



'The Corporate Reputation of Pharma in 2020 during the Covid Pandemic — the Patient Perspective'

The results of a survey of 1,920 patient groups worldwide.
—the respondent patient groups reached out to more than 1 million patients in 2020.

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~ **Contact:** Alex Wyke ~ **Mob:** +44-(0)-7960-855-019 ~ **Email:** report@patient-view.com

SUMMARY OF FINDINGS

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Patient groups responding to 2020's 'Corporate Reputation of Pharma' survey are uniquely positioned to comment on the pharma industry's performance during the pandemic, as these patient organisations not only understand the perceptions of patients, but are also the only stakeholder to network with ALL other stakeholders in the healthcare system. For this reason, the opinions of 1,920 patient groups on the performance of the pharmaceutical industry in 2020 during the Covid pandemic were collected, November 2020-February 2021. The 1,920 patient groups reached out to over 1 million patients in 2020.

Patient perspectives of pharma during the Covid pandemic: top-line findings

- 1. The pharma industry's effectiveness at tackling the Covid pandemic:** 62% of 2020's 1,920 respondent patient groups believed that the pharma industry as a whole was "Very effective" or "Effective" at tackling the Covid pandemic for the patients known to them. Though patient groups from different countries and specialising in different therapy areas held wide-ranging views on the subject.
- 2. The pharma industry's corporate reputation in 2020:** 50% of 2020's respondent patient groups stated that the pharmaceutical industry as a whole had an "Excellent" or "Good" corporate reputation (the highest in the ten years that PatientView has been conducting its corporate-reputation surveys). However, the majority of patient groups still believed the industry to be "Fair" or "Poor" in most areas except R&D.
- 3. The top-three pharma companies voted "Best" for their response to Covid in 2020** (among patient groups familiar with the company) : **ViiV Healthcare, 1st | Pfizer, 2nd | and Roche/Genentech, 3rd.**
- 4. The top-three pharma companies voted "Best" for their overall corporate reputation in 2020** (among patient groups familiar with the company): **ViiV Healthcare, 1st | Roche/Genentech, 2nd | and Pfizer, 3rd.**

Covid has thrown into stark relief virtually all aspects of pharmaceutical-company business, and has had a

direct impact on the corporate reputation of the industry and individual companies. The comments supplied to this latest ‘Corporate Reputation’ survey by respondent patient groups make clear that both the effectiveness of pharma’s Covid response, and its corporate reputation, were directly tied to one another in 2020. The 2020 ‘Corporate Reputation’ survey asked respondent patient groups to assess pharmaceutical companies, not just on ability to produce vaccines (which respondent patient groups considered impressive), but also on the contributions that the companies made to alleviating problems imposed by the pandemic on non-Covid patients—who were isolated from their customary routine healthcare during much of 2020.

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ABOUT PATIENTVIEW’S TWO 2020 ‘CORPORATE-REPUTATION’ SURVEYS

I. Survey of 1,920 patient groups

When? The survey was conducted November 2020–February 2021, when key events of the pandemic will have influenced the opinions of respondent patient groups.

Where? To ensure a global reach, the survey was conducted in 21 languages.

The questionnaire? Pharma was assessed across a wide range of its activities important to patients and patient groups [see list of indicators of corporate reputation, below], including a new indicator for 2020—pharma’s effectiveness at tackling Covid.

Companies assessed? 48 companies were included for assessment in the 2020 survey: AbbVie | Acorda Therapeutics | Ammirall | Amgen | Astellas Pharma | AstraZeneca | Bayer | Biogen | Boehringer Ingelheim | Bristol Myers Squibb | Chiesi Farmaceutici | CSL Behring | Daiichi Sankyo | Dr Reddy’s Laboratories | Eisai | Eli Lilly | Ferring | Gedeon Richter | Gilead Sciences/Kite Pharma | Grifols | Grünenthal | GSK | Horizon Therapeutics | Ipsen | Janssen (Pharmaceutical Companies of Johnson & Johnson) | LEO Pharma | Lundbeck | Menarini | Merck & Co/MSD | Merck KGaA/EMD Serono | Mylan | Novartis | Novo Nordisk | Octapharma | Otsuka | Pfizer | Pierre Fabre Laboratories | Roche/Chugai/Genentech | Sandoz | Sanofi | Servier | Sun Pharma | Takeda/Shire | Teva | UCB | Vertex Pharmaceuticals | Vifor | ViiV Healthcare.

