



'The Corporate Reputation of Pharma in 2020 during the Covid-19 Pandemic — the Perspective of German Patient Groups'

The results of an independent survey of 103 German patient groups in 2020. Collectively, these patient groups reached out to 57,000 German patients during 2020. The respondent German patient groups commented on 22 companies, selecting those with the “Best” corporate reputation in 2020, and assessing which were “Best” at tackling Covid-19 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 103 German patient groups on the performance of the pharmaceutical industry during the Covid-19 pandemic of 2020.

GERMAN PATIENT-GROUP PERSPECTIVES ON PHARMA DURING THE COVID-19 PANDEMIC:

TOP-LINE INDUSTRY-WIDE FINDINGS

- **The pharma industry's effectiveness at tackling Covid-19 in Germany in 2020.** According to the feedback provided by 2020's respondent German patient groups, patients in Germany faced many new challenges during the pandemic. So, during 2020 and beyond, German patient groups looked to pharma for extra support in helping the patients with whom they were familiar. The 2020 'Corporate Reputation' survey found that 61% of 2020's respondent German patient groups judged the industry's response to Covid-19 to be “Very effective” or “Effective”. Despite the high score, however, German patient groups thought that the pharma industry could have done more for patients during the Covid-19 pandemic.

- **The pharma industry's corporate reputation in Germany in 2020.** Respondent German patient groups rated the pharma industry's corporate reputation more favourably in 2020 than in 2019. In 2020, 49% of 2020's respondent German patient groups stated that the industry had an "Excellent" or "Good" corporate reputation, against 33% saying the same in 2019.

COMPANY RANKINGS

Two sets of rankings are provided in the 2020 Germany analyses:

- (1.) out of 22 pharma companies, and
- (2.) out of just 14 of the largest, multi-national, multi-therapy ('big-pharma') companies.

Response to Covid-19 in Germany in 2020

1. **Out of 22 pharma companies:** The three pharma companies voted "Best" in 2020 for helping German patients and patient groups during Covid-19 were: **1st, ViiV Healthcare | 2nd, Pfizer | and, 3rd, AbbVie**—as assessed by respondent German patient groups familiar with the company.
2. **Out of 14 'big-pharma' companies:** The three 'big-pharma' companies voted "Best" in 2020 for helping German patients and patient groups during Covid-19 were: **1st, Pfizer | 2nd, AbbVie | and, 3rd, Merck & Co/MSD**—as assessed by respondent German patient groups familiar with the company.

Overall corporate reputation in Germany in 2020

1. **Out of 22 pharma companies:** The three pharma companies voted "Best" for overall corporate reputation in Germany in 2020 were: **1st, ViiV Healthcare | 2nd, AbbVie | and, 3rd, Pfizer**—as assessed by respondent German patient groups familiar with the company.
2. **Out of 14 'big-pharma' companies:** The three 'big-pharma' companies voted "Best" in 2020 for overall corporate reputation in Germany in 2020 were: **1st, AbbVie | 2nd, Pfizer | and, 3rd, Merck & Co/MSD**—as assessed by respondent German patient groups familiar with the company.

The commentaries supplied to PatientView by the respondent German patient groups made clear that their opinions on pharma companies during 2020 were primarily influenced by company responses to Covid-19—whether that be development and production of vaccines, or (seen as particularly important by German patient groups) other efforts by companies to support patients during lockdown.

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ABOUT THE 2020 'CORPORATE REPUTATION' SURVEY

A survey of 103 German patient groups

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

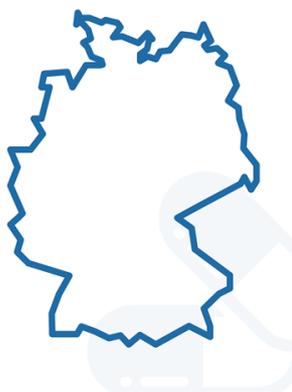
The questionnaire? Pharma was assessed across a wide range of its activities important to patients and patient groups, including a new indicator for 2020—pharma's effectiveness at tackling Covid-19

Companies assessed? 22 companies were included in the 2020 Germany analyses:

AbbVie | Amgen | AstraZeneca | Bayer | Biogen | Boehringer Ingelheim | Bristol Myers Squibb | CSL Behring | Eli Lilly | Gilead Sciences | Grünenthal | GSK | Janssen | Merck & Co/MSD | Merck KGaA | Novartis | Pfizer | Roche | Sandoz | Sanofi | Takeda/Shire | ViiV Healthcare.

