La REPUTACIÓN CORPORATIVA de las EMPRESAS FARMACÉUTICAS en 2021 (DESDE la PERSPECTIVA de los PACIENTES)

EDICIÓN LATINOAMERICANA

SPECIAL POWERPOINT, AUGUST 2022

PATIENT VIEW
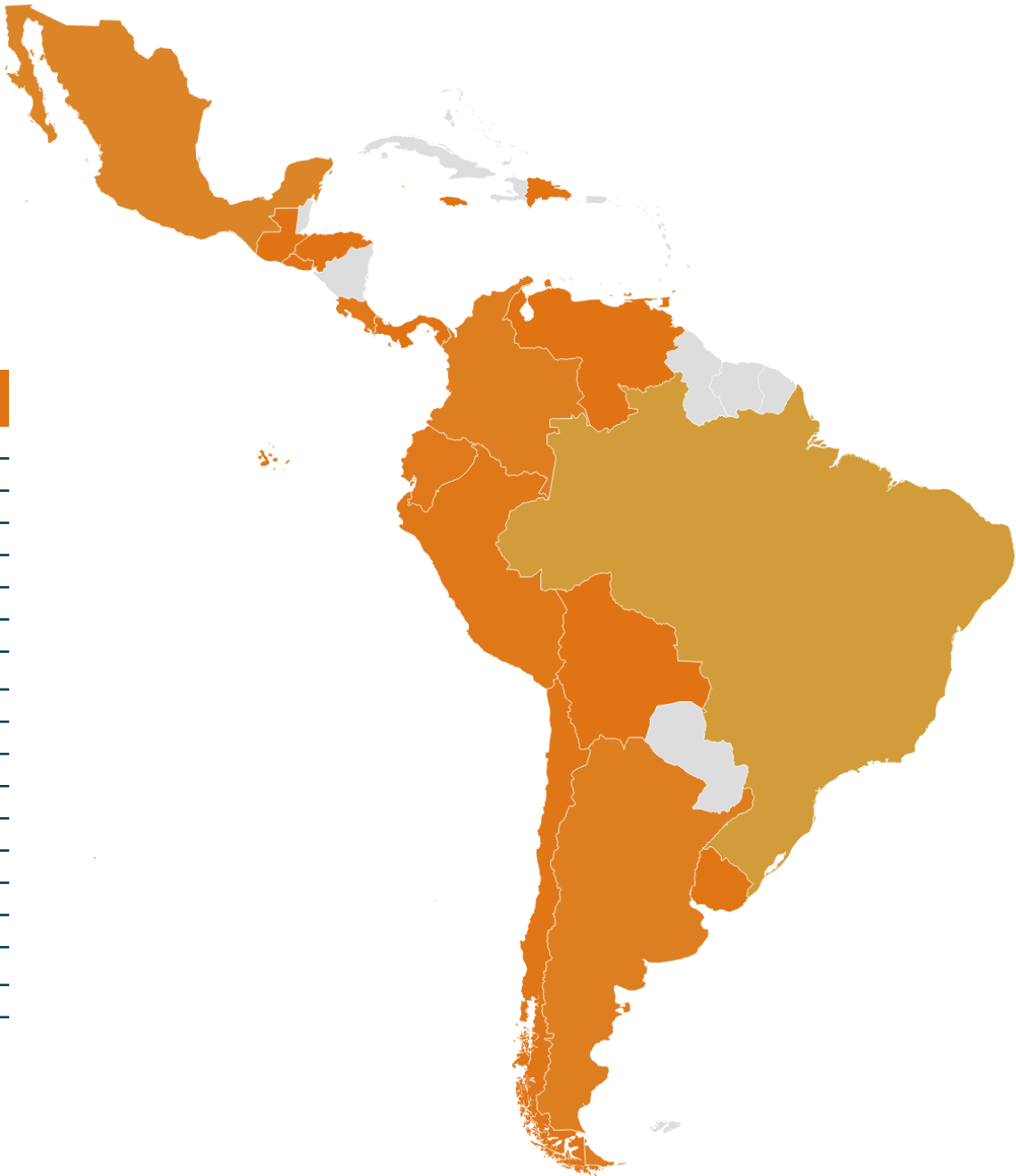
Contents

RESPONDENT PROFILES

Collating the data

Online survey; the 2021 version conducted November 2021 to February 2022.
Collectively, the respondent LatAm patient groups were headquartered in 19 different countries.

