

PRESS RELEASE: 'Corporate Reputation of Pharma
in 2018 - the Global Patient Perspective'

'Corporate Reputation of Pharma in 2018 - the Patient Perspective'

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~ **Contact:** Alex Wyke ~ **Tel:** +44-(0)1547-520-96 ~ **Email:** report@patient-view.com

ABOUT THIS 2018 REPORT AND SURVEY

- **Results drawn from survey conducted:** November 2018 - February 2019.
- **Survey conducted in 18 languages:** Danish | Dutch | English | Finnish | French | German | Greek | Hungarian | Italian | Japanese | Korean | Portuguese | Polish | Russian | Spanish | Swedish | Traditional Chinese | Turkish.
- **Profile of 2018's respondent patient groups:**
 - 1,500 respondent patient groups.
 - From 78 countries.
 - Covering 102 medical specialties.
 - 61% are national patient groups. And
 - 9% are international patient groups.
- **Patient-group partnerships with industry:** 1,218 of the 1,500 respondent patient groups (81%) worked/partnered with at least one pharma company.
 - **Industry-wide analyses:** the pharma industry as a whole assessed at a wide range of activities important to patients and patient groups; its performance compared with that of other healthcare sectors.
 - **Company analyses:** 46 pharma companies analysed for performance at 12 indicators of corporate reputation.
 - **Seven leading pharma companies** • Eisai; • Ipsen; • Janssen (Pharmaceutical Companies of Johnson & Johnson); • Merck & Co / MSD; • Novartis; • Pfizer; and • ViiV Healthcare **tell their own stories about their patient-centric strategies**, and about their activities in the field of patient-group relations, during 2018 (plus their plans for 2019).
 - **Report length:** 157 pages.

London, April 18th, 2019.

The 'Corporate Reputation of Pharma, 2018' Global report is based on the findings of a PatientView November 2018-February 2019 survey exploring the views of **1,500 patient groups worldwide** (one of the highest response rates attained by this annual survey). The report **provides feedback (from the perspective of these patient groups) on the corporate reputation of the pharma industry during 2018**, as well as on the performance of **46 pharma companies** at **12 key indicators** that influence corporate reputation (all of importance to patients and patient groups).

The Corporate-Reputation survey is now in its 8th annual edition—thus, 8 years of historical data on corporate reputation and levels of company patient centricity are available. In addition, for the first time, **PatientView has produced a separate analysis of the corporate reputation of 13 of the biggest of these 46 pharma companies, to enable peer-to-peer comparisons between the larger companies.**

THE INDICATORS OF CORPORATE REPUTATION MEASURED IN THE 2018 SURVEY

1. Having an effective patient-centred strategy.
2. Providing high-quality patient information.
3. Ensuring patient safety.
4. Supplying high-quality, useful products.
- 5.i. Being transparent about the company's own pricing policies.
- 5.ii. Being transparent about, and sharing the results of, clinical trials.
- 5.iii. Being transparent about its funding of external stakeholders (for instance, medical professionals).
6. Acting with integrity.
7. Working effectively in partnership with patient groups (or with patients familiar to the patient group).
8. Providing more services than just medicines (services 'beyond the pill').
- 9.i. Engaging patients in the company's product research.
- 9.ii. Engaging patients in its product development (including clinical trials).

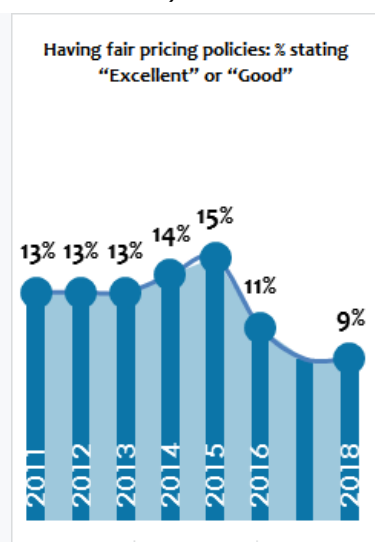
The 46 companies assessed for 2018:

AbbVie | Acorda Therapeutics | Allergan | Ammiral | Amgen | Astellas Pharma | AstraZeneca | Bayer | Bial | Biogen | Boehringer Ingelheim | Bristol-Myers Squibb | Celgene | Chiesi Farmaceutici | CSL Behring | Daiichi Sankyo | Eisai | Eli Lilly (Lilly) | Ferring | Gedeon Richter | Gilead Science | Grifols | Grünenthal | GSK | Ipsen | Janssen (Pharmaceutical Companies of Johnson & Johnson) | LEO Pharma | Lundbeck | Menarini | Merck & Co / MSD | Merck KGaA | Mundipharma | Novartis | Novo Nordisk | Octapharma | Otsuka | Pierre Fabre Laboratories | Pfizer | Roche | Sanofi | Servier | Takeda (including Shire) | Teva | UCB | Vertex Pharmaceuticals | ViiV Healthcare.

