

THE CORPORATE REPUTATION OF PHARMA IN 2019

THE PATIENT PERSPECTIVE—SPAIN EDITION
THE VIEWS OF 164 SPANISH PATIENT GROUPS



PUBLISHED JULY 2020



PATIENTVIEW'S COVID-RELATED RESEARCH

A new PatientView survey: 'The experience of PATIENT ORGANISATIONS during the Covid-19 global pandemic' —*now launched and running*

This mid-2020 survey hopes to:

- ▶ Quantify the impact of Covid-19 on patient organisations.
- ▶ Map the activities of patient groups in various countries, and across a number of disease specialties, in reaction to Covid-19.
- ▶ Identify the areas in which patient groups are resilient, and those in which they need targeted support.
- ▶ Discover how patient organisations have responded to the challenges of the pandemic.

Publication date of results: September 2020

A new service: #PAGC19

PatientView has launched #PAGC19 on Twitter, and is encouraging patient groups to adopt this hashtag in any of their tweets about Covid-19.

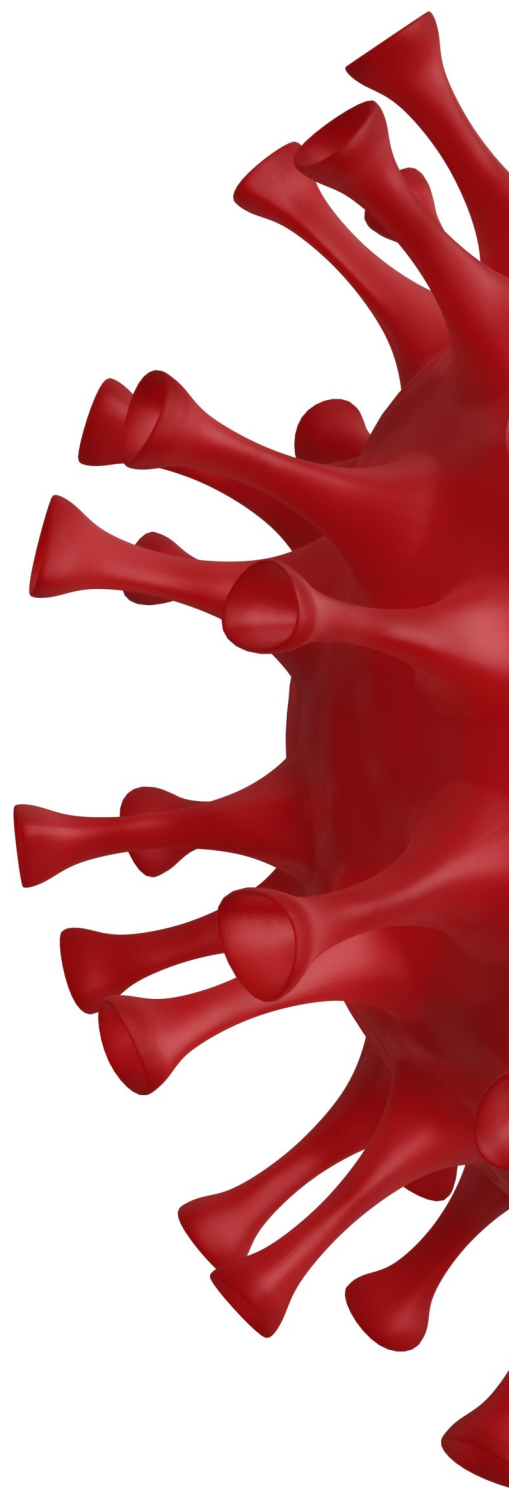
Patients are having difficulty finding healthcare information on Covid-19 that is both relevant to their needs, and trustworthy. Fortunately, patient groups comprise a powerful and responsible source of tailored support and information for people living with a disease condition, and concerned about Covid.

All tweets containing #PAGC19 are automatically picked up and pooled on the website: <https://patientviewblog.com>.

