only strategic roles, no Regional Heads have solely occupied P&L roles.
- Country GMs are most likely to have had no previous GM experience between all three functions.



# Competencies – Function



Sample sizes:  
Country GMs: 43  
Heads of Europe: 9  
Regional Heads: 12

- Head of Europe is the function that has the least diverse competencies with no Europe GM having had experience in finance, human resources, government affairs, consulting, clinical development, or regulatory affairs.
- On the other hand, Country GMs are the ones with the most diverse competencies.
- The most frequent competencies are sales & marketing and strategy, followed by market access and medical affairs.

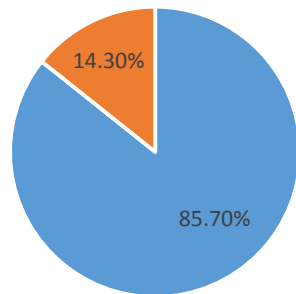
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# Country Comparison

**France – UK – Germany**

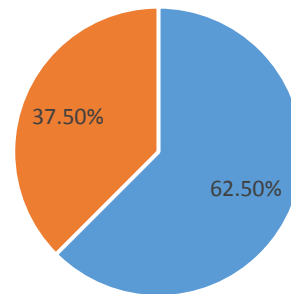
# Gender Split – Countries

Gender Split - France GMs



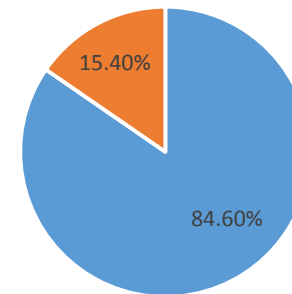
■ Men ■ Women

Gender Split - UK GMs



■ Men ■ Women

Gender Split - Germany GMs



■ Men ■ Women

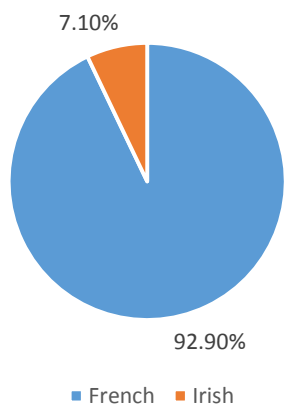
*Sample sizes:  
France: 14  
UK: 16  
Germany: 13*

- The UK has the most women GMs with 37.50% women GMs while only 15.40% of Germany GMs and 14.30% of France GMs are women.

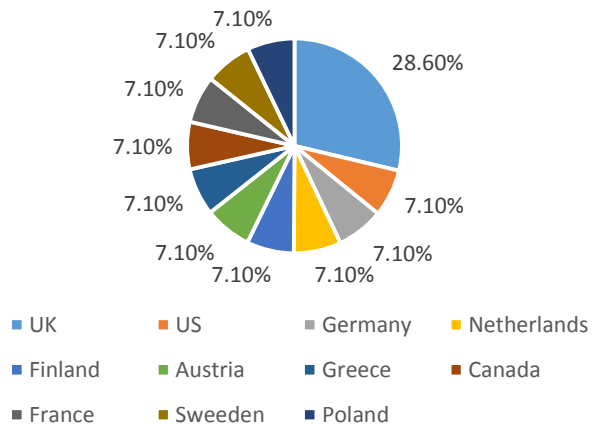
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# Nationality – Countries

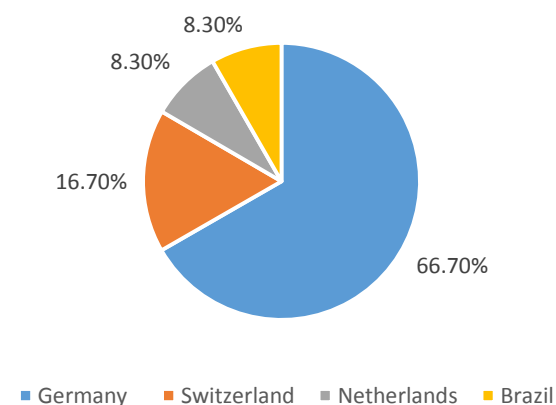
Nationality - France GMs



Nationality - UK GMs



Nationality - Germany GMs



Sample sizes:  
 France: 14  
 UK: 16  
 Germany: 14

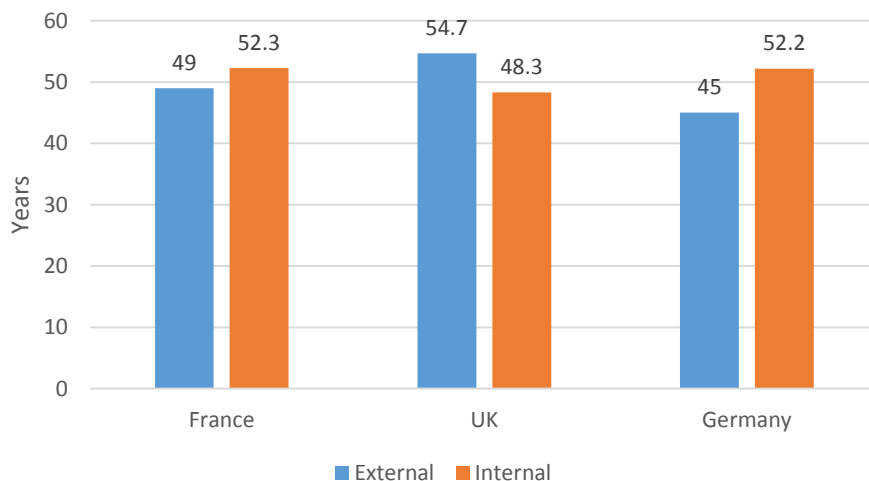
- GMs are mostly nationals with the exception of the UK that has a majority of foreigners.
- France, on the other hand, only counts 7.1% of foreign GMs.
- Even though German national GMs prevail in Germany, there is a some diversity in the origins of its GMs with foreigners representing 33.3% of its GMs.