HOW DID INDUSTRY FARE?

In 2018, patient-group attitudes towards the pharma industry as a whole remained on a par with those they held in 2017

- Patient groups viewed the corporate reputation of the pharma industry as largely unchanged in 2018 from 2017, **with 41% of 2018's respondent patient groups stating that the industry had an "Excellent" or "Good" corporate reputation, and ranking pharma 3rd out of nine healthcare sectors for corporate reputation.** In 2017, 43% of respondent patient groups had thought that the pharma industry as a whole had an "Excellent" or "Good" corporate reputation.
- **53% of 2018's respondent patient groups believed that the pharma industry was "Excellent" or "Good" at making high-quality products** (a figure slightly down on the 57% of 2017). — BUT:



Levels of patient engagement in pharma R&D, 2018 v. 2017

- 8% of the 1,218 respondent patient groups that work with pharma stated that they were **engaged in companies' drug research/drug discovery**—that is, before clinical trials begin (the equivalent figure in 2017 was 13%).
- 14% of the patient groups that work with pharma stated that they were **engaged in companies' clinical trials** (the equivalent figure in 2017 was 13%).
- 7% of patient groups that work with pharma stated they were **engaged in companies' drug-development activities**—that is, after clinical trials were completed (the question was not asked in 2017).

- In 2018, **only 9% of the respondent patient groups stated that pharma as a whole was "Excellent" or "Good" at having fair pricing policies.** (This question was not asked in the 2017 survey, but the equivalent figure from the 2016 survey was 11%.) 2018 saw the beginning of President Trump's Congressional hearing on drug pricing, with top drug executives providing testimony. Some pharma companies have responded to demands for lower prices in the US and elsewhere by publicly stating that they are stabilising annual price increases [for case studies from contributor companies, see the Global report's Appendix 1 supplement]. Other companies have not committed to such restrictions.
- PatientView's 'Patient Engagement in R&D: Still a Challenge', published in December 2018, drew together the comments of thousands of patient groups on the subject of pharma's engagement in R&D. From the feedback received, **patient groups clearly feel that they (and the patients they represent) should be more actively engaged in the whole repertoire of activities that surround corporate R&D.** Companies and regulatory agencies are trying to respond to the trend with the support of patient groups, through consortia like:
 - the European PARADIGM (Patients Active in Research Dialogues for an Improved Generation of Medicines);
 - the Food and Drug Administration's PFDD (Patient Focused Drug Development); and
 - the global PFMD (Patient Focused Medicines Development).
 However, as shown by the answers to PatientView's 2018 Corporate-Reputation question on the types of relationships that patient groups have with pharma [see accompanying figures], **only a small fraction** of the respondent patient groups that work with pharma have been engaged in the process of pharma R&D.

HOW DID COMPANIES PERFORM?

The companies most familiar to patient groups

The number/percentage of patient groups claiming familiarity with each individual pharma company gives an idea of the company's corporate brand awareness within the patient community in 2018. By this criteria, **Novartis** is the company best known among patient organisations in 2018, with as many as 1,011 of the 1,500 respondent patient groups claiming familiarity with it. This result is a first for Novartis, since, in all previous years, Pfizer has been the company best known to patient groups worldwide (in 2018, 981 of the 1,500 respondent patient groups claimed familiarity with Pfizer). The 2018 survey found that **Novartis** also had the largest number of respondent patient-group partners (at 399), with Roche (339), and Pfizer (320) next in line, respectively.

Companies with the "Best" corporate reputation (out of 46 companies) in 2018, as assessed by patient groups familiar with the company

Ranking is measured by patient groups familiar with a company. Such patient groups provide feedback on the public-domain persona of the companies.

- **ViiV Healthcare** was ranked overall 1st for corporate reputation in 2018 among 46 pharma companies, according to the 121 respondent patient groups claiming familiarity with it. ViiV was also ranked 1st in 2018 for all twelve individual indicators of corporate reputation.
- **Gilead Sciences** was ranked overall 2nd for corporate reputation in 2018 (up one place from overall 3rd in 2017) by the 284 patient groups claiming familiarity with it. This higher ranking suggests an end to the hostility that patient groups felt following the launch of the company's highly-priced hepatitis drug, Solvadi, in 2013.
- **Janssen** was ranked overall 3rd for corporate reputation in 2018 (up two places from overall 5th in 2017) by the 666 patient groups claiming familiarity with it. An upward move of two places, this high in the rankings, is a considerable achievement for any large multinational pharma company.
- **Novartis** was ranked overall 4th for corporate reputation in 2018 (retaining its 4th-place rank of 2017) by the 1,011 patient groups claiming familiarity with it.

