



AUTOIMMUNE EDITION: THE CORPORATE REPUTATION OF PHARMA IN 2021

The Patient Perspective—Autoimmune Edition

*The views of 293 autoimmune patient groups
(138 of these respondent patient groups specialised in arthritis)*

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PatientView is today publishing the results of its latest 'Corporate Reputation of Pharma' survey—Autoimmune Edition, now in its 4th year, and two years into the Covid-19 pandemic. Between November 2021-February 2022, the survey collected the opinions of 293 autoimmune patient groups on the performance of the pharmaceutical industry during 2021.

Patient groups—and autoimmune patient groups especially—possess a deep and unique understanding of the patients they represent and express the collated views of these patients. Patient-group perspectives have become increasingly important to regulators that demand patient input into trial design and conduct (as well as into the evaluation of clinical outcomes). At the same time, many patient groups are also familiar with the complexities of the pharmaceutical industry's business. From their vantage point, therefore, patient groups are both able to assess pharma, and to recommend ways in which companies can improve—all from a patient perspective.

Continue reading for details on:

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

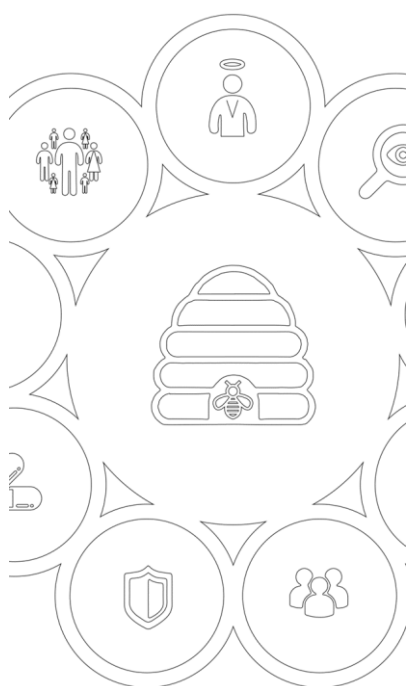
Contents and tables can be downloaded [here](#)

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 (in this case, patients with an autoimmune condition).
- (2) The performance of **individual pharma companies** (27 in total in the autoimmune edition of the 2021 survey results). 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. The new 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



Each indicator measures which three companies were “Best” in 2021 at the following:

1. Supporting patients during the Covid-19 pandemic [*first added in the 2020 survey*].
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) Pricing;
 - (ii) Clinical data; and
 - (iii) The 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
 - (ii) Development



The 27 companies included in the autoimmune arm of the 2021 ‘Corporate Reputation of Pharma’ analyses:

AbbVie | Amgen | AstraZeneca | Bayer | Biogen | Boehringer Ingelheim | Bristol Myers Squibb | Eli Lilly | Ferring | Gilead Sciences | GSK | Janssen | LEO Pharma | Merck & Co/MSD | Merck KGaA/EMD Serono | Mylan | Novartis | Otsuka | Pfizer | Pierre Fabre | Roche/Genentech/Chugai | Sandoz | Sanofi | Takeda | Teva | UCB.

Chart 2: The number of respondent autoimmune patient groups familiar, or working, with the 27 companies listed above [<https://datawrapper.dwcdn.net/2Dj98/1/>]

138 of the 293 respondent autoimmune patient groups focused on arthritis, and a separate set of analyses has been made for this therapy area. 17 companies are included in the arthritis analysis.

Chart 3: The number of respondent arthritis patient groups familiar, or working, with the 17 companies listed above [<https://bit.ly/3f6l4EJ>].

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

SUMMARY OF RESULTS

FINDINGS AT INDUSTRY-WIDE LEVEL

2021's respondent autoimmune patient groups ranked the pharma industry's corporate reputation as higher than that of all other healthcare sectors (including biotech, retail pharmacists, generic drug, and medical-device companies); 63% rated the pharma industry's corporate reputation as "Excellent" or "Good". This figure has risen from 47% during the four years in which the autoimmune arm of the 'Corporate Reputation' survey has been running.