Respondent profiles, 2021

(Country headquarters of respondent LatAm patient groups; N = 242)

Country	#
Argentina	22
Bolivia	1
Brazil	88
Cayman Islands	1
Chile	8
Colombia	23
Costa Rica	13
Dominican Republic	1
Ecuador	14
El Salvador	4
Guatemala	4
Honduras	1
Jamaica	1
Mexico	38
Panama	3
Peru	11
Trinidad and Tobago	1
Uruguay	6
Venezuela	2

Collating the data

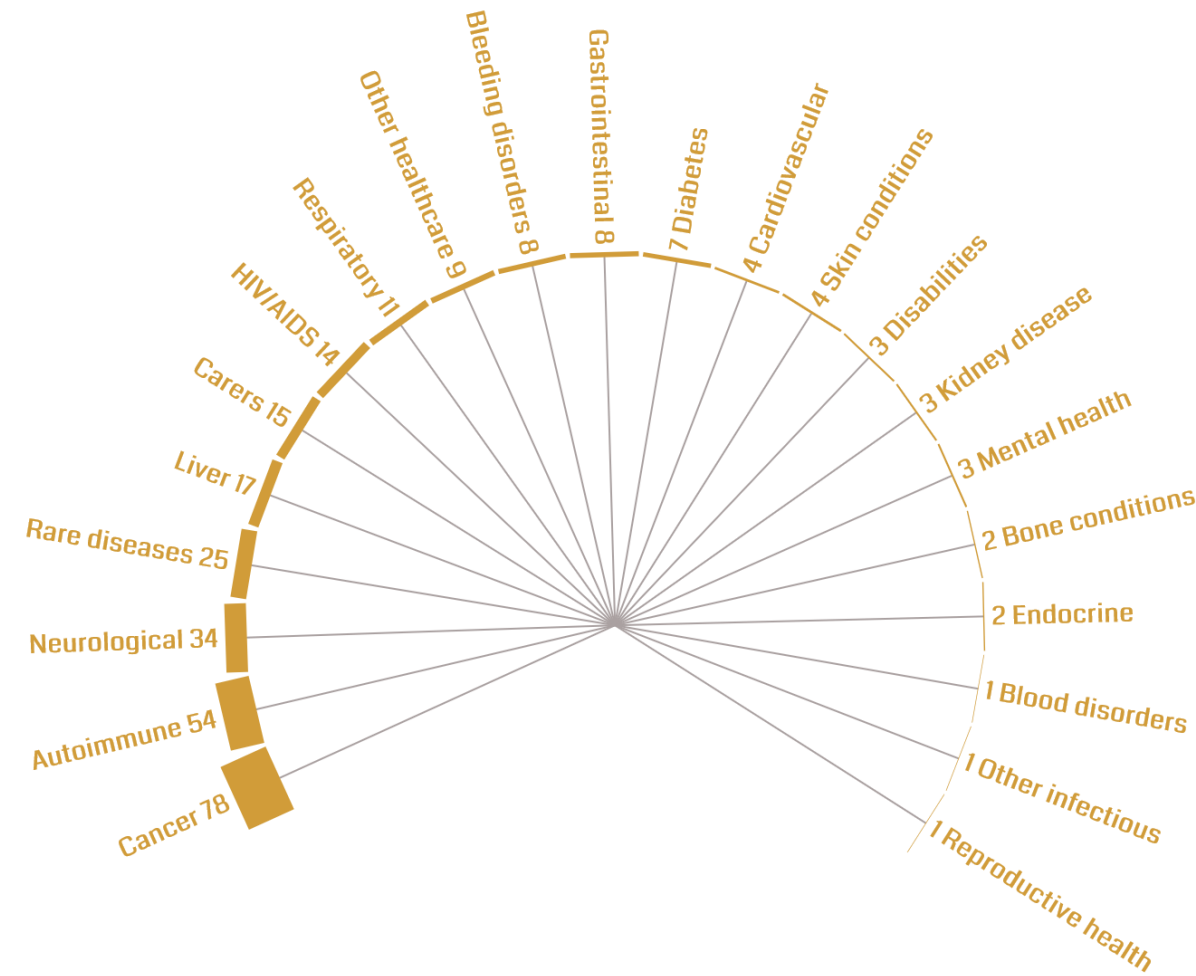**Why ask patient groups for their opinions on pharma?**