Big leaps

Some companies witnessed significant rises up PatientView's rankings in 2018:

- The biggest surprise is an almost unprecedented leap of 30 places (from overall 37th in 2017 to overall 7th in 2018) by **Takeda**, boosted by its acquisition of Shire. Several Japanese companies have stepped up efforts to improve their patient centricity during the past few years. The relative standing at corporate reputation held by Japanese companies in 2018 can be seen in the table below

- Another surprise is **Chiesi Farmaceutici**, which rose 21 places (from overall 40th in 2017 to 19th in 2018). 36% of the respondent patient groups stating familiarity with Chiesi were based in Italy, and might be measuring Chiesi's corporate standing in Italy as much as the company's work with patients (though, if this was the case, the same should probably have happened in previous years).
- **Bristol-Myers Squibb** owes its jump of seven places (from overall 31st in 2017 to 24th in 2018), in part, to a significant increase in B-MS' integrity, as reported by the respondent patient groups familiar with the company.
- **Boehringer Ingelheim** has been making a slow but constant annual climb in overall ranking during the last few years. Respondent patient groups familiar with the company have marked Boehringer up from overall 33rd in 2015 to 15th in 2018.

Overall rankings for corporate reputation among the Japan-headquartered pharma companies, 2018 v. 2017 (as assessed by patient groups familiar with the company)		
	2018	2017
Takeda	7th	37th
Eisai	19th	13th
Otsuka	22nd	24th
Astellas	40th	26th
Daiichi	42nd	42nd

Rankings of individual pharma companies among patient groups familiar with the company, 2018 v. 2017, ordered HIGH to LOW				
	TOTAL	2018	2017	DIFFERENCE
ViiV Healthcare	12	1	1	0
Gilead	43	2	3	1
Janssen	48	3	5	2
Novartis	49	4	4	0
AbbVie	51	5	2	-3
Roche	60	6	6	0
Takeda (inc. Shire)	101	7	37	30
UCB	110	8	8	0
Pfizer	114	9	10	1
Sanofi	133	10	15	5
Novo Nordisk	138	11	9	-2
Lundbeck	151	12	7	-5
GSK	181	13	11	-2
Eli Lilly	198	14	12	-2
Boehringer	208	15	21	6
Celgene	214	16	14	-2
Biogen	236	17	22	5
Bayer	242	18	19	1
Chiesi	250	19	40	21
Eisai	250	19	13	-6
Amgen	264	21	25	4
Otsuka	281	22	24	2
Merck & Co / MSD	296	23	16	-7
Bristol-Myers	303	24	31	7
Ipsen	309	25	23	-2
Vertex	313	26	18	-8
Merck KGaA	323	27	17	-10
Acorda	325	28	39	11
AstraZeneca	330	29	26	-3
Menarini	347	30	30	0
LEO Pharma	355	31	29	-2
CSL Behring	364	32	31	-1
Grünenthal	366	33	38	5
Octapharma	407	34	28	-6
Grifols	420	35	33	-2
Teva	425	36	34	-2
Allergan	432	37	34	-3
Gedeon Richter	433	38	43	5
Ferring	435	39	41	2
Astellas	441	40	26	-14
Servier	467	41	43	2
Daiichi Sankyo	482	42	42	0
Pierre Fabre	486	43	36	-7
Bial	509	44	46	2
Mundipharma	528	45	-	-
Almirall	536	46	45	-1

**Among the 13 biggest pharma companies:
those with the "Best" corporate reputation in 2018,
as assessed by patient groups familiar with the company**

Eighteen pharma companies rose in the overall rankings, 2018 v. 2017 (as assessed by patient groups familiar with each company)

	2018	2017	Difference
Takeda (inc. Shire)	7th	37th	+30
Chiesi	19th	40th	+21
Acorda	28th	39th	+11
Bristol-Myers Squibb	24th	31st	+7
Boehringer I.	15th	21st	+6
Sanofi	10th	15th	+5
Biogen	17th	22nd	+5
Grünenthal	33rd	38th	+5
Gedeon Richter	38th	43rd	+5
Amgen	21st	25th	+4
Janssen	3rd	5th	+2
Otsuka	22nd	24th	+2
Ferring	39th	41st	+2
Servier	41st	43rd	+2
Bial	44th	46th	+2
Gilead	2nd	3rd	+1
Pfizer	9th	10th	+1
Bayer	18th	19th	+1

Setting out the rankings of only the 13 largest multinational pharma companies (calculated by re-ranking the 13 companies for each of the 12 indicators, as determined by the patient groups familiar with them) provides a different perspective on how these largest pharmaceutical companies fare for corporate reputation against what they see as their own corporate peers. By this assessment ...

