



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

The results of an independent survey of 232 neurology patient groups in 2020. Collectively, these patient groups reached out to 138,100 patients with various neurological conditions during 2020. The respondent neurology patient groups commented on 23 companies, selecting those with the “Best” corporate reputation in 2020, and which were “Best” at responding to Covid-19 in 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, between November 2020 and February 2021, the opinions of 232 neurology patient groups on the performance of pharma during the Covid-19 pandemic of 2020 (from both industry-wide and company-specific perspectives). For a list of companies included in these 2020 neurology analyses, see below.

The findings show that patients with neurological conditions suffered significantly (some more than others) during the Covid-19 lockdowns of 2020. Many patients with neurological conditions were unable to attend hospital. Drug shortages were also created by Covid-19-related disruptions to the drug-distribution supply chain. Patient groups specialising in neurological conditions had to step up and fill new demands placed on them by 'locked-down' neurology patients. However, many such patient groups found that they weren't receiving hoped-for support from pharma while the pandemic was raging.

INDUSTRY-WIDE FINDINGS, 2020—THE PERSPECTIVES OF NEUROLOGY PATIENT GROUPS

The perceptions of respondent neurology patient groups **as a whole** were compared with those from respondent patient groups specialising in **five different types** of neurology conditions:

- epilepsy;
- dementia;
- multiple sclerosis;
- neuromuscular conditions ;and
- Parkinson's.

Pharma's response to Covid-19

58% of 2020's respondent neurology patient groups judged the pharma industry's response to Covid-19 to be "Very effective" or "Effective"—a figure not far short of the global average of 62% from patient groups of all therapy areas.

However, **Chart 1** shows that attitudes towards the pharma industry's effectiveness at tackling Covid-19 varied significantly among the patient groups specialising in the different neurology conditions. Most negative were the respondent epilepsy patient groups. The feedback they provided to the 2020 survey highlighted the problems that the patients with whom they were familiar were having in accessing standard epilepsy treatments during the pandemic of 2020.

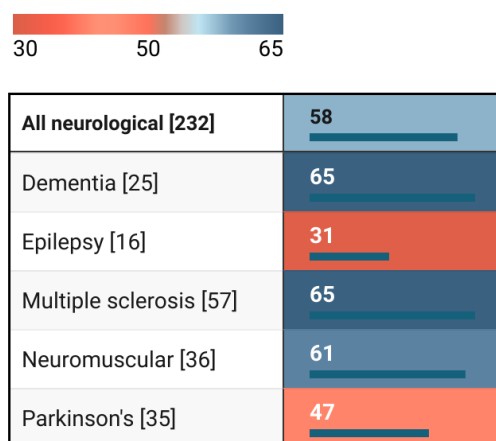


Chart 1: Percentage of respondent neurology patient groups which thought the pharma industry "Very effective" or "Effective" at supporting patients during the Covid-19 pandemic of 2020—comparing five different neurology conditions

The corporate reputation of pharma

Every year since 2013, only a minority of the 'Corporate Reputation's respondent neurology patient groups have taken a positive view of the pharma industry, and that remained true in 2020: 46% of 2020's respondent neurology patient groups stated that the pharma industry as a whole had an "Excellent" or "Good" corporate reputation. Nevertheless, this figure put the pharma industry ahead of most other healthcare sectors, except for retail pharmacists (59%). The biotechnology industry was considered to be on a par with pharma for corporate reputation in 2020.

Opinions among the various different types of respondent neurology patient groups were again dissimilar—a point illustrated by **Chart 2 (see next page)**. The chart shows that, although all respondent neurological patient groups took a more positive view of the pharma industry's corporate reputation in 2020 than in 2019, the levels of approval did differ significantly between the categories of neurological patient groups.

Respondent multiple-sclerosis patient groups were the most positive, with 62% stating that the pharma industry had an “Excellent” or “Good” corporate reputation in 2020. By contrast, only 31% of the respondent epilepsy patient groups stated the same. The biggest rise in approval ratings for the pharmaceutical industry was reported by respondent Parkinson's patient groups, with 55% stating that the pharma industry had an “Excellent” or “Good” reputation (a 16% increase on the equivalent figure from 2019).

