



GERMANY EDITION: THE CORPORATE REPUTATION OF PHARMA IN 2021

The Patient Perspective—Germany edition

The views of 151 German patient groups

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PatientView is today publishing the results of its latest 'Corporate Reputation of Pharma' survey—the 2021 Germany edition (now in its 10th year, and two years into the Covid-19 pandemic). Between November 2021-February 2022, the survey collected the opinions of 151 German patient groups on the performance of the pharmaceutical industry during 2021.

Patient groups responding to the 'Corporate Reputation of Pharma' survey are uniquely positioned to comment on the pharma industry's performance during the pandemic. Patient groups not only understand the perceptions of patients, but are also the only healthcare stakeholder to network with *all* other stakeholders in the healthcare system.

Continue reading on for details of:

- ▶ **How PatientView measures pharma's corporate reputation from a patient perspective;**
- ▶ **The headline results of the 2021 Germany element of the 'Corporate Reputation' survey;**
- ▶ **The companies included in the 2021 Germany analysis; and**
- ▶ **The profiles of 2021's respondent German patient groups.**

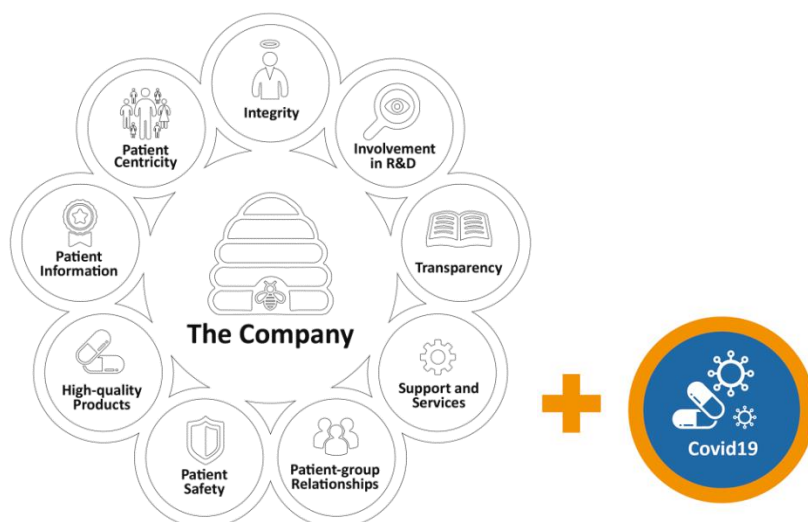
Contents and tables can be downloaded [here](#)

METHODOLOGY

PatientView’s annual online ‘Corporate Reputation of Pharma’ survey measures various aspects of pharma’s performance—all from a patient and patient-group perspective. The survey’s questions to respondent patient groups fall into two areas:

- (1) The performance of the **pharma industry as a whole**, compared to other healthcare industries, —and for various activities of importance to patients.
- (2) The performance of **individual pharma companies** (24 companies in the 2021 Germany arm of the survey). Companies are assessed by respondent patient groups for their performance across nine indicators of corporate reputation. A new, 10th, indicator was added to the previous year’s survey (that of 2020), looking at companies’ support to patients during the Covid-19 pandemic. This indicator was retained in the 2021 survey [see chart below].

Chart 1: The nine indicators that measure pharma’s corporate reputation, from a patient perspective, plus a 10th indicator on patient support during the Covid-19 pandemic



Respondent German patient groups are asked to nominate the three companies they think “Best” at each of the indicators of corporate reputation.

Companies assessed for corporate reputation in the 2021 Germany report

AbbVie | Amgen | AstraZeneca | Bayer | Biogen | Boehringer Ingelheim | Bristol Myers Squibb | CSL Behring | Eli Lilly | Gilead Sciences | Grünenthal | GSK | Janssen | Merck KGaA | MSD | Mylan | Novartis | Novo Nordisk | Pfizer | Roche | Sandoz | Sanofi | Takeda | Teva | ViiV Healthcare

Chart 2.

