



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

The results of an independent survey of 116 respiratory patient groups in 2020. Collectively, these patient groups reached out to 66,200 patients with various respiratory conditions during 2020. The respondent respiratory patient groups commented on 17 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 to February 2021) the opinions of 116 respiratory patient groups on the performance of the pharmaceutical industry during the Covid-19 pandemic of 2020.

Respiratory patient-group perspectives on pharma during the Covid-19 pandemic

INDUSTRY-WIDE FINDINGS IN THE FIELD OF RESPIRATORY CONDITIONS, 2020

- ***The pharma industry's effectiveness at tackling Covid-19, 2020.***
60% of 2020's respondent respiratory patient groups judged the industry's actions in tackling Covid-19 to be "Very effective" or "Effective" during 2020 (similar to the 62% average from patient groups therapy wide in 2020).
- ***The pharma industry's corporate reputation, 2020.*** *53% of 2020's respondent respiratory patient groups stated that the pharmaceutical industry had an "Excellent" or "Good" corporate reputation (around the same as the 56% reported by respiratory patient groups in 2019).*

THE 2020 RANKINGS OF INDIVIDUAL PHARMA COMPANIES WORKING IN THE FIELD OF RESPIRATORY DISEASES

Two sets of rankings are provided in the 2020 analyses, from the perspective of the 116 respondent respiratory patient groups: (1.) assessing the corporate reputation of 17 pharma companies; and (2.) assessing the corporate reputation of just 12 of the largest pharma companies ('big pharma').

Response to Covid-19 in 2020, according to 116 respondent respiratory patient groups

1. **Out of 17 pharma companies:** The three pharma companies voted “Best” for supporting patients with respiratory conditions during the Covid-19 pandemic in 2020 were: **1st, Boehringer Ingelheim | 2nd, Janssen | and, 3rd, Pfizer**—as assessed by respondent respiratory patient groups familiar with the company.
2. **Out of 12 ‘big-pharma’ companies:** The three ‘big-pharma’ companies voted “Best” in 2020 for supporting patients with respiratory conditions during the Covid-19 pandemic in 2020 were: **1st, Janssen | 2nd, Pfizer | and, 3rd, Roche/Genentech**—as assessed by respondent respiratory patient groups familiar with the company.

Overall corporate reputation in 2020, according to 116 respondent respiratory patient groups

1. **Out of 17 pharma companies:** The three pharma companies voted “Best” for overall corporate reputation in 2020 were: **1st, Boehringer Ingelheim | 2nd, Pfizer | and, 3rd, Janssen**—as assessed by respondent respiratory patient groups familiar with the company.
2. **Out of 12 ‘big-pharma’ companies:** The three ‘big-pharma’ companies voted “Best” in 2020 for overall corporate reputation in 2020 were: **1st, Pfizer | 2nd, Janssen | and, 3rd, Roche/Genentech**.

The commentaries supplied to PatientView by 2020’s respondent respiratory patient groups made clear that their opinions on pharma companies in 2020 were primarily influenced by company responses to Covid-19—whether that be the development and production of vaccines, or other efforts by companies to support patients with respiratory conditions during lockdown.

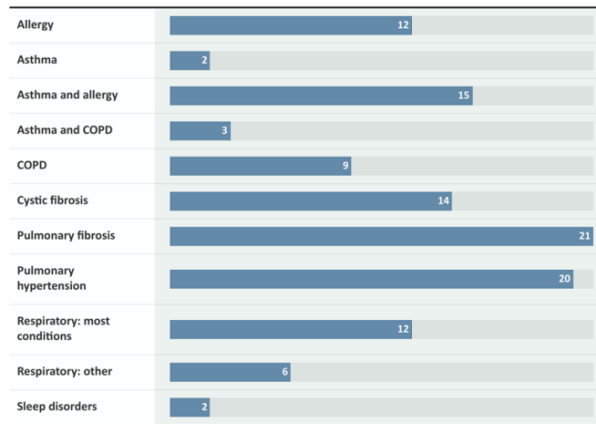
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ABOUT THE 2020 ‘CORPORATE REPUTATION’ SURVEY

A survey of 116 respiratory patient groups

- **When?** The survey was conducted November 2020-February 2021, when key events of the pandemic will have influenced the opinions of respondent respiratory 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 during that year.
- **Companies assessed?** 17 companies were included in the 2020 respiratory analyses: AbbVie | AstraZeneca | Bayer | Boehringer Ingelheim | Bristol Myers Squibb | Chiesi Farmaceutici | Eli Lilly | GSK | Janssen | Merck & Co/MSD | Mylan | Novartis | Pfizer | Roche/Genentech | Sandoz | Sanofi | 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.