Chart 2: *The pharma industry's corporate reputation, 2020 v. 2019—according to five different categories of respondent neurology patient groups. Percentage of respondent neurology patient groups stating that the pharma industry has an “Excellent” or “Good” corporate reputation*

	2020 ▼	2019	Diff
Multiple sclerosis [57]	62	50	+12
Parkinson's [35]	55	39	+16
Dementia [25]	48	39	+9
All neurological conditions [232]	46	35	+11
Neuromuscular [36]	38	24	+14
Epilepsy [16]	31	27	+4

THE RANKINGS OF **INDIVIDUAL PHARMA COMPANIES**, 2020—THE PERSPECTIVES OF NEUROLOGY PATIENT GROUPS

Rankings were calculated according to the assessments made by ...

1. **All 232 respondent neurology patient groups** (assessing 23 companies that hold a neurology portfolio, including 12 'big-pharma' companies);
2. **The 57 respondent multiple-sclerosis patient groups** (assessing 10 companies that hold a multiple-sclerosis portfolio, including five 'big-pharma' companies).

Covid-19 response

Table 1: The three pharma companies voted “Best” for their *support of patients during the Covid-19 pandemic in 2020* by respondent neurology patient groups *familiar* with the companies [figure in brackets is the total number of companies included in each therapy-area set of the rankings]

Rank	All neurology [all 23 companies]	All neurology [12 'big-pharma']
1st	Roche/Genentech	Roche/Genentech
2nd	Eisai	Novartis
3rd	Biogen	Pfizer

Rank	Multiple sclerosis [all 10 companies]	Multiple sclerosis [5 'big-pharma']
1st	Roche/Genentech	Roche/Genentech
2nd	Novartis	Novartis
3rd	Biogen	Bristol Myers Squibb

2020’s respondent neurology patient groups named **nine companies** that they saw to be supplying flexible emergency support to neurology patients/patient groups during Covid-19, or offering practical steps for neurology patients cut off from treatment during lockdown: • Biogen; • Eisai; • Lundbeck; • Novartis; • Pfizer; • Roche/Genentech; • Sanofi; • Teva; and • UCB.

Overall corporate reputation

Table 2: The three pharma companies voted “Best” for *overall corporate reputation in 2020*, according to respondent neurology patient groups *familiar* with the companies [figure in brackets is the total number of companies included in each therapy-area set of the rankings]

Rank	All neurology [all 23 companies]	All neurology [12 'big-pharma']
1st	Roche/Genentech	Roche/Genentech
2nd	Biogen	Novartis
3rd	Novartis	AbbVie

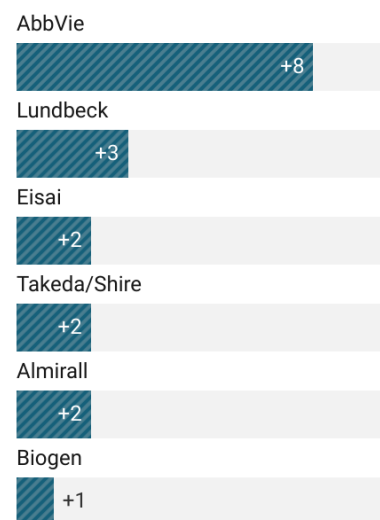
Rank	Multiple sclerosis [all 10 companies]	Multiple sclerosis [5 'big-pharma']
1st	Roche/Genentech	Roche/Genentech
2nd	Biogen	Novartis
3rd	Novartis	Sanofi

The commentaries supplied to PatientView by 2020's respondent neurology patient groups made clear that their opinions on the corporate reputation of 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 neurological conditions during lockdown. 2020's respondent neurology patient groups also offered recommendations on how the pharma industry, and individual companies, could improve their service to patients with neurological conditions.

Other success stories

Chart 3: Companies showing an increase in overall rankings in the PatientView 'Corporate Reputation of Pharma' neurology league tables, 2019-2020 (as assessed by respondent neurology patient groups *familiar* with the company)

The company making the biggest jump in overall corporate reputation in the field of neurology conditions in 2020 was **AbbVie**, which was ranked **7th** out of 23 pharma companies by 2020's respondent neurology patient groups *familiar* with the company—a jump of 8 places on AbbVie's 2019 position (when the company was ranked 15th out of 21 companies).



