

# What 205 Asian patient groups think of 31 pharma companies in 2019

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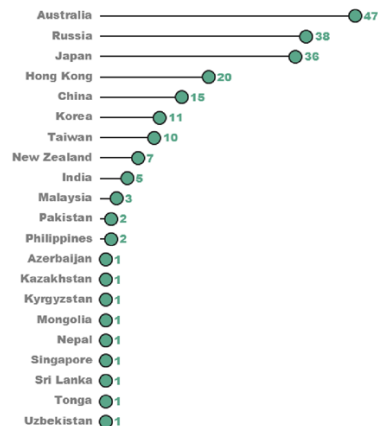
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This is the 2nd edition of 'The Corporate Reputation of Pharma - from the Perspective of Asian Patient Groups'. These 2019 results are drawn from a survey of Asian patient groups, conducted November 2019 - February 2020.

Note: *The PatientView survey took place largely before the Covid crisis became global. However, the media across the Asian region were closely covering the pandemic early on—following the first signs of an unusual 'pneumonia' in Wuhan, China, reported to the World Health Organization on December 31st, 2019.*

## Country headquarters of respondent Asian patient groups, 2019; number of patient groups



## About the 2019 survey of Asian patient groups

**Country headquarters.** PatientView includes in this 2019 Asia analysis countries located exclusively in Asia, and countries with transcontinental land territories that stretch into Asia (Russia is the main example). By these criteria, responses were received from a total of 21 Asian countries [see chart], although the majority of the respondent Asian patient groups—59%—came from Australia, Russia, and Japan.

**Therapy areas.** 2019's 205 respondent Asian patient groups specialised in 66 different therapy areas. The largest representation, 13%, were HIV/AIDS patient groups.

**Geographic remit.** The 205 Asian patient groups reported the following geographic remits: 55% had a national geographic remit; 23% were regional (a large area within their country); 18% local; and 4% had an international remit.

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## On the relationships that Asian patient groups had with pharma, 2019

71% of the 205 Asian patient groups responding to the 2019 survey worked with at least one pharma company.

**The 31 companies included for assessment in the 2019 Asia 'Corporate-Reputation' analyses** (in alphabetical order):

AbbVie | Allergan | Amgen | Astellas | AstraZeneca | Bayer | Biogen |  
Boehringer Ingelheim | Bristol Myers Squibb | Celgene\* | CSL Behring |  
Daiichi Sankyo | Eisai | Eli Lilly | Gilead | GSK | Janssen | Merck & Co/MSD |  
Merck KGaA | Mundipharma | Novartis | Novo Nordisk | Octapharma | Otsuka  
| Pfizer | Roche (Chugai in Japan) | Sandoz | Sanofi | Takeda/Shire | Teva |  
ViiV Healthcare

\* Celgene has been included as a separate entity in the 2019 results because the company's acquisition by Bristol Myers Squibb was only completed in November 2019, and the 2019 'Corporate-Reputation' survey is intended to reflect the views of patient groups throughout 2019.

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## What this report contains

**Industry-wide analyses:** The 2019 Asia 'Corporate-Reputation' report examines issues of importance to Asian patient groups, including three subjects that dominated the patient-group/pharma landscape in Asia in 2019:

- drug pricing;
- transparency of pricing policies; and
- patient engagement in R&D.

Analyses are reinforced by extensive feedback from 2019's respondent Asian patient groups [found in Appendix I], organised according to the countries of the respondent patient groups.

**The Asia report contains case studies** of three very-different countries/regions—Australasia, Japan, and Russia.

**Individual company analyses:** The 31 pharma companies are reviewed by 2019's 205 respondent Asian patient groups for overall corporate reputation, and for performance at 12 individual indicators of corporate reputation.

The 12 indicators used to measure corporate reputation from a patient perspective

- |   |  |
|---|--|
| 1. Patient centricity.                  | 5iii. Transparency: funding of stakeholders.     |
| 2. Patient information.                 | 6. Integrity.                                    |
| 3. Patient safety.                      | 7. Quality of relationships with patient groups. |
| 4. High-quality products.               | 8. Providing services 'beyond the pill'.         |
| 5i. Transparency: pricing.              | 9i. Engaging patients in research.               |
| 5ii. Transparency: clinical-trial data. | 9ii. Engaging patients in development.           |