The patient-group perspective is especially important to pharma, because 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 therapy areas of respondent LatAm patient groups; N = 242)

* Some disease areas fall into more than one category

Respiratory 11
HIV/AIDS 14
Carers 15
Liver 17
Rare diseases 25
Neurological 34
Autoimmune 54
Cancer 78
Other healthcare 9
Bleeding disorders 8
Gastrointestinal 8
7 Diabetes
4 Cardiovascular
4 Skin conditions
3 Disabilities
3 Kidney disease
3 Mental health
2 Bone conditions
2 Endocrine
1 Blood disorders
1 Other infectious
1 Reproductive health

Collating the data

76% of the 242 LatAm patient groups responding to the 2021 'Corporate Reputation of Pharma' survey worked with at least one pharma company.

Respondent profiles, 2021
(according to the geographic remit of respondent LatAm patient groups; N = 242)

- International (6%)
- Local (10%)
- Regional (16%)
- National (68%)

WHAT PATIENTVIEW MEASURES

The Company

PatientView's annual online 'Corporate Reputation of Pharma' 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 alike 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 and patient groups. In addition, the reputation of the pharma industry is compared with that of other healthcare industries. Feedback to this first part of the survey provides an annual baseline of the attitudes of patient groups (and, ultimately, patients) towards pharma. Such attitudes can—and often do—fluctuate from year to year.

▸ Secondly, the performance at corporate reputation of *individual 'big-pharma' companies* (13 in the LatAm version of the 2021 survey, and 14 in the 2020 survey). Companies are assessed by respondent patient groups for performance at **9 indicators of corporate reputation**—plus, a new 10th indicator originally 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 'big-pharma' companies they think "Best" at each indicator of corporate reputation.

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

1. Supporting patients during the Covid-19 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; and
   iii. Company funding of external healthcare 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.

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

▶ Reputación corporativa – *a pharma company meeting the expectations of patients and patient groups.*

▶ Empresas con las que su organización está familiarizada – *the respondent patient group feeling knowledgeable enough about a pharma company to be able to comment on its activities and products.*

▶ Respuesta a la pandemia de la Covid-19 – *support directed by a pharma company specifically at the patients known to the respondent patient group.*

▶ Productos fueron de "mayor beneficio" para los pacientes – *a pharma company supplying products of most benefit to the patients with whom the respondent patient group is familiar.*

▶ Servicios 'más allá de los medicamentos' – *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.*

▶ Involucrar a los pacientes en la investigación y/o descubrimiento de medicamentos – *a pharma company involving patients known to the respondent patient group in research or discovery (that is, before clinical trials begin).*

▶ Involucrar a los pacientes en el desarrollo de medicamentos – *a pharma company involving patients known to the respondent patient group in the development process (including clinical trials, and after).*