# Age – Country Comparison

Average GM Age – Country Comparison



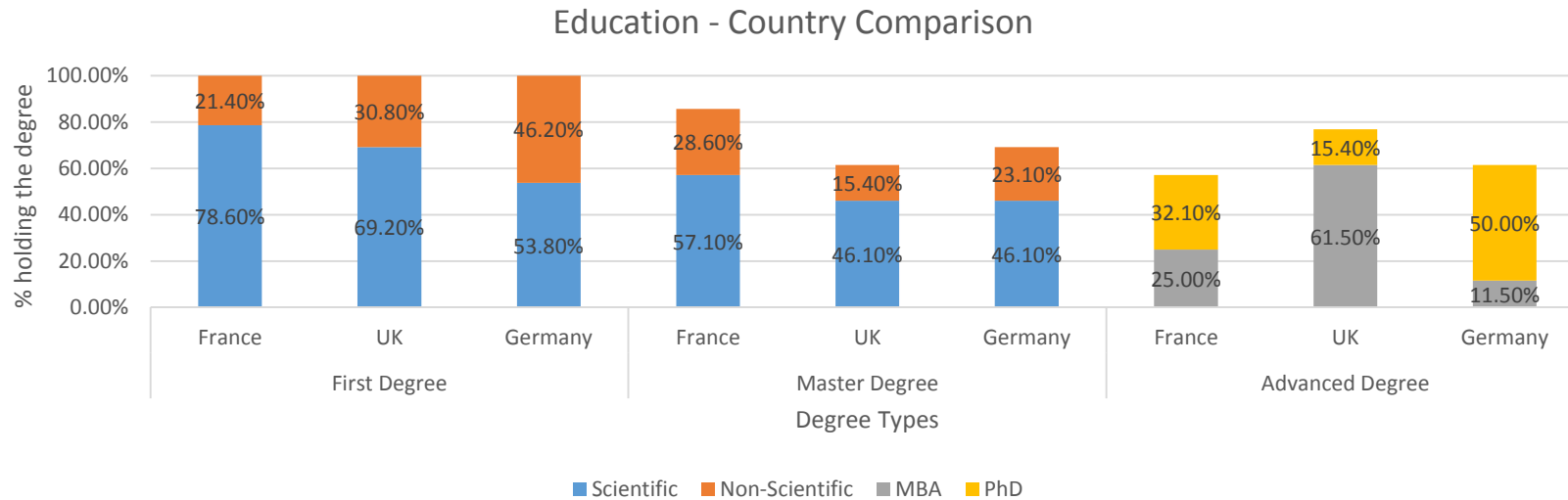
Average GM Age Per Type of Recruitment – Country Comparison



Sample sizes: UK: 11  
Germany: 9  
France: 14

- While the age difference between the 3 countries is negligible with Germany GMs being the youngest with an average age of 49.8 years and France GMs the oldest with an average age of 51.1 years, the age gaps between externally and internally recruited GMs are significant.
- For each country, there is an important age gap between externally and internally recruited GMs, the biggest one being Germany with externally recruited candidates that are on average 7.2 years younger than internal ones.
- Externally recruited GMs in France are also 3.3 years younger than internally promoted ones.
- The UK is the only country where externally recruited GMs are older than internally recruited ones, with a 6.4 years difference.

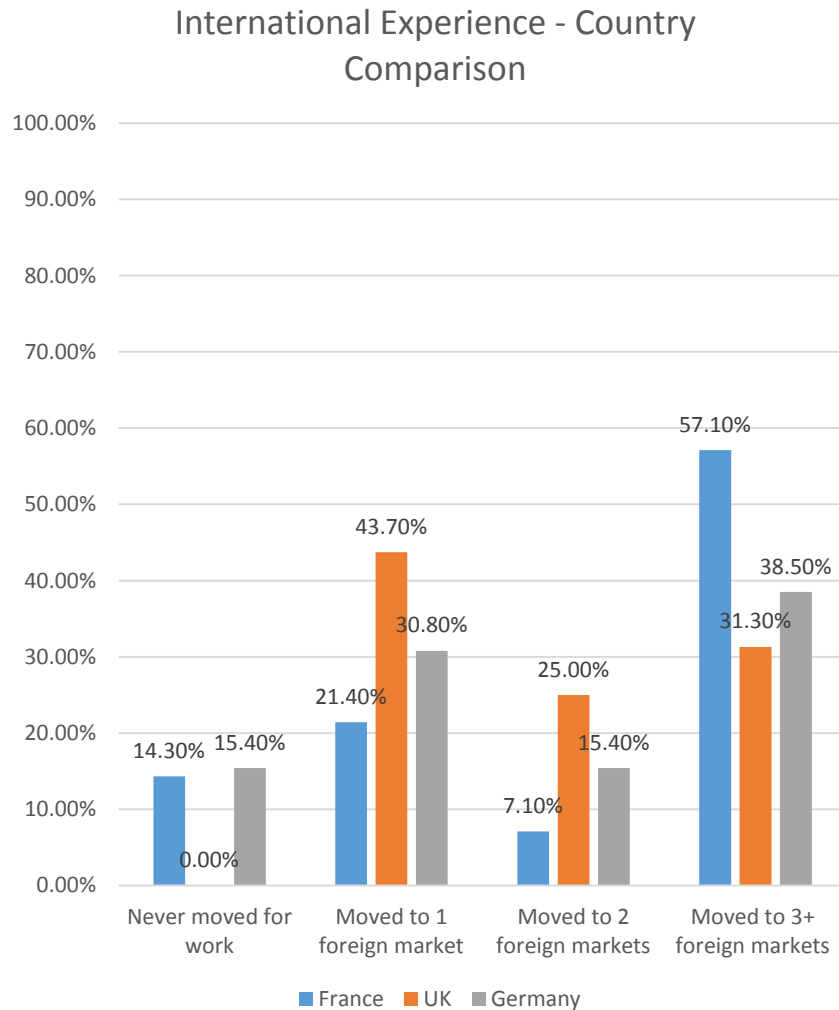
# Education – Countries



Sample sizes:  
 France: 14  
 UK: 13  
 Germany: 13

- France GMs have the most master degrees with a total of 85.7% of them holding one. However, it is also the country with the least advanced degrees with only 57.1% of its GMs holding one.
- On the other hand, the UK is the country with the least master degrees with only 61.5% of UK GMs holding one but it is also the country with the most advanced degrees with 76.9% of its GMs holding one.
- Scientific first degrees and masters dominate even though they are less popular in Germany with only 53.8% of scientific first degrees and 66.7% of its GMs holding a master having a scientific master degree.
- In France and Germany, GMs have more PhDs than MBAs while in the UK MBAs prevail over PhDs.

