



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

The results of an independent survey of 409 cancer patient groups worldwide. The 409 respondent cancer patient groups specialised in several types of cancer. Collectively, they reached out to 264,000 patients during 2020. Respondent cancer patient groups looked at 33 companies with oncology portfolios, and were asked to select those that had the "Best" corporate reputation in 2020, and were "Best" at tackling Covid during 2020.

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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 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 409 cancer patient groups on the performance of the pharmaceutical industry during the Covid pandemic of 2020.

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

1. **The pharma industry's effectiveness at tackling the Covid pandemic:** Cancer patients have unwittingly suffered during Covid, side-lined at home, freeing up healthcare resources to cope with the pandemic. During 2020 and beyond, patient groups looked to pharma for extra support. The 2020 'Corporate Reputation' survey found that the pharma industry, for the most part, stepped up to the mark. 69% of 2020's 409 respondent cancer patient groups judged the industry's response to Covid to be "Very effective" or "Effective" (61% of patient groups from across all therapy areas thought the same). However, attitudes to pharma's Covid-related activities were not standard among the different types of respondent cancer patient groups.

2. **The pharma industry's corporate reputation among cancer patient groups in 2020:** Cancer patient groups responding in 2020 rated the corporate reputation of the pharma industry more favourably than in previous years. 58% of 2020's respondent cancer patient groups stated that the industry had an "Excellent" or "Good" corporate reputation, against 54% of 2019's respondent cancer patient groups, and also against 2020's therapy-wide average of 50%. (Again, though, not all of the different categories of respondent cancer patient groups felt the industry's corporate reputation to be as high.)
3. **Rankings of companies for their ...**
 - **Response to Covid:** The top-three companies voted "Best" in 2020 (by respondent cancer patient groups familiar with the company) for helping patients and patient groups during Covid were all 'big-pharma' companies: **1st, Roche/Genentech | 2nd, Pfizer | and, 3rd, AstraZeneca.**
 - **Overall corporate reputation.** Similarly, the top-three companies voted "Best" in 2020 for corporate reputation (by respondent cancer patient groups familiar with the company) were also all from 'big pharma': **1st, Roche/Genentech | 2nd, Pfizer | and, 3rd, Novartis.**

The commentaries supplied to PatientView by the respondent cancer patient groups made clear that their opinions of pharma companies during 2020 were 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.

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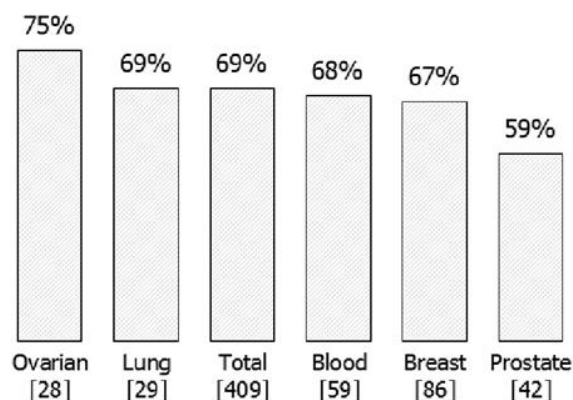
ABOUT THE 2020 'CORPORATE-REPUTATION' SURVEY

A survey of 409 cancer patient groups

- **When?** The survey was conducted November 2020-February 2021, when key events of the pandemic will have influenced the opinions of respondent cancer 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?** 33 companies were included in the 2020 cancer analyses:
 AbbVie | Amgen | Astellas Pharma | AstraZeneca | Bayer | Boehringer Ingelheim | Bristol Myers Squibb | Daiichi Sankyo | Dr Reddy's | Eisai | Eli Lilly | Ferring | Gedeon Richter | Gilead Sciences | Grifols | GSK | Ipsen | Janssen | Menarini | Merck & Co/MSD | Merck KGaA/EMD Serono | Mylan | Novartis | Otsuka | Pfizer | Pierre Fabre | Roche/Genentech | Sandoz | Sanofi | Servier | Sun Pharma | Takeda/Shire | Teva
 - **How were the companies assessed?** The indicators used to measure a company's corporate reputation: **1.** Covid response [*new for the 2020 survey*] | **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.
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1. THE PHARMA INDUSTRY'S EFFECTIVENESS AT TACKLING THE COVID PANDEMIC IN 2020

Chart 1: The effectiveness of the pharma industry at supporting patients during Covid, 2020. *Percentage of respondent cancer patient groups stating "Very effective" or "Effective"*



69% of 2020's respondent cancer patient groups judged the industry's response to Covid to be "Very effective" or "Effective". However, attitudes to pharma's Covid-related activities were not standard among the different types of respondent cancer patient groups. The most positive were ovarian-cancer patient groups—75% of which thought pharma "Very effective" or "Effective" at supporting patients during Covid. The equivalent figure from prostate-cancer patient groups was 59% [see chart 1].

