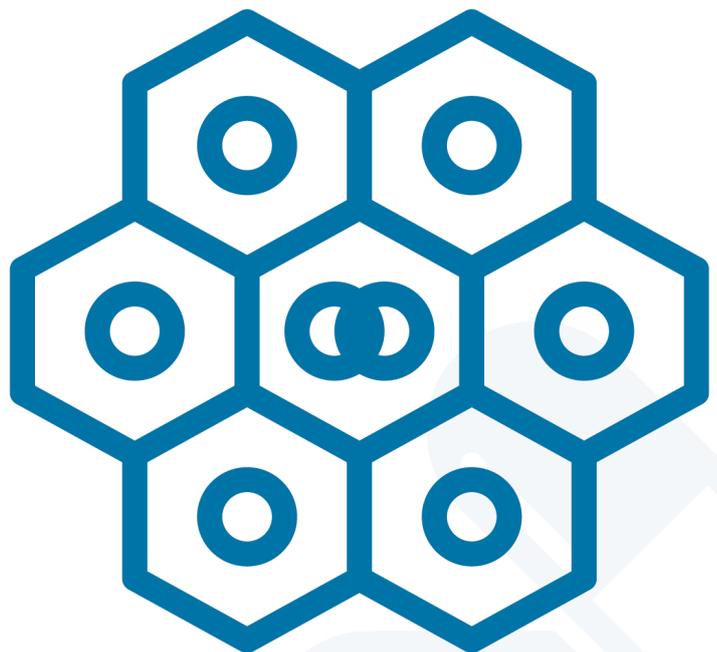


THE CORPORATE REPUTATION OF PHARMA IN 2019

THE PATIENT PERSPECTIVE—CANCER EDITION
THE VIEWS OF 389 CANCER PATIENT GROUPS

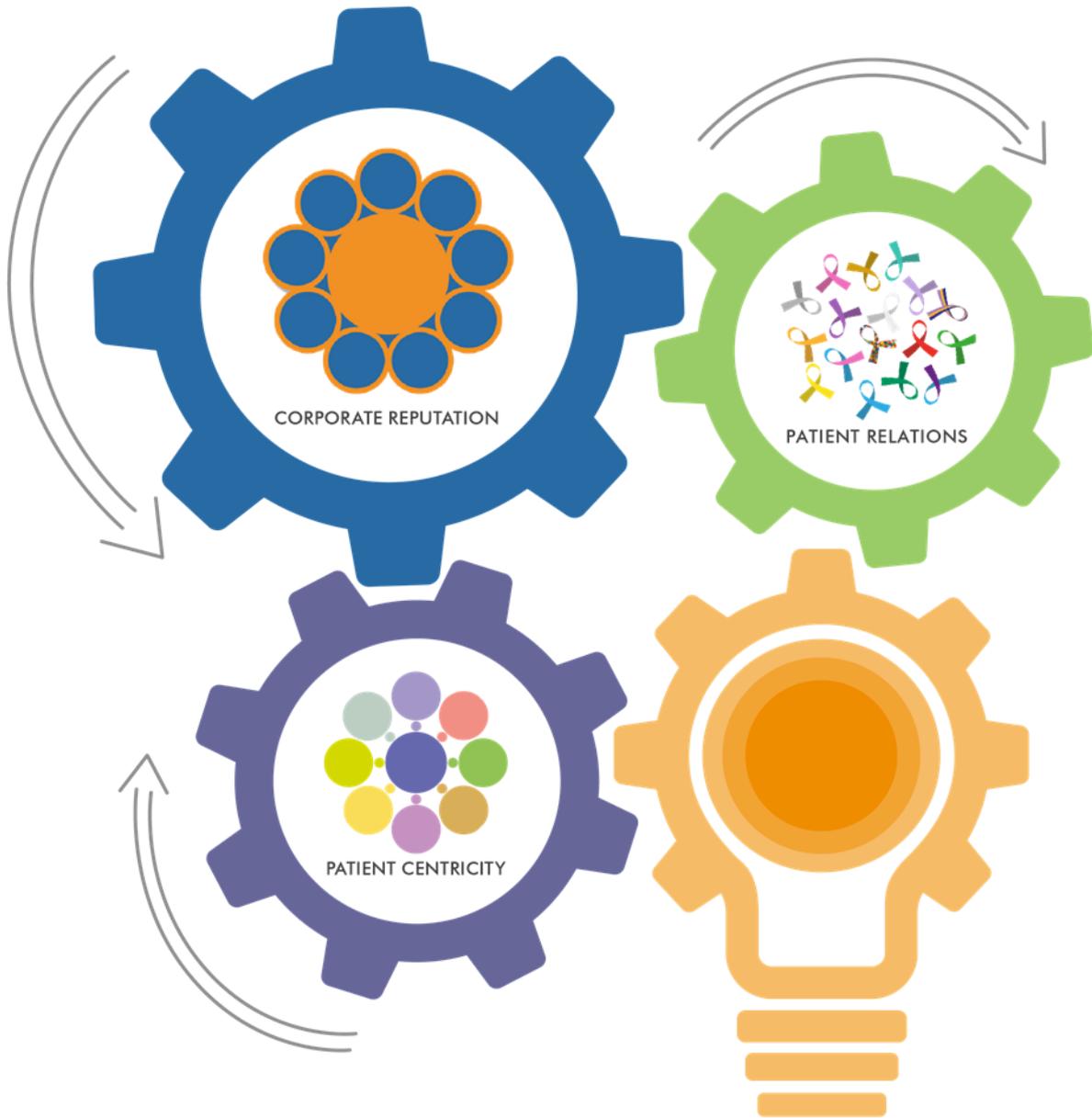
PUBLISHED MAY 2020



 PATIENT
VIEW

PATIENTVIEW'S TOOLKITS

All three toolkits are supportive of one another, and are designed to yield positive advances in corporate reputation from a patient perspective.



PRECONDITIONS TO PATIENT-CENTRICITY ARE CLOSE TO THOSE OF CORPORATE REPUTATION.

A company that is more patient-centric than its peers will also have a better corporate reputation than them among patient groups. Patient groups defined for PatientView the contributing indicators for patient-centricity and for corporate reputation. These evidence-based indicators are virtually the same for both corporate parameters.

BENCHMARKING THE PATIENT MOVEMENT

Benchmarking the patient movement tells you where to make the most effective investments to improve your patient group relationships.

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EXECUTIVE SUMMARY



EXECUTIVE SUMMARY

We are pleased to publish the results of the 2019 (8th) edition of 'The Corporate Reputation of Pharma—from the Perspective of Cancer Patient Groups'.

A note about COVID-19 and the 2019 'Corporate-Reputation' results