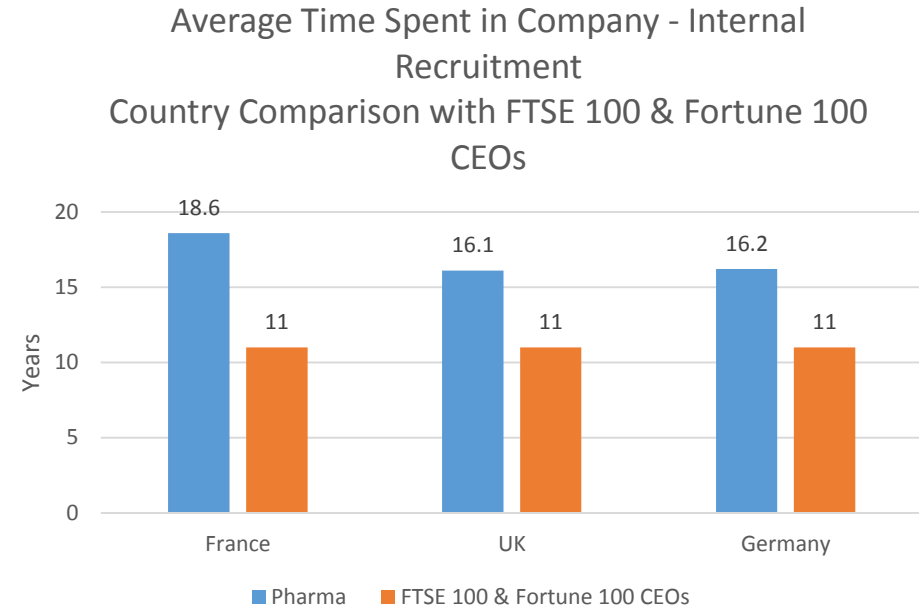
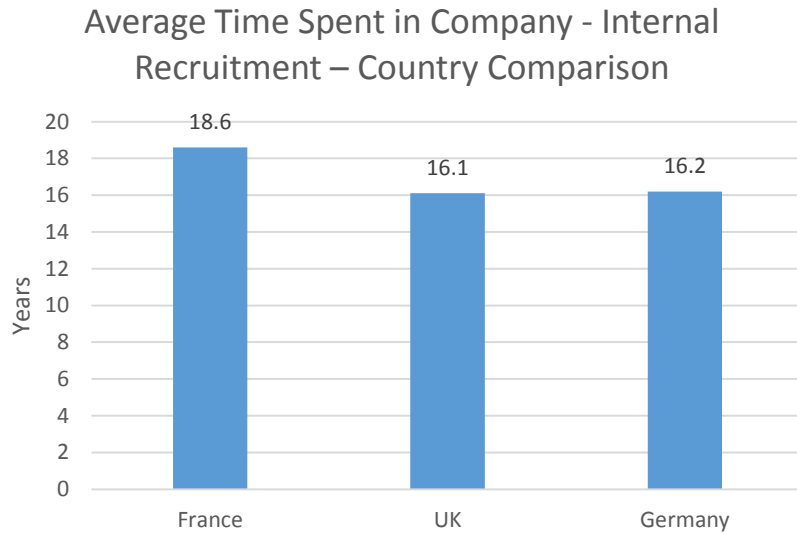
# International Experience – Countries



- All UK GMs have moved at least once to a foreign country for work. However, most of them have only lived in one country (43.7%) as compared to only 25% in 2 foreign markets and 31.3% in 3 or more foreign markets.
- France is the country where GMs have travelled the most with 57.1% of its GMs having worked in 3 foreign countries or more. However, 14.3% of its GMs have never moved for work purposes.
- Germany appears to be the country where the GMs have the least international experience.

Sample sizes: France: 14  
UK: 16  
Germany: 13

# Time Spent in Company – Countries



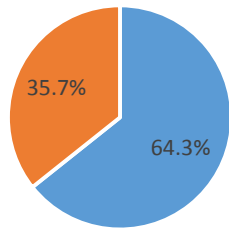
Sample sizes: France: 9  
UK: 11  
Germany: 10  
FTSE 100 & Fortune 100: ?

- The average time spent in the current company for internally promoted GMs is the longest in France with an average of 18.6 years compared to 16.1 years in the UK and 16.2 years in Germany. It therefore takes longer for employees to obtain a GM position in their current company in France.
- Pharma appears to be an industry where employees stay particularly longer before being promoted to a GM position. Indeed, while the FTSE 100 and Fortune 100 internally promoted CEOs stay, on average, 11 years in their company before being promoted, in France, Germany and the UK, the pharma GMs have been in their company for 18.6 years, 16.1 years, and 16.2 years respectively.



