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 147 Rare-Disease Patient Groups Worldwide

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• Findings based on a survey of 147 patient groups from 31 countries with an interest in rare diseases
• Survey conducted November 2014 to January 2015
• This independent study, funded by PatientView, reveals for the first time the perspectives of 147 patient groups with an interest in rare diseases on the corporate reputation of 15 individual pharma companies, and of the pharma industry as a whole, in 2014. This report also compares the results from the rare-disease patient organisations 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.

The 15 pharma companies reviewed in the study are:
AbbVie | AstraZeneca | Baxter International | Bayer | Boehringer-Ingelheim (B-I) | Bristol-Myers Squibb (BMS) | Eli Lilly (Lilly) | GlaxoSmithKline (GSK) | Janssen | Merck & Co (USA) | Novartis | Novo Nordisk | Pfizer | Roche | Sanofi

Results for individual pharma companies

Sanofi tops the list of 15 companies for corporate reputation in 2014, as ranked by rare-disease patient groups

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

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

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

About the corporate stars

- **Sanofi** is the best-performing company overall, according to the rare-disease patient groups; they place it first for three of the six indicators used by PatientView to assess corporate reputation – patient-centred strategy, patient safety record and for acting with integrity. They also rank second for both providing patients with useful products and for being transparent with its external stakeholders. The French-headquartered global biopharma company’s endeavours in rare diseases are mainly conducted through its Boston US-based subsidiary Genzyme, which became part of the Sanofi group in 2011. Since it was founded in 1981, Genzyme has continually emphasised the importance of strong relationships with patient communities.

- **Novo Nordisk** is placed second overall, and ranks first for its provision of high-quality information for patients. The Danish-based global healthcare company is included because of its activities in the fields of growth disorders and haemophilia, which include the establishment of its own Foundation dedicated to the disease area and its support for patient organisations.

- **Novartis** is placed joint third overall by the rare-disease organisations, and they give it its highest ranking - second - for its patient-centred strategy. The Swiss pharma major continues to be a leading developer of treatments for rare cancers.
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- Pfizer, in joint third place, is ranked first by the rare-disease patient groups for its provision of useful products and also for its transparency with external stakeholders. The US-headquartered biopharma major has a longstanding history of targeting rare-disease R&D, forging strong ties with leading organisations in the sector and focusing on and supporting patients and their needs for example obtaining real-life insights into sickle cell patients, to find out ways to motivate them to volunteer for clinical trials.

- GSK, in fifth place overall, gains its highest rankings for its provision of high-quality information and its patient safety record; for both indicators it is placed second. In 2014, three drugs developed by the UK-headquartered pharma major for the treatment of rare cancers – chronic lymphocytic leukaemia, advanced melanoma and aplastic anaemia – received major-market approval though by January 2015 these drugs passed to Novartis as part of an asset swap deal. GSK retains its Rare Disease Unit which is investigating inherited deficiencies, including respiratory conditions.

What matters to rare-disease patient groups

- This first-ever analysis of how rare-disease patient groups regard the industry reveals that the high prices sought by many manufacturers for their new drugs have caused them to fall sharply down the corporate reputation rankings. Having fair pricing policies is the most important influence on a pharma manufacturer’s reputation, say rare-disease patient groups.

- The survey also finds that a number of other influences are less important to rare-disease groups and their representatives than for patient organisations overall, and these findings include some surprises. For example, while 19% of the 1,150 groups representing all therapy areas which responded to PatientView’s Corporate Reputation survey, published in February 2015, say that having a patient-centred strategy is the most important influence on reputation, just 13.7% of the rare-disease groups agree. Similarly, ensuring patient safety is cited as the most important influence by 13.6% of patient groups overall but by only 12.3% of the rare-disease groups, and 14.3% of patient groups overall - but just 11.6% of rare-disease groups - consider that making high-quality, useful products is the most important influence.

- In contrast, 9.6% of rare-disease organisations prioritise philanthropic activity as most important for improving corporate reputation, compared with just 4.4% for patient groups overall, and the importance of this is borne out by the rare-disease groups’ high rankings for companies engaged in such activities, notably Sanofi/Genzyme, Pfizer, Novo Nordisk and GSK. Transparency in corporate activities, acting with integrity and providing surplus services are also rated more highly by the rare-disease groups than by organisations representing all therapy areas.