How were the companies assessed? The indicators used to measure a company's corporate reputation: **1.** Covid-19 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.

1. THE PHARMA INDUSTRY'S EFFECTIVENESS AT TACKLING THE COVID-19 PANDEMIC IN GERMANY IN 2020



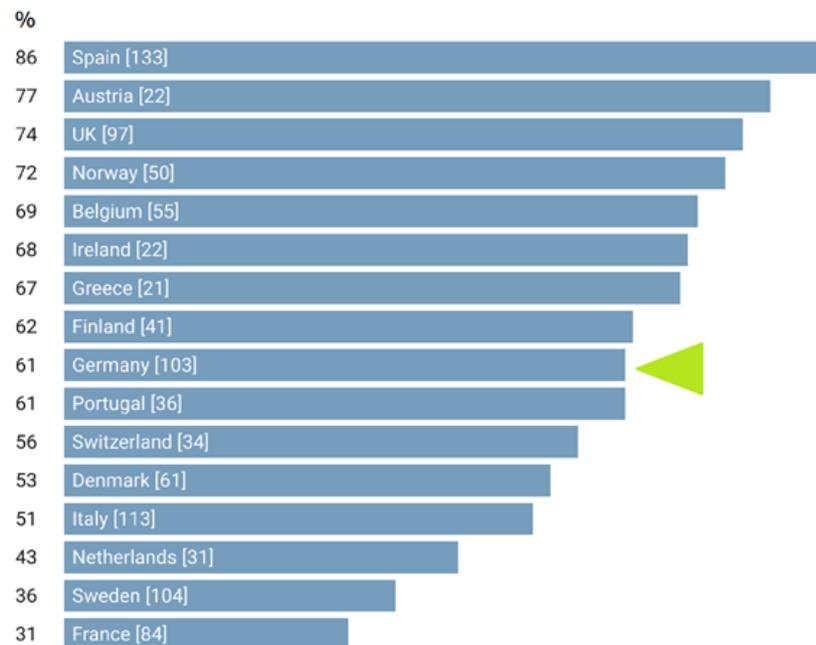
61% of 2020's respondent German patient groups judged the industry's response to Covid-19 to be "Very effective" or "Effective" (on a par with the average of 62% from respondent patient groups worldwide).

For comparisons with the equivalent figures from other countries in Western Europe, see Chart 1 on the next page.

The positivity shown by respondent German patient groups to the pharma industry during 2020 stems largely from the accelerated research, development, and manufacture of Covid-19 vaccines.

But, despite the improved scoring, the majority of 2020's respondent German patient groups still believed pharma to be either "Fair" or "Poor" (or they "Did not know") at key activities of importance to patients. The main sentiment from German patient groups was that much more could have been done during Covid-19 by the pharma industry—not least, in the **relationships that companies have with patient groups.**

Chart 1: The effectiveness of the pharma industry at supporting patients during Covid-19 in 2020—by countries in Western Europe (Percentage of respondent patient groups stating "Very effective" or "Effective")



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In 2020, only 39% of respondent German patient groups stated that the pharma industry was "Excellent" or "Good" at patient-group relationships (versus 36% in 2019); the equivalent 2020 figure from patient groups worldwide was 48%. A number of respondent German patient groups commented on the lack of support they received from pharma during the Covid-19 pandemic.

