How has the Covid crisis impacted the image of pharmaceutical companies in France?

Key findings of the IPSOS industry reputational survey conducted across its stakeholder base

This survey of pharmaceutical company stakeholders was conducted by Ipsos in September and October 2021. Respondents included:

- ***Healthcare professionals****: representative samples of 193 general practitioners, 203 hospital-based specialists and 203 retail pharmacists*
- ***General Public****: 2,000 people from a national representative sample of the French population, with additional focus on (200) young people aged between 17 and 23 to specifically analyse the attractiveness of the industry*
- ***Elected representatives****: 211 national and local elected representatives, including 10 members of parliament, 100 mayors/deputy mayors/councillors of cities with populations in excess of 100,000, and 101 regional/departmental councillors*
- ***Industry employees****: 1,017 employees responded to the questionnaire sent by LEEM to its member companies*

All were interviewed online, with the exception of elected representatives, who were contacted by phone and asked to complete a shortened questionnaire.

2021 put the spotlight firmly on pharmaceutical companies, whose image has been enhanced by the leading role they have played in combating the pandemic. Confidence indicators in the industry itself, as well as in pharmaceutical products and vaccines in general, are on the rise, but cannot conceal structural image issues for the sector as a whole, as is the case with combating shortages or the pursuit of the public interest.

- Already shaped by the emergence of the Covid-19 pandemic in 2020 and in particular the research for a vaccine against Covid 19, news from the industry are still on a strong momentum in 2021. When asked for their impressions of *the pharmaceutical company response to the Covid-19 crisis*, stakeholder respondents are generally positive.
    - The highest praise is reserved for the speed with which vaccines have been developed, as well as the level of collaboration between pharmaceutical companies and research organisations
    - However, there are also some negative references, particularly around the level of profit generated and France's late entry to, or even absence from, the vaccine development race;

- Other issues more commonly raised about the industry (lack of transparency, shortages of pharmaceutical products, etc.) represented only a small proportion of these spontaneous responses, probably as a result of being overshadowed by Covid realities

- It should be noted that the elected officials voiced the highest levels of criticism on a range of subjects: the lack of health sovereignty in France, the fact that there is no French vaccine, and the lack of anticipation and information are the most frequently criticised shortcomings (although they are very much in the minority)

- This focus on the sector and the actions it took in response to the Covid crisis - which was judged favourably (the effectiveness of pharmaceutical companies in managing the health crisis was cited by 60% of the general public, 84% of general practitioners, 86% of hospital-based specialists, 81% of pharmacists and 93% of employees) - **has strengthened its image**:

  - **There are no doubts around the usefulness of the industry**, with a 90% endorsement across all stakeholders, ranging from 91% for the general public (up 3 points compared to October 2020) to 100% for pharmacists and industry employees).

  - **Confidence in the industry is increasing**: its confidence rating has risen by 10 points in two years among the general public (from 52% in November 2019 to 62% in October 2021), and 15 points in one year among elected representatives (72%). Confidence remains very high among healthcare professionals (90% of doctors and 96% of pharmacists) and employees (94%). Nevertheless, confidence in the industry as expressed by the general public and elected representatives remains **below that of other sectors, such as aerospace, construction and automotive**. It is also important to note that **some sectors lagging behind in terms of image, whose role was highlighted during the Covid crisis also saw previously low confidence levels rise among the general public**: these include mass retail (+21 pts in 2 years, from 35% to 56%), the food industry (+19 pts, from 38% to 57%) and banking/insurance (+11 pts, from 35% to 46%), although all three of these sectors remain below the pharmaceutical industry.