The #PAGC19 tweets are categorised on the website according to disease area—so that patients can quickly find tweets relevant to their own medical condition.

Importantly, the source of every tweet included on the website is easily identifiable (via the Twitter user name that begins with @), so that patients can be sure who is actually providing the information and support.

The website also files patient-group-recommended videos of experts pointing out solutions to the problem of living with a medical condition during the pandemic.



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TABLES AND CHARTS

- ▶ Number of respondent Spanish patient groups claiming familiarity with the company, 2019.
- ▶ Number of respondent Spanish patient groups saying that they had a working relationship with the company, 2019.
- ▶ Profiles of respondent Spanish patient groups familiar with the company, 2019: specialties, geographic remit; and types of relationships.
- ▶ Company scores among respondent Spanish patient groups familiar with the company, and which work with the company, for each of the 12 indicators of corporate reputation, 2019.
- ▶ Percentage of the respondent Spanish patient groups that work with the company, but which also work with other companies, 2019.
- ▶ Overall rankings for the company, according to respondent Spanish patient groups familiar with the company, 2019 v. 2018.
- ▶ Overall rankings for the company, according to respondent Spanish patient groups that work with the company, 2019 v. 2018.
- ▶ Company rankings for each of the 12 indicators according to respondent Spanish patient groups familiar, or working, with the company, 2019 v. 2018.
- ▶ Snapshot view: where the company sits in the corporate tiers for each of the 12 indicators (in the higher, the middle, or the lower tier), as assessed by respondent Spanish patient groups familiar with the company, 2019.
- ▶ Snapshot view: where the company sits in the corporate tiers for each of the 12 indicators (in the higher, the middle, or the lower tier), as assessed by respondent Spanish patient groups that work with the company, 2019.
- ▶ The company's Patient Corporate Reputation Indexes (PCRIs), 2015-2019—selected indicators.

COMPANY	PAGE
AbbVie	42
Almirall	44
AstraZeneca	46
Bayer	48
Biogen	50
Boehringer Ingelheim	52
Bristol Myers Squibb	54
Eli Lilly	56
Gilead	58
Grifols	60
Grünenthal	62
GSK	64
Janssen	66
LEO Pharma	68
Merck & Co/MSD	70
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Novartis	74
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Pfizer	78
Roche	80
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APPENDIX I—page numbers

Feedback/advice from respondent Spanish patient groups, 2019

RESPONDENT SPECIALTY	PAGE
Ankylosing spondylitis	89
Arthritis (of most/all types)	89
Asthma	91
Asthma and allergy	91
Ataxia	92
Autoimmune	93
Cancer (of most/all types)	93
Cancer: blood	94
Cancer: breast	94
Cancer: digestive	95
Cancer: head and neck	95
Cancer: pancreatic	96
Cancer: rare	96
Cancer: skin	97
Cancer: women's	97
Chronic disease in general	98
Circulatory: heart	99
Circulatory: thrombosis	100
Dementia/memory disorders	100
Diabetes	101
Disability: hearing loss	101
Disability (other types of)	102
Endocrine conditions (of most/all types)	102
Epilepsy	102
Familial hypercholesterolemia	103
Fibromyalgia	103
Haemophilia	104
Hepatitis	104
HIV/AIDS	105
Infection	107
Liver conditions (other types of)	108
Lupus	108
Medical errors	108
Multiple sclerosis	109
Neurological conditions (other types of)	109
Neuromuscular conditions	109
Parkinson's	110
Patients' rights	111
Pulmonary fibrosis	111
Pulmonary hypertension	112
Rare diseases	112
Schizophrenia	113
Visual impairment	114



EXECUTIVE SUMMARY



EXECUTIVE SUMMARY

We are pleased to publish the results of the 6th edition of 'The Corporate Reputation of Pharma—from the Perspective of Spanish Patient Groups, 2019'.

