



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

The results of an independent survey of 113 Italian patient groups in 2020. Collectively, these patient groups reached out to 56,500 Italian patients during 2020. The respondent Italian patient groups commented on 25 companies, selecting those with the “Best” corporate reputation in 2020, and assessing which were “Best” at tackling Covid-19 during 2020.

**EMBARGOED PRESS RELEASE:
1am GMT, MONDAY, SEPTEMBER 13th 2021**

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SUMMARY OF FINDINGS

London, September 13th, 2021

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 to February 2021) the opinions of 113 Italian patient groups on the performance of the pharmaceutical industry during the Covid-19 pandemic of 2020.

ITALIAN PATIENT-GROUP PERSPECTIVES ON PHARMA DURING THE COVID-19 PANDEMIC

Industry-wide findings

- ***The pharma industry's effectiveness at tackling Covid-19, 2020.***
Only 51% of 2020's respondent Italian patient groups judged the industry's actions in tackling Covid-19 to be “Very effective” or “Effective” during 2020 (a lower figure than the 62% average from patient groups worldwide, and far lower than the highest figure reported in any country in Western Europe—Spain's 86%, from 2020's respondent Spanish patient groups).

- **The pharma industry's corporate reputation in Italy, 2020.** 56% of 2020's respondent Italian patient groups stated that the pharmaceutical industry had an "Excellent" or "Good" corporate reputation—slightly lower than the 59% given by Italian patient groups responding in 2019. However, even this slightly-lower figure of 56% still managed to place the pharma industry equal first for corporate reputation in Italy in 2020, alongside biotechnology companies, and slightly ahead of medical-device companies (54%), and retail pharmacists (50%). 2019's respondent Italian patient groups had also ranked the pharmaceutical industry first for corporate reputation in Italy.

Company rankings

Two sets of rankings are provided in the 2020 analyses: (1.) out of 25 pharma companies, and (2.) out of just 14 of the largest, multi-national, multi-therapy ('big-pharma') companies.

Response to Covid-19 in Italy, 2020

1. **Out of 25 pharma companies:** The three pharma companies voted "Best" in 2020 for helping Italian patients and patient groups during Covid-19 were: **1st, Roche | 2nd, Gilead Sciences | and, 3rd, Janssen**—as assessed by respondent Italian patient groups familiar with the company.
2. **Out of 14 'big-pharma' companies:** The three 'big-pharma' companies voted "Best" in 2020 for helping Italian patients and patient groups during Covid-19 were: **1st, Roche | 2nd, Janssen and, 3rd, Pfizer**—as assessed by respondent Italian patient groups familiar with the company.

Overall corporate reputation in Italy in 2020

1. **Out of 25 pharma companies:** The three pharma companies voted "Best" for overall corporate reputation in Italy in 2020 were: **1st, Roche | 2nd, Pfizer | and, 3rd, Novo Nordisk**—as assessed by respondent Italian 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 Italy in 2020 were: **1st, Roche | 2nd, Pfizer | and, 3rd, Janssen**—as assessed by respondent Italian patient groups familiar with the company.

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

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ABOUT THE 2020 'CORPORATE REPUTATION' SURVEY

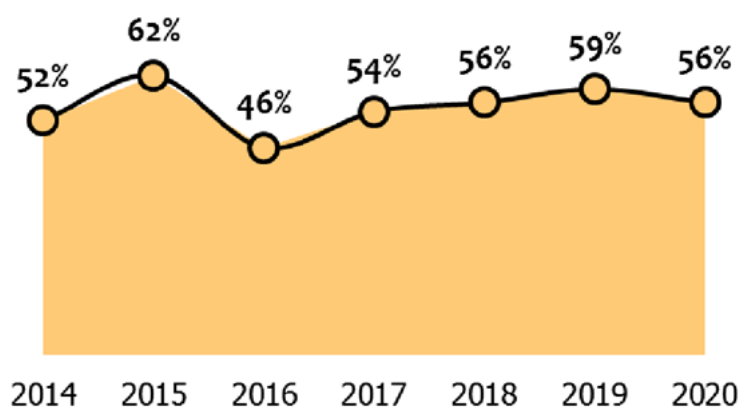
A survey of 113 Italian patient groups

- **When?** The survey was conducted November 2020-February 2021, when key events of the pandemic will have influenced the opinions of respondent Italian 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?** 25 companies were included in the 2020 Italy analyses:
AbbVie | Amgen | AstraZeneca | Bayer | Biogen | Boehringer Ingelheim | Bristol Myers Squibb | Chiesi Farmaceutici | Eli Lilly | Gilead Sciences | GSK | Janssen | Menarini | Merck & Co/MSD | Merck KGaA | Mylan | Novartis | Novo Nordisk | Pfizer | Pierre Fabre | Roche | Sandoz | Sanofi | Takeda/Shire | Teva .
- **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 CORPORATE REPUTATION IN ITALY, 2020

The majority (56%) of 2020's respondent Italian patient groups stated that the pharma industry had an "Excellent" or "Good" corporate reputation in 2020 (59% of respondent Italian patient groups in 2019 said the same) [see Chart 1]. The equivalent global figure in 2020 was 50%.