  - **The image of pharmaceutical companies is improving significantly** among the general public, from a low level in 2019 (when only 28% of respondents had a positive image of the industry, compared with 41% in 2021), and among elected representatives (only 39% of whom reported a positive image in 2020, compared with 67% today). Traditionally more positive about the sector, healthcare professionals and industry employees are also more positive about its image: 72% of general practitioners (up 2 pts compared to October 2020, 75% of hospital-based specialists (up 5 pts), 72% of pharmacists (up 6 pts) and 90% of employees (up 6 pts)). It is also important to note that the image of public research organisations among the general public has followed the same trend as that for pharmaceutical companies, and now stands at the very high level of 80%

- There have been intense debates in France around the issue of vaccines in general, and Covid-19 vaccines in particular, so it is interesting to analyse their impact on public opinion. These debates have neither tarnished the image of the sector - quite the contrary, in fact - **nor dented confidence in vaccination generally, which has even increased:**

- **Confidence in vaccines generally has risen to an all-time high**, with 80% confidence among the general public (up 12 pts year-on-year, and 3 points above the previous record set in 2013), 96% among elected representatives (up 9 pts) and very nearly 100% of healthcare professionals

- In terms of the risk/benefit ratio for vaccines, all stakeholders were overwhelmingly convinced of the benefits. The most vaccine-resistant individuals among the general public seem to be concentrated in the working classes and rural population, who still remain to be convinced

- **When asked to self-qualify, 49% of French people say they are "pro-vaccine", 23% have reservations, but only 6% are "anti-vaccine". 22% did not state their position**. Here again, the more hesitant respondents were among the working classes, women and young people. Those who describe themselves as "anti-vaccine" are more numerous among supporters of the extreme right (13% of of whom described themselves as "anti-vaccine") and young people (11% of 18-24 year olds)

- In terms of Covid-19 vaccines specifically, confidence levels are slightly lower than for vaccines in general, but still high to very high: 71% confidence among the general public (only 18% of whom are fully confident), and over 90% among elected representatives (92%), general practitioners (95%), hospital-based specialists (96%) and pharmacists (96%)

- **Looking in greater detail at the image of the industry shows that it is improving overall, particularly in terms of its contribution to therapeutic progress, its role in extending life expectancy, and the quality and effectiveness of its medicinal products**. These issues, which were among the highest rated before the Covid-19 crisis, have risen by a further 4 points among the general public (to between 73% and 75%) and by almost 9 points among elected representatives (to between 94% and 95%). The increases seen among the various healthcare professionals are smaller, but only because these perceptions were already widely shared (between 87% and 96%).

- The actions undertaken by pharmaceutical companies during the Covid crisis have also improved those aspects of their image that were previously less positive, such as their contribution to the public interest (seen positively by 50% of the general public (up 4 pts) and by 64% of elected representatives (up 11 pts)), and their role in facilitating access to treatment and medicinal products for the greatest number of people (seen positively by 56% of the general public (up 5 pts) and 64% of by elected representatives (up 8 pts)). These aspects are less advanced among healthcare professionals, but are already reaching higher levels

- These improvements are supported by a very positive assessment of the coordinated response of the industry in the 'vaccine race'. So, for example, more than two-thirds of French people (68%) say they were impressed by the research and development capabilities and efforts of pharmaceutical companies to find a vaccine quickly. This figure rises to 87% among hospital-based specialists and to over 90% among other healthcare professionals and industry employees.

- The positive improvement in the image of the industry should not, however, detract from the fact that some issues still challenge its reputation in the longer term, and particularly those around pharmaceutical product shortages (especially for pharmacists) and patient centricity, but also investment choices and the efforts made to ensure early patient access to innovative treatments. Looking beyond the Covid crisis, it is therefore crucial that these issues are effectively addressed in order to consolidate the improved reputation of pharmaceutical companies among stakeholders.

- Furthermore, **the health sovereignty of France, which was rarely questioned before the crisis, is now a real concern**. Nearly 80% of industry stakeholders believe that the Covid-19 crisis is synonymous with increased awareness of France's dependence on other countries for its supplies of pharmaceutical products (although at 69%, the figure is slightly less among young people). At the same time, only 28% of French general public and 32% of elected representatives believe that France is investing in the pharmaceutical industry at the level needed to cope with any future health crises. This doubt is shared by healthcare professionals (22% of general practitioners, 30% of hospital-based specialists and 23% of pharmacists) and industry employees (19%).

Visit www.leem.org for the detailed results

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