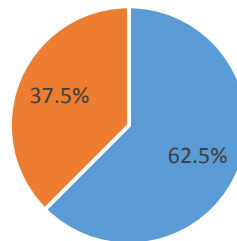
# Company Backgrounds – Countries

Company Backgrounds - France



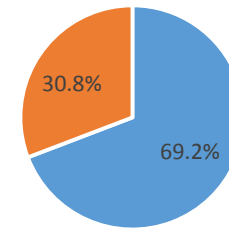
■ Only Pharma ■ Other backgrounds

Company Backgrounds - UK



■ Only Pharma ■ Other backgrounds

Company Backgrounds - Germany

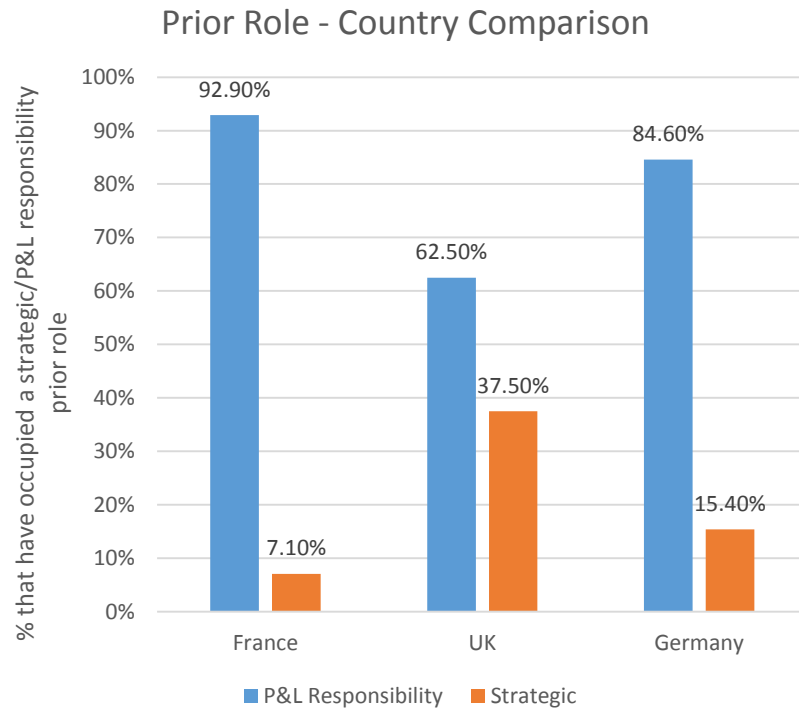


■ Only Pharma ■ Other backgrounds

*Sample sizes:  
France: 14  
UK: 16  
Germany: 13*

- Following the general trend, the GMs of all countries come mostly from an only-pharma background.
- UK GMs are those that have the most non-pharma backgrounds, with 37.5% as opposed to France with 35.7% and Germany with only 30.8%.

# Prior Role – Countries



Sample sizes:

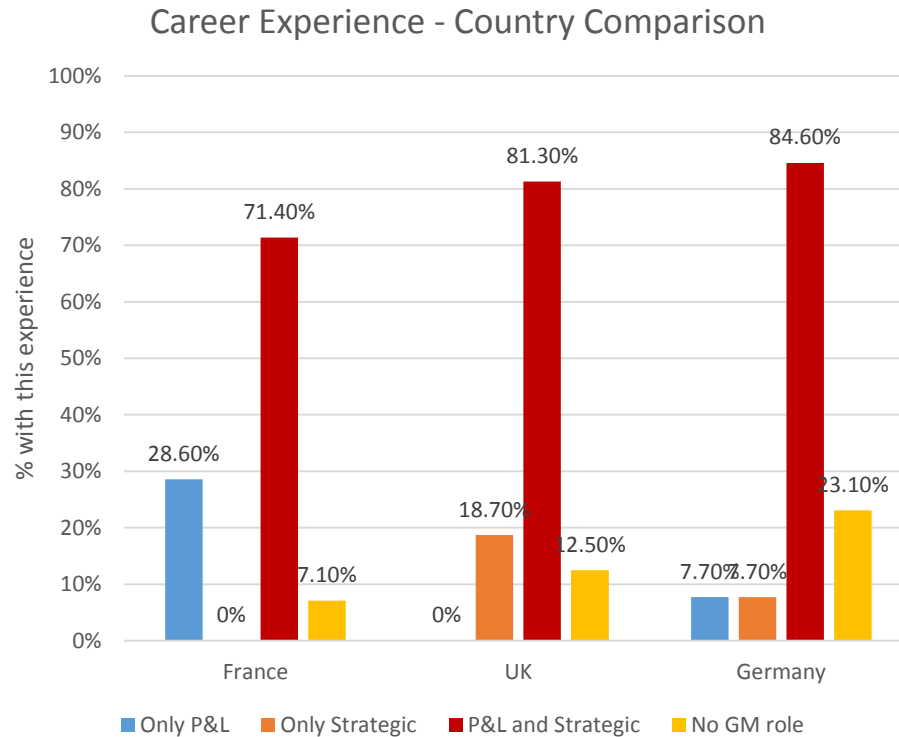
France: 14

UK: 16

Germany: 13

- P&L responsibility in prior positions are predominant for all countries.
- However, considerably more UK GMs have occupied a previous strategic role (37.5%) compared to Germany with 15.4% and France with the lowest percentage, 7.10%

# Career Experiences – Countries



Sample sizes:

