



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

The results of an *independent survey of 207 US patient groups.*
The respondent US patient groups reached out to ...
167,700 patients during 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, PatientView collected (November 2020-February 2021) the opinions of 207 US-based patient groups on the performance of the pharmaceutical industry during the Covid pandemic of 2020.

US patient-group perspectives of pharma during the Covid pandemic: *top-line findings*

1. ***The pharma industry's effectiveness at tackling the Covid pandemic in the US:*** *An overwhelming 82% of 2020's 207 respondent US patient groups judged the industry's response to Covid to be "Effective" or "Very effective"—the second-highest approval rating from patient groups in any country worldwide (and only below the figure of 86%, assessed by respondent patient groups from Spain). The equivalent global rating was 62%.*
2. ***The pharma industry's corporate reputation in the US in 2020:*** *2020's respondent US patient groups rated the corporate reputation of the pharma industry as a whole far more favourably than in previous years. 57% of 2020's respondent US patient groups stated that the industry had an "Excellent" or "Good" corporate reputation in the US, against 48% of 2019's US respondent patient groups (and above 2020's global average of 50%). Only the biotechnology sector outranked the pharma industry for corporate reputation in the US in 2020, according to respondent US patient groups.*

3. *Rankings of individual companies:*

RESPONSE TO COVID :

- **All 38 companies:** The top-three pharma companies voted “Best” for their response to Covid in the US in 2020 (as assessed by respondent US patient groups familiar with the company): **1st, ViiV Healthcare | 2nd, Horizon Therapeutics | and, 3rd, Lundbeck.**
- **Among the 14 big pharma:** The top-three pharma companies voted “Best” for their response to Covid in the US in 2020 (as assessed by respondent US patient groups familiar with the company): **1st, Pfizer | 2nd, Roche/Genentech | and, 3rd, Janssen.**

OVERALL CORPORATE REPUTATION:

- **All 38 companies:** The top-three pharma companies voted “Best” for their overall corporate reputation in the US in 2020 (as assessed by respondent US patient groups familiar with the company): **1st, ViiV Healthcare | 2nd, Horizon Therapeutics | and, 3rd, Lundbeck.**
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The 2020 ‘Corporate Reputation’ survey asked respondent US 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). The commentaries supplied to PatientView by the respondent US patient groups made clear that their opinions of pharma companies during 2020 were indeed primarily influenced by company responses to Covid—whether development of vaccines, production of vaccines, or efforts made by companies to support patients in other ways during lockdown.

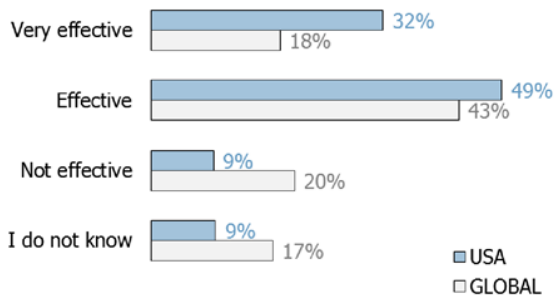
ABOUT THE 2020 ‘CORPORATE-REPUTATION’ SURVEY

A survey of 207 US 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.
- **The questionnaire?** Pharma was assessed across a wide range of its activities important to patients and patient groups, including a new indicator for 2020—pharma’s effectiveness at tackling Covid.
- **Companies assessed?** 38 companies were included in the 2020 USA analyses: AbbVie | Acorda Therapeutics | Amgen | Astellas Pharma | AstraZeneca | Bayer | Biogen | Boehringer Ingelheim | Bristol Myers Squibb | CSL Behring | Daiichi Sankyo | Eisai | Eli Lilly | Ferring | Gilead Sciences/Kite Pharma | Grifols | GSK | Horizon Therapeutics | Ipsen | Janssen (Pharmaceutical Companies of Johnson & Johnson) | Lundbeck | Merck & Co | Merck KGaA/EMD Serono | Mylan | Novartis | Novo Nordisk | Otsuka | Pfizer | Roche/Genentech | Sandoz | Sanofi | Servier | Sun Pharma | Takeda/Shire | Teva | UCB | Vertex Pharmaceuticals | and 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.