The number of respondent German patient groups familiar, or working, with the companies listed above [<https://bit.ly/3oF51Qf>].

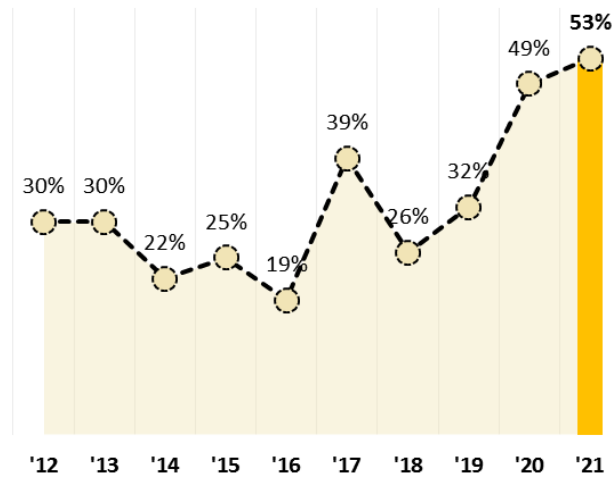
Click here to read more about PatientView’s [methodology for the ‘Corporate Reputation of Pharma’ 2021 \(published 2022\)](#).

SUMMARY OF RESULTS FOR GERMANY, 2021

FINDINGS AT PHARMA-INDUSTRY LEVEL

PatientView’s data shows that the overall reputation of the pharmaceutical industry in Germany has steadily increased from a low in 2016 [see chart below]. In 2021, as many as 53% of respondent German patient groups stated that pharma’s reputation was either “Excellent” or “Good—against just 19% saying the same back in 2016.

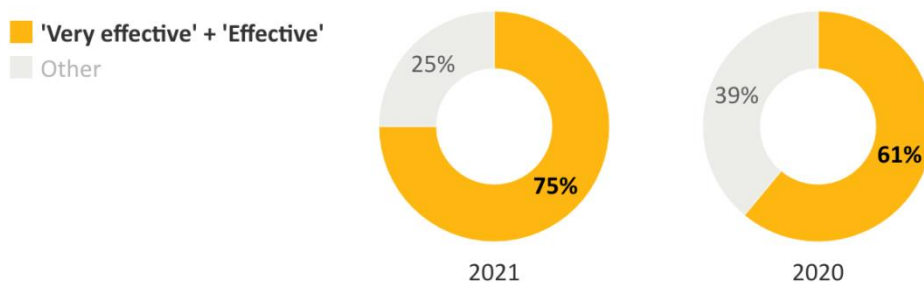
Chart 3: The corporate reputation of the pharmaceutical industry, 2012-2021
(Percentage of respondent German patient groups stating “Excellent” or “Good”)



In the latter two years, at least, much of that increase in reputation in Germany can be attributed to the strong contribution pharma made to tackling the Covid-19 pandemic—chiefly, the development and roll out of vaccines. German scientific innovation played a major role in the development of at least one vaccine used successfully to immunise patients in Germany. The BioNTech partnership with Pfizer may have contributed to the latter’s rise in Germany in 2021 to overall 2nd for corporate reputation (and 1st for ‘big pharma’).

In 2021, 75% of respondent German patient groups stated that pharma was “Very effective” or “Effective” at supporting patients during the Covid-19 pandemic—higher than the equivalent 2020 Germany figure of 61% (or the 2021 global figure of 66%, reported by respondent patient groups worldwide).

Chart 4: Percentage of respondent German patient groups believing the pharma industry to be “Very effective” or “Effective” at supporting patients during the Covid-19 pandemic, 2021 v. 2020



These statistics, however, disguise the continued and significant areas of contention that do exist on the German patient-group scene about the reputation of the pharma industry. For example, Covid-19 also highlighted the limitations in pharma-company relationships with German patient groups.