Covid-19 should have a relatively limited impact on many of the results of the PatientView 2019 'Corporate-Reputation' study, because the survey took place (November 2019 to late-February 2020) largely before the crisis became global. However, the opinions of the 3 respondent China-based cancer patient groups may have been influenced by the epidemic. Announcements about Covid-19 by some pharma companies during January and February 2020, and reported in the US media, may have influenced the views of the 67 US cancer patient groups responding to the 'Corporate-Reputation' survey during its last two months.

ABOUT THE RESPONDENT CANCER PATIENT GROUPS

389 cancer patient groups responded to the survey about pharma's corporate reputation in 2019—a substantial increase on the 266 cancer patient groups that responded to the previous year's survey of 2018. [Note that 2019's larger response rate (an increase of 46% over that of 2018) is likely to reduce the level of comparability between the 2019 and the 2018 results—a factor which should be taken into account when examining the data.]

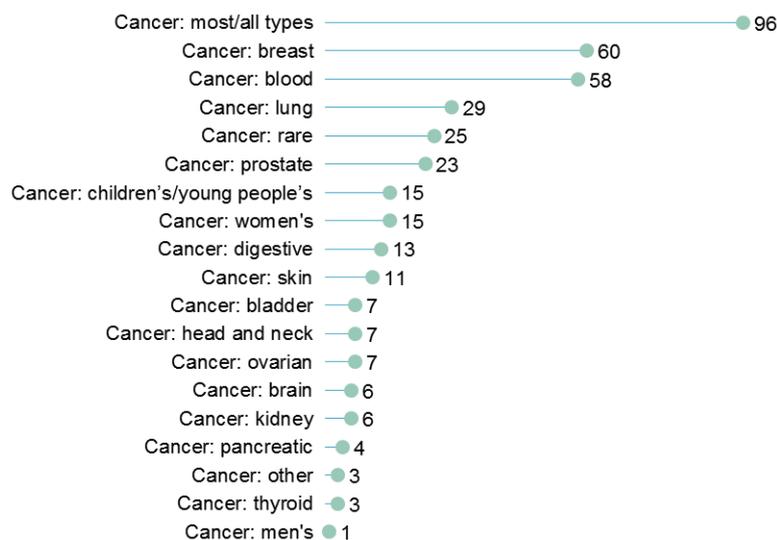
Around 25% of 2019's respondent cancer patient groups were umbrella patient groups, and/or covered most types of cancer. The remainder specialised in various types of cancer.

