NEW PUBLICATION FROM PATIENTVIEW - a research and publishing company focusing on the patient agenda

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‘The Corporate Reputation of Pharma in 2014
—the Perspective of 130 Diabetes Patient Groups Worldwide

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• Findings based on a survey of 130 patient groups with an interest in diabetes from 34 countries
• Survey conducted November 2014 to January 2015
• This independent study, funded by PatientView, represents the perspectives from 130 patient groups with an interest in diabetes on the corporate reputation of 14 individual pharma companies (and of the pharma industry as a whole) in 2014. The results from the respondent diabetes patient groups are compared in this report with those from the entire body of 1,150 patient groups covering all therapy areas which responded to PatientView’s report: The Corporate Reputation of Pharma in 2014 – the Patient Perspective, published in February 2015, and with the responses of diabetes patient groups in the previous year’s survey (2013).

The 14 pharma companies reviewed in the study are:
AstraZeneca | Bayer | Boehringer-Ingelheim | Bristol-Myers Squibb | Eli Lilly (Lilly) | GlaxoSmithKline (GSK) | Janssen | Merck & Co (US) | Novartis | Novo Nordisk | Pfizer | Sanofi | Servier | Takeda

Results for individual pharma companies

Novo Nordisk emerges as the clear winner out of the 14 companies assessed for corporate reputation by diabetes patient groups in 2014, taking the top spot for all six measurement indicators used by PatientView

<table>
<thead>
<tr>
<th>Company</th>
<th>Rank in 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Novo Nordisk</td>
<td>1st</td>
</tr>
<tr>
<td>Bayer</td>
<td>2nd</td>
</tr>
<tr>
<td>Lilly</td>
<td>3rd</td>
</tr>
<tr>
<td>Sanofi</td>
<td>4th</td>
</tr>
<tr>
<td>Pfizer</td>
<td>5th</td>
</tr>
</tbody>
</table>

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

- Patient centricity: Novo Nordisk
- Patient information: Novo Nordisk
- Patient safety: Novo Nordisk
- Useful products: Novo Nordisk
- Transparency: Novo Nordisk
- Integrity: Novo Nordisk

About the corporate stars

- Novo Nordisk holds for 2014 the best corporate reputation out of all 14 pharma companies reviewed in this report, according to the patient groups worldwide with an interest in diabetes. The Denmark-based global healthcare company moves up to the top spot from second in 2013, and holds the lead ranking this year for all six of the report’s measurement indicators. Novo Nordisk’s position is remarkable given the company has had to face similar challenges—products approvals, pricing battles, product safety issues—as other companies in the very competitive diabetes sector. This new report examines why such might be the case.

- Bayer moved up to second place overall, from fourth in 2013. The diabetes patient groups have ranked the German global enterprise second for its patient-centricity, the quality of its patient information and its integrity. Although Bayer does not produce diabetes drugs it has a number of treatments for visual impairments brought on by diabetes.
In 2014 Lilly is in third place overall. The diabetes patient groups rank the US pharma major second for its records on patient safety and transparency.

Sanofi ranks fourth position overall in 2014. In the latest review, the French biopharma’s top ranking by indicator is for its provision of useful, high-quality products, for which the diabetes patient groups place it second.

Pfizer is in fifth place overall, moving up strongly from 11th in 2013.

What matters to diabetes patient groups

The PatientView report provides some background analysis as to the reasons for this year’s corporate rankings, but in general it finds that:

- Diabetes patient groups believe that the single most important strategy for improving a pharma company’s corporate reputation is that it should have a patient-centred strategy. This was cited as top priority by 19.8% of the groups in 2014, and is close to the views of patient organizations across all therapy areas, 19% of which considered this strategy to be the most important. The views of the diabetes patient groups were also close to those representing all therapy areas in the next most-important factors – patient safety and the provision of high-quality, useful products.

- Opinions diverge on the importance of fair pricing policies to attaining a good corporate reputation; 15.8% of patient groups across all therapy areas consider such policies to be important, but the percentage of diabetes patient organizations holding this view is almost half, at 8.7%. Unlike other therapy areas like cancer, pricing has not been so much in the spotlight. However with diabetes drug prices now increasing, pricing could become more important to diabetes patient groups.

- Developments in the field of diabetes have been particularly fast-paced in recent years, and the patient groups’ rankings indicate that a company’s reputation is particularly enhanced by its provision not only of effective new drugs but also of efficient administration devices such as needles and pens and blood glucose monitors. There is also wide appreciation of efforts such as DAWN2, the largest global study ever taken to understand the unmet needs of people with diabetes, which was initiated in 2011 by a range of partners including Novo Nordisk, the International Diabetes Federation (IDF) and the International Alliance of Patient Organizations (IAPO).