Respondent cancer patient groups specifically highlighted four companies for best practice during the Covid pandemic of 2020. Examples include ...

Bristol Myers Squibb. *"We received information for patients from Bristol Myers Squibb only. None of the other pharma companies we work with has provided information for patients during the Covid-19 pandemic. We have recently asked all those we work with for information about potential interactions between their drugs and the Covid-19 vaccine, but have only received a response from BMS."*—National gastrointestinal-cancer patient group, UK

Pfizer. *"More activity through specific projects that can be monitored and measured; Pfizer is in a special position here, and collaborating well with the Norwegian Breast Cancer Society on projects."*—National breast-cancer patient group, Norway

Roche/Genentech. *"Roche has implemented some very useful services: patient transport; home shopping; drug collection from pharmacies; and home delivery of hospital drugs. It would be interesting if these services became permanent, perhaps with a partnership between pharmaceutical companies."*—Associazione Insieme per i pazienti di Oncologia Polmonare (IPOP) Onlus, Italy

Sanofi. *"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."*—National cancer patient group, USA

2. THE PHARMA INDUSTRY'S CORPORATE REPUTATION IN 2020

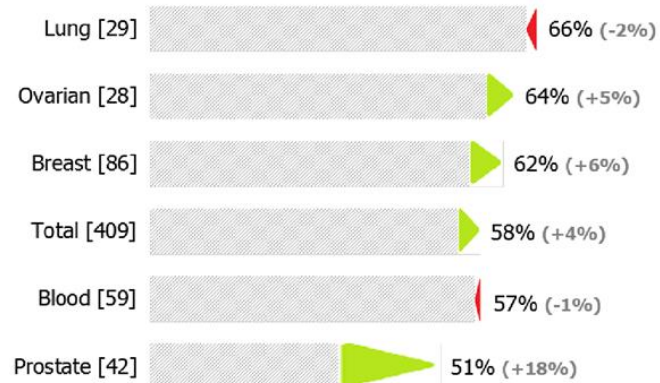
Respondent cancer patient groups rated the corporate reputation of the pharma industry as a whole more favourably in 2020 than in the previous seven years that this cancer edition has been conducted. 58% of 2020's respondent cancer groups stated that the industry had an "Excellent" or "Good" corporate reputation, against 54% in 2019.

However, attitudes among 2020's different respondent cancer patient groups did vary—with lung-cancer patient groups being most positive about the pharma industry's corporate reputation, and prostate-cancer patient groups the least positive [see chart 2].

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

Chart 2: Percentage of respondent cancer patient groups stating that the pharmaceutical industry had an "Excellent" or "Good" corporate reputation, 2020

[Number in brackets represents the change from 2019]

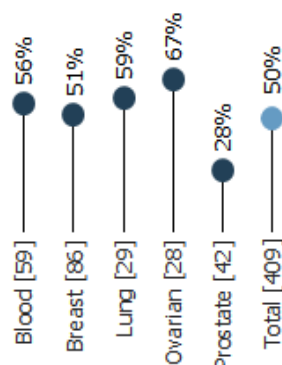


- **Creating products of benefit to patients:** In 2020, 71% of respondent cancer patient groups stated that the industry was "Excellent" or "Good" at this core activity (versus 62% in 2019).
- **Ability to innovate:** In 2020, 65% stated that the industry was "Excellent" or "Good" at innovation (versus 56% in 2019).
- **Ensuring patient safety:** In 2020, 63% stated that the industry was "Excellent" or "Good" at patient safety (versus 56% in 2019).

- **Having high-quality patient-group relationships.** In 2020, 59% stated that the industry was "Excellent" or "Good" at patient-group relationships (versus 53% in 2019).

(Though, again, cancer patients groups varied in their views on the effectiveness of pharma at these activities.)