How were the companies assessed? The indicators used to measure a company’s corporate reputation: **1.** Covid response [*new for 2020*]. **2.** Patient centricity. **3.** Patient information. **4.** Patient safety. **5.** High-quality products. **6.i.** Transparency: pricing. **6.ii.** Transparency: clinical-trial data. **6.iii.** Transparency: funding of external stakeholders. **7.** Integrity. **8.** Quality of relationships with patient groups. **9.** Providing services ‘beyond the pill’. **10.i.** Engaging patients in research. **10.ii.** Engaging patients in development.

II. Best-practice case studies from pharma

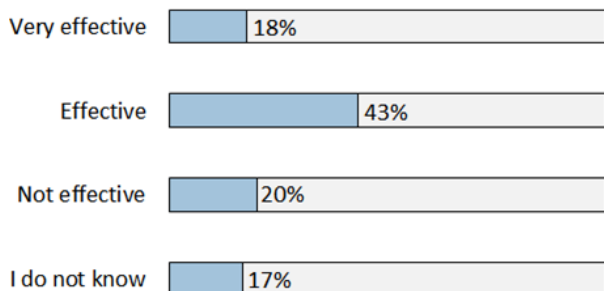
The survey provided pharma companies with an opportunity to tell their own story on how they tried to help patients cope during Covid. Seven companies participated, offering insights into what the pharma industry saw as its remit during the pandemic—both in 2020, and moving forward into 2021: Boehringer Ingelheim | Gilead Sciences | Horizon Therapeutics | Ipsen | Lundbeck (US division) | Pfizer | and ViiV Healthcare.

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1. THE PHARMA INDUSTRY’S EFFECTIVENESS AT TACKLING THE COVID PANDEMIC IN 2020

The effectiveness of the pharma industry at supporting patients during Covid, 2020.

Percentage of respondent patient groups stating “Very effective” or “Effective”



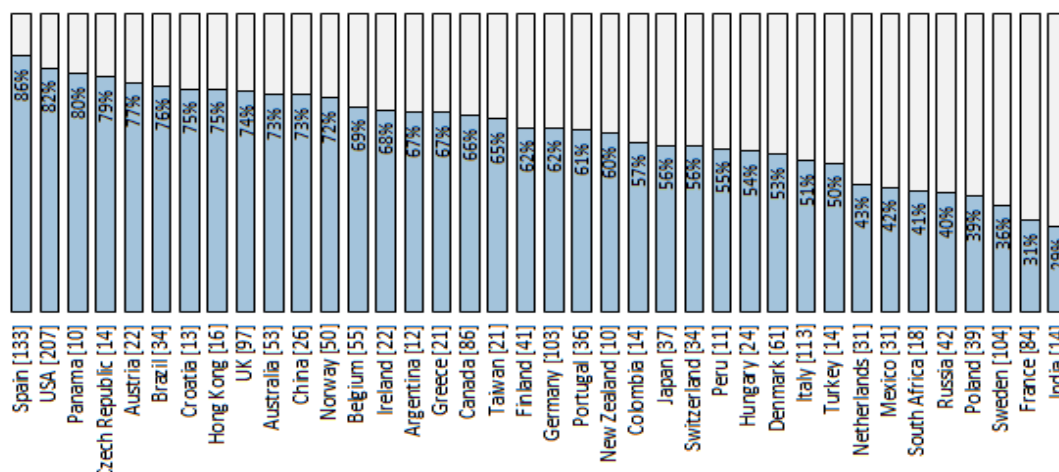
- 62% of 2020’s 1,920 respondent patient groups believed that the pharma industry as a whole was “Very effective” or “Effective” at tackling the Covid pandemic for just those patients known to them.