German patient groups utilise three traditional sources of income: their own individual fundraising mechanisms or activities (such as publications, events, or membership fees), plus donations from health insurers and the pharmaceutical industry. The health insurers (GKV) only increased their financing of the patient-group sector in Germany by 0.6% in 2020, despite patient groups having to cope with far-greater demands from patients in need of support during lockdowns. Not surprisingly, German patient groups turned to pharma for more support—which was not forthcoming. According to the German organisation Freiwillige Selbstkontrolle für die Arzneimittelindustrie (FSA) e.V. [Association for the Voluntary Self-Regulation of the Pharmaceutical Industry], pharma donated 15% less to German patient groups in 2020 than in 2019.

Sources:

- <https://www.vdek.com/vertragspartner/Selbsthilfe.html>
- <https://www.fsa-pharma.de/de/mitteilungen/presse/archiv/transparenzveroeffentlichungen-2021>

“Den groessten Nutzen hat bisher BioNTech geliefert, nicht zuletzt aufgrund eine Sehr guten Projektmanagements.” (“BioNTech has delivered the greatest benefit so far, not least due to very-good project management.”)—National circulatory-conditions patient group

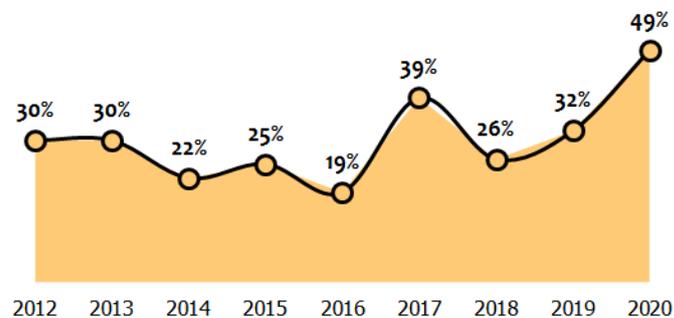
“Die Zusammenarbeit mit Patientengruppen in der Pandemiezeit nicht zu vergessen, es gibt noch mehr Erkrankungen wie Covid.” (“Don’t forget about cooperation with patient groups during a pandemic; Covid-19 is not the only disorder.”)—National lung-cancer patient group

“Kontakt halten, Bedarf erfragen.” (“Maintain contact; ask about needs.”)—Regional addiction patient group

2. THE PHARMA INDUSTRY’S CORPORATE REPUTATION IN GERMANY IN 2020

In 2020, 49% of the respondent German patient groups stated that the industry had an “Excellent” or “Good” corporate reputation, against 32% in 2019 [see Chart 2]. The equivalent global figure in 2020 was 50%. 2020’s respondent German patient groups ranked the pharma industry 2nd for corporate reputation out of nine healthcare sectors—behind retail pharmacists, at 67% [see Chart 3 on the next page].

Chart 2: Pharma’s corporate reputation in Germany has improved significantly since 2012 (Percentage of respondent German patient groups per year stating that the pharmaceutical industry has an “Excellent” or “Good” corporate reputation)