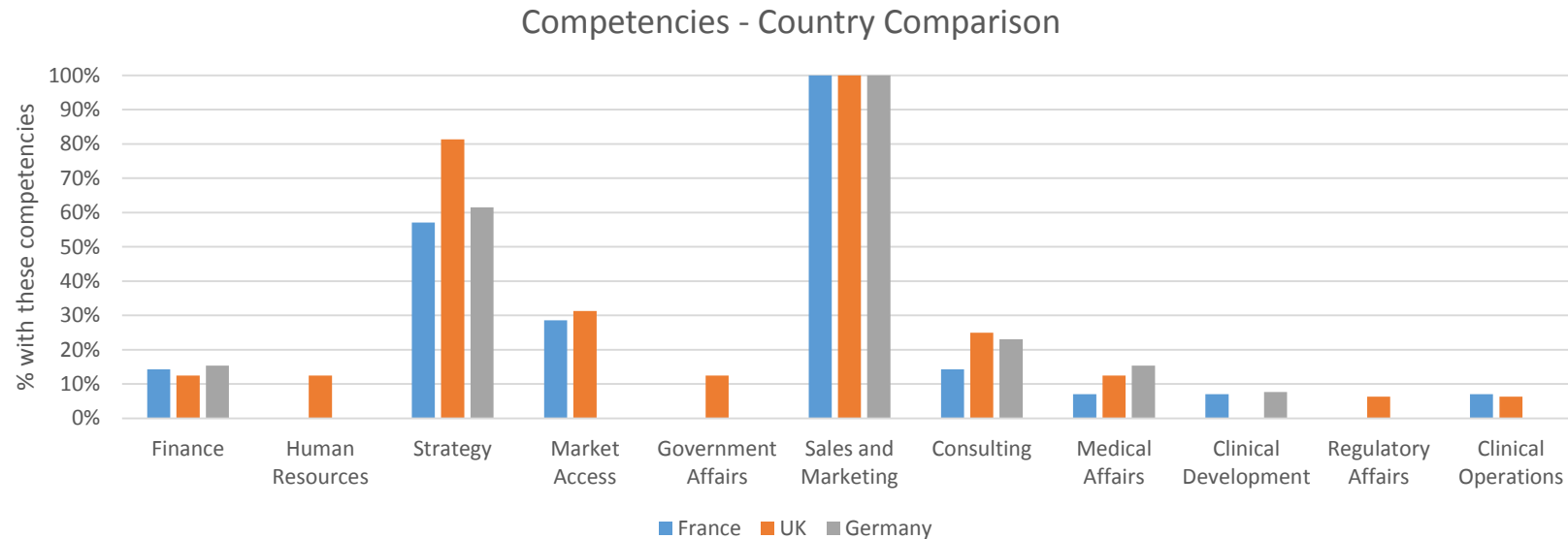
France: 14

UK: 16

Germany: 13

- Combined P&L responsibility and strategic experiences dominate for the three countries and are especially high for Germany GMs, representing 84.6% of all their career experiences.
- While no France GM has ever had only strategic roles, no UK GM has solely occupied P&L roles.
- Germany GMs are most numerous for not having previous GM experience during their career (23.1%).

# Competencies – Countries



Sample size:  
France: 14  
UK: 16  
Germany: 13

- UK GMs are the ones that have the most diverse competencies, only lacking experience in clinical development as opposed to UK and Germany GMs who both lack experience in human resources, government affairs and regulatory affairs.
- Germany GMs seem to be the ones with the least diverse competencies, also lacking market access and clinical operations experiences.

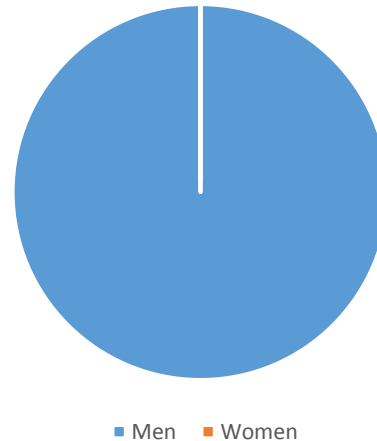
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# Accelerating Companies

# Gender Split – Accelerating Companies

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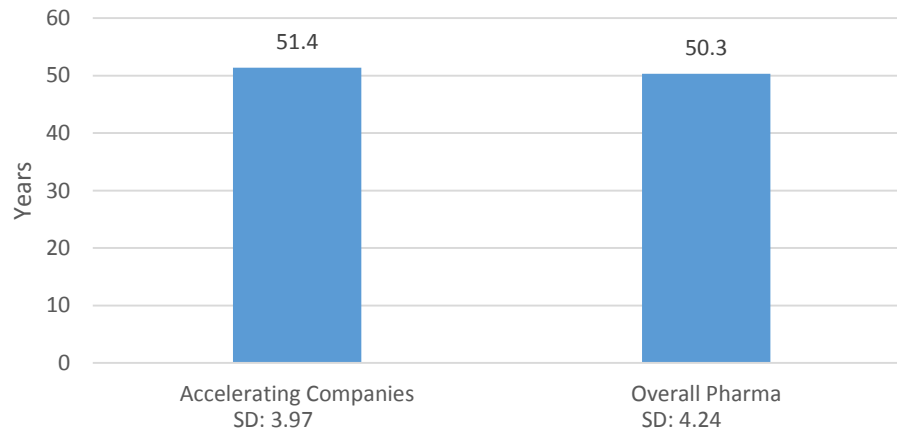
Gender Split - Accelerating Companies



- There are only men holding GM positions in the accelerating companies Gilead and Shire.