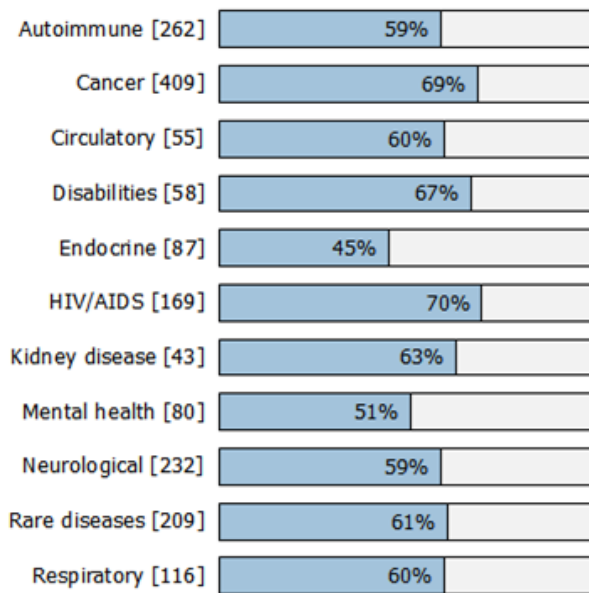
A majority of patient groups in most countries stated that such was the case. The exceptions were patient groups from eight countries—including France and India. In their feedback to the survey, patient groups responding from France and India raised strikingly-similar criticisms of the pharma industry during the pandemic: a lack of information from pharma about Covid (and a lack of information about Covid’s impact on patients’ situations); a withdrawal of contact during 2020 by pharma companies that were these patient groups’ customary partners; and a failure by pharma to prevent many Covid-induced shortages of patients’ normal medicines.

In the case of therapeutic areas, 2020’s respondent endocrine patient groups seemed the least satisfied with pharma’s capacity to help patients during Covid. Feedback given to the survey by the 66 respondent diabetes patient groups suggest that their unhappiness stems from the difficulties diabetes patients experienced in accessing insulin during the pandemic.

The effectiveness of the pharma industry at supporting patients during Covid, 2020—by country

Percentage of respondent patient groups stating “Very effective” or “Effective”





The effectiveness of the pharma industry at supporting patients during Covid, 2020—by therapy area
Percentage of respondent patient groups stating “Very effective” or “Effective”

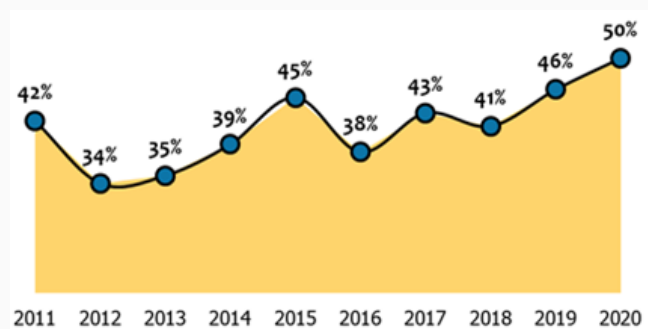
2. THE PHARMA INDUSTRY’S CORPORATE REPUTATION, 2020

Patient groups were more positive about the pharmaceutical industry in 2020 than in the previous nine years this survey has been conducted.

- 50% of 2020’s respondent patient groups stated that the pharmaceutical industry as a whole had an “Excellent” or “Good” corporate reputation—ranking pharma 2nd for corporate reputation out of nine healthcare sectors (retail pharmacists were ranked 1st).

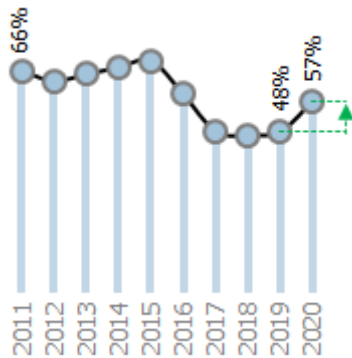
The corporate reputation of the pharmaceutical industry, 2011-2020.