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

COVID-19 should have a relatively limited impact on 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, early announcements by companies (such as J&J) on their contributions to tackle Covid-19 may have had some effect on the 2019 'Corporate-Reputation' results.

Covid-19 is currently creating greater public awareness of the pharmaceutical industry. On the one hand, the industry's scientific abilities are being applauded. On the other hand, drug companies have come under pressure to reduce prices during the pandemic. The 2019 'Corporate-Reputation' results can therefore serve as a platform to assist pharma in its corporate-reputation strategies, in the context of the Covid-19 crisis and thereafter—at a time when the reputation of the pharmaceutical industry is very much in the public eye.

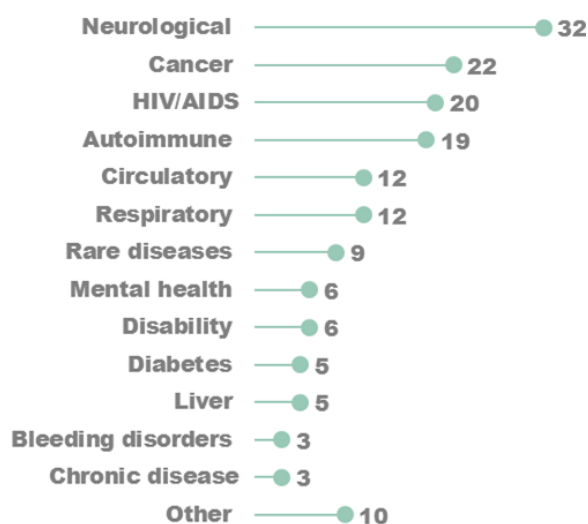
ABOUT 2019's RESPONDENT SPANISH PATIENT GROUPS

164 Spanish patient groups responded to the 2019 survey on pharma's corporate reputation (137 Spanish patient groups responded to the previous year's survey of 2018).

Therapy areas: 2019's respondent Spanish patient groups specialised in a wide variety of therapy areas [see chart, right].

- **Autoimmune** includes: ankylosing spondylitis; arthritis; Crohn's and colitis; lupus; psoriasis and psoriatic arthritis.
- **Cancer** includes: cancer in general; and the following cancers—blood; breast; children's/young people's; digestive; head and neck; lung; pancreatic; skin; and women's.
- **Circulatory** includes: circulatory diseases in general; and the following circulatory diseases—familial hypercholesterolemia; heart disease; and thrombosis.

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



- **Mental health** includes: mental health in general; depression; and schizophrenia.
- **Neurological** includes: neurological conditions in general; and the following neurological conditions—ataxia; brain injury; dementia/memory disorders; epilepsy; fibromyalgia; migraine/other headache disorders; multiple sclerosis; neuromuscular conditions; pain; and Parkinson's.
- **Respiratory** includes: asthma; COPD; cystic fibrosis; pulmonary fibrosis; and pulmonary hypertension.

Geographic remit: 43% of the respondent Spanish patient groups had a national geographic remit; 37% were regional; 17%, international; and 4%, local.

Relationships with pharma: 102 of the 164 Spanish patient groups responding to the 2019 survey worked with at least one pharma company.



THE RELATIONSHIPS THAT SPANISH PATIENT GROUPS HAVE WITH PHARMA, 2019



SPANISH PATIENT GROUPS: FAMILIARITY, AND PARTNERSHIPS, WITH PHARMA COMPANIES, 2019

(Number of respondent Spanish patient groups)

Respondent Spanish patient groups—their familiarity, and partnerships, with 23 select major multinationals, 2019

Company	Number familiar with the company	Number that work with the company
AbbVie	42	24
Almirall	29	4
AstraZeneca	36	13
Bayer	66	14
Biogen	23	7
Boehringer Ingelheim	45	12
Bristol Myers Squibb	48	22
Eli Lilly	40	18
Gilead	38	21
Grifols	31	5
Grünenthal	21	12
GSK	54	18
Janssen	64	31
LEO Pharma	21	6
Merck & Co/MSD	62	24
Merck KGaA	24	6
Novartis	93	33
Novo Nordisk	20	8
Pfizer	85	27
Roche	77	22
Sanofi	44	17
Takeda/Shire	20	7
ViiV Healthcare	26	17