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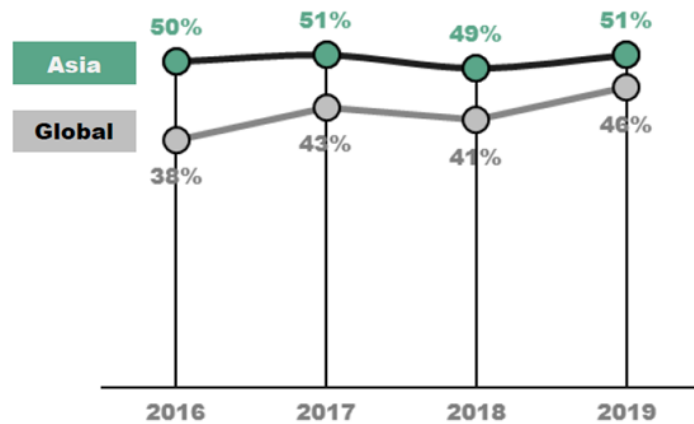
## Key industry-wide findings for Asia, 2019

### The corporate reputation of the pharma industry as a whole in Asia

2019's respondent Asian patient groups were more positive about the pharmaceutical industry's corporate reputation than patient groups worldwide. 51% of 2019's respondent Asian patient groups described the industry's corporate reputation as "Excellent" or "Good", compared with 46% saying the same worldwide. Indeed, Asian patient groups have remained consistently more positive about the pharma industry than their peers in

other parts of the world since 2016, when PatientView first began measuring the Asian input [see chart below].

The corporate reputation of the pharmaceutical industry, Asia v. global, 2016-2019 (percentage of respondent patient groups stating “Excellent” or “Good”)



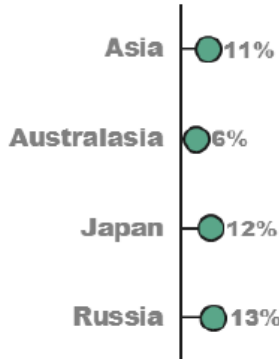
**On high-quality products:** A key reason why Asian patient groups rate the overall corporate reputation of pharma more highly than patient groups from elsewhere is their obvious conviction that the pharmaceutical industry produces high-quality products of benefit to patients. As many as 56% of 2019’s 205 respondent Asian patient groups described pharma as “Excellent” or “Good” at creating high-quality products. The equivalent figure from patient groups worldwide was 53% in 2019.

**Main concerns:** While Asian patient groups have confidence in the pharmaceutical industry’s ability to produce high-quality products of benefit to patients, and also perhaps ensure the safety of the patients who take the industry’s medicines, Asian patient groups remain less sure of the efficacy of other elements of the industry. As mentioned above in this press release, the greatest worries of Asian patient groups in 2019 appear to have been:

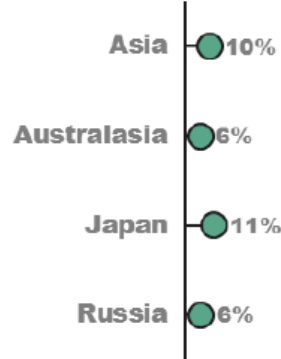
- A perception that pharma lacks transparency (particularly in its pricing policies);
- Whether these pricing processes are fair; and ...
- Whether patients are sufficiently engaged in the whole range of pharma R&D.

How good or bad the pharmaceutical industry was at carrying out specific activities (Percentage of respondent patient groups from the whole of Asia, and from Australasia, Japan, and Russia stating “Excellent” or “Good”)

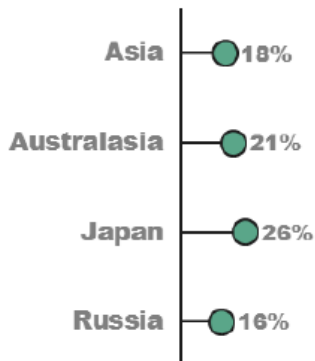
**Being transparent in pricing**



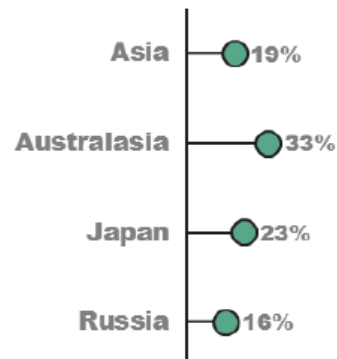
**Fair pricing policies**



**Patient engagement in research**



**Patient engagement in drug development**



Many, if not most, governments across Asia face the common problem of growing and ageing populations, with its concomitant rise in non-communicable chronic diseases. These epidemiological changes have meant that the amount Asian countries spend on pharmaceuticals as a proportion of total healthcare spend has also been growing sharply, outpacing other parts of the world. The OECD’s latest-available figures indicate that pharmaceutical expenditure, as a proportion of total healthcare spend, was 29% in Russia, compared with just 12% in the USA. The equivalent figures for Australia and Japan were 14% and 18%. Asian governments have had to respond to the situation by finding ways to rein in their medicines bill.