Percentage of respondent patient groups stating “Excellent” or “Good”

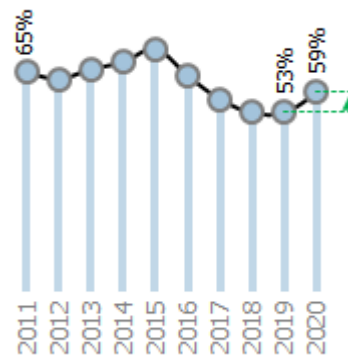


Patient groups were impressed by the innovative and vaccine-development skills of pharma during the pandemic. Indeed, a number of the respondent patient groups commented that they wished these skills could be replicated in future for non-Covid treatments.

respondent patient groups stating “Excellent” or “Good”



2011-2020. Percentage of respondent patient groups stating “Excellent” or “Good”



Although increases in approval ratings were posted on all of pharma’s activities in 2020, the majority of patient groups nevertheless still believed the industry to be only “Fair” or “Poor” in areas other than innovation and the production of high-quality products. Pharma’s pricing policies continued to be the worst-rated subject area for the industry, with only 11% of the 1,920 respondent patient groups judging the pharma industry “Excellent” or “Good” at setting fair pricing policies.

3. RESPONSE TO COVID BY INDIVIDUAL PHARMA COMPANIES

- **The top-three pharma companies voted “Best” by respondent patient groups for response to Covid: ViiV Healthcare, 1st | Pfizer, 2nd | and Roche/Genentech, 3rd.**

TOP 15: Rankings of the top companies (out of 48 companies) for response to Covid in 2020 (as assessed by respondent patient groups familiar with the company)

| | |
|----------------------|----|
| ViiV Healthcare | 1 |
| Pfizer | 2 |
| Roche/Genentech | 3 |
| Gilead Sciences | 4 |
| Horizon Therapeutics | 5 |
| Novartis | 6 |
| Janssen | 7 |
| AstraZeneca | 8 |
| AbbVie | 9 |
| Takeda/Shire | 10 |
| GSK | 11 |
| Novo Nordisk | 12 |
| Sanofi | 13 |
| Lundbeck | 14 |
| Grifols | 15 |

Factors influencing the opinions of respondent patient groups

Many factors directly and indirectly influenced the attitudes of patient groups to the effectiveness of individual pharma companies at supporting patients during the Covid pandemic, including:

- **Vaccine manufacturers.** Two vaccine manufacturers—AstraZeneca and Pfizer—became especially high profile during the course of the pandemic (and, more latterly, Janssen). Novartis and Sanofi were thrown into the spotlight for their efforts to support the manufacturing of other companies’ vaccines. One important issue for patient groups—especially those based in developing countries—was equity of access to the vaccines.

- **Non-vaccine-manufacturing companies** had to adapt to the new circumstances of Covid when working on

behalf of their usual patient customers—and were judged according to their efforts by 2020’s respondent patient groups.

- **Patient welfare during Covid.** Patients suffered significantly during Covid—primarily due to delays in, or even cancellation of, treatment and care. Many of the respondent patient groups looked to pharma for help in tackling the new health burdens on patients.
- **Drug shortages, and rising prices.** Manufacturing-and-distribution processes were disrupted when production facilities were forced to operate under social-distancing and remote-working policies. The race to re-purpose existing drugs to treat Covid also led to drug shortfalls and price rises for non-Covid patients.
- **The breakdown of doctor-patient relationships.** Healthcare professionals were obliged to switch attention to treating just Covid patients. The consequence has been that relations between doctors and non-Covid patients became strained.
- **Pharma-company relationships with patient groups.** Most of 2020’s respondent patient groups saw an increase in demand for their activities during Covid, but, deprived of their traditional fund-raising exercises, simultaneously experienced a major decline in revenues. Respondents also reported that the majority of pharmaceutical companies during the pandemic reduced, or put on hold, relationships with patient groups (some of the companies which did exactly the opposite tell their stories in the report’s appendix of best-practice case studies).
- **Impact of government, regulators and the media.** In addition to all of the above, the enormous publicity given to the pandemic by governments and the media reshaped people’s thinking about the reputational status of some pharma companies. Many of the above factors are, of course, largely out of pharma’s control.

What patient groups say

"Other than news stories of the development of the vaccines we really haven't heard of any company offering help that supported our consumers."
...Australian regional arthritis patient group

"Ask targeted questions about patients' needs; have very broad contact with patient organisations... in the pandemic, the contact is breaking down."
...Switzerland-based national neurological patient group

"Provide better quick-start programs for meds when Covid delayed shipments and approvals."
...International rare-cancer patient group, USA

4. RANKINGS FOR OVERALL CORPORATE REPUTATION BY INDIVIDUAL PHARMA COMPANIES IN 2020

- The top-three pharma companies voted “Best” by respondent patient groups for overall corporate reputation in 2020: **ViiV Healthcare**, 1st | **Roche/Genentech**, 2nd | and **Pfizer**, 3rd.