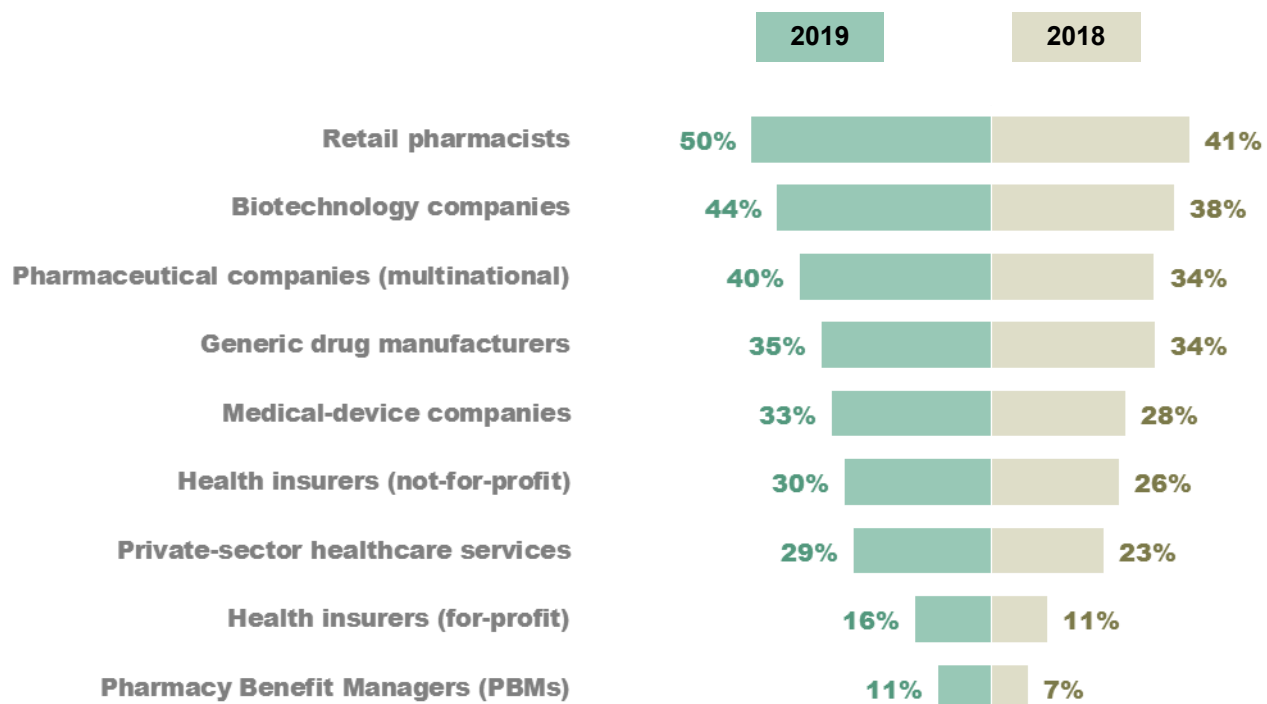
THE CORPORATE REPUTATION OF THE PHARMA INDUSTRY, 2019 —FROM THE PERSPECTIVE OF SPANISH PATIENT GROUPS

- The corporate reputation of the pharma industry, 2019 v. 2018—compared with that of eight other healthcare sectors
- The corporate reputation of the pharma industry over time, 2014-2019
- The performance of the pharma industry in 2019 at activities important to Spanish patient groups
- The performance of the pharma industry at activities important to Spanish patient groups, 2015-2019