▶ *For more on methodology, see* https://bit.ly/3vgL0lX

INDUSTRY-WIDE ANALYSES

The pharma industry v. other healthcare sectors, 2021 v. 2020

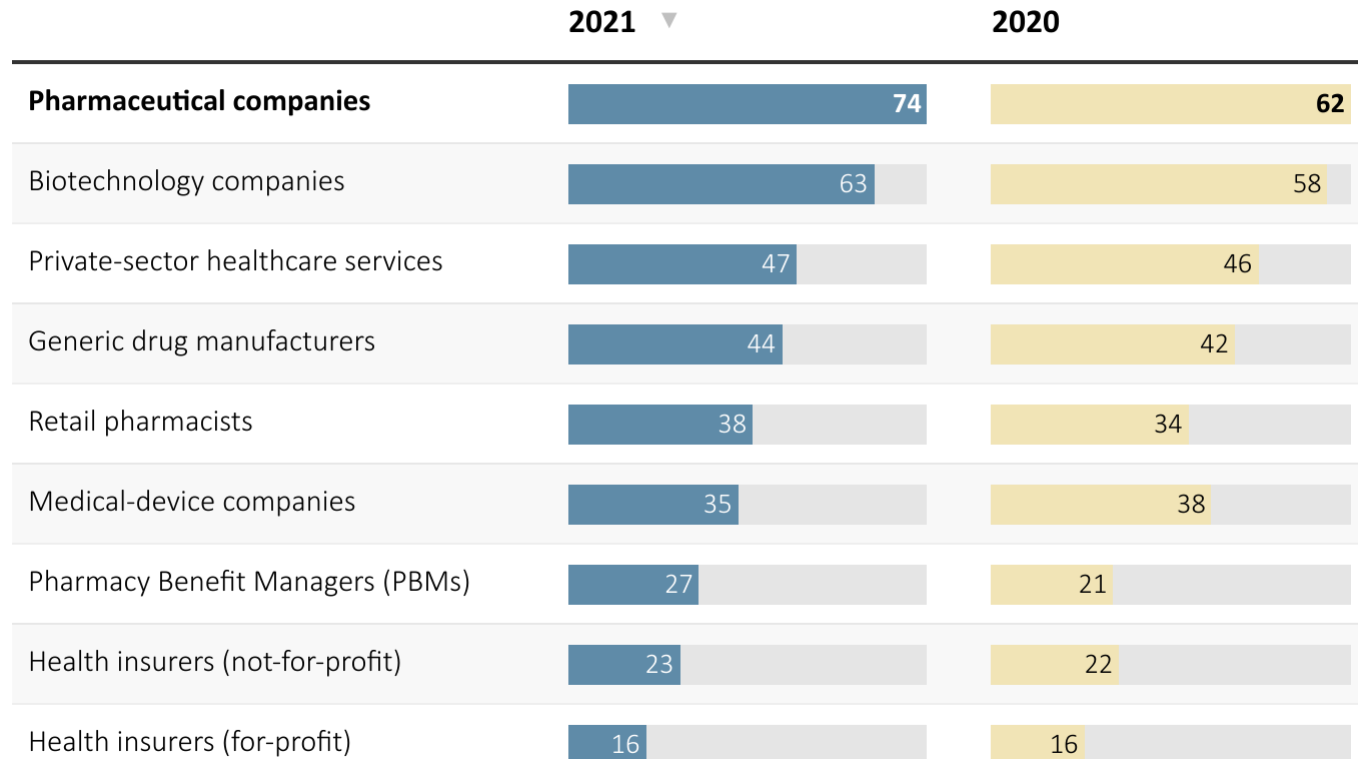The pharma industry's performance at activities important to patients and patient groups, 2021 v. 2020

The pharma industry'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 across varying specialties.

The corporate reputation of the pharma industry v. that of other healthcare sectors, LatAm, 2021 v. 2020

(Percentage of respondent LatAm patient groups stating "Excellent" or "Good")

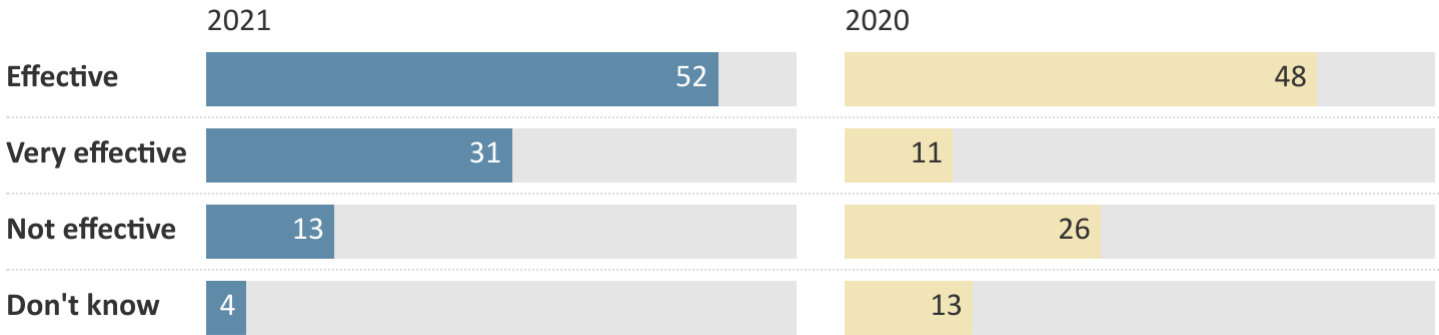|	2021 ▽	2020
Pharmaceutical companies	74	62
Biotechnology companies	63	58
Private-sector healthcare services	47	46
Generic drug manufacturers	44	42
Retail pharmacists	38	34
Medical-device companies	35	38
Pharmacy Benefit Managers (PBMs)	27	21
Health insurers (not-for-profit)	23	22
Health insurers (for-profit)	16	16

Latin-American patient groups responding to 2021's 'Corporate Reputation' survey place the pharma industry 1st for corporate reputation out of 9 healthcare sectors.