TOP 15: Rankings of the top companies (out of 48 companies) for overall corporate reputation in 2020 during the Covid pandemic (as assessed by respondent patient groups *familiar* with the company)

| | Rank 2020 | Rank 2019 | Difference |
|----------------------|-----------|-----------|------------|
| ViiV Healthcare | 1 | 1 | 0 |
| Roche/Genentech | 2 | 2 | 0 |
| Pfizer | 3 | 6 | +3 |
| Horizon Therapeutics | 4 | - | - |
| Gilead Sciences | 5 | 5 | 0 |
| Novartis | 6 | 4 | -2 |
| Janssen | 7 | 7 | 0 |
| AstraZeneca | 8 | 13 | +5 |
| AbbVie | 9 | 3 | -6 |
| Takeda/Shire | 10 | 8 | -2 |
| GSK | 11 | 12 | +1 |
| Sanofi | 12 | 9 | -3 |
| Novo Nordisk | 13 | 10 | -3 |
| UCB | 14 | 16 | +2 |
| Lundbeck | 15 | 15 | 0 |

ViiV Healthcare retained the **top spot** for overall corporate reputation that it has held since 2013. Although not a vaccine maker, ViiV Healthcare stated (in its contribution to PatientView’s best-practice case studies) that the company’s response to the Covid-19 pandemic was demonstrated by ... *“our dedicated and committed team—for whom ending the epidemic is at the heart of everything we do.”*

Roche also retained the same rank for corporate reputation in 2020 that it had held in 2019—overall **2nd**. The company explained its result to PatientView: *“To establish a true partnership, it is important for us as an organisation to listen to Patient communities to understand their needs. In recent years communities have expressed their needs to us very clearly; they asked us for early and systematic partnership across the entire Roche organisation, and to simplify our engagement through single points of contact. This approach has been critical through the challenges of an ongoing pandemic. It has meant that we have provided prompt and tailored support for Patient Organisations across the Globe. Whether that be - sharing our learnings as we navigated new digital tools, enabling communication between communities in the virtual setting, or supporting other areas of unmet need.”*

Pfizer saw its ranking for corporate reputation increase by three places in 2020, to reach overall **3rd**. Pfizer pointed out (in its contribution to PatientView’s best-practice case studies): *“We believe our reputation is inextricably linked to our Covid-19 response ... to help scientists more rapidly bring forward therapies and vaccines to protect humankind from the escalating Covid-19 pandemic, and prepare the industry to better respond to future global health crises.”*

Other success stories

Companies showing an increase in overall rankings in the PatientView ‘Corporate Reputation of Pharma’ league table, 2019-2020 (as assessed by respondent patient groups *familiar* with the

Horizon Therapeutics was included in the company listings for the first time in 2020. Horizon was ranked:

company)

| | | |
|--|-----|---------------------------|
| | +10 | Astellas Pharma |
| | +9 | Grifols |
| | +9 | Vertex Pharmaceuticals |
| | +8 | Eisai |
| | +6 | Amgen |
| | +6 | Vifor Pharma |
| | +5 | AstraZeneca |
| | +4 | Acorda Therapeutics |
| | +3 | Pfizer |
| | +3 | Merck KGaA/EMD Serono |
| | +3 | Ipsen |
| | +2 | UCB |
| | +1 | GSK |
| | +1 | Bristol Myers Squibb |
| | +1 | Ferring |
| | +1 | Pierre Fabre Laboratories |

- Overall **4th** out of 48 companies for corporate reputation in 2020, as assessed by respondent patient groups *familiar* with the company.

Astellas achieved the largest jump in overall rankings for corporate reputation, as assessed by patient groups *familiar* with the company. In 2020, Astellas ranked 25th out of 48 companies—an increase of 10 places on its 2019 rank of 35th.