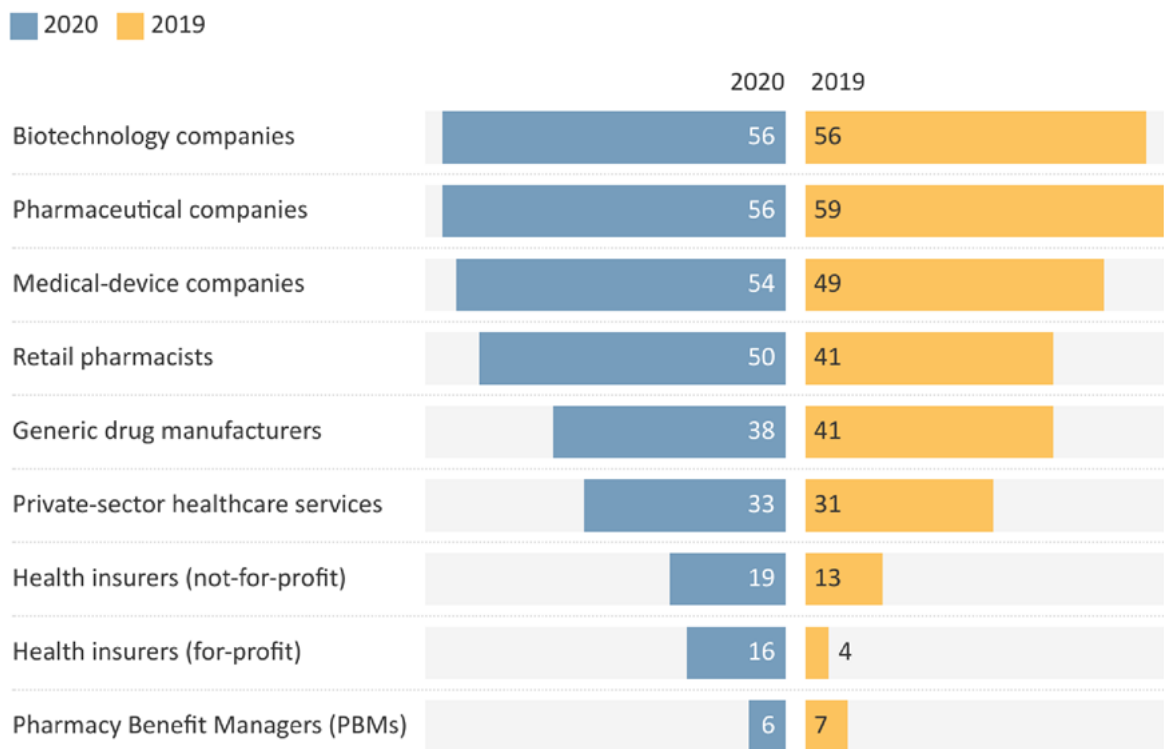
Chart 1: The pharma industry's corporate reputation in Italy has remained relatively stable since 2014 (Percentage of respondent Italian patient groups per year stating that the pharmaceutical industry has an "Excellent" or "Good" corporate reputation)



Respondent Italian patient groups ranked the pharma industry **joint 1st** out of nine healthcare sectors for corporate reputation in Italy in 2020 [see Chart 2]. The majority of 2020's respondent Italian patient groups also endorsed the pharma industry's capabilities at three of its key activities in 2020:

- 59% of 2020's respondent Italian patient groups stated that the pharma industry was "Excellent" or "Good" at **innovation** (against 49% saying the same in 2019).
- 58% of 2020's respondent Italian patient groups stated that the industry was "Excellent" or "Good" at **creating products of benefit to patients** (against 50% saying the same in 2019).
- 50% of 2020's respondent Italian patient groups described the industry as "Excellent" or "Good" at **patient safety** (against 46% saying the same in 2019).

Chart 2: The corporate reputation of the pharmaceutical industry in Italy, 2020 v. 2019—compared with that of other healthcare sectors (Percentage of respondent Italian patient groups stating "Excellent" or "Good")



2. THE PHARMA INDUSTRY’S EFFECTIVENESS AT TACKLING THE COVID-19 PANDEMIC IN ITALY IN 2020



Although 2020’s respondent Italian patient groups acknowledged the pharma industry’s capabilities at three of its key activities in 2020, just 51% of them judged the industry’s response to Covid-19 to be “Very effective” or “Effective”—one of the lowest figures reported in Western Europe [see Chart 3]. Several reasons explain why Italian patient groups gave a low estimation of the industry’s ability to tackle Covid-19:

- By the time the 2020 PatientView ‘Corporate Reputation’ survey was closing in late-February 2021 (which was after more than a year of the pandemic in Italy), the number of cases of Italian people who had contracted Covid-19 had grown to over 2 million. Deaths of Italian citizens were approaching 100,000.
- At that same time (end February 2021) Italy ranked near bottom in Western Europe for the levels of its population vaccinated against Covid-19, with only France ranking lower [see Chart 4].