Pharma industry-wide rankings for 2014

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

<table>
<thead>
<tr>
<th>2014 rankings for eight healthcare industries</th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of responding rare-disease patient groups stating that the specific healthcare industry’s reputation is “excellent,” “good,” “fair” or “poor”</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail pharmacists</td>
<td>7.1%</td>
<td>48.6%</td>
<td>31.4%</td>
<td>10.7%</td>
</tr>
<tr>
<td>Medical device companies</td>
<td>5.7%</td>
<td>42.9%</td>
<td>40.0%</td>
<td>7.9%</td>
</tr>
<tr>
<td>Private healthcare</td>
<td>5.0%</td>
<td>36.4%</td>
<td>42.9%</td>
<td>12.1%</td>
</tr>
<tr>
<td>Biotechnology companies</td>
<td>5.0%</td>
<td>35.7%</td>
<td>45.7%</td>
<td>8.6%</td>
</tr>
<tr>
<td>Multinational pharma companies</td>
<td>5.7%</td>
<td>31.4%</td>
<td>43.6%</td>
<td>19.3%</td>
</tr>
<tr>
<td>Generic drugmakers</td>
<td>2.1%</td>
<td>34.3%</td>
<td>44.3%</td>
<td>17.1%</td>
</tr>
<tr>
<td>Health insurers (not-for-profit)</td>
<td>4.3%</td>
<td>25.0%</td>
<td>45.7%</td>
<td>18.6%</td>
</tr>
<tr>
<td>Health insurers (for-profit)</td>
<td>2.1%</td>
<td>27.1%</td>
<td>41.4%</td>
<td>23.6%</td>
</tr>
</tbody>
</table>

Rare-disease patient groups hold a higher opinion of the multinational pharmaceutical industry’s reputation than patient groups do in general, PatientView finds.

- The rare-disease patient groups rank the reputation of multinational pharma fifth in the table of eight healthcare industries, while 1,150 patient groups covering all therapeutic areas which responded to PatientView’s report: The Corporate Reputation of Pharma in 2014 – the Patient Perspective, put it in sixth place. Fewer rare-disease groups believe retail pharmacy, medical devices private healthcare and not-for-profit health insurers have an ‘Excellent’ of ‘Good’ corporate reputation, when compared with patient groups from other therapy areas.
Five-year view

- In 2014, 25% of the rare-disease groups say that they, or the people they represent, believe that the industry’s reputation has improved over the past five years; the same percentage of all 1,150 patient groups responding to PatientView’s Corporate Reputation of Pharma 2014 report which hold this view. Slightly more rare-disease groups than the universe of patient organisations believe that the industry’s reputation has worsened during the period, at 36.1% vs 35%, while the remainder of both groups believe that it has not changed – 38.9% of the rare-disease groups, and 39.9% of patient organisations overall, hold this view.

Conduct report

- Organisations with an interest in rare diseases are generally less impressed than patient groups generally about how good the pharmaceutical industry is at carrying out a range of activities which influence their corporate standing with patients and their representative groups. In only one area studied for the report – providing access to clinical trials – do more rare-disease groups than the 1,150 patient organisations overall consider the industry’s performance to be “excellent” or “good,” at 34.5% compared to 34%.

- Rare disease patient groups consider the industry to be “excellent” or “good” at being innovative, at making high-quality, useful products and at ensuring patient safety; however, for a range of other activities, only a minority are impressed by the sector’s performance.

- Pricing continues to be the most pressing concern for all patient organisations, and particularly those with an interest in rare diseases. The PatientView report finds among the rare-disease groups, the percentage believing that pharmaceutical manufacturers’ performance is “excellent” or “good,” in implementing fair pricing policies is just 11%. This finding reflects the difficulties involved in setting affordable prices and reimbursement levels for new “orphan” medicines, which generally have very high development and production costs, but for which a lack of agreement between manufacturers and payers on what is an acceptable price can jeopardise access to these vital treatments for the very small numbers of patients who need them.

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Percentage of patient groups stating that pharma is “Excellent” or “Good” at having fair pricing policies

<table>
<thead>
<tr>
<th>Condition</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diabetes</td>
<td>17%</td>
</tr>
<tr>
<td>All types</td>
<td>14%</td>
</tr>
<tr>
<td>Cancer</td>
<td>13%</td>
</tr>
<tr>
<td>Rare diseases</td>
<td>11%</td>
</tr>
<tr>
<td>Mental health</td>
<td>10%</td>
</tr>
<tr>
<td>HIV/AIDS</td>
<td>9%</td>
</tr>
<tr>
<td>Neurological</td>
<td>9%</td>
</tr>
</tbody>
</table>

END OF PRESS RELEASE
APPENDIX

Geographic profile of the 147 respondent rare-disease patient groups

About PatientView’s series of reports on corporate reputation:

There are 16 reports in the Corporate Reputation series from PatientView. In addition to this new report on rare diseases, already published are The Corporate Reputation of Pharma – the Patient Perspective in 2014: Global Edition, plus studies on HIV/AIDS, diabetes, cancer, mental health and neurological conditions. To follow are:

Circulatory conditions

and

Eastern Europe, All Europe, Germany, the Nordic Region, Spain, UK, USA

and

The Medical Device Industry in 2014.

PRICING

Each of the individual reports in the ‘Corporate Reputation’ series is priced at:

- GBP 2,200 for a single licence (which can be circulated to a maximum of 30 full-time employees of your company).
- GBP 5,500 for a global subscription licence (which can be circulated to all full-time employees in your company, anywhere in the world).

The price of a subscription to the complete set of 16 reports on corporate reputation from a patient perspective is:

- GBP 7,500 for a single licence (which can be circulated to a maximum of 30 full-time employees of your company).
- GBP 14,000 for a global subscription (which can be circulated to all full-time employees in your company, anywhere in the world).