

# PRESS RELEASE FROM PATIENTVIEW - a research and publishing company focusing on the patient agenda

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## ‘The Corporate Reputation of Pharma in 2014 —the Patient Perspective’ *and how the corporate reputation of pharma companies has changed over the past four years*

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- Findings based on a survey of 1,150 patient groups (from 58 countries and of differing specialties)
- Survey conducted mid-November 2014 to mid-January 2015
- Patient-group feedback on the corporate reputation of the entire pharma industry during 2014
- Patient-group feedback on the corporate reputation of 37 individual pharma companies in 2014
- Results for 2014 are compared with those of 2013, 2012, and 2011

This independent study, funded by PatientView, represents the perspectives from 1,150 patient groups on the corporate reputation of 37 individual pharma companies (and of the pharma industry as a whole) in 2014. The 2014 figures are also compared with those of the past three years, to identify trends. The 37 pharma companies reviewed in the study are:

AbbVie | Actavis | Allergan | Amgen | Astellas | AstraZeneca | Baxter International | Bayer | Biogen Idec | Boehringer-Ingelheim | Bristol-Myers Squibb | Celgene | Eisai | Eli Lilly (Lilly) | Gilead | GlaxoSmithKline (GSK) | Grünenthal | Ipsen | Janssen | Lundbeck | Menarini | Merck & Co (USA) | Merck KgA (Germany) | Mylan | Novartis | Novo Nordisk | Otsuka | Pfizer | Roche | Sanofi | Servier | Shire | Stada Arzneimittel | Takeda | Teva | UCB | ViiV Healthcare

## Results for individual pharma companies

**The corporate reputation of individual pharma companies (as seen from a patient perspective) shows some significant changes between 2014 and 2013 (37 companies assessed in 2014; 33 companies in 2013)**

### OVERALL RANKINGS FOR CORPORATE REPUTATION FROM A PATIENT PERSPECTIVE: TOP-TEN PHARMA COMPANIES

Company	Rank in 2014	Rank in 2013
ViiV Healthcare	1st	1st
AbbVie	Equal 2nd	3rd
Novo Nordisk	Equal 2nd	10th
Novartis	4th	9th
Lundbeck	Equal 5th	22nd
Roche	Equal 5th	6th
Pfizer	7th	4th
Janssen	8th	5th
UCB	9th	11th
Eisai	10th	-

### COMPANIES RANKING FIRST FOR THE FOLLOWING INDICATORS OF CORPORATE REPUTATION, 2014:

- **Patient centricity:** ViiV Healthcare
- **Patient information:** ViiV Healthcare
- **Patient safety:** ViiV Healthcare
- **Useful products:** ViiV healthcare
- **Transparency:** Novo Nordisk
- **Integrity:** AbbVie

### About the top-ten corporate stars

- **ViiV Healthcare** continues to rank 1st in 2014 for overall corporate reputation from a patient perspective, as it did in 2013. The company is considered number 1 for patient centricity, for providing high-quality patient information, for patient safety, and for having high-quality products useful to patients.
- **AbbVie** improves on an already-excellent position of 3rd-place overall in 2013, ranking equal-2nd in 2014 out of 37 companies for corporate reputation from a patient perspective. AbbVie also ranks 1st for integrity in 2014 (in 2013, it

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ranked 3rd for this indicator of corporate reputation). The company's strong performance may, in part, be due to its separation from Abbott (medical devices), allied to the effort it has made to create a new patient-centric identity.