Chart 3: The effectiveness of the pharma industry at supporting patients during Covid-19, 2020—countries performing below the Western-European average (Percentage of respondent patient groups from each country stating “Very effective” or “Effective”)

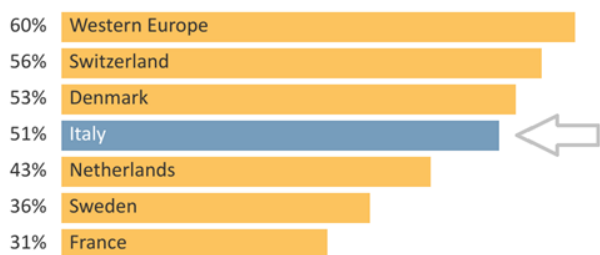
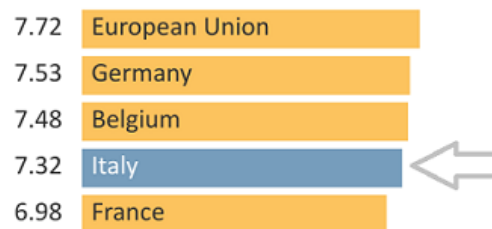


Chart 4: Countries performing below the EU average at Covid-19-vaccine doses administered per 100 people, as of February 28th 2021 (the end of the PatientView 2020 survey period) (Source: Official data collated by ‘Our World in Data’)



The majority of 2020’s respondent Italian patient groups believed pharma to be either “Fair” or “Poor” (or they “Did not know”) during 2020 at other key activities of importance to patients. The main sentiment from 2020’s respondent Italian patient groups was that much more could have been done in Italy during Covid-19 by the pharma industry—particularly in its **provision of patient information** (notably information related to the interaction of Covid-19 and Italian patients’ customary treatments). Only 39% of 2020’s respondent Italian patient groups stated that the pharma industry was “Excellent” or “Good” at providing high-quality patient information (38% of 2019’s respondent Italian patient groups said the same).

The majority of 2020's respondent Italian patient groups remained sceptical, too, about the industry's abilities to **engage patients in R&D**. Only 13% of 2020's respondent Italian patient groups stated that the industry was "Excellent" or "Good" at these activities.

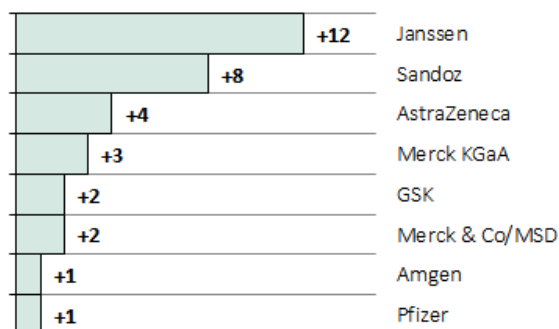
<p>On patient information</p> <p>"I pazienti richiedono informazioni semplici. Tali informazioni andrebbero concordate con specialisti del settore ed orientate alla relazione fra virus e gestione della propria patologia."</p> <p>("Patients ask for simple information. This information should be agreed upon with specialists in the sector, and should focus on the relationship between the virus, and the management of your disease.")</p> <p>—national fertility patient group, Italy</p>	<p>On patient engagement in R&D</p> <p>"Coinvolgimento sin dalla fase preclinica. Co-design del consenso informato. Scelta condivisa dei PROMs ed eventuali PREMs. Co-design del materiale di informazione durante il trial e di quello per la disseminazione."</p> <p>("Involvement, right from the pre-clinical phase. Co-design the informed consent. Shared choice of patient-reported outcomes [PROMs], and any patient-reported experiences [PREMs]. Co-design the informational material during the trial, and the dissemination informational material.")</p> <p>—national skin-disorders patient group</p>
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3. RANKINGS OF INDIVIDUAL PHARMA COMPANIES IN ITALY IN 2020

The companies voted "Best" for Covid-19 response in Italy in 2020, and "Best" for overall corporate reputation in Italy in 2020, can be found in the summary above. Other success stories included ...

Janssen jumped 12 places in ranking for overall corporate reputation in Italy in 2020, as assessed by respondent Italian patient groups *familiar* with the company. Janssen ranked overall 4th in Italy in 2020 out of 25 pharma companies.

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



PROFILE OF 2020'S 113 RESPONDENT ITALIAN PATIENT GROUPS

Of the 113 respondent patient groups ...

- 5% held an international geographic remit.
- 50% were national patient groups.
- 25% were large regional.
- 19% local.
- 63% worked/partnered with at least one pharmaceutical company.
- The 113 respondent Italian patient groups specialised in 44 different therapy areas.



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