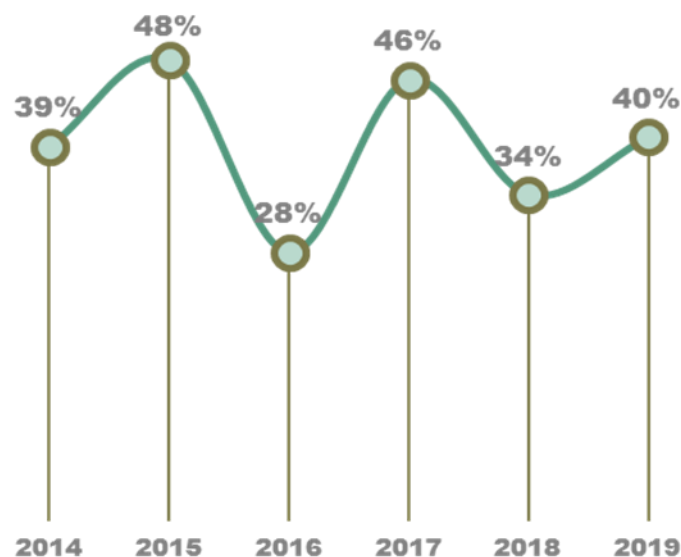
THE CORPORATE REPUTATION OF THE PHARMACEUTICAL INDUSTRY, 2019 v. 2018 —COMPARED WITH THAT OF EIGHT OTHER HEALTHCARE SECTORS

(Percentage of respondent Spanish patient groups stating “Excellent” or “Good”)



THE CORPORATE REPUTATION OF THE PHARMACEUTICAL INDUSTRY, 2014-2019

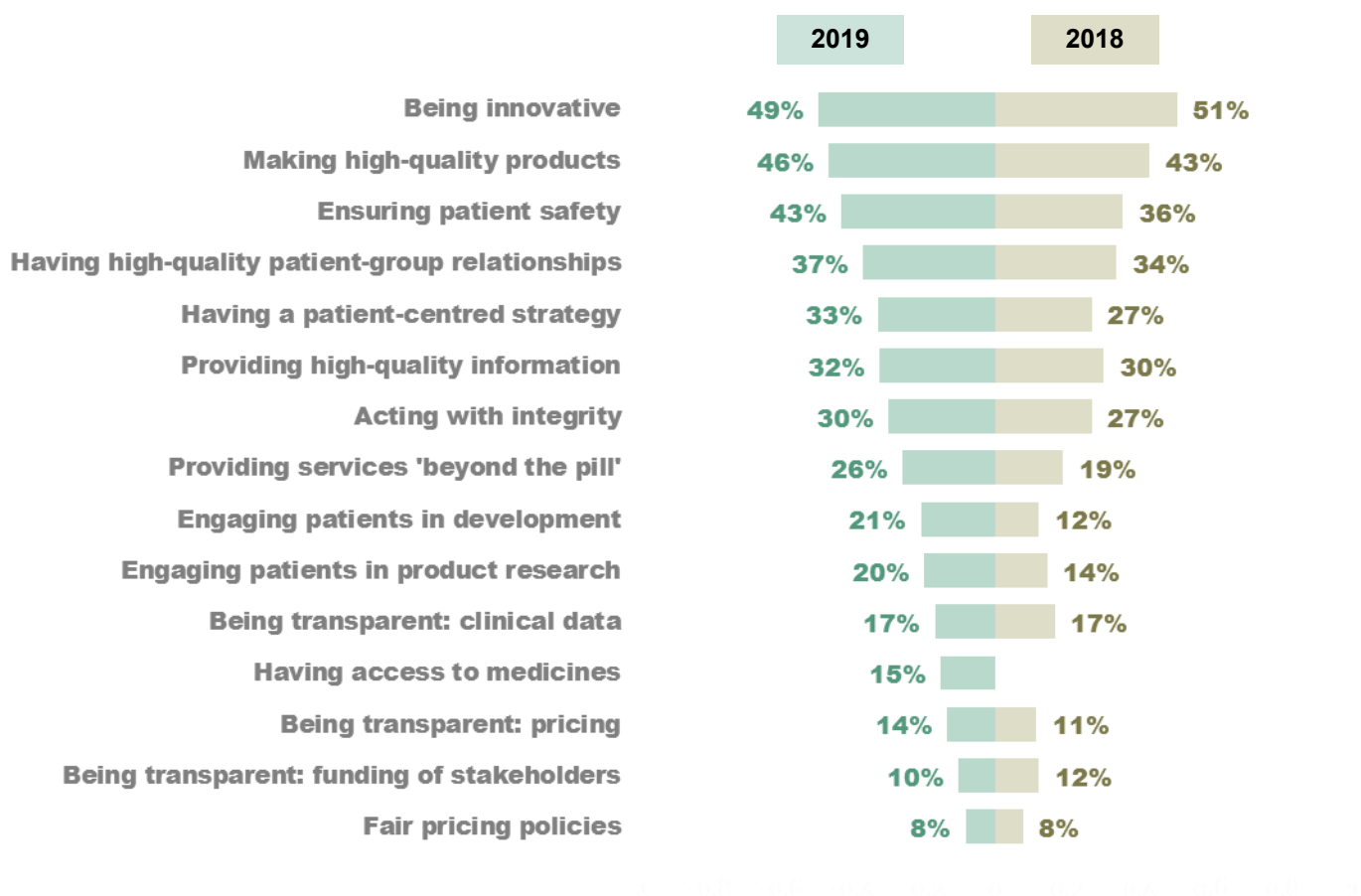
(Percentage of respondent Spanish patient groups stating “Excellent” or “Good”)