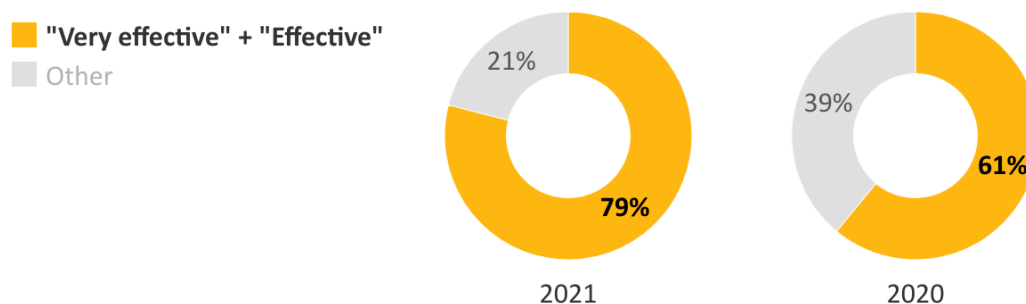
On Covid-19

The perceived increase in the pharma industry's corporate reputation by autoimmune patient groups is inevitably due, in part at least, to the industry's efforts during the Covid-19 pandemic. 79% of 2021's respondent autoimmune patient groups rated the pharma's industry's response to the pandemic as "Very effective" or "Effective" (noticeably up on 2020's figure of 61%). Autoimmune-conditions patient groups played a key role in keeping the patients they represent informed and supported during the pandemic, and they clearly valued the help industry provided them at the time.



An Argentinian national patient group specialising in the care of people with multiple sclerosis told the 2021 'Corporate Reputation' survey:
"Many [pharma companies] supported patient organisations for the dissemination of information, but were not initiatives of theirs directly."

Chart 4: The percentage of respondent autoimmune patient groups stating that the pharma industry was "Very effective" or Effective" at supporting patients during the Covid-19 pandemic, 2021 v. 2020



On innovation and treatments

The majority of 2021's respondent autoimmune patient groups also thought the pharma industry "Excellent" or "Good" at: • innovation (57%); at • making high-quality products (61%); and at • ensuring patient safety (56%). The past decade has seen a rapid increase in the approvals of new treatments for rheumatoid arthritis—the latest being so-called Janus kinase (JAK) inhibitors, that tackle inflammation associated with the disease. JAK inhibitors may, additionally, have the potential to treat other autoimmune diseases.¹

On pricing and access to medicines

But respondent autoimmune patient groups were far more negative about pharma's pricing policies, and about patients' ability to access autoimmune medications. Only 33% of 2021's 293 respondent autoimmune patient groups believed the pharma industry to be "Excellent" or "Good" at ensuring access to medicines. And just 12% of 2021's respondent autoimmune patient groups rated the pharma industry "Excellent" or "Good" at fair pricing policies. These scores for the industry by autoimmune patient groups have remained consistently low over the past few years.

The most-recent innovations for autoimmune diseases belong to a class of drugs known as biologics, 'targeted' therapies which work on different aspects of the immune response. However, because these are made using biotechnological techniques, they have proved more costly than their conventional chemical predecessors. As a result, cash-strapped healthcare systems have been rationing the use of the newer treatments, not least because of the high prevalence of autoimmune diseases among populations.

According to the World Economic Forum (WEF), the rising number of patients with autoimmune diseases has meant a fourfold-plus increase in global spending on treating autoimmune conditions in the period 2011-20. The WEF states that the total hit \$107 billion in 2020, and is forecast to climb still further by the end of 2022, to \$140 billion. Such a rapid growth in both patients and costs highlights the ongoing need for pharma to find ways of making autoimmune treatments more affordable.²

Although the cost of biologics is anticipated to fall as patents on the original treatments expire, and cheaper, lookalike biosimilars are introduced, patient groups are advocating for policymakers to review rationing procedures, especially since patent expiry on newer drugs is years away. In addition, some autoimmune patient groups feel that pharma is neglecting autoimmune patients who are on older, less profitable, drugs.



