

How PatientView