WHERE PHARMA NEEDS TO IMPROVE



Although 2020's respondent neurology patient groups acknowledged the pharma industry's capabilities at innovation, and at the provision of products of benefit to patients, the majority also believed pharma to be either "Fair" or "Poor" (or they "Did not know") during the pandemic of 2020 at other key activities of importance to patients—most notably:

- provision of patient information; and
- patient engagement in R&D.

Provision of patient information

"Informer over compabiliteit parkinsonmedicatie en coronamedicatie."
(*"Provide information about the compatibility of medicines used to treat Parkinson's and coronavirus infections."*)—
Regional Parkinson's patient group, Belgium

"Ritka betegség esetén az árva gyógyszer gyártójától nemzetközi szinten és az orvosainkon keresztül sem tudtunk információhoz jutni az árva gyógyszerrel kezeltek veszélyeztetettségéről." (*"In the case of a rare disease, we were unable to obtain information from the orphan-drug manufacturer internationally, or through our physicians, about the vulnerability of those treated with the orphan drug. And that is at least what we would have expected."*)—
National epilepsy patient group, Hungary

Only 35% of 2020's respondent neurology patient groups stated that the industry was "Excellent" or "Good" at providing high-quality patient information (against 34% in 2019). 2020's respondent neurology patient groups identified that patients with a neurological condition had a strong, but unmet, need during the pandemic for information from pharma about the impact of Covid-19 on their medical conditions, in particular:

- How Covid-19 affects people with specific neurological diseases; and
- Whether vaccination has any consequences for neurological treatments.

Patient engagement in R&D

"Include patients at all stages of drug development, in order to build credible trust in the general community."—
National neurological-conditions patient group, USA

Only 19% of 2020's respondent neurology patient groups stated that the industry was "Excellent" or "Good" at engaging patients in research (against 17% in 2019). Also in 2020, just 21% of respondent neurology patient groups stated that the industry was "Excellent" or "Good" at engaging patients in drug development, against 17% in 2019. Respondents provided several comments on the subject.

ABOUT THE 2020 'CORPORATE REPUTATION' SURVEY

A survey of 232 neurology patient groups

- **When?** The survey was conducted November 2020-February 2021, when key events of the pandemic will have influenced the opinions of respondent neurology 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?** 23 companies were included in the 2020 neurology analyses: AbbVie | Acorda Therapeutics | Almirall | Bayer | Biogen | Bristol Myers Squibb | Eisai | Eli Lilly | GSK | Janssen | Lunbeck | Merck & Co/MSD | Merck KGaA/EMD Serono | Mylan | Novartis | Pfizer | Roche/Genentech | Sandoz | Sanofi Sun Pharma | Takeda/Shire | Teva | UCB.
- **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.

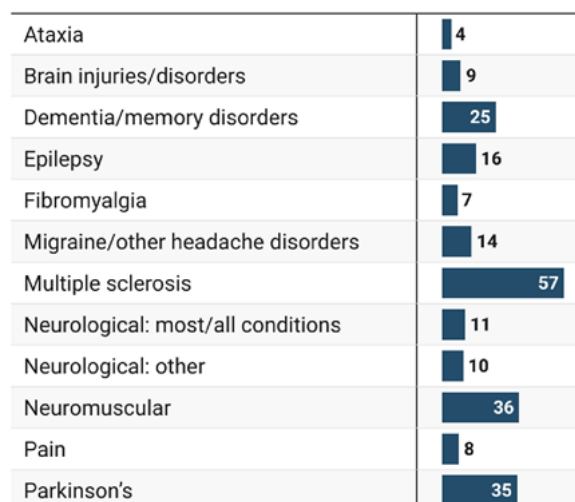
PROFILE OF 2020's 232 RESPONDENT NEUROLOGY PATIENT GROUPS

Of the 262 respondent patient groups ...

- 7% held an international geographic remit.
- 58% were national patient groups.
- 19% were large regional.
- 15% local.
- 57% worked/partnered with at least one pharmaceutical company.
- The 232 respondent neurology patient groups were headquartered in 47 different countries.

Chart 4. Therapeutic areas of respondent neurology patient groups, 2020.

Number of respondent neurology patient groups, N=232



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

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