The 389 cancer patient groups came from 57 countries, with the following geographic remit:

- 68% had a national geographic remit.
- 11% an international remit.
- 11% regional (an area within one country). And ...
- 11% were local.

78% of the 389 cancer patient groups responding to the 2019 survey worked with at least one pharma company.

Specialties of respondent cancer patient groups, 2019
Number of respondent cancer patient groups





EXECUTIVE SUMMARY

INDUSTRY-WIDE FINDINGS

The different types of cancer patient groups vary considerably in their views on pharma

2019's respondent cancer patient groups held diverse opinions on the pharmaceutical industry—according to the cancer specialty of the organisation. While 68% of 2019's 29 respondent lung-cancer patient groups thought that the pharma industry had an "Excellent" or "Good" corporate reputation, only 33% of 2019's 24 respondent prostate-cancer patient groups said the same [see chart below].

Stark differences emerged between the viewpoints of some cancer patient groups between 2018 and 2019. Most notable was the assessment by rare-cancer patient groups that the industry's corporate reputation had risen. Just 14% of 2018's respondent rare-cancer patient groups stated that the pharmaceutical industry had an "Excellent" or "Good" corporate reputation; 2019's figure was 40% (although, even at 40%, this figure was still lower than the equivalents from most other types of cancer patient groups). Prostate-cancer patient groups scored the pharma industry lowest for corporate reputation in 2019 among the industry's 8

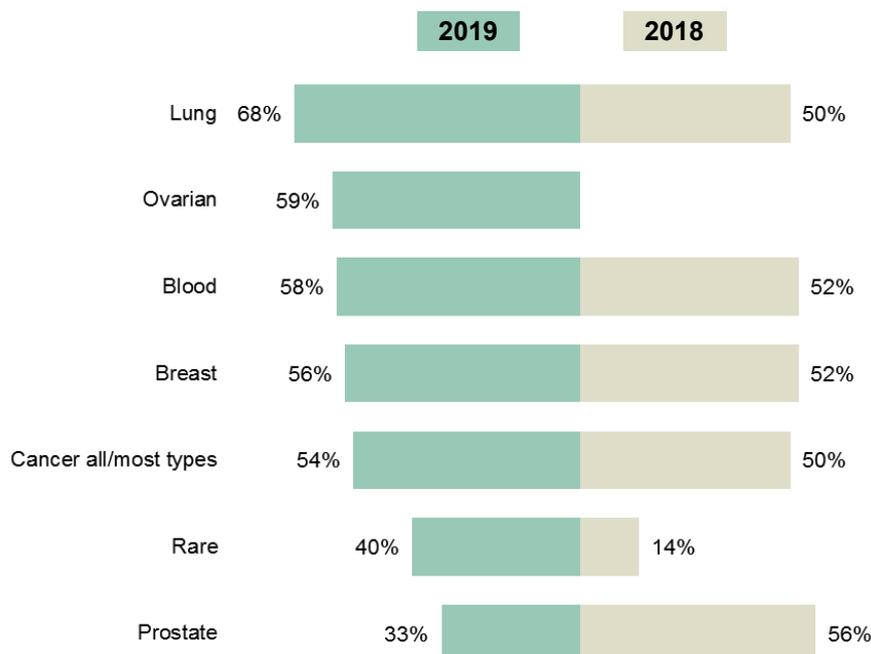
other peer sectors—whereas, in 2018, prostate-cancer patient groups ranked the industry near the top (with 56% stating that the pharmaceutical industry had an "Excellent" or "Good" corporate reputation that year). Of 2019's different types of respondent cancer patient groups, prostate-cancer patient groups appeared to be among the most disengaged with pharma.