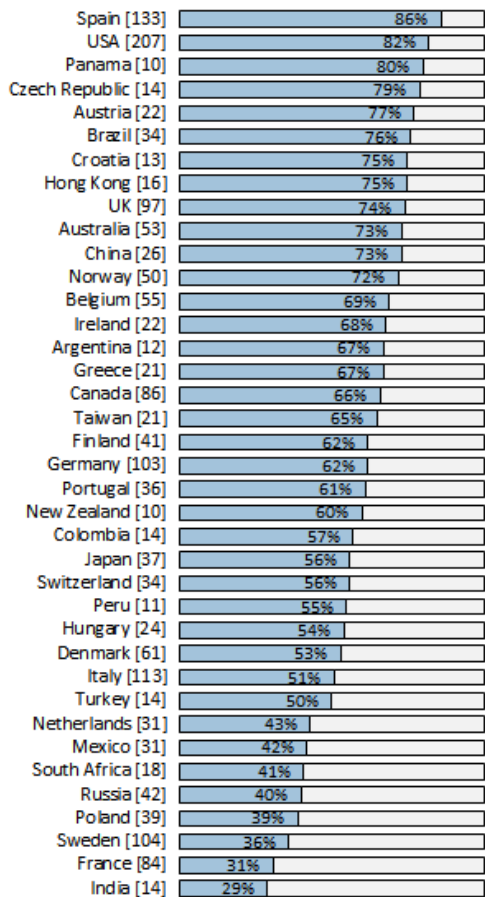
1. THE PHARMA INDUSTRY'S EFFECTIVENESS AT TACKLING THE COVID PANDEMIC IN 2020

The effectiveness of the pharma industry at supporting patients during Covid, 2020: USA versus global. Percentage of respondent patient groups stating "Very effective" or "Effective"



- 82% of 2020's 207 respondent US patient groups believed that the pharma industry as a whole was "Very effective" or "Effective" at tackling the Covid pandemic (for those patients known to them). The equivalent figure worldwide was 61%.

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 positivity shown by 2020's respondent US patient groups stems largely from their perception of the speed of vaccine development, and, by inference, the innovative expertise of the pharma sector as a whole:

"Covid vaccine development was superb." — US international diabetes patient group

Similarly, the pace of production scale-up and vaccine roll-out also attracted praise, particularly when companies were seen to be collaborating in these tasks:

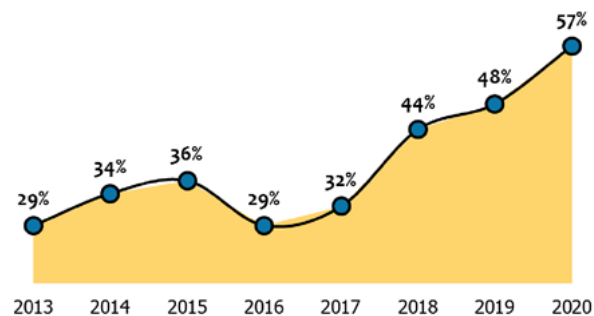
"Patients are pleased to see companies like Sanofi stepping in to manufacture the vaccine that they did not create, to ensure wider and faster distribution." —US national cancer patient group

2. THE PHARMA INDUSTRY'S CORPORATE REPUTATION IN 2020

Patient groups were more positive about the pharmaceutical industry in 2020 than in the previous 7 years that this survey has been conducted.

- 57% of 2020's respondent US 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 (the biotechnology sector was ranked 1st).

The corporate reputation of the pharmaceutical industry, 2013-2020. Percentage of respondent US patient groups stating "Excellent" or "Good"



Furthermore, 2020's respondent US patient groups assessed the pharmaceutical industry as a whole more positively for all of its key activities—most notably for:

- **Creating products of benefit to patients.** In 2020, 81% of respondent US patient groups stated that the industry was "Excellent" or "Good" at this core activity (versus 67% in 2019).
- **Ability to innovate.** In 2020, 72% stated that the industry was "Excellent" or "Good" at innovation (versus 52% in 2019).

But, for the most part, the sentiment from respondent US patient groups was that more could have been done during Covid by the pharma industry. Access to medicines was a case in point. US patient groups reported challenges in sourcing reliable supplies of patients' usual treatments during the pandemic. Requests from respondent US patient groups included:

"Ensure continuity and availability of medication access."—US national epilepsy patient group

"Be transparent about the impact of Covid on the production/availability of products."—US local bleeding-disorders patient group

Respondent US patient groups also focused on supply-chain issues during Covid:

"Provide better quick-start programs for medications when Covid delays shipments and approvals."—US international rare-cancer patient group