Asian patient groups, though younger and less experienced than their counterparts in North America and Europe, have nevertheless been evolving their roles rapidly. Not only do Asian patient groups provide support to the patients they represent, but—as a 2018 PatientView study on the global patient movement found—71% of Asian patient groups campaigned or advocated to government for improvements to their country’s healthcare system, and almost half (49%) stated that they sat on government healthcare committees. Thus, Asian patient groups are highly alert to the political landscape as it affects healthcare—a fact reflected in their views of pharma, gathered in this Asia edition of the results of the 2019 PatientView ‘Corporate-Reputation’ survey.

The **Genetic Alliance Australia** stated: *“Pricing in Australia is not transparent, or a real reflection of development costs, and may be higher than other countries.”*

The **Max Family Society**, a Malaysian patient group specialising in blood and rare cancers, called for the pharma industry to be *“transparent on pricing.”*

And a national **head-and-neck-cancer patient group** from the Philippines wanted *“honest pricing”*.

Such feelings appear uniform among patient groups across Asia.

### **Key company findings for Asia, 2019**

**ViiV Healthcare** was ranked **overall 1st** out of 31 companies for corporate reputation in 2019 by the 30 respondent Asian patient groups familiar with the company. ViiV was not included in the 2019 rankings as judged by patient-group partners, because too few respondent Asian patient groups stated that they worked with the company.

**Gilead Sciences** was ranked **overall 2nd** out of 31 companies for corporate reputation in 2019 by the 45 respondent Asian patient groups familiar with the company. Gilead was also ranked **overall 2nd** in 2019 by its 17 respondent Asian patient-group partners.

**Roche/Chugai** was ranked overall 3rd out of 31 companies for corporate reputation in 2019 by the 130 respondent Asian patient groups familiar with the company. Roche/Chugai was ranked overall 1st in 2019 by its 49 respondent Asian patient-group partners.

### Comparing just the 14 largest pharma companies ('big pharma'), Asia, 2019 v. 2018

To enable peer-to-peer comparisons of the results, PatientView also recalculates overall rankings for the 12 indicators of corporate reputation for just the 14 largest, multinational, multi-therapy pharma companies. These 'big-pharma' results provide a different perspective on how the largest pharmaceutical companies fare for corporate reputation—enabling true peer-to-peer analyses. (Takeda/Shire was added to this listing in 2019 for the first time.)

#### Australasia

13 companies were included in the 2019 analyses of Australasian patient-groups' opinions of pharma:

AbbVie | Amgen | AstraZeneca | Bayer | Bristol Myers Squibb | Eli Lilly | Gilead | GSK | Janssen | Merck & Co/MSD | Novartis | Pfizer | Roche | Sanofi.

**AstraZeneca** was ranked overall 1st out of the 13 companies for corporate reputation in 2019 by the 22 respondent Australasian patient groups familiar with the company.

#### Japan

9 companies were included in the 2019 analyses of Japanese patient-groups' opinions of pharma:

Astellas | Bayer | Eisai | Eli Lilly | GSK | Novartis | Pfizer | Roche (Chugai in Japan) | Takeda/Shire.

**Novartis** was ranked overall 1st out of the 9 companies for corporate reputation in 2019 by the 20 respondent Japanese patient groups familiar with the company.

#### Russia

4 companies were included in the 2019 analyses of Russian patient-groups' opinions of pharma:

Bayer | Octapharma | Roche | Takeda/Shire.

**Takeda/Shire** was ranked overall 1st out of the 4 companies for corporate reputation in 2019 by the 20 respondent Russian patient groups familiar with the company.

For **further information** on PatientView's latest publication, 'The Corporate Reputation of Pharma—from the Perspective of Asian Patient Groups, 2019', please use the contact details at the top.

**To download the publication's contents, list of tables and charts, and sample materials, please click below:**

**[LINK TO SAMPLE PAGES OF 2019's ASIA ANALYSIS](#)**



~END OF NOTIFICATION~

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