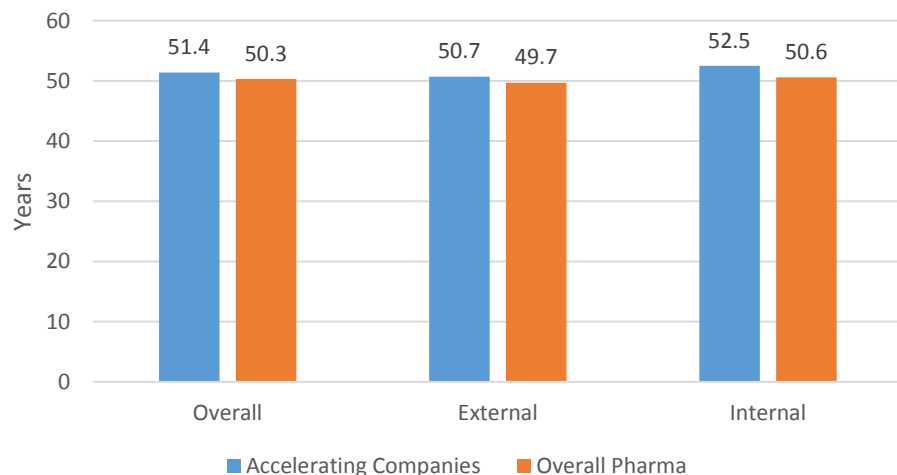
# Age – Accelerating Companies

Average Age - Accelerating Companies vs Overall Pharma



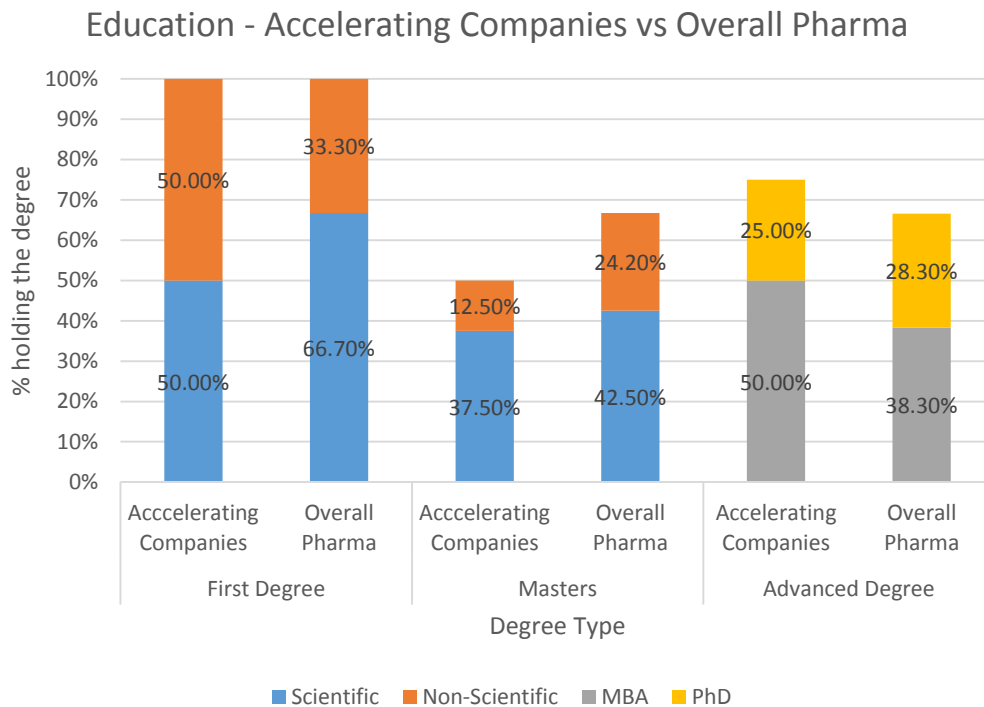
- Accelerating companies' GMs are older than the overall pharma sector ones.
- The biggest difference is between the internally recruited accelerating companies' GMs that are 52.5 on average and the overall pharma sector GMs that are on average 50.6.

Average Age - Accelerating Companies vs Overall Pharma



Sample size:  
Accelerating companies: 5  
Overall pharma: 47

# Education – Accelerating Companies



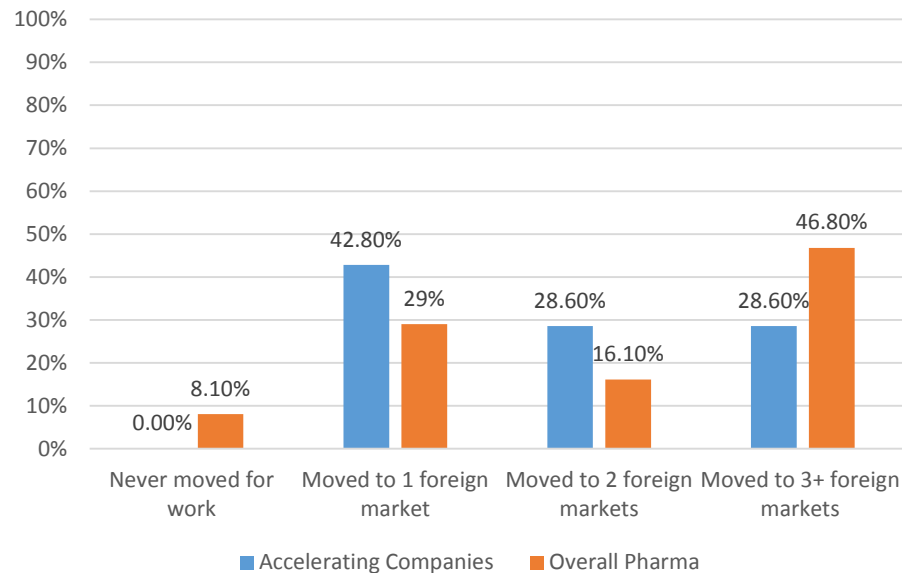
Sample sizes:  
 Accelerating companies: 8  
 Overall pharma: 60

- While there is a majority of scientific first and master degrees for the overall pharma sector, accelerating companies have 50% of scientific and 50% of non-scientific first degrees.
- Surprisingly, accelerating companies' GMs have less master degrees than the overall pharma sector ones.
- However, they possess more advanced degrees than overall pharma ones.
- MBAs dominate over PhDs for GMs in both accelerating companies and overall pharma.



# International Experience – Accelerating Companies

International Experience - Accelerating Companies vs Overall Pharma

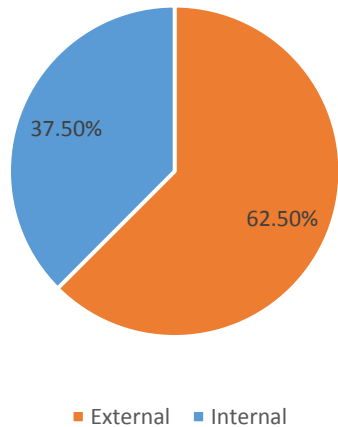


Sample Size:  
Accelerating Companies: 7  
Overall pharma: 62

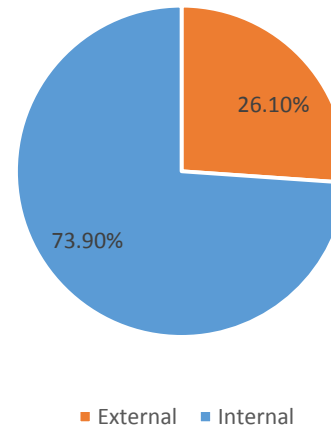
- Accelerating companies' GMs all have international experience.
- However, a higher proportion of the overall pharma sector's GMs have moved to 3 or more countries for work (46.8%) compared to 28.6% for the overall sector.
- Most accelerating companies' GMs have worked in only one foreign market (42.80%).