A UK arthritis patient group commented: *"All of them [pharma] are trying to do the same thing—which feels like a 'tick-box' exercise to make them look good. Most pharma will only offer support beyond the medications to those on their drug. What is truly needed is public awareness about early diagnosis—and, ideally, supporting those people who are not on the really-expensive drugs. There only seems to be investment from the companies that have the advanced therapies, not the regular DMARDs that are not making them much money."*

In summary

2021's respondent autoimmune patient groups collectively cover a broad range of autoimmune conditions, yet show remarkable consistency in their feedback to the 'Corporate Reputation' survey. While making clear how much they value the investment and success the industry has had in developing new drugs for many autoimmune conditions, they also enunciate their desire to be more

¹ <https://www.nature.com/articles/s41584-021-00726-8>

² <https://www.weforum.org/agenda/2022/01/autoimmune-western-diet-fast-food>

involved in research and development. They hold strong views on how pharma can be better partners with autoimmune patient groups, and they express concerns over the pricing of new autoimmune products. These sentiments are not unique to patient groups in the autoimmune-disease area, but do provide valuable insights, given the significant economic and lifestyle impact that long-term autoimmune conditions have on patients, and on society as a whole—worldwide.

COMPANY RANKINGS IN THE FIELD OF AUTOIMMUNE CONDITIONS

▶ **The top-three pharma companies** out of 27 companies, ranked for their overall corporate reputation in 2021, as assessed by respondent autoimmune patient groups **familiar** with the company:

Pfizer, 1st | **AbbVie**, 2nd | **Novartis**, 3rd.

▶ **The top-three pharma companies** out of 23 companies, ranked for their overall corporate reputation in 2021, as assessed by respondent autoimmune patient groups **working** with the company:

Pfizer, 1st | **AbbVie**, 2nd | **Takeda**, 3rd.

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

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

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

Pfizer, 1st | **AbbVie**, 2nd | **Takeda**, 3rd.

▶ **The companies rising the most in the autoimmune rankings, 2020 to 2021**, as assessed by respondent autoimmune patient groups **familiar** with the company, can be seen in the chart below.

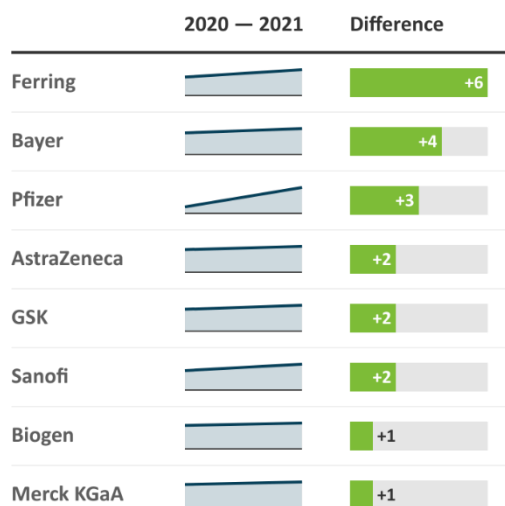


Chart 5: Companies rising the most in the rankings for overall corporate reputation in the field of autoimmune conditions, 2020 to 2021, as assessed by respondent autoimmune patient groups familiar with the company
Listed high to low, top to bottom

COMPANY RANKINGS IN THE FIELD OF ARTHRITIS

▶ **The top-three pharma companies** out of 17 companies, ranked for their overall corporate reputation in 2021, as assessed by respondent arthritis patient groups **familiar** with the company: **Pfizer**, 1st | **AbbVie**, 2nd | **Novartis**, 3rd.

▶ **The top-three pharma companies** out of 15 companies, ranked for their overall corporate reputation in 2021, as assessed by respondent arthritis patient groups **working** with the company: **Pfizer**, 1st | **AbbVie**, 2nd | **Novartis**, 3rd.

PROFILE OF RESPONDENT PATIENT GROUPS

2021's 293 respondent autoimmune patient groups were based in 54 countries, and specialised in a range of autoimmune conditions.

Chart 6: Number of respondent autoimmune patient groups per therapeutic area

Acne	1
Ankylosing spondylitis	7
Arthritis	101
Arthritis: young people	2
Atopic dermatitis/eczema	7
Autoimmune: most types	8
Autoimmune: other	4
Axial spondyloarthritis	10
Coeliac	2
Crohn's disease and ulcerative colitis	37
Juvenile idiopathic arthritis (JIA)	3
Lupus	11
Multiple sclerosis	48
carers, family, and friends: multiple sclerosis	12
Pemphigus and pemphigoid	1
Psoriasis	10
Psoriasis and psoriatic arthritis	15
Scleroderma	14

PatientView would like to thank the 293 autoimmune patient groups which gave up their time to respond to the 'Corporate Reputation of Pharma' survey 2021 (published 2022).

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

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