Disparate sentiments were also expressed by cancer patient groups when scoring the industry for its ability to carry out activities of importance to patients. Blood-, breast-, lung-, and ovarian-cancer patient groups all scored the industry more highly than prostate-cancer and rare-cancer patient groups [see pages 6-7].

Scale of industry endeavour in each therapy area

2019's industry-wide 'Corporate-Reputation' cancer results can largely be explained by the scale of industry's endeavour in each cancer therapy area, as perceived by the various types of cancer patient groups—specifically, the range of treatments available. [The table on page 8 provides an indication of where individual companies are focusing in the field of oncology (again, from the perception of cancer patient groups).] Cancer patient groups specialising in the more well-established cancer therapy areas—such

The corporate reputation of the pharmaceutical industry, 2019 v. 2018
Percentage of respondent cancer patient groups stating "Excellent" or "Good"





EXECUTIVE SUMMARY



Sample comments on the subject of patient needs in treatment and care, 2019
For a full set of comments from the respondent cancer patient groups, go to Appendix I

All types of cancer	<p>Local patient group, Australia — [Healthcare companies' corporate reputation] "Rare and-less common cancers struggle to attract research dollars and clinical trial drugs."</p> <p>Associazione 'Compagni di viaggio' Onlus [Travel Companions' Association], Italy — [Products of most benefit to patients] "Investire di più su aree di bisogno poco redditive come ad esempio in oncologia l'area delle cure palliative e della terminalità, e le simultaneous care." ("Invest more in unprofitable areas of need, such as, in oncology, the area of palliative and end-of-life care, and simultaneous care.")</p>
Blood cancers	<p>Instituto Roda da Vida [Wheel of Life Institute], Brazil — [Services 'beyond the pill'] "Implementar políticas de apoio para diagnóstico precoce e acesso ao tratamento, que sejam contínuas, independente da mudança do seu quadro de funcionários." ("Implement policies to support in early diagnosis and access to treatment, which are continuous, regardless of any changes in staff.")</p>
Breast-cancer patient groups	<p>National patient group, Korea — [Information for patients] "오프라인의 정보 및 건강강좌 지원." ("Providing support for offline information and health lectures.") — [Services 'beyond the pill'] "환자의 암 극복 후 동아리활동 지원." ("Providing support for club activities of patients after overcoming cancer.")</p>
Lung-cancer patient groups	<p>National patient group, UK — [Products of most benefit to patients] "Innovating treatments for under-served groups, where there are few lines of treatment. Considering placement of new treatments in relation to existing lines of therapy. Enhancing options, rather than replacing/replicating existing therapies. Reducing the side effect and toxicity profile of treatments. Including research into the impact of innovative treatment on those with poorer-performance status/or co-morbidities. Considering treatment design that minimises the impact on the normal daily-living habits of the patient population."</p>
Ovarian-cancer patient groups	<p>Asociación de Afectados por Cáncer de Ovario [Association of those Affected by Ovarian Cancer] (ASACO), Spain — [Services 'beyond the pill'] "El escuchar los problemas reales de las pacientes en cuanto a abordaje óptimo de su enfermedad." ("Listen to patients' real problems in order to address their disease in the best-possible way.")</p>
Prostate-cancer patient groups	<p>National patient group, Japan — [Products of most benefit to patients] "去勢抵抗性がんに対する新薬。" ("New drugs for castration-resistant prostate cancer.")</p> <p>Prostatkreftforeningen [Prostate Society] PROFO Romerike, Norway — [Products of most benefit to patients] "Slutte å skape falske forventninger." ("Stop creating false expectations.")</p>
Rare-cancer patient groups	<p>National patient group, Bulgaria — [Patient centricity] "Our group is working with rare-cancer patients. Probably, the pharma industry is not interested in such diseases."</p> <p>National patient group, Canada — [Products of most benefit to patients] "Develop products for rare types of cancers. Have a percentage of R&D dedicated to rare disease."</p>



APPENDIX I

THE RESPONDENT CANCER PATIENT GROUPS: THEIR VIEWS ON PHARMA, AND THEIR RECOMMENDATIONS FOR IMPROVING CORPORATE REPUTATION, 2019-2020

These quotations from respondent cancer patient groups are arranged in alphabetic order of the patient-groups' cancer specialty, and, within that, alphabetic order of country.