# External Recruitment – Accelerating Companies

Accelerating Companies



Overall Pharma

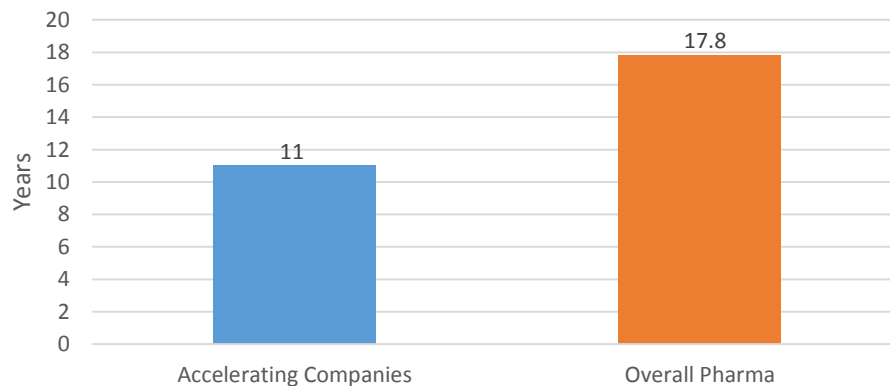


Sample size:  
Accelerating companies: 8  
Overall pharma: 65

- Accelerating companies mostly recruited their GMs externally (62.5%), a change from the overall pharma trend.

# Time Spent in Company – Accelerating Companies

Average Time Spent in Company - Internal  
Recruitment - Accelerating Companies vs Overall  
Pharma

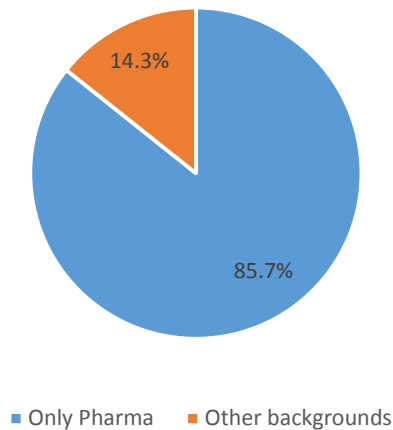


- Internally recruited accelerating companies' GMs have spent 6.8 less years in their current company than internally recruited GMs from the overall pharma sector.

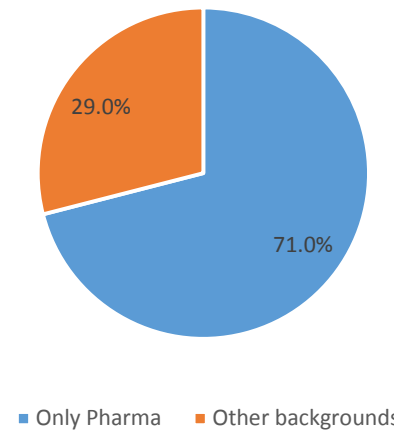
*Sample size:*  
*Accelerating Companies: 8*  
*Overall pharma: 63*

# Company Background – Accelerating Companies

Company Backgrounds - Accelerating Companies



Company Backgrounds - Overall Pharma

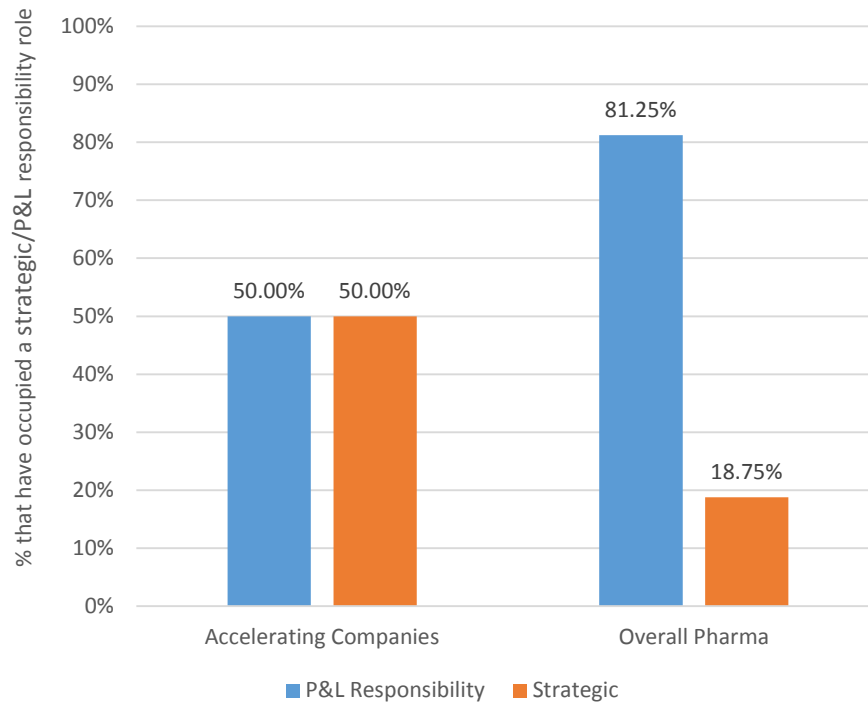


*Sample size:  
Accelerating companies: 7  
Overall pharma: 62*

- Only pharma backgrounds are also dominant in accelerating companies.
- Accelerating companies' GMs are even more numerous to have an only pharma background with 85.7% as compared to the overall pharma GMs that are 71% to have an only-pharma background.