As many as 74% of 2021's 242 respondent LatAm patient groups thought the pharma industry's corporate reputation to be "Excellent" or "Good."
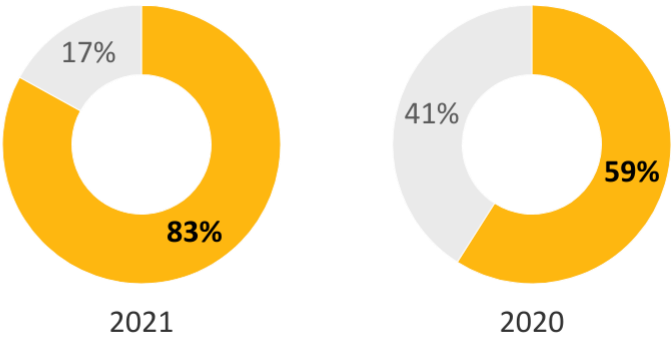
The Covid-19 factor and the pharma industry, LatAm, 2021 v. 2020

(*Percentage of respondent LatAm patient groups which thought the pharma industry
"Very effective" or "Effective" at supporting patients in Latin America during the Covid-19 pandemic*)

The pharma industry's performance in LatAm at activities important to patients in the region, 2021 v. 2020

(Percentage of respondent LatAm patient groups stating "Excellent" or "Good")

LatAm patient groups were more positive about the pharma industry, and all of its activities, in 2021 than in 2020. The industry's best improvements were seen in three areas: • fair pricing policies; • transparency of pharma funding to other healthcare stakeholders; and • patient centricity.

The pharma industry was also rated more highly by respondent LatAm patient groups in 2021 than in 2020 for two particularly-important activities: • innovation; and • producing high-quality products.

LatAm patient groups saw the industry's active response to Covid-19 as one of the main reasons for the uprating. The pandemic provided the pharma industry a huge opportunity to prove its value to patient groups in Latin America (as elsewhere), by contributing direct solutions to the healthcare challenges of the pandemic (and, in so doing, to heighten its corporate reputation).

	2021	2020	Difference ▼
Fair pricing policies	28	17	+11
Transparency: funding	31	21	+10
Patient centricity	57	48	+9
Access to medicines	36	27	+9
Patient engagement: research	30	21	+9
Patient engagement: development	30	21	+9
Innovation	72	64	+8
Patient-group relationships	59	52	+8
Patient safety	63	56	+7
Integrity	60	53	+7
High-quality products	76	70	+6
Patient information	58	54	+4
Transparency: clinical data	42	38	+4
Transparency: pricing	35	32	+3
Services 'beyond the pill'	45	44	+1

COMPANY-SPECIFIC ANALYSES

DESCRIPTOR

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

— A company's **scores** in Latin America are based on the percentage of respondent LatAm patient groups stating that the company is "**Best**" at an activity of importance to LatAm patients and patient groups.

— Two sets of scores are provided:

(i.) assessed by respondent LatAm patient groups familiar with a company; and

(ii.) assessed by respondent LatAm 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 in Latin America, other companies may surpass those scores. LatAm patient groups from different countries/therapy areas hold differing opinions of pharma—meaning that comparisons of companies based solely on their scores 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 LatAm patient groups familiar with the company, and by those which work/partner with the company.

— Final rankings in Latin America are obtained by adding up each company's rankings for each indicator.

— The LatAm rankings provided in this presentation are for *'big pharma'* (the largest companies, to allow for true peer-to-peer comparisons between these companies)—selected on the basis that these companies are multinational, multi therapy, and stand among the top revenue earners in the industry.

The 13 companies included in the 2021 LatAm 'big-pharma' analyses

AbbVie I Amgen I AstraZeneca I Bristol Myers Squibb I Eli Lilly I GSK I Janssen I MSD I Novartis I Pfizer I Roche I Sanofi I Takeda

▶ **Rankings of 'big pharma' (the 13 largest companies, to allow for true peer-to-peer comparisons among these companies)**—selected on the basis that the companies are multinational, multi therapy, and among the top revenue earners in the industry.

The information about the companies featuring in the LatAm 'big-pharma' analyses, 2021

▶ The number of respondent LatAm patient groups claiming *familiarity* with each company, and the number saying that they had a *working* relationship with a company, 2021.

▶ The profile of respondent LatAm patient groups *familiar*, and *working*, with each company in 2021:
   specialties and geographic remit.