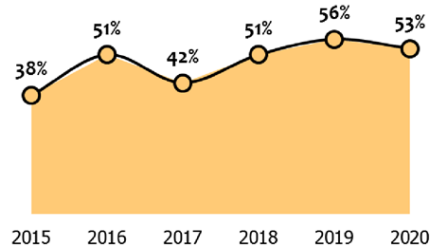
Chart 1. Therapeutic areas of respondent respiratory patient groups, 2020. Number of respondent respiratory patient groups, N=116



1. THE PHARMA INDUSTRY’S CORPORATE REPUTATION AMONG RESPIRATORY PATIENT GROUPS, 2020

The majority of respiratory patient groups have been gradually adopting a more positive view of the pharma industry since PatientView first began analysing their opinions in 2015. In 2020, 53% of the respondent respiratory patient groups assessed the pharma industry as having an “Excellent” or “Good” corporate reputation (though this figure is slightly down on the 56% saying the same in 2019).

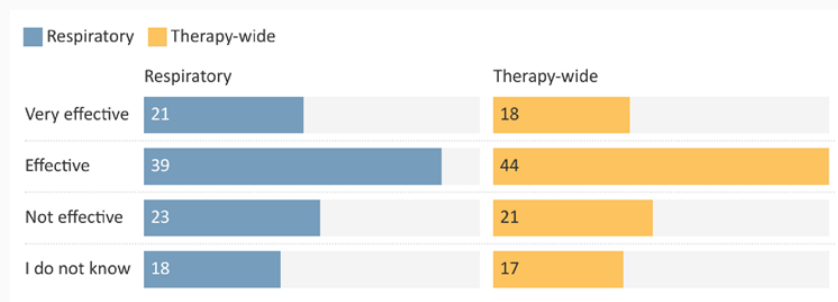
Chart 2: The pharma industry’s corporate reputation since 2015, as assessed by respondent respiratory patient groups (Percentage of respondent respiratory patient groups per year stating that the pharmaceutical industry has an “Excellent” or “Good” corporate reputation)



The 2020 figure of 53% from respiratory patient groups puts the corporate reputation of the pharma industry ahead, in their opinion, of that of most other major healthcare stakeholders, the exception being retail pharmacists (60% of 2020’s respondent respiratory patient groups stated that the retail-pharmacy sector had an “Excellent” or “Good” corporate reputation).

2. THE PHARMA INDUSTRY’S SUPPORT OF PATIENTS DURING THE COVID-19 PANDEMIC, 2020

Chart 3: Percentage of respondent patient groups which thought the pharma industry “Very effective” or “Effective” at supporting patients during the Covid-19 pandemic of 2020: Respiratory patient groups v. patient groups therapy wide



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

60% of 2020's respondent respiratory patient groups judged the industry's response to the Covid-19 pandemic to be "Very effective" or "Effective." The average from patient groups across all therapy areas was slightly higher, at 62%. The fact that the majority of 2020's 116 respondent respiratory patient groups were positive about the pharmaceutical industry's attempts to help patients with respiratory conditions during the pandemic in part explains why most of these patient groups also assessed the industry's performance at its key R&D activities more positively in 2020:

- **Creating products of benefit to patients:** 64% of 2020's respondent respiratory patient groups stated that the industry was "Excellent" or "Good" at this core activity (52% said the same in 2019).
- **Ensuring patient safety:** 59% of 2020's respondent respiratory patient groups stated that the industry was "Excellent" or "Good" at patient safety (a similar figure to the 60% of 2019).
- **Ability to innovate:** 51% stated that the industry was "Excellent" or "Good" at innovation in 2020 (against 45% saying the same in 2019).

2020's respondent respiratory patient groups referred, in the commentaries they supplied to the survey, to the pharma companies offering patients with respiratory conditions flexible emergency support during the Covid-19 pandemic of 2020, or providing practical steps for respiratory patients cut off from their customary forms of treatment during lockdown. Respondent respiratory patient groups also noted, though, that not all pharma companies were as helpful during the pandemic to patients with respiratory conditions.