Patient groups that wish their quotes to be attributed are named (the rest are anonymised).

CANCER SPECIALTY	PAGE
Most/all types of cancer	120
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Brain cancer	144
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Other types of cancer	173



CANCER PATIENT-GROUP FEEDBACK ON (AND ADVICE TO) PHARMA, 2019

On this page ...

Cancer: most/all
types

Cancer: • most/all types

Local cancer patient group, Australia

Familiar with: AbbVie, Amgen, AstraZeneca, Bayer, Eli Lilly, GSK, Merck & Co/MSD, Novartis.

Worked with: Bristol Myers Squibb, Pfizer, Roche/Genentech.

— [Healthcare companies' corporate reputation] "Rare and less-common cancers struggle to attract research dollars and clinical-trial drugs."

— [Patient centricity] "Be more transparent. Work with patient advocacy groups, like Rare Cancers. Provide more assistance to support those living with disease."

— [Information for patients] "Information for patients in other languages. See the fact sheets developed by www.btaa.org.au in 10 languages, plus simple English."

— [Patient safety] "Be open about side effects."

— [Transparency] "Medicines Australia work with companies to ensure that they are transparent. All are pretty good on reporting."

— [Integrity] "Choose community stakeholder liaison people more on ability, and less on appearances."

Krebspatienten für Krebspatienten, Austria

Familiar with: Allergan, Amgen, AstraZeneca, Bayer, Biogen, Bristol Myers Squibb, Eli Lilly, Gilead (including Kite Pharma), GSK, Janssen, Novartis, Novo Nordisk, Roche/Genentech, Sandoz, Takeda (including Shire), Teva.

Worked with: Merck KGaA/EMD Serono, Merck & Co/MSD, Pfizer, Sanofi.

— [Information for patients] "Kontakte, Printangebote." ("Contact; printed content.")

Núcleo Assistencial para Pessoas com Câncer [Assistance Centre for People with Cancer] (NASPEC), Brazil

Familiar with: AbbVie, Merck & Co/MSD.

Worked with: Merck KGaA/EMD Serono, Roche/Genentech.

— [Patient centricity] "Dar condição de acesso aos pacientes nas novas drogas, apoiar ações

de representantes de pacientes." ("Provide conditions for patient access to new drugs; support the campaigns of patient representatives.")

— [Information for patients] "Manter contato e capacitar os representantes de organização dos pacientes." ("Maintain contact with, and provide training for, the representatives of patient groups.")

— [Patient safety] "Dar transparência aos resultados das pesquisas e ser éticos." ("Be transparent in research results, and be ethical.")

— [Products of most benefit to patients] "Investir em pesquisa nos cânceres de maior incidência de mortes." ("Invest in research into the types of cancer with the highest mortality rates.")

— [Transparency] "Divulgar resultados de pesquisas e investimentos." ("Share the results from research and investments.")

— [Integrity] "Serem éticos." ("Be ethical.")

— [Patient-group partnerships] "Contribuir para crescimento e conhecimento dos grupos." ("Contribute to the growth and knowledge of patient groups.")

— [Services 'beyond the pill'] "Facilitar agregar conhecimento para fortalecer suas lutas." ("Facilitate acquiring knowledge, in order to strengthen advocacy campaigns.")

— [Engaging patients in R&D] "Dar conhecimento as organizações de pacientes os andamentos das pesquisas." ("Inform patient groups about the progress of trials.")

Regional cancer patient group, Brazil

Familiar with: Astellas, Bristol Myers Squibb, Merck & Co/MSD.

Worked with: Merck KGaA/EMD Serono, Novartis, Pfizer, Roche/Genentech.