▶ Company per-indicator scores at corporate reputation in Latin America, as assessed by respondent LatAm patient groups *familiar*, and *working*, with each company, 2021.

▶ Overall rankings at corporate reputation in Latin America, as assessed by respondent LatAm patient groups *familiar*, and *working*, with each company, 2021 v. 2020.

▶ Rankings in Latin America for each of the 10 indicators of corporate reputation, as assessed by respondent LatAm patient groups familiar, and working, with each company, 2021 v. 2020.

RANKINGS

→ Overall rankings for corporate reputation in Latin America,
out of 13 'big-pharma' companies, according to respondent
LatAm patient groups FAMILIAR with each company, 2021 v. 2020

OVERALL RANKINGS in Latin America out of 13 'BIG-PHARMA' companies

COMPANY	RANK 2021	RANK 2020	Diff
Roche	1	1	0
Pfizer	2	3	+1
AstraZeneca	3	2	-1
Novartis	4	4	0
AbbVie	5	7	+2
Sanofi	6	6	0
Janssen	7	10	+3
Amgen	8	5	-3
GSK	9	9	0
MSD	10	13	+3
Takeda	11	7	-4
Eli Lilly	12	14	+2
Bristol Myers Squibb	13	12	-1

Overall rankings in Latin America for corporate reputation, out of 13 'big-pharma companies, according to respondent LatAm patient groups WORKING with each company, 2021 v. 2020

OVERALL RANKINGS in Latin America out of 13 'BIG PHARMA'

COMPANY	RANK 2021	RANK 2020	Diff
Roche	1	1	0
Pfizer	2	3	+1
AstraZeneca	3	2	-1
Novartis	4	6	+2
Sanofi	5	7	+2
AbbVie	6	8	+2
Amgen	7	5	-2
Janssen	8	11	+3
GSK	9	3	-6
Takeda	10	12	+2
MSD	11	14	+3
Eli Lilly	12	13	+1
Bristol Myers Squibb	13	9	-4

A few COMMENTS from respondent Latin-American patient groups, 2021

Commentaries from respondent LatAm patient groups, 2021

—comments which help define the attributes in the field of corporate reputation that LatAm patients and patient groups look for from pharma companies

Respuesta a la pandemia de la Covid-19

"Colaborar en la difusión de la enfermedad con personal de la salud y pacientes y cuidadores."

—National rare-disease patient group, Argentina

"Disponibilizarem doações de medicamentos nos casos de urgência e de falta. Também é importante estabelecer um bom relacionamento entre as secretarias de saúde do estado, para realizarem melhores negociações. Isso impacta diretamente na compra de medicamentos e muitas vezes na falta dele."

("Poner a disposición donaciones de medicamentos en casos de urgencia y desabastecimiento. También es importante establecer una buena relación entre las secretarías de salud de los estados, para llevar a cabo mejores negociaciones. Esto impacta directamente en la compra de medicamentos y muchas veces en la falta de los mismos.")

—Associação Catarinense de Doenças Raras (ACDR), Brazil

Relaciones con los grupos de pacientess

"Melhorar o relacionamento com as Organizações de Sociedade Civil, ampliando as oportunidades de aprendizado e apoio à projetos voltados ao paciente oncológico."

("Mejorar las relaciones con las Organizaciones de la Sociedad Civil, ampliando las oportunidades de aprendizaje y apoyando proyectos dirigidos a pacientes con cáncer.")

—Regional breast-cancer patient group, Brazil

Commentaries from respondent LatAm patient groups, 2021

—comments which help define the attributes in the field of corporate reputation that LatAm patients and patient groups look for from pharma companies

Servicios 'más allá de los medicamentos'
"Más educación al paciente sin sesgos de marca."
—National bleeding-disorders patient group, Colombia

Información de gran calidad a los pacientes
"Criar mecanismos de informação e atualização sobre as novas tecnologias de tratamento."
—APROD-PA - Asociación Pro-paciente Oncológico y Manejo del Dolor y Cuidados Paliativos del HOMACE, Costa Rica

"Diseño de campañas educativas focalizadas por nivel de educación, tomando en cuenta los países en vía de desarrollo."
—Fundación Un Amigo Como Tú, Dominican Republic

"Efectos secundarios, formas en las que actúan los medicamentos, formas en las que se puede llevar mejor el apego al tratamiento."
—Regional multiple-sclerosis patient group, Mexico

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