For further information on this Global report, please use contact details at the head of the press release

For a profile of respondent patient groups see next page

~END OF PRESS RELEASE~

PatientView
Tel: ++44-(0)1547-520-965
E-mail: report@patient-view.com
www.patient-view.com
Registered in England Number: 3944382
Registered office:
One Fleet Place, London, EC4M 7WS, UK
|

PROFILE OF 2020'S RESPONDENT PATIENT GROUPS

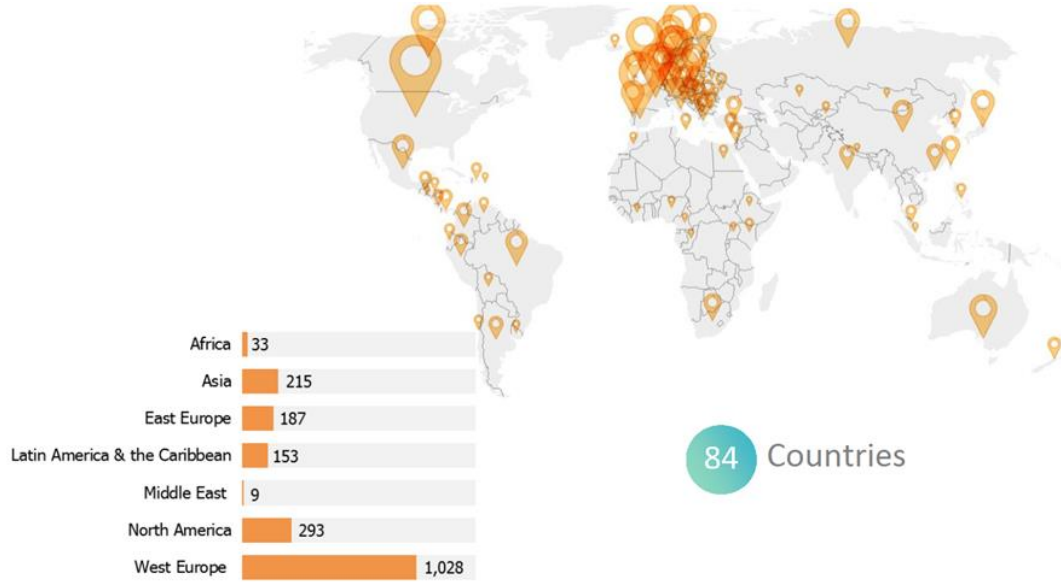
1,920 respondent patient groups.

- From 84 countries.
- Covering 133 main medical specialties.
- 59% national patient groups. And ...
- 10% international patient groups.

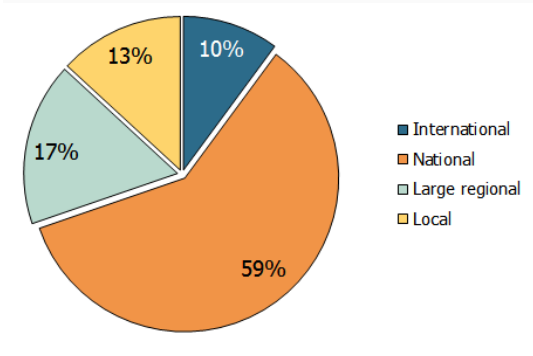
Patient-group partnerships with industry.

- 1,264 of the 1,920 respondent patient groups (66%) worked or partnered with at least one pharma company.

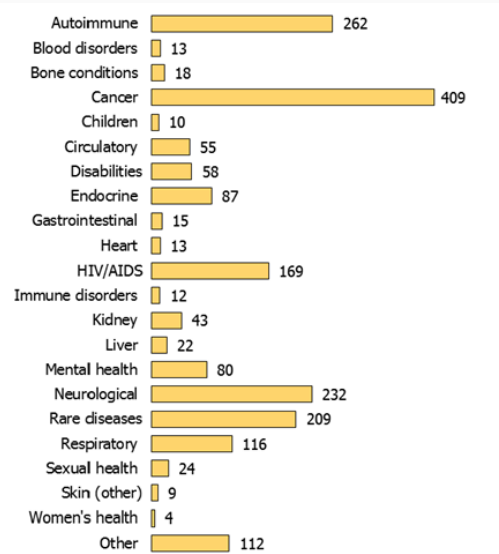
The geographic spread of 2020's respondent patient groups. Numbers of respondent patient groups



Geographic remit of 2020's respondent patient groups



Key therapy areas of 2020's respondent patient groups



* Some therapy areas feature in more than one category