HOW GOOD OR BAD THE PHARMACEUTICAL INDUSTRY WAS IN 2019 v. 2018 AT CARRYING OUT SPECIFIC ACTIVITIES

—all of which influence the industry's corporate standing with patients and patient groups
(Percentage of respondent Spanish patient groups stating "Excellent" or "Good")





RANKINGS OF 23 INDIVIDUAL PHARMA COMPANIES

ACCORDING TO SPANISH PATIENT GROUPS FAMILIAR
WITH THE COMPANIES

- ▶ 2019 rankings for each indicator of corporate reputation, high to low—compared with 2018
- ▶ Final 2019 overall rankings, A to Z, and high to low—compared with 2018



THE CORPORATE REPUTATION OF PHARMA —SPAIN EDITION

23 COMPANIES, 2019 (v. 2018)



PROFILES OF THE 23 COMPANIES

COMPANY	PAGE
AbbVie	42
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Biogen	50
Boehringer Ingelheim	52
Bristol Myers Squibb	54
Eli Lilly	56
Gilead	58
Grifols	60
Grünenthal	62
GSK	64
Janssen	66
LEO Pharma	68
Merck & Co/MSD	70
Merck KGaA	72
Novartis	74
Novo Nordisk	76
Pfizer	78
Roche	80
Sanofi	82
Takeda/Shire	84
ViiV Healthcare	86



THE TWELVE INDICATORS OF CORPORATE REPUTATION, 2019 (v. 2018)

1. Patient centricity.
2. Patient information.
3. Patient safety.
4. High-quality products.
- 5i. Transparency: pricing.
- 5ii. Transparency: clinical-trial data.

- 5iii. Transparency: funding of stakeholders.
6. Integrity.
7. Quality of relationships with patient groups.
8. Providing services 'beyond the pill'.
- 9i. Engaging patients in research.
- 9ii. Engaging patients in development.

1ST PAGE:

- ▶ Number of respondent Spanish patient groups familiar with the company, 2019.
- ▶ The number of respondent Spanish patient groups saying that they had a working relationship with the company, 2019.
- ▶ The profile of the respondent Spanish patient groups familiar with the company (specialties, and geographic remit), 2019.
- ▶ The types of relationships that the company had with its Spanish patient-group partners, 2019.
- ▶ Company performance at corporate reputation in 2019, according to respondent Spanish patient groups familiar, and which partner/work, with the company.
- ▶ Competitors' relationships in 2019 with the respondent Spanish patient groups with which the company partners/works.