Pharma/patient-group relations in Germany in 2021

Covid-19 exposed deficiencies in the state of Germany's digitised health records that were surprising for such an advanced technological country. One particular weakness brought to light was the healthcare system's inability to efficiently identify, or communicate with, German populations most at risk of infection.¹ German patient groups were often left to bridge the gap during the pandemic.

In a 2020 PatientView study on patient-group experiences of Covid-19 ('The Perspectives of 1,720 Patient Groups during the Covid-19 Pandemic'), 54% of the 87 respondent German patient groups stated that they increased their direct contact with patients during the pandemic—by arranging more online communications, peer-to-peer support, and, sometimes, facilitating healthcare delivery. However, only 4% of these 87 respondent German patient groups stated that pharma increased its support to them, and helped them in their endeavours during the pandemic.²

44% of the 151 German patient groups responding to the 2021 'Corporate Reputation of Pharma' survey rated the industry as "Excellent" or "Good" for its relationships with them—an increase of 5% on the previous year in Germany, and a similar figure to the 2021 global average of 49%.

Nonetheless, feedback from 2021's respondent German patient groups suggests that pharma could improve further by:

- ▶ Supporting German patient groups in the work they do, and in the goals they wish to achieve;
- ▶ Fashioning sustainable working relationships with German patient groups, while also maintaining good levels of contact;
- ▶ Including German patients and patient groups more in pharma activities (such as the production of patient-informational materials; or, even, in drug development); and
- ▶ Being flexible in dealings with German patient groups.

Pricing and transparency

- ▶ In 2021, only 9% of the 151 German patient groups responding to that year's 'Corporate Reputation of Pharma' survey rated the industry as "Excellent" or "Good" at having fair pricing policies; 32% of them rated the industry as "Poor."
- ▶ In 2021, only 7% rated the industry as "Excellent" or "Good" at being transparent about its pricing policies (and as many as 51% rated the industry as "Poor").

According to the latest-available OECD data (2019) out of the following 11 countries—Australia, Austria, Belgium, Canada, France, Germany, Japan, Sweden, Switzerland, UK, and USA—spending on prescription drugs was higher in Germany than anywhere else, except for the USA (where spending was yet greater).³

Following the September 2021 Federal election, the new German administration expressed a determination to combat the size of the country's prescription-drugs bill.⁴ In these reforms, patient

¹ <https://www.aicgs.org/2021/11/challenges-for-the-german-healthcare-system-in-the-covid-19-pandemic-and-beyond>

² <https://createsend.com/t/j-57D693D55D59C7912540EF23F30FEDED>

³ <https://www.healthsystemtracker.org/chart-collection/how-do-prescription-drug-costs-in-the-united-states-compare-to-other-countries/#Per%20capita%20prescribed%20medicine%20spending,%20U.S.%20dollars,%202004-2019>

⁴ <https://www.insideeulifesciences.com/2021/11/29/new-german-government-plans-significant-changes-with-impact-on-the-healthcare-life-sciences-and-food-sector/>

groups have been promised greater representation in the Joint Federal Committee (G-BA) which assesses the relative merits of all new drugs submitted for review—yet another reason why pharma in Germany needs to give greater consideration to the patient perspective in the work they do.

„Patientenrelevante Punkte (die sich oftmals von denen des G-BAs unterscheiden) aufgreifen und mitsamt der Patientenexpertise in die Forschung einfließen lassen.“

(“Pick up on points that are relevant to patients—which are often different from those of the Joint Federal Committee (G-BA), and include these, along with patient expertise, in the research.”)

National pain patient group, Germany

COMPANY RANKINGS IN GERMANY IN 2021

▶ **The top-three pharma companies in Germany in 2021, out of 24 companies**, ranked for their overall corporate reputation (as assessed by respondent German patient groups familiar with the company):

ViiV Healthcare, 1st | **Pfizer**, 2nd | **MSD***, 3rd.