- **Novo Nordisk** jumps 8 places in the rankings, from 10th in 2013 to equal-2nd overall in 2014. The company was dragged down in previous years—despite performing well at patient-centredness—by a perception among patient groups that it was poorer at transparency and integrity (possibly because of its decision to stop selling medicines to Greece back in 2010). In 2014, however, Novo Nordisk moves past these difficulties to rank 1st for transparency.
- **Novartis** rises five places in the rankings, from 9th in 2013 to 4th overall in 2014. The increase is partly due to the fact that patient groups rank the company 3rd in 2014 for providing high-quality products useful to patients.
- **Lundbeck** makes the biggest leap in the rankings, from 22nd in 2013 to equal-5th overall in 2014. After holding high positions in both 2011 (3rd place overall) and 2012 (1st place overall), Lundbeck dramatically slumped to 22nd in 2013—almost certainly because patient groups reacted to the June 2013 news that the company had been fined by the European Commission. Yet, in just a year, Lundbeck manages to move back up to 5th place in the 2014 rankings. In fact, mental-health patient groups vote Lundbeck 1st in 2014 for overall corporate reputation among 12 other pharma companies with a mental-health portfolio (separate mental-health analysis to be published by PatientView later in February 2015).
- **Roche** rises one place in the rankings, from 6th in 2013 to equal-5th overall in 2014. Roche also increases its reputation for producing high-quality products useful to patients, ranking 4th for this indicator in 2014 (up from 10th in 2013).
- **Pfizer** falls three places—though it remains in the top ten, at 7th-place overall. The company's ranking for patient-centredness drops five places in 2014 to 11th. One of the reasons for Pfizer's slide in the rankings may be that almost 10% of the 515 respondent patient groups commenting on Pfizer are from the UK, where significant public antagonism was felt towards Pfizer's attempted 2014 takeover of UK-headquartered AstraZeneca.
- **Janssen** also falls three places, from 5th in 2013 to 8th overall in 2014. The company, however, improves its reputation for acting with integrity, rising four places for this indicator in 2014.
- **UCB** rises 3 places overall in 2014. The company performs best at providing high-quality information to patients (ranking 8th for this indicator in 2014, compared with 13th in 2013).
- **Eisai** appears in 2014 for the first time in the annual Corporate Reputation study, coming 10th overall—helped by the fact that patient groups rank it 6th for producing high-quality products useful to patients. One of the reasons for their vote of confidence may be the FDA's 2014 approval for Eisai's Akynzeo, a combination treatment designed to prevent nausea and vomiting among cancer patients undergoing chemotherapy. Eisai is also known to be working on new drugs for Alzheimer's disease.

### Another ascending star

- Another strong performer is **Biogen Idec**, which rises from overall 31st position in 2013 to 19th in 2014. In the course of a year, the company significantly improves its performance for integrity (jumping from 33rd position in 2013 to 11th in 2014), and in other areas of corporate reputation.

### Receding stars

A number of pharma companies see their positions decline significantly in 2014.

- **Gilead** falls 12 places from its 2013 rank of 2nd to 14th overall in 2014. Respondent patient groups, however, continue to acknowledge the value of Gilead's products, ranking the company 2nd in 2014 for this indicator of corporate reputation. Gilead's controversial pricing strategy for its new hepatitis-C drugs, Sovaldi and Harvoni, is undoubtedly likely to be a contributory factor in the company's declining overall corporate reputation among patients. Activists worldwide have held public demonstrations to oppose Gilead's pricing decisions for the treatments.
- **AstraZeneca's** fall in the rankings from 17th in 2013 to 24th overall in 2014 may be the result of it having experienced a turbulent 2014—not least, surviving an attempted takeover by Pfizer.
- **Lilly** ranks 12th overall in 2014, down from 7th in 2013. Its steepest declines are for providing high-quality information to patients (a fall of 8 places between 2013 and 2014).

### Stars shining in specific areas

Other companies retain their 2013 rankings, but some shine in specific areas. Comparing 2014 with 2013:

- **Bayer** rises four places for patient-centredness in 2014, to 17th out of 37 companies.
- **BMS** rises four places for patient safety in 2014, to 22nd.
- **GSK** rises six places for having a good record on patient safety in 2014, to 9th.
- **Merck & Co** (the US company) rises three places for providing high-quality information to patients in 2014, to 17th.
- **Sanofi** rises five places for producing high-quality products useful to patients in 2014, to 13th.
- **Teva** rises five places for having a good record on patient safety in 2014, to 16th.

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## Pharma industry-wide rankings for 2014 and 2013

### Results for the pharma industry as a whole (plus other healthcare industries)

#### 2014 and 2013 rankings for 8 healthcare industries

Percentage of respondent patient groups stating that the specific healthcare industry has an "excellent" or "good" reputation

	% in 2014	Rank in 2014	% in 2013	Rank in 2013
Retail pharmacists	63.3%	1st	61.9%	1st
Medical device companies	51.3%	2nd	54.9%	2nd
Private healthcare services	45.7%	3rd	51.1%	3rd
Biotechnology companies	41.3%	4th	40.6%	6th
Generic drug manufacturers	40.6%	5th	41.5%	5th
<b>Multinational pharma</b>	<b>39.0%</b>	<b>6th</b>	<b>35.4%</b>	<b>7th</b>
Health insurers (not-for-profit)	36.7%	7th	42.8%	4th
Health insurers (for-profit)	24.3%	8th	26.7%	3rd