# Prior Role – Accelerating Companies

Prior Role - Accelerating Companies vs Overall Pharma

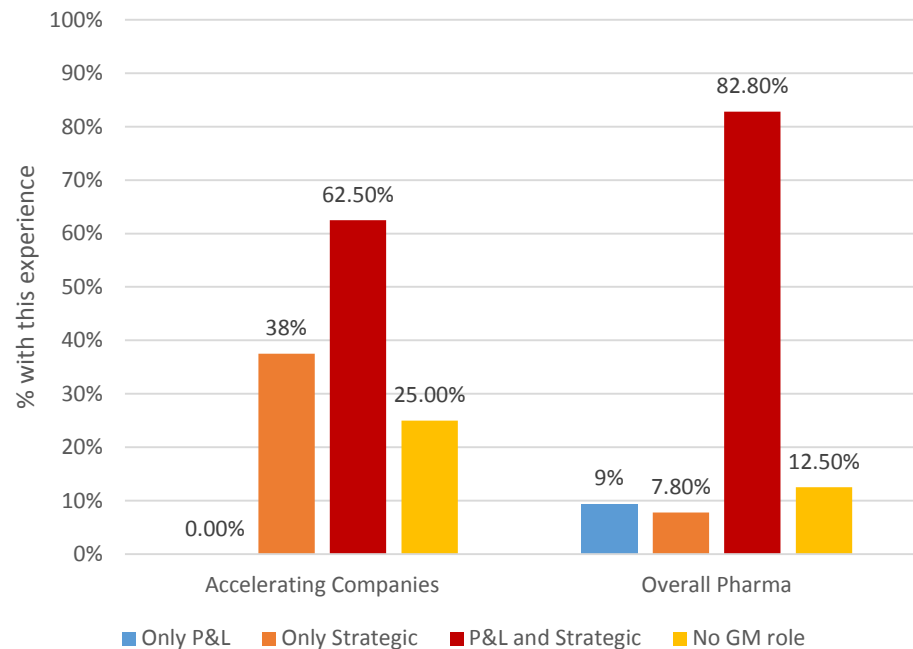


- Accelerating companies GM's have equally had as many P&L responsibility prior roles as strategic ones while the overall pharma sector's GMs have had considerably more P&L responsibility in prior positions (81.25%).

Sample Size:  
Accelerating Companies: 8  
Overall pharma: 64

# Career Experience – Accelerating Companies

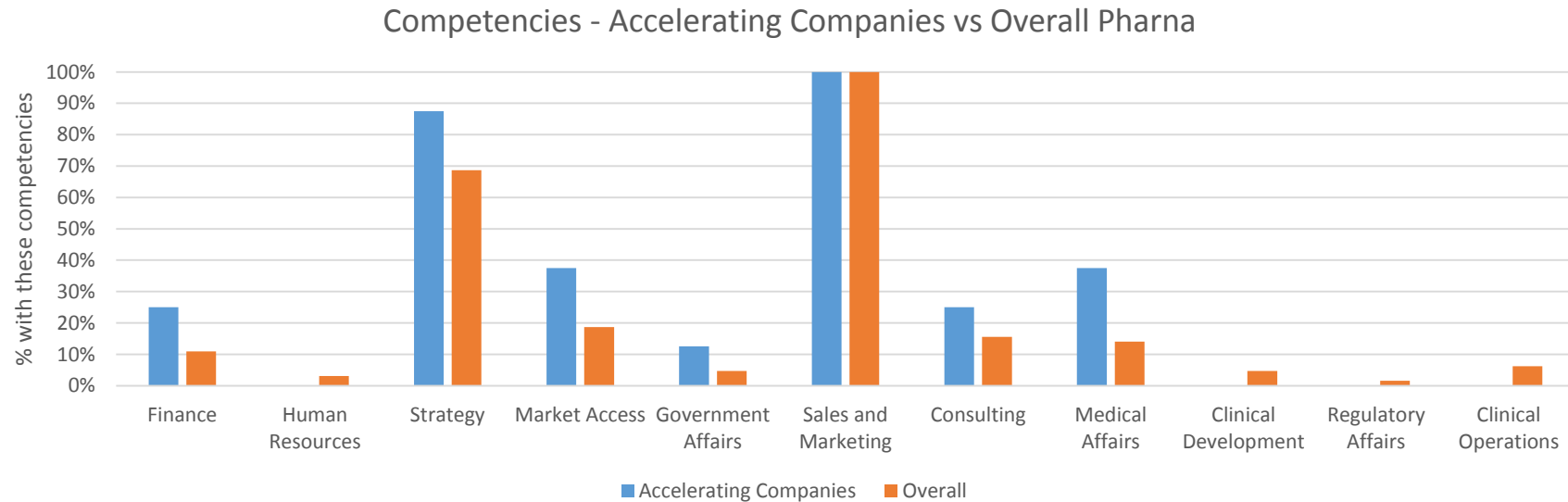
Career Experience - Accelerating Companies vs Overall Pharma



Sample Size:  
Accelerating Companies: 8  
Overall pharma: 64

- Combined P&L responsibility and strategic experiences dominate for both categories.
- However, they are less important in accelerating companies with 62.50% of accelerating companies' GMs having both experiences while 82.8% of overall pharma GMs have them both.
- No GM from accelerating companies has had only P&L responsibilities.
- More GMs from accelerating companies haven't had any GM role prior to their current position (25%) than the overall pharma sector (12.50%).

# Competencies – Accelerating Companies



Sample sizes:  
Accelerating companies: 8  
Overall pharma: 64

- Accelerating companies' GMs appear to have less but more concentrated competencies.
- They don't possess any human resources, clinical development, regulatory affairs or clinical operations experience.
- However, there is a bigger proportion of them having every other competency than the overall pharma sector GMs.

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