"В 2020 г. в России исчезли некоторые антибактериальные внутривенные препараты, необходимые для пациентов с муковисцидозом. Некоторые фарм.компании откликнулись и предоставили благотворительные партии, которые по согласованию с Минздравом России были переданы напрямую в больницы для конкретных пациентов. Некоторые фарм.компании отказались. Мы понимаем, что благотворительная помощь - дело добровольное, тем не менее надеялись на гуманитарный отклик ввиду особенной ситуации." (In 2020, some intravenous antibacterial medicines required for patients with cystic fibrosis disappeared in Russia. Some pharmaceutical companies responded, and provided charitable consignments, which, in consultation with the Russian Ministry of Health, have been given directly to hospitals for specific patients. Some pharmaceutical companies have refused. We understand that charitable support is voluntary, but we had hoped, because of the special situation, for a humanitarian response.)

—Благотворительный фонд «Острова», a national cystic-fibrosis patient group, Russia

"The companies we deal with have ensured the supply chain of medications was maintained, and still is."

—Pulmonary Hypertension Australia (PHA)

"Se rapprocher un peu plus des associations de patients, comme a su le faire Roche sur toute la période de la pandémie." ("Work more closely with patients' associations, as Roche has had the sense to do throughout the pandemic.")

—Association Pierre ENJALRAN Fibrose Pulmonaire Idiopathique (APEFPI), a national respiratory-conditions patient group, France

3. WHERE PHARMA NEEDS TO IMPROVE



Although 2020's respondent respiratory patient groups acknowledged the pharma industry's capabilities in R&D in 2020, the majority also believed pharma to be either "Fair" or "Poor" (or they "Did not know") at other key activities of importance to patients—notably pharma's **provision of patient information**. 45% of 2020's respondent respiratory patient groups stated that the pharma industry was "Excellent" or "Good" at providing high-quality patient information (against 52% saying the same in 2019).

2020's respondent respiratory patient groups emphasised a strong unmet demand from respiratory patients for information from pharma on the impact of Covid-19 and vaccines on patients with respiratory conditions, including:

- How Covid-19 affects people with respiratory diseases;
- How to use respiratory treatments when vaccinated; and
- How to adapt hospital-based treatments for home use during lockdown.

“当初、呼吸器疾患がある人はハイリスクとされたが、ステロイド吸入治療を続けている人のリスクは小さいといったコメントをオンライン講演会で医師らが発言するようになった。基礎疾患がある人はそれぞれ状況が違い、医師の考え方も異なるが、製薬メーカーとしてはどう考えるか、薬品と対象疾患に関連した正しい知識を発信してほしい。” (“Although, initially, people with respiratory disease were said to be at high risk, doctors have said in online lectures that the risk is small for people on continued inhaled-steroid therapy. The circumstances of people with underlying disease varies from person to person, and the opinions of doctors also differ. We would like to know what the drug manufacturers think, and we would like them to disseminate correct knowledge relating to drugs and the target diseases.”)

—Regional asthma-and-allergy patient group, Japan

4. 2020'S RANKINGS OF INDIVIDUAL PHARMA COMPANIES THAT WORK IN THE FIELD OF RESPIRATORY CONDITIONS

The companies voted "Best" for Covid-19 response by respiratory patient groups in 2020, and "Best" for overall corporate reputation in the field of respiratory conditions in 2020, can be found in the summary at the beginning of this press release.

The company making the biggest jump in overall corporate reputation in the field of respiratory conditions was **Pfizer**—ranked **2nd** out of 17 pharma companies in 2020 by respondent respiratory patient groups familiar with the company (this position represented a jump of 5 places on its 2019 performance, when Pfizer ranked 7th out of 14 companies).

PROFILE OF 2020's 116 RESPONDENT RESPIRATORY PATIENT GROUPS

Of the 116 respondent patient groups ...

- 11% held an international geographic remit.
- 58% were national patient groups.
- 18% were large regional.
- 14% local.
- 65% worked/partnered with at least one pharmaceutical company.
- The 116 respondent respiratory patient groups were headquartered in 34 different countries.



*For further information on this 2020 respiratory 'Corporate Reputation' report, please use
contact details at the head of the press release.*

~END OF PRESS RELEASE~

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