### The corporate reputation of the whole pharma industry improves in 2014—at the expense of the health-insurance industry, but still remains lower than that of retail pharmacists and medical-device companies

- The multinational pharma industry in 2014 ranks 6th among 8 healthcare-industry sectors. 39% of the 1,150 patient groups respondent in 2014 say that pharma has either an "excellent" or a "good" corporate reputation in 2014 (compared with 35.4% which said the same in 2013, when pharma ranked 7th out of 8 healthcare industries). The step up the rankings for pharma is primarily due to a decline in the corporate reputation of both the *not-for-profit* and the *for-profit* health-insurance sectors, which rank 7th and 8th respectively in 2014.

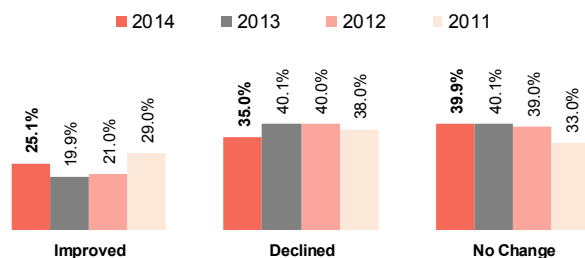
### While the corporate reputation of the whole pharma industry improves in 2014, it is still not restored to that of a peak level of 2011 (and, even in 2011, the reputation of pharma was below that of most other healthcare-industry sectors)

- In 2014, 25.1% of respondent patient groups say that the pharma industry's reputation has improved over the past five years. Just 19.9% of 2013's respondent patient groups said the same. The percentage at pharma's peak, in 2011, was 29%—itself an unimpressive figure.

### What do you think your members (or the people your organisation represents) believe has happened to the reputation of the pharmaceutical industry over the past five years?

Its reputation has ...

Percentage of total responses



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The majority of patient groups respondent in 2014 acknowledged that pharma's innovative capabilities, and its ability to ensure patient safety, are each "excellent" or "good". However, the majority of patient groups do not believe that the industry is "excellent" or "good" in its other activities

These further activities are:

- Having a good relationship with the media
- Providing high-quality information for patients
- Providing access to clinical trials
- Having a patient-centred strategy
- Acting with integrity
- Managing adverse news about products
- Having ethical marketing practices
- Providing services to patients outside its business remit
- Being transparent in all corporate activities
- Practising philanthropic activities
- Fair pricing policies

### Pharma's pricing policies

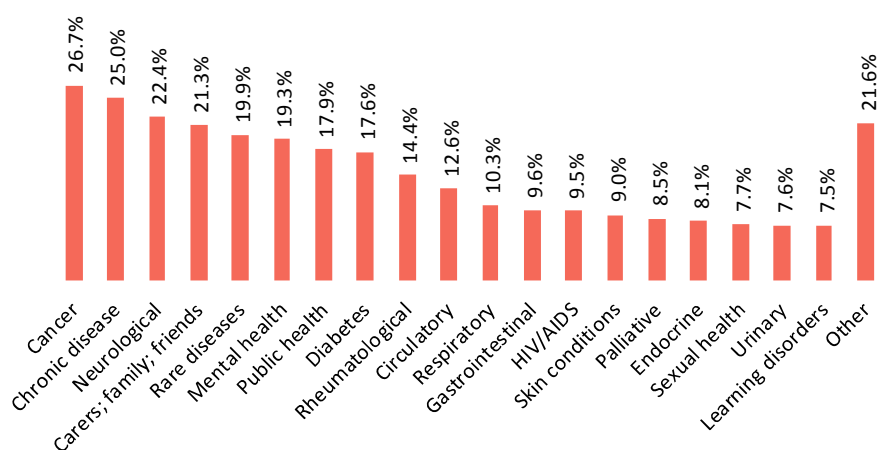
*This remains the most contentious issue from the patient perspective. Only 14% of patient groups in 2014 believe that pharma is "excellent" or "good" at pricing its drugs.*

## END OF PRESS RELEASE

## APPENDIX

### Profile of the 1,150 respondent patient groups in 2014

Main specialisations of 2014's 1,150 respondent patient groups  
% of responses (patient groups can have more than one specialty)



Geographic headquarters of 2014's 1,150 respondent patient groups—by country  
% of responses