3. RANKINGS OF INDIVIDUAL PHARMA COMPANIES

The top-three pharma companies voted “Best” by respondent US patient groups in 2020 were the same—both for their response to Covid, and for their overall corporate reputation (as assessed by respondent US patient groups familiar with the company): **1st, ViiV Healthcare | 2nd, Horizon Therapeutics | and, 3rd, Lundbeck.**

TOP-15 of 38 COMPANIES: rankings in the US in 2020 of the top companies for (i) response to Covid, and (ii) overall corporate reputation (as assessed by respondent US patient groups familiar with the company)

Company	Patient support during Covid	Overall ranking 2020
ViiV Healthcare	1	1
Horizon	2	2
Lundbeck	3	3
Pfizer	4	5
Roche/Genentech	5	4
Janssen	6	6
Takeda	7	7
Otsuka	8	18
Daiichi Sankyo	9	16
CSL Behring	10	13
Acorda	11	19
Novartis	12	9
Eisai	13	15
Servier	14	10
Gilead Sciences	15	8

ViiV, Horizon, AND Lundbeck all say that they have made significant efforts to support patients during Covid in 2020.

- According to ViiV Healthcare, 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.”**
- According to Horizon Therapeutics: **“Covid-19 hit our rare-disease communities hard, and we committed to working alongside them. From our patient-services team keeping in touch with families, just to ask how we could help, to our sales team making sure physicians continued to have our support, our approach was always one of partnership, rooted in care.”**
- According to Lundbeck: **“We have worked throughout the pandemic to support our patient communities through a variety of efforts and outreach. In partnership with patient-advocacy-group partners, we shared resources and information to help people who may be struggling with social isolation, and the mental-health impacts of the pandemic.”**

Companies showing an increase in overall rankings in the PatientView 'Corporate Reputation of Pharma' league table, USA, 2019-2020 (as judged by respondent US patient groups familiar with the company)

+15	Daiichi Sankyo
+12	Servier
+12	Eisai
+10	Biogen
+7	AstraZeneca
+5	Sanofi
+4	Gilead Sciences
+4	Novo Nordisk
+4	Merck KGaA/EMD Serono
+3	AbbVie
+3	GSK
+3	Sandoz
+2	Vertex Pharmaceuticals
+1	Pfizer
+1	Takeda
+1	Teva

Daiichi Sankyo achieved the largest jump in overall rankings for corporate reputation in the US between 2019 and 2020, as judged by US patient groups familiar with the company [see chart below]. In 2020 in the US, Daiichi ranked overall 16th out of 38 companies, according to the 40 respondent US patient groups familiar with the company (an increase of 15 places on its 2019 US rank of 31st).

Daiichi's webpage details the company's efforts to support US patients in 2020 during the pandemic: "**Our U.S. affiliate, Daiichi Sankyo, Inc., has made donations totalling \$645,000 to Healthcare Ready, Americares, the American Red Cross, and other local organizations with programs dedicated to addressing the Covid-19 pandemic. Furthermore, US employees with appropriate medical or healthcare credentials are allowed to take extra time away from work, to volunteer their time to help alleviate the pressure on those on the healthcare front lines who are taking care of patients.**"

Comparing the corporate reputation in the US of just the 14 largest pharma companies ('big pharma'), 2020 v. 2019

To enable peer-to-peer comparisons, PatientView recalculates overall rankings for the 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 peer-to-peer analyses.

1st. Roche/Genentech: Roche/Genentech ranked **overall 1st** among the 14 major peers for corporate reputation in the US in 2020, as judged by respondent US patient groups familiar with the company (Roche's 2019 US ranking among 'big pharma' had also been 1st). Roche ranked **2nd** for its response to Covid.

2nd. Pfizer: Pfizer ranked **overall 2nd** among the 14 major peers for corporate reputation in the US in 2020, as judged by respondent US patient groups familiar with the company (Pfizer's 2019 US ranking among 'big pharma' had been 3rd). Pfizer ranked **1st** for its response to Covid.

3rd. Janssen: Janssen ranked overall 3rd among the 14 major peers for corporate reputation in the US in 2020, as judged by respondent US patient groups familiar with the company (Janssen's 2019 US ranking among 'big pharma' was 2nd). Janssen ranked **3rd** for its response to Covid.

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PROFILE OF 2020's 207 RESPONDENT US PATIENT GROUPS

- Covering 64 main medical specialties.
- 53% national patient groups.
- 28% international patient groups.
- 83% worked/partnered with at least one pharmaceutical company.



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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