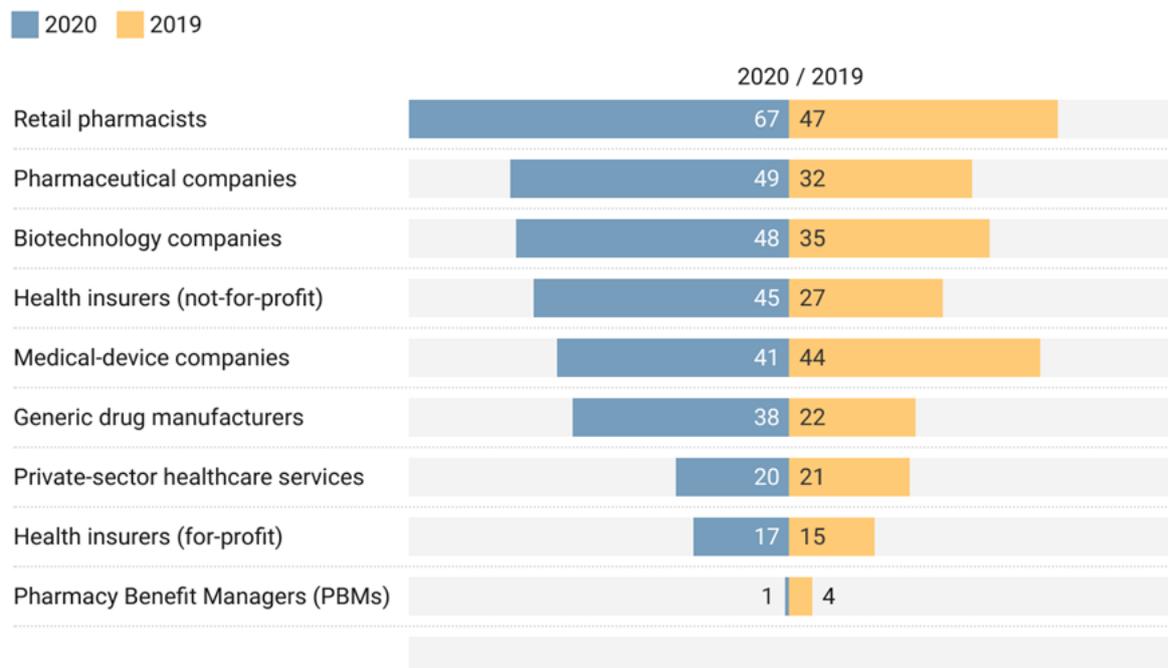


3. RANKINGS OF INDIVIDUAL PHARMA COMPANIES IN GERMANY IN 2020

Two sets of rankings are provided for these 2020 Germany analyses:

- (1.) out of 22 pharma companies, and
- (2.) out of just 14 of the largest, multi-national, multi-therapy ('big-pharma') companies.

Chart 3: The corporate reputation of the pharmaceutical industry in Germany, 2020 v. 2019—compared with that of other healthcare sectors (Percentage of respondent German patient groups stating “Excellent” or “Good”)



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PHARMA COMPANIES VOTED “BEST” FOR THEIR RESPONSE TO COVID-19 IN GERMANY IN 2020

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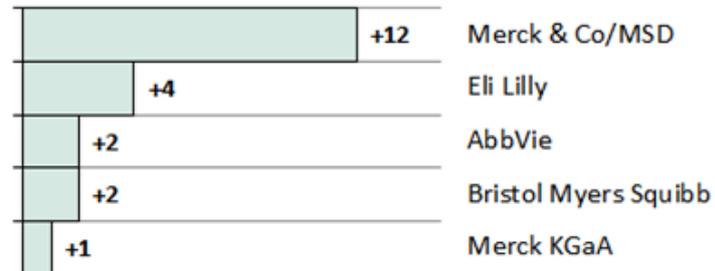
PHARMA COMPANIES WITH THE “BEST” CORPORATE REPUTATION IN GERMANY IN 2020

1. **Out of 22 pharma companies:** The three pharma companies voted “Best” for overall corporate reputation in Germany in 2020 were: **1st, ViiV Healthcare** | **2nd, AbbVie** | and, **3rd, Pfizer**—as assessed by respondent German patient groups familiar with the company.
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Other success stories

Merck & Co/MSD achieved the largest jump in the rankings for overall corporate reputation in Germany in 2020, as assessed by respondent German patient groups *familiar* with the company. In 2020, Merck & Co/MSD ranked overall 4th out of 22 companies—an increase of 12 places on its 2019 overall rank of 16th.

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



PROFILE OF 2020'S 103 RESPONDENT GERMAN PATIENT GROUPS

Of the 103 respondent German patient groups ...

- 2% held an international geographic remit.
- 59% were national patient groups.
- 17% were large regional.
- 11% local.
- 59% worked/partnered with at least one pharmaceutical company.
- The 103 respondent German patient groups specialised in 50 different therapy areas.
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For further information on this 2020 Germany 'Corporate Reputation' report, please use contact details at the head of the press release.

~END OF PRESS RELEASE~

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