The rankings at corporate reputation of 13 of the biggest pharma companies, 2018 v. 2017 (as assessed by patient groups familiar with the companies)

	TOTAL	RANK 2018	RANK 2017	DIFFERENCE
Janssen	26	1	3	+2
AbbVie	27	2	1	-1
Novartis	29	3	2	-1
Roche	39	4	4	0
Pfizer	61	5	5	0
Sanofi	73	6	8	+2
GSK	89	7	6	-1
Eli Lilly	100	8	7	-1
Amgen	117	9	11	+2
Bayer	117	9	10	+1
Bristol-Myers	133	11	13	-2
Merck & Co	136	12	9	-3
AstraZeneca	145	13	12	-1

- **Janssen** emerges as having the best overall corporate reputation (judged by patient groups familiar with the company) among the 13 major peers in 2018. AbbVie held this rank in 2017.
- **AbbVie** ranks 2nd (according to patient groups familiar with the company) among the big 13 in 2018.
- The two major multinational pharma companies showing the best improvement in ranking for corporate reputation among these 13 peers (again, judged by patient groups familiar with each company) are **Sanofi** and **Amgen**, both rising two places—from 8th in 2017 to 6th in 2018; and 11th to 9th, respectively.

NET PROMOTER SCORE: HOW COMPANIES PERFORM AMONG PATIENT-GROUP PARTNERS

Another, different, measure of companies' corporate reputation is also undertaken by PatientView—a standard management tool called Net Promoter Score (NPS). PatientView asks the patient groups that work or partner with a company an NPS question: whether they would recommend the company it works or partners with to another patient group. The answer is rated on a scale of 0 to 10 (with '10' being a definite recommendation of the company, and '0' being definitely no recommendation of the company). 2018's NPS only included a company when a minimum of 30 of that company's respondent patient-group partners answered the NPS question about it. Scores above 40% are considered excellent for the company; 20-39% very good; 10-19% healthy; 0-9% average. Negative scores are considered poor.

Results from the 2018 NPS:

- In 2018, **Lundbeck** came top for the second year in a row, with an outstanding NPS of +72% (even higher than the 60% the company attained in 2017).
- **Novo Nordisk** gained 2018's second-highest NPS, 39%.
- **ViiV Healthcare** was given a high NPS of +35%.
- **Roche**, too, attained a high NPS of +35%.
- **Bristol-Myers Squibb** saw the sharpest rise up 2018's NPS tables, rising 14 percentage points, to reach +12%.

Company NPS, 2018 v. 2017, ordered HIGH to LOW

Company	2018	2017
Lundbeck	+72%	+60%
Novo Nordisk	+39%	+33%
ViiV Healthcare	+35%	+34%
Roche	+35%	+35%
UCB	+26%	+43%
Janssen	+25%	+24%
Gilead	+23%	+25%
Takeda (inc Shire)	+21%	+15%
Pfizer	+21%	+12%
AbbVie	+20%	+28%
Merck KGaA	+20%	+21%
Novartis	+17%	+32%
Boehringer I.	+13%	+6%
Sanofi	+13%	+16%
Celgene	+13%	+26%
Bristol-Myers Squibb	+12%	-2%
Biogen	+4%	+23%
Eli Lilly	+3%	+11%
Astellas	+3%	+12%
Allergan	+3%	+23%
GSK	+2%	+11%
AstraZeneca	-3%	-14%
Bayer	-7%	-7%
Merck & Co / MSD	-9%	+13%
Teva	-15%	-9%
Amgen	-19%	+15%

In general, the companies ranking highly at NPS also sit in the top tier of PatientView's Corporate-Reputation rankings. Deviations from PatientView's rankings occur when companies' performance across all 12 indicators are inconsistent.



For further information on this Global report, please use contact details above

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PatientView

Tel: ++44-(0)1547-520-965

E-mail: report@patient-view.com

www.patient-view.com

Registered in England Number: 3944382

Registered office:

One Fleet Place, London, EC4M 7WS, UK