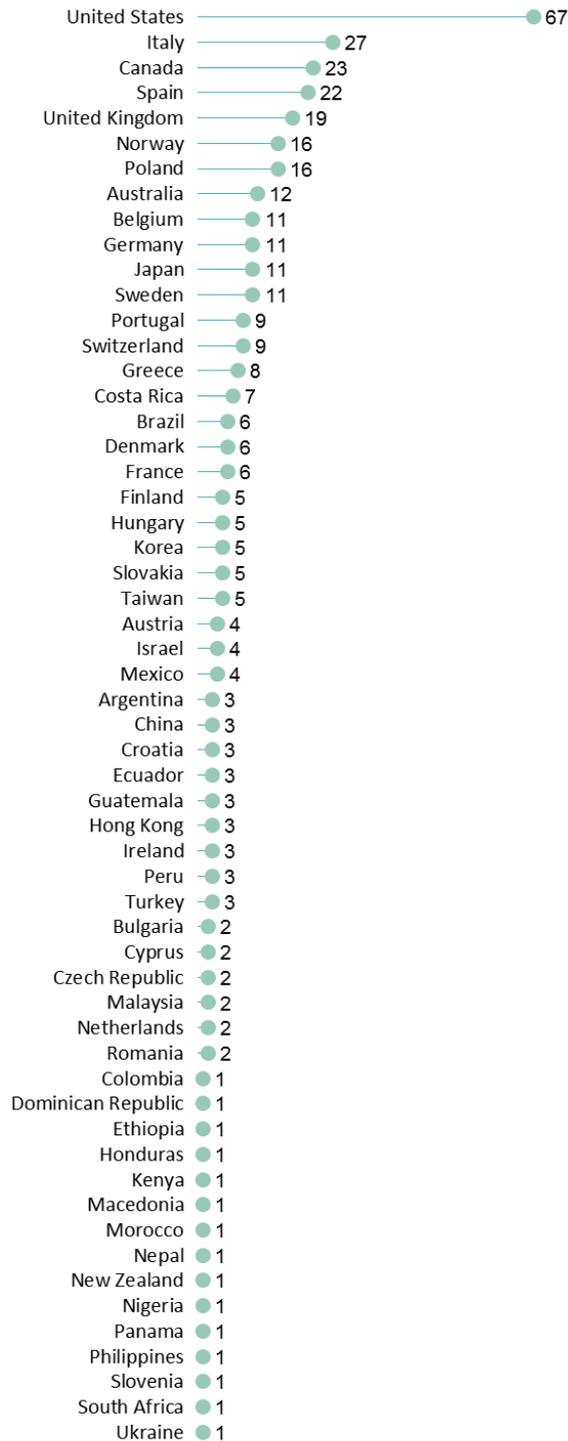
— [Patient centricity] "Envolver o paciente no desenvolvimento de novas tecnologias em saúde e empoderar esse paciente para que seja protagonista da sua própria História." ("Involve the patient in the development of new health technologies, and empower the patient to be the protagonist in their own story.")

— [Information for patients] "Fornecer informações a cerca da doença e dos tratamentos em uma linguagem acessível." ("Provide information about the



COUNTRY HEADQUARTERS OF RESPONDENT CANCER PATIENT GROUPS, 2019

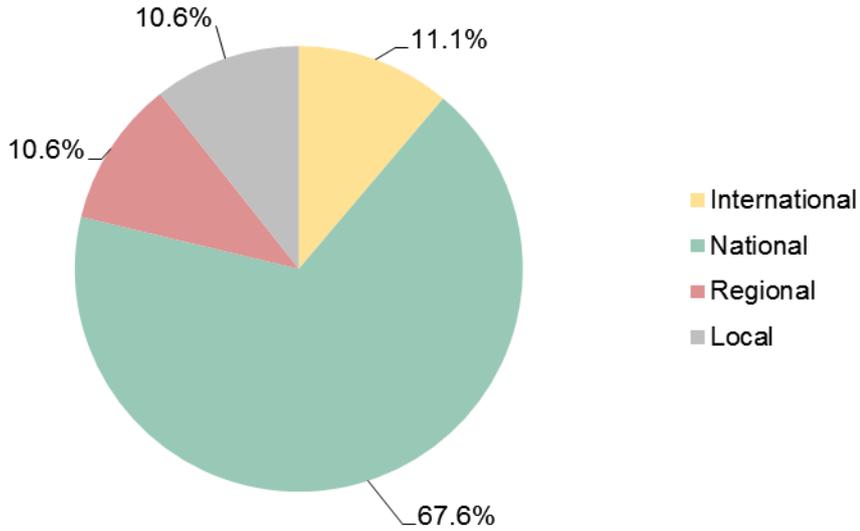
Number of respondent cancer patient groups





GEOGRAPHIC REMIT OF RESPONDENT CANCER PATIENT GROUPS, 2019

Percentage of respondent cancer patient groups





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