NOTE

About the **tiers**
Companies are allocated into tiers for their corporate reputation, as follows:

FAMILIAR WITH

- Rankings 1-7 = Top tier.
- Rankings 8-15 = Middle tier.
- Rankings 16-23 = Lower tier.

WORK WITH

- Rankings 1-4 = Top tier.
- Rankings 5-8 = Middle tier.
- Rankings 9-12 = Lower tier.

2ND PAGE:

- ▶ Overall rankings for the company, according to respondent Spanish patient groups familiar with the company, 2019 (v. 2018).
- ▶ Overall rankings for the company, according to respondent Spanish patient groups that work with the company, 2019 (v. 2018).
- ▶ Company rankings for each of the 12 indicators, according to respondent Spanish patient groups familiar, or working, with the company, 2019 (v. 2018).
- ▶ Snapshot view: where the company sits in the corporate tiers for each of the 12 indicators (in the higher, the middle, or the lower tier), as assessed by respondent Spanish patient groups familiar with the company, 2019.
- ▶ Snapshot view: where the company sits in the corporate tiers for each of the 12 indicators (in the higher, the middle, or the lower tier), as assessed by respondent Spanish patient groups that work with the company, 2019.
- ▶ The company's overall Patient Corporate Reputation Index (PCRI), 2015-2019, as assessed by respondent Spanish patient groups familiar with the company; plus PCRI performance for select indicators.

[The Patient Corporate Reputation Index (PCRI) is a measure designed to standardise PatientView's ranking data, to prevent results from being influenced by the different numbers of companies included in the Spain analyses, 2015-2019.

PCRI ranking is from 0 to 1, with 1 being the best (the highest) rank.]



APPENDIX I:

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

These quotations from respondent Spanish patient groups are arranged in alphabetic order of the patient-groups' specialty.

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

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Lupus	108
Medical errors	108
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Neuromuscular conditions	109
Parkinson's	110
Patients' rights	111
Pulmonary fibrosis	111
Pulmonary hypertension	112
Rare diseases	112
Schizophrenia	113
Visual impairment	114