Chart 3: Percentage of respondent cancer patient groups stating that pharma is "Excellent" or "Good" at providing high-quality patient information, 2020 [Number of respondents]



Despite positive impressions of the pharma industry, the sentiment from some of 2020's respondent cancer patient groups was that more could have been done during Covid by the pharma industry—and by individual companies. Respondent cancer patient groups identified a strong, yet unmet, demand for information from pharma about Covid's impact on cancer communities, and on cancer treatment; information that included how: (i) Covid affects people with specific cancers; (ii) to use cancer treatments when vaccinated; and (iii) to adapt hospital-based treatments for home use.

3. RANKINGS OF INDIVIDUAL PHARMA COMPANIES

The top three of 33 pharma companies voted “Best” by respondent cancer patient groups in 2020 for their (i) **response to Covid**: **1st, Roche/Genentech** | **2nd, Pfizer** | and, **3rd, AstraZeneca**; and, (ii) **overall corporate reputation**: **1st, Roche/Genentech** | **2nd, Pfizer** | and, **3rd, Novartis**. All three are ‘big-pharma’ companies.

Response to Covid: rankings in 2020 of the top 15 of 33 companies for **response to Covid**, as assessed by respondent cancer patient groups *familiar* with the company

	% stating "Excellent" or "Good"	Rank 2020
Roche/Genentech	49%	1
Pfizer	38%	2
AstraZeneca	32%	3
Novartis	31%	4
Janssen	27%	5
Bristol Myers Squibb	24%	6
AbbVie	18%	7
Merck KGaA/EMD	16%	8
Servier	16%	9
Daiichi Sankyo	15%	10
Takeda/Shire	15%	11
Merck & Co/MSD	15%	12
GSK	13%	13
Sanofi	11%	14
Bayer	11%	15

Corporate reputation: rankings in 2020 of the top 15 of 33 companies for **overall corporate reputation**, as assessed by respondent cancer patient groups *familiar* with the company

	Rank 2020	Rank 2019	Diff
Roche/Genentech	1	1	0
Pfizer	2	3	+1
Novartis	3	2	-1
AstraZeneca	4	5	+1
Bristol Myers Squibb	5	6	+1
Janssen	5	4	-1
Merck KGaA/EMD	7	14	+7
Servier	8	10	+2
Merck & Co/MSD	9	7	-2
Takeda/Shire	10	8	-2
AbbVie	11	11	0
GSK	12	19	+7
Amgen	13	12	-1
Bayer	14	13	-1
Sanofi	15	15	0

Other success stories for corporate reputation in the field of cancer, 2020

Menarini achieved the largest jump in overall rankings for corporate reputation in the field of cancer between 2019 and 2020, as judged by respondent cancer patient groups familiar with the company. In 2020, Menarini ranked overall 19th out of 33 companies, according to the 31 respondent cancer patient groups familiar with the company (an increase of 10 places on its 2019 rank of 29th). During 2020, Menarini expanded its investment in oncology through acquisition. Menarini also committed itself that year to supplying tests, and developing treatments, for coronavirus.

Other companies rising up the rankings for corporate reputation in the field of cancer included **Merck KGaA/EMD Serono**, which was ranked 7th out of 33 companies by the 118 cancer patient groups familiar with the company (an increase of seven places on its 2019 ranking of 14th). And **GSK** also rose seven places in 2020, to reach 12th out of 33 companies, according to the 185 respondent cancer patient groups familiar with the company.

Company performance in five different cancer specialties

Companies in the ‘big-pharma’ category dominated the rankings in 2020 in five different fields of cancer—blood, breast, lung, ovarian, and prostate, according to the respective respondent cancer patient groups familiar with the companies [see table].

Companies ranked 1st for (i) their support of patients during Covid, and (ii) for their overall corporate reputation (as assessed by patient groups familiar with the companies, and specialising in five different types of cancers)

	Support for patients during Covid	Overall corporate reputation
Blood	Janssen	Novartis
Breast	Roche/Genentech	Roche/Genentech
Lung	Roche/Genentech	Roche/Genentech
Ovarian	AstraZeneca	AstraZeneca
Prostate	Janssen	Janssen

PROFILE OF 2020’s 409 RESPONDENT CANCER PATIENT GROUPS

Of the 409 respondent cancer patient groups:

- 62% were national patient groups.
- 13% international patient groups.
- 13% were large regional.
- 11% were local.
- 74% worked/partnered with at least one pharmaceutical company.
- The 409 respondent cancer patient groups were headquartered in 55 different countries.



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

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