THE CORPORATE REPUTATION OF PHARMA —FROM A PATIENT PERSPECTIVE, 2021 (PUBLISHED 2022)

METHODOLOGY

PATIENT VIEW

Collating the data

Online survey—this year's version conducted November 2021 to February 2022. Respondent patient groups are drawn from across the globe. Collectively, they hold expertise in a wide range of therapy areas.

Why ask patient groups for their opinions on pharma?

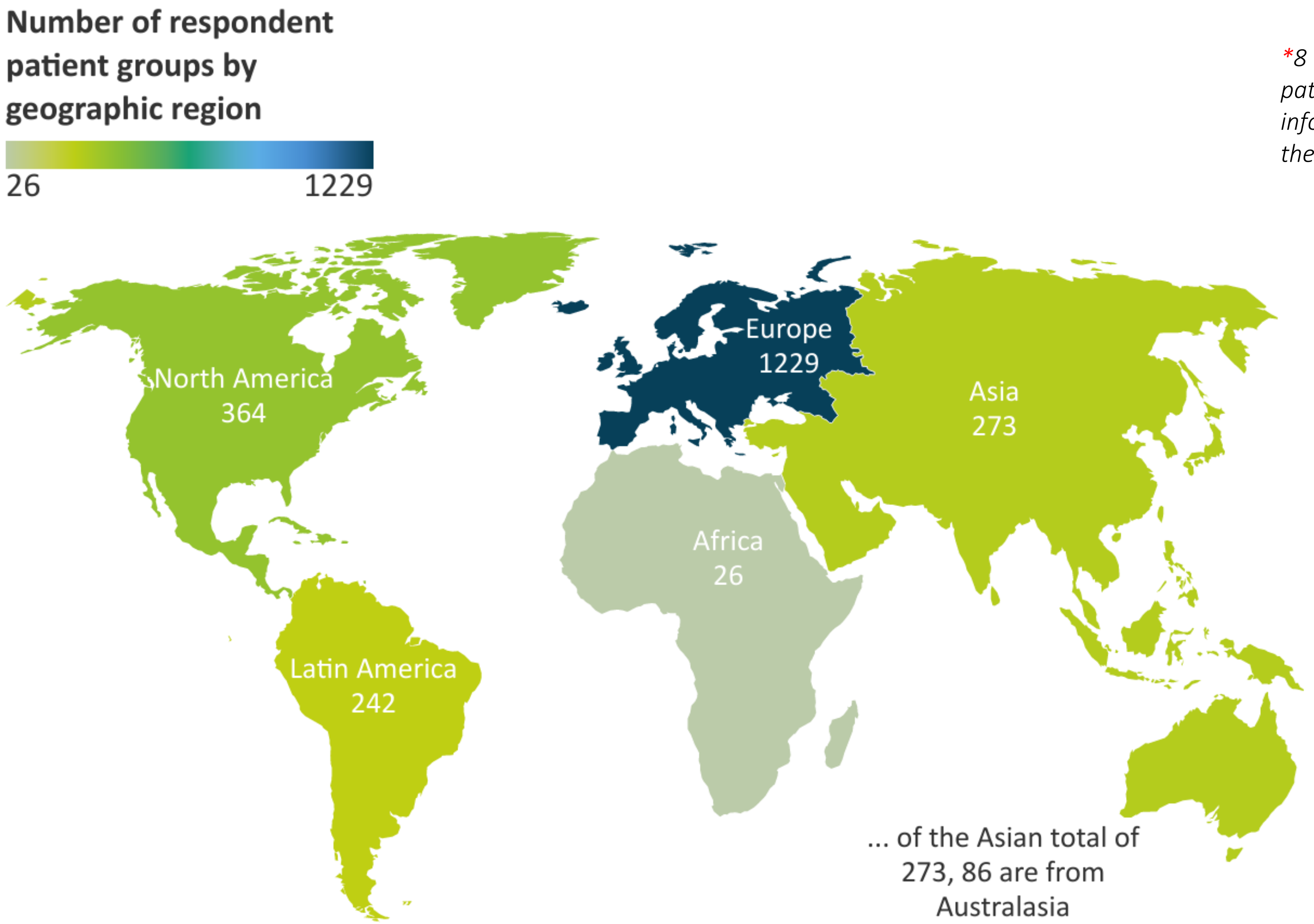
The patient-group perspective is especially important to pharma. Patient groups possess a unique understanding of the needs of the patients they represent.

Many, too, are familiar with the complexities of pharma's business.

Patient groups, from their vantage point, are therefore able to assess pharma, and to recommend ways that the industry (and individual companies) can improve—all from a patient perspective.

Respondent profiles, 2021

(according to the country in which respondent patient groups are headquartered; N = 2,150)



**8 of 2021's 2,150 respondent patient groups did not provide information on which country they are based.*

Gathering feedback from patient groups

Collating the data

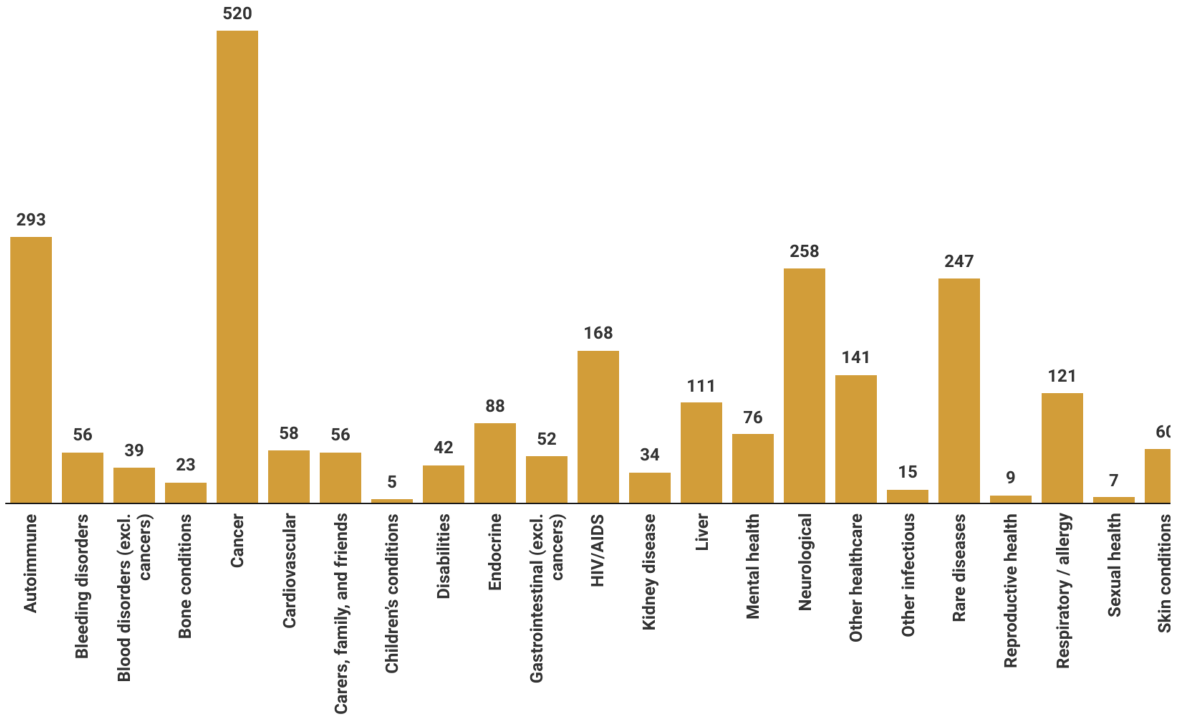
72% of respondent patient groups responding to the 2021 survey worked with at least one pharma company.

The 2021 survey was conducted in 21 languages:

Arabic | Chinese (Simplified) | Chinese (Traditional) | Danish | Dutch | English | Finnish | French | German | Greek | Hungarian | Italian | Japanese | Korean | Norwegian | Portuguese | Polish | Russian | Spanish | Swedish | Turkish.

Respondent profiles, 2021

(according to the therapy areas of respondent patient groups; N = 2,150)



**3 of 2021's 2,150 respondent patient groups did not provide information on the therapy areas of their focus.*

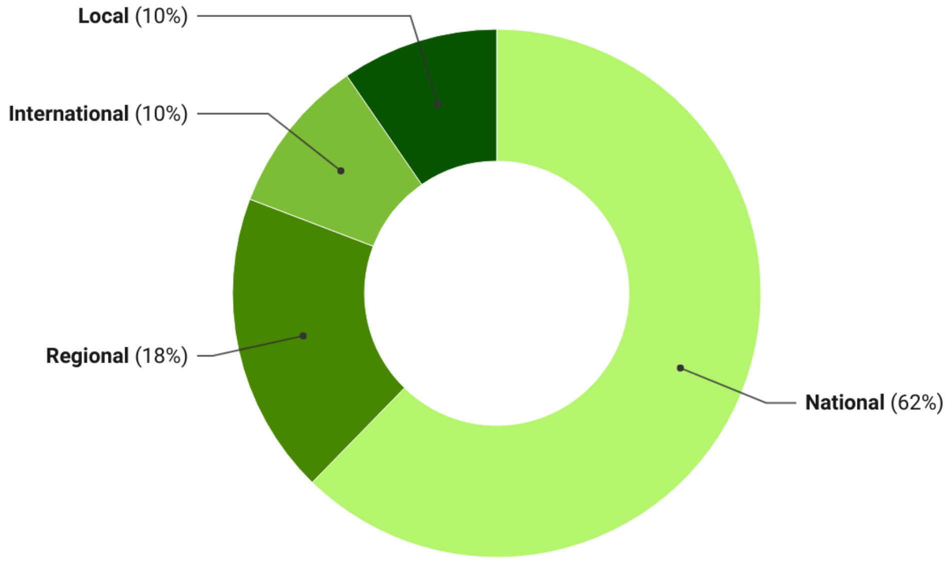
Gathering feedback from patient groups

Collating the data

2021’s 2,150 respondent patient groups reached out to approximately **19 million** patients worldwide during the course of 2021.

Respondent profiles, 2021

(according to the geographic reach of respondent patient groups; N = 2,150)



**4 of 2021’s 2,150 respondent patient groups did not provide information on their geographic remit.*

WHAT WE MEASURE (AND *WHY* WE MEASURE IT)

PATIENT VIEW

What we measure, and why

PatientView's annual online survey measures various aspects of pharma's performance at corporate reputation—always from a patient perspective.

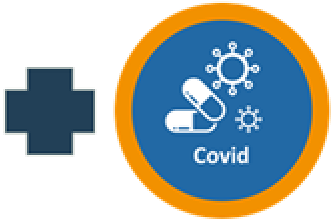
During the course of the survey's 11-year history, pharma companies and patient groups have contributed to the design of the survey questionnaire.

The survey questionnaire is divided into two sections, to assess …

- Firstly, the overall performance of the ***pharma industry as a whole*** at various activities of importance to patients. In addition pharma reputation is compared against other healthcare industries. Feedback to this first part of the survey provides an annual baseline of the attitudes of patient groups (and, ultimately, patients) toward pharma. Such attitudes can—and often do—fluctuate from year to year.

- Secondly, the performance at corporate reputation of ***individual pharma companies*** (47 in the 2021 survey: 48 in the 2020 survey). Companies are assessed by respondent patient groups for performance at **9 indicators of corporate reputation**—plus, a new 10th indicator added for the 2020 survey, and retained for the 2021 survey, examining companies for their support to patients during Covid-19. Respondent patient groups are asked to nominate the 3 companies they think "Best" at each indicator of corporate reputation.