Pharma industry-wide rankings for 2014

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

2014 rankings for eight healthcare industries

<table>
<thead>
<tr>
<th>Industry</th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail pharmacists</td>
<td>11.8%</td>
<td>51.3%</td>
<td>28.6%</td>
<td>7.6%</td>
</tr>
<tr>
<td>Medical device companies</td>
<td>13.4%</td>
<td>47.1%</td>
<td>31.1%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Generic drug manufacturers</td>
<td>4.2%</td>
<td>45.4%</td>
<td>41.2%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Multinational pharma</td>
<td>2.5%</td>
<td>45.5%</td>
<td>36.1%</td>
<td>15.1%</td>
</tr>
<tr>
<td>Private healthcare</td>
<td>5.9%</td>
<td>41.2%</td>
<td>38.7%</td>
<td>9.2%</td>
</tr>
<tr>
<td>Health insurers (not-for-profit)</td>
<td>5.9%</td>
<td>36.1%</td>
<td>42.9%</td>
<td>11.8%</td>
</tr>
<tr>
<td>Biotechnology companies</td>
<td>5.9%</td>
<td>34.5%</td>
<td>42.0%</td>
<td>10.1%</td>
</tr>
<tr>
<td>Health insurers (for-profit)</td>
<td>0.8%</td>
<td>26.1%</td>
<td>37.8%</td>
<td>31.1%</td>
</tr>
</tbody>
</table>

The multinational pharmaceutical industry’s reputation among diabetes patient groups has improved significantly, with 47.9% now holding the view that it is “excellent” or “good,” compared with 39% in 2013.
The diabetes patient groups also rank multinational pharma’s reputation fourth-best out of the eight healthcare industries. In marked contrast, the 1,150 patient groups representing all therapy areas which responded to PatientView’s annual survey place pharma in sixth position in 2014, ranking it higher only than health insurers (for-profit and not-for-profit).

However, the diabetes patient groups now rank generic drugmakers third for reputation out of the eight healthcare industries, one place above multinational pharma and two positions up from the sixth place which the patient organisations awarded generics firms in 2013. This improved performance appears to be due to the perception among patient groups that access to effective medicines is boosted by the availability of cheaper generic drugs.

Five-year view

29.1% of the diabetes patient groups now say they (or the people their organisation represents) believe that the pharma industry’s reputation has improved in the last five years. This is a significant improvement on 2013 when just 14.1% of the groups had held this view; moreover, this opinion is now shared by 25.1% of all types of patient organisations. However, another 29.1% of diabetes patient groups now also feel that the industry’s reputation has worsened over the period, although this is a drop from the 32.8% holding this opinion in 2013 and compares to 35% of patient organisations across all therapy areas which now take this view.

Conduct report

An increased number of diabetes patient groups believe that the pharmaceutical industry is “excellent” or “good” at innovation: 71% held this view in 2014 compared with 68% in 2013, and 67% of patient organisations across all therapy areas currently agree, the latest survey finds.

In 2014, diabetes patient groups are far more positive about pharma’s abilities to ensure patient safety, with 58% saying that pharma is “Excellent” or “Good” at this activity (the equivalent figure for 2013 was 49%). The same is true for pharma’s provision of high-quality information to patients—50% of respondent diabetes patient groups in 2014 say that pharma is “Excellent” or “Good” at this activity, against 41% saying as much in 2013; for having a good relationship with the media—50% in 2014, against 44% in 2013; and for having a patient-centred strategy—34% in 2014, against 24% in 2013.

Although not as many diabetes patient groups believe pricing is crucial to having a good corporate reputation, fair pricing policies remain a contentious issue as it is with patient groups from all therapy areas). In 2014, just 17% of diabetes patient groups say that pharma is “Excellent” or “Good” at this activity—a figure only marginally higher than the 14% of patient groups from all therapy areas saying the same.
About PatientView’s series of reports on Corporate reputation:
There are 16 reports in the Corporate Reputation series from PatientView; in addition to diabetes, already published are reports on cancer and mental health, and the global edition. To follow are:

HIV/AIDS, Circulatory conditions, Neurological conditions, Rare diseases.

and

Eastern Europe, All Europe, Germany, Nordic region, Spain, UK, USA.

and

The Medical Device Industry in 2014