APPENDIX II

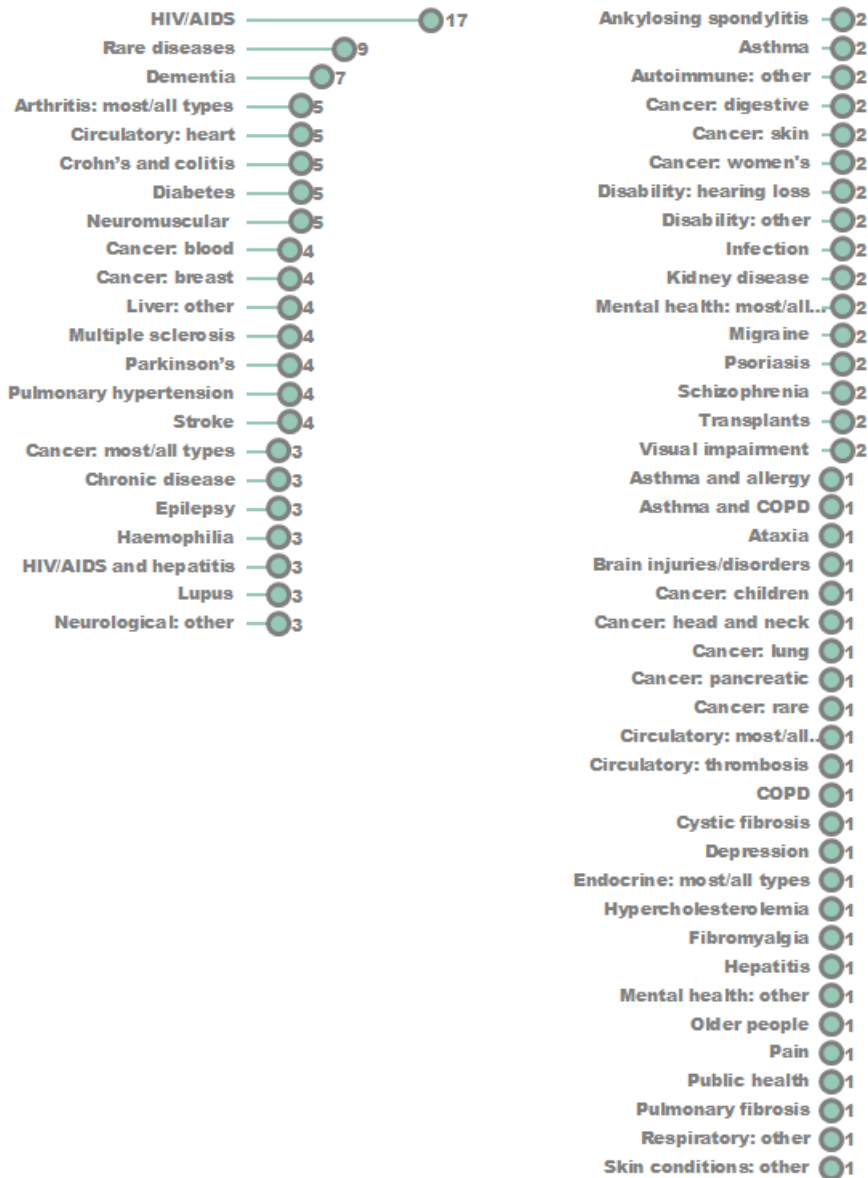
PROFILING QUESTIONS—SPAIN EDITION, 2019

- ▶ Specialties of respondent Spanish patient groups, 2019
- ▶ Geographic remit of respondent Spanish patient groups, 2019



SPECIALTIES OF RESPONDENT SPANISH PATIENT GROUPS, 2019

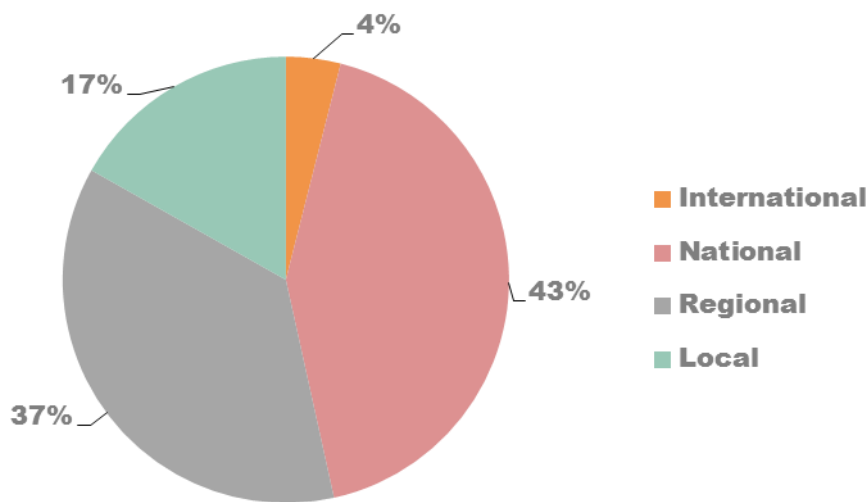
Number of respondent Spanish patient groups





GEOGRAPHIC REMIT OF RESPONDENT SPANISH PATIENT GROUPS, 2019

Percentage of respondent Spanish patient groups





Contact details:

PatientView Ltd

Registered office: One Fleet Place, London, EC4M 7WS, UK

Tel: +44-(0)1547-520-965

Email: report@patient-view.com

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