The ten indicators measuring corporate performance from a patient perspective



Which companies were "Best" in 2021 at the following:

1. Supporting patients during the Covid pandemic
2. Having an effective patient-centred strategy.
3. Providing high-quality information for patients.
4. Ensuring patient safety.
5. Providing products of most benefit to patients.
6. Being transparent on ...
    i. Company pricing;
    ii. The company's clinical data;
    iii. Company funding of external stakeholders.
7. Acting with integrity.
8. Quality of relationships with patient groups.
9. Providing services 'beyond the pill'.
10. Engaging patients in ...
    i. Research; and in
    ii. Development.

Some definitions

PatientView supplies few definitions to respondent patient groups, because the survey is all about their perception. However, the following concepts were defined in the 2021 questionnaire:

- Patient support during the Covid-19 pandemic – *support directed by a pharma company specifically at the patients known to the respondent patient group.*
- Familiarity with a company – *the respondent patient group feeling knowledgeable enough about a pharma company to be able to comment on its activities and products.*
- Corporate reputation – *a pharma company meeting the expectations of patients and patient groups.*
- High-quality, useful products – *a pharma company supplying products of most benefit to the patients with whom the respondent patient group is familiar.*
- Services 'beyond the pill' – *a pharma company understanding the patient journey of the patients known to the respondent patient group, and providing patient services that go beyond just the provision of medicine.*
- Patient engagement in R&D (drug research) – *a pharma company involving patients known to the respondent patient group in research or discovery (that is, before clinical trials begin).*
- Patient engagement in R&D (drug development) – *a pharma company involving patients known to the respondent patient group in the development process (including clinical trials, and after).*

The ten indicators measuring corporate performance from a patient perspective

PatientView has been researching the views and needs of patient groups for more than 20 years. The extensive qualitative feedback collated by PatientView from patient groups responding to its surveys provides a clearer picture of what patient groups are looking for in companies—the qualities and attributes that define a positive corporate reputation (all from a patient perspective).

This latest research takes into account the fall-out from the Covid-19 pandemic—which, in part, redefined the way that patient groups value the corporate reputation of individual pharma companies.

The next few slides provide a short description of what patient groups consider to be "'Best" practice (as drawn from the PatientView evidence base) at each of the 10 indicators measuring corporate performance from a patient perspective.

Indicator 1. Supporting patients during the Covid pandemic

Covid

Q. If you were asked to make a definite choice:
In 2021, which three companies were "best" at responding to the Covid-19 pandemic, during its 2nd year, by supporting the patients known to your organisation?

Covid-19 had positioned the entire pharma industry into the international spotlight by the end of 2020. That first year of the pandemic provided pharma with both challenges and opportunities to prove its value, contributing solutions to the healthcare problems posed—and, in so doing, heighten corporate reputation. The same has proven true for 2021. The comments received from patient groups responding to the 2020 and 2021 surveys identified the key factors influencing patient perceptions of pharma's corporate performance during Covid-19.

Patient groups' assessments of individual companies for this indicator consider:

- Patient welfare.
- Drug shortages, and rising drug prices.
- The breakdown of doctor-patient relationships.
- Pharma relationships with patient groups.
- Calls for greater transparency.
- The impact of increased public knowledge of all aspects of pharma's business (and public thirst for better information).
- The speed of innovation and drug development (particularly in the case of vaccines).
- The shift to remote healthcare, and the increased provision of healthcare support in the home.

Indicator 2. Patient centricity

Patient Centricity

**Q. If you were asked to make a definite choice:
Which three companies were "best" in 2021 at having an effective patient-centred strategy?**

Pharma has been emphasising efforts to be patient centric—efforts to put the patient at the heart of what they do—for at least a decade. Pharma believes that such activity is not just right in essence—it can also bolster company reputation with those ultimate customers, the patients.

Now that Covid-19 has adapted the healthcare landscape to a certain extent, companies face even more pressure to bring true value to moves towards patient centricity.

In practice, the factors that define patient centricity include <u>all</u> of the PatientView indicators of corporate reputation. Indicator 2, however, is most particularly aimed at measuring patient-group perceptions as to whether a company is authentic and effective in its patient-centric actions.

Indicator 3. Patient information

Patient Information

Q. If you were asked to make a definite choice:
Which three companies were "best" in 2021 at providing high-quality information for patients?

The main connection between pharma companies and patients is through the information that companies provide. Pharma's patient information helps patients gain, and hold, confidence in the medicines they are prescribed. Unfortunately, information and mis-information alike flowed abundantly during the pandemic.

Patient-groups' assessments of individual-companies' performance in this 3rd indicator of corporate reputation consider whether the information supplied by the company is:

- Useful and relevant.
- Co-created with patients.
- Communicated via multiple channels.
- Balanced, and clear.
- Helpful in supporting doctor-patient relations.
- Offered throughout the length of a patient's course of drug treatment.
- Accessible to all relevant patients (patients can find it easily).
- Continuously reviewed and improved.
- Available regardless of the company's commercial priorities.

Indicator 4. Patient safety

Patient Safety

Q. If you were asked to make a definite choice:
Which three companies were "best" in 2021 at ensuring patient safety?

Pharma's responsibility to patient safety extends well beyond the regulatory boundaries in which the industry functions. Concerns over safety issues (and how well, and how quickly, these are addressed by any company concerned) can, surprisingly swiftly, change a company's reputation for the better, or for the worse.

The pandemic has added further considerations to the customary mix, by highlighting the fine balance that exists between public health versus individual patient need, and the requirement for speed of development versus the inherent caution built into regulatory frameworks. Yet, several fundamental patient needs remain unchanged: to be able to access, and continue to access, medicines in the knowledge that the treatments are safe enough to use.

Therefore, for this 4th indicator, respondent patient groups assess individual companies at:

- Transparency of their safety processes.
- Effectiveness at contingency planning.
- Reporting of adverse events.
- Sharing with patients and patient groups of updates emerging from real-word evidence.
- Communication about drug shortages.
- Availability of useful supportive digital tools.

Indicator 5. Providing products of most benefit to patients

High-quality Products

**Q. If you were asked to make a definite choice:
Which three companies’ products were of “most benefit” in 2021 to the patients known to your organisation?**

Industries achieves success through the serving of customer needs.

Respondent patient groups assess individual pharma companies for this 5th indicator at:

- Whether the company’s products deliver real value to patients.
- The extent to which patients are involved with the company in defining the priorities necessary in improving existing products.
- The patient populations able to benefit from the product.
- Ease of administration of the medicine.
- The emphasis the company places on the development of personalised medicines.
- Company engagement with patient groups (with the aim of being better able to communicate product-specific information to patients).
- Levels of company support provided to patient groups in their efforts to get their voices heard across the healthcare system.

Indicator 6. Transparency

Transparency

Q. If you were asked to make a definite choice:
Which three companies had the "best" record in 2021 at being transparent?

Patient groups believe that the inevitable stress imposed by increased demand on financially-challenged healthcare systems can, in part, be resolved through open and honest dialogue between all stakeholders—each working to fairly apportion rationed resources. The message, for the pharmaceutical industry, is to be as open as possible in all aspects of its work.

Patient groups assess individual companies for this 6th indicator of corporate reputation at:

- Levels of openness and honesty.
- Valid explanations for drug-pricing policies.
- Ease of public access to company clinical data.
- Complete disclosure of funding of third parties—even if local regulators do not demand such disclosure.
- Transparency information that is culturally relevant, comprehensive, and easy to find in the public domain.

Indicator 7. Acting with integrity

Q. If you were asked to make a definite choice:
Which three companies had the “best” record in 2021 for acting with integrity?

Patient-groups’ views on the integrity of pharma have always hinged on the balance between the industry’s need to generate return for investors, and the industry’s responsibilities to patients, healthcare providers, and the wider society.

Patient groups’ assessments of individual companies for this 7th indicator consider:

- The openness and clarity provided by the company on the balance it maintains between profits and patient welfare.
- The degree to which the company’s leadership favours patient-centric strategies.
- Company efforts to tackle health inequities.
- The company’s speed and flexibility when adapting to patient priorities.

Indicator 8. Quality of relationships with patient groups

Patient-group Relationships

Q. If you were asked to make a definite choice:
Which three companies "best" worked in partnership in 2021 with your patient group?

Of all the indicators of patient centricity, patient-group relationships are perhaps the most visible aspect of a company at work. Such relationships provide patient groups with direct experience of companies, and comprise one of the key factors in how companies are judged by patient groups.

Patient groups' assess individual companies for this 8th indicator at:

- The company's understanding of the patient groups with which it interacts—their activities and goals.
- The flexibility the company demonstrates in its patient-group relationships.
- The regularity of communication.
- The sustainability of the relationship.
- Levels of trust.
- The levels of good governance.
- How contact with the patient group is managed, internally and externally.

Indicator 9. Providing services ‘beyond the pill’

Support and Services

Q. If you were asked to make a definite choice:
Which three companies “best” provided patients with services ‘beyond the pill’ in 2021?
[That is: understood the patient journey, and offered services beyond just the provision of medicine.]

‘Beyond-the-pill’ services have been provided by pharma for decades. However, they are not usually assessed for their value to patients with the same rigour as the industry’s commercial products. Sometimes, too, a company’s ‘beyond-the-pill’ services overlap with those provided by patient groups.

Therefore, patient-group assessments of individual companies for this 9th indicator consider:

- ‘Beyond-the-pill’ services that recognise the practical and emotional needs which exist in patient priorities.
- ‘Beyond-the-pill’ services that are tailored to patients’ individual circumstances.
- ‘Beyond-the-pill’ services designed in collaboration with patients and/or patient groups.

Indicator 10. Engaging patients in R&D

Involvement in R&D

Q. If you were asked to make a definite choice:
Which three companies were "best" in 2021 at R&D?
[Note: research/discovery is before clinical trials begin; drug development includes clinical trials, and after.]

Although R&D is the driving force of the industry, the ultimate customer, the patient, has remained one step removed from the proceedings, restricted to participating in clinical trials, or in research by third parties. Until recently, patients' input on other R&D activities has been limited. Information about patient experiences, needs, and feelings have been mostly 'second guessed' by companies, or gathered and filtered through medical experts.

Patient groups' assessments of individual companies for this final indicator of corporate reputation consider:

- The extent to which the company includes patients in discussions on all of its aspects of medical research.
- The company's inclusion of certain previously-unmet patient needs—particularly for convenience, and for treatments that better fit in with their lives.
- The diversity of the populations the company includes in its clinical research.
- Inclusion of patient perspectives when collecting data following the product's launch.

THE ANALYSES

Measuring the corporate reputation of the pharma industry as a whole: 4 measures

Pharma v. other healthcare sectors, 2021 v. 2020

Pharma's record over time

Pharma's performance at activities important to patients and patient groups, 2021 v. 2020

Pharma's effectiveness at tackling the Covid-19 pandemic
[new indicator as of the 2020 survey]

These industry-wide questions to respondent patient groups not only throw light on the general frame of mind of patient groups in any particular year, they also (when the data are filtered accordingly) provide baselines about the attitudes of patient groups in different geographic regions, and of varying specialties.

Measuring the performance of individual pharma companies at corporate reputation

Scores: *show levels of strength and weakness within a company*

- A company's scores are based on the percentage of respondent patient groups stating that the company is "Best" at an activity of importance to patients and patient groups.
- Two sets of scores: (i) assessed by patient groups familiar with a company; and (ii) assessed by patient groups which work/partner with the company. [Note that the 'worked-with' responses are included in the 'familiar-with' responses.]

(Note: Even if a company has high scores, other companies may surpass them. Patient groups from different therapy areas, and from different countries, hold differing opinions of pharma—meaning that such comparisons could be misleading.)

Rankings: *show levels of strength and weakness of a company compared with its peers*

- Companies are ranked against their peers for each of the indicators of corporate reputation, assessed both by patient groups familiar with the company, and by those which work/partner with the company.
- Final rankings are obtained by adding up each company's rankings for each indicator.
- 3 sets of ranking are provided:
  - Rankings of all assessed companies (47 in the 2021 survey; 48 in the 2020 survey).
  - Rankings of 'big pharma' (the 13 largest companies, to allow for true peer-to-peer comparisons among these multinational, multi-therapy companies).
  - Rankings of generic drug companies (again, to allow for peer-to-peer comparisons among these companies).

Companies included in the 2021 analyses

AbbVie | Acorda Therapeutics | Almirall | Amgen | Astellas Pharma | AstraZeneca | Bayer | Biogen | Boehringer Ingelheim | Bristol Myers Squibb | Chiesi Farmaceutici | CSL Behring | Daiichi Sankyo | Dr Reddy's | Eisai | Eli Lilly | Ferring | Gedeon Richter | Gilead Sciences | Grifols | Grünenthal | GSK | Horizon Therapeutics | Ipsen | Janssen | LEO Pharma | Lundbeck | Menarini | Merck & Co/MSD | Merck KGaA/EMD Serono | Mylan | Novartis | Novo Nordisk | Octapharma | Otsuka | Pfizer | Pierre Fabre | Roche/Genentech | Sandoz | Sanofi | Servier | Sun Pharma | Takeda | Teva | UCB | Vertex | ViiV Healthcare

The information provided to each company

- The number of respondent patient groups claiming *familiarity* with the company, and the number saying that they had a *working* relationship with the company, 2021.
- The profile of respondent patient groups *familiar*, and *working*, with the company in 2021: patient reach; country headquarters; specialties; geographic remit; and types of relationships with the company.
- Company scores, as assessed by respondent patient groups *familiar*, and *working*, with the company, for each of the indicators of corporate reputation, 2021.
- Percentage of the respondent patient groups *working* with the company, and which also worked with other companies, 2021.
- Overall rankings, as assessed by respondent patient groups *familiar*, and *working*, with the company, 2021 v. 2020.
- Rankings for each of the 10 indicators, as assessed by respondent patient groups *familiar*, and *working*, with the company, 2021 v. 2020.
- Snapshot view: where the company sits in the corporate tiers for each of the 10 indicators (in the higher, the middle, or the lower tier), as assessed by respondent patient groups *familiar*, and *working*, with the company, 2021.
- Overall rankings for the company over time, 2015-2021, as assessed by respondent patient groups *familiar* with the company.

Commentaries from respondent patient groups, which help define the attributes patients look for in each of the 10 indicators of corporate reputation

On patient centricity

“Be open to supporting patient-centric initiatives that are top priority for the patient community, rather than patient-centric initiatives that are most closely linked to pharma strategy (but not necessarily top priority for patients).”

National cancer patient group, Australia

On patient information

“Het wordt allemaal nogal vaag gehouden of beschreven in een taal die niet voor iedereen begrijpelijk is. Houd er rekening mee dat niet elke patiënt hogere studies/medische studies heeft voltooid. Deze mensen hebben ook recht op begrip.”

(“It is all kept rather vague, or described in a language that is not intelligible to everyone. Please remember that not every patient has completed higher studies/medical studies. Such people also have the right to understand.”)

Local mental-health patient group, Belgium

In case you do not know about PatientView ...

PatientView has been undertaking wide-ranging analyses to help understand the patient world, and to highlight patients' latest expectations of pharma

- PatientView is a UK-based research body, formed in 2000 in response to the emerging powerful new global patient movement.
- PatientView aims both to give patient groups a global platform, and to help industry better understand the needs of patients.
- PatientView relies on patient groups to willingly participate in the research that goes into the creation of PatientView products and services. As such, the data that PatientView collects is evidence based.

In August 2021, PatientView published a full set of analyses of patient-group perspectives of pharma [cover of publication, left]. The August 2021 publication, Being Patient Centric, provides a strategic game plan for the optimum ways in which companies can become patient centric. The patient centricity of a company, and its corporate reputation, are intrinsically linked.

PATIENT VIEW

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