(*known as Merck & Co in Canada and the United States)

▶ **The top-three pharma companies in Germany in 2021, out of 15 companies**, ranked for their overall corporate reputation (as assessed by respondent German patient groups working with the company):

ViiV Healthcare, 1st | **Pfizer**, 2nd | **AstraZeneca**, 3rd.

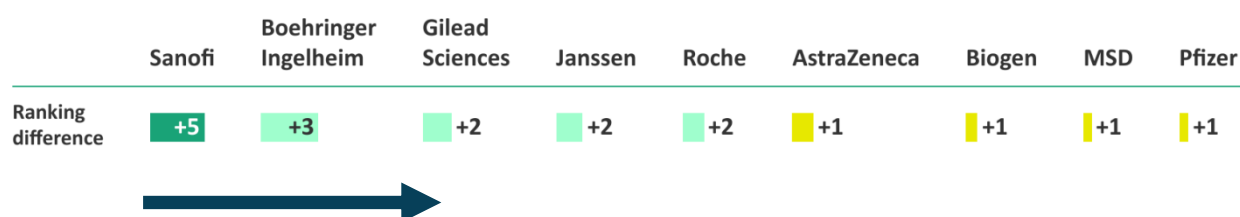
▶ **The top-three ‘big-pharma’ companies in Germany in 2021, out of 13 ‘big-pharma’ companies**, ranked for their overall corporate reputation (as assessed by respondent German patient groups familiar with the company):

Pfizer, 1st | **MSD**, 2nd | **Roche**, 3rd.

▶ **The pharma companies rising the most in the Germany rankings, 2020 to 2021**, can be seen in the chart below.

Chart 5: Pharma companies making the biggest rises in the Germany rankings, 2020 to 2021, as assessed by respondent German patient groups familiar with the company

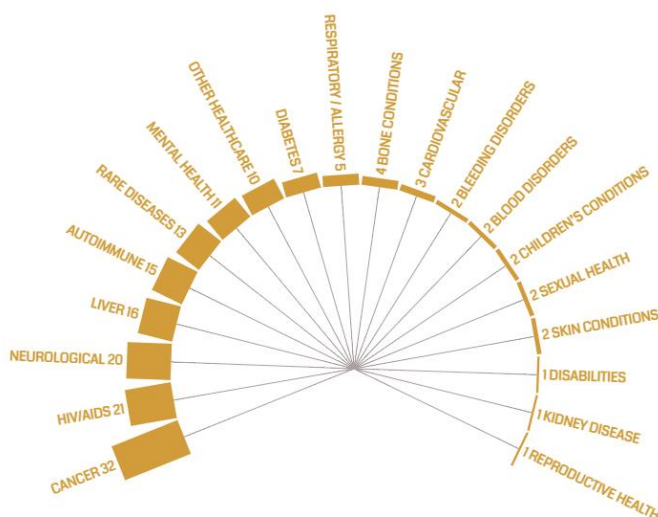
Rises listed high to low, left to right



PROFILES OF 2021'S RESPONDENT GERMAN PATIENT GROUPS

2021's respondent German patient groups specialised in **15 broad disease subject areas** [see chart below].

Chart 6: Therapeutic areas of respondent German patient groups, 2021



** Some disease areas fall into more than one category*

PatientView would like to thank the 151 German patient groups that gave up their time to respond to the 'Corporate Reputation of Pharma' survey 2021 (published 2022).

These respondent German patient groups feel that the sharing of feedback and experiences will help the industry gain valuable insights into improvement in meaningful ways. Many of the 24 pharma companies featured in the 2021 Germany element of the 'Corporate Reputation of Pharma' survey are building strategies around patients, and the feedback these survey results provides can influence their models and approaches, enabling companies to align more closely with patient needs and perspectives.

For further information on this Germany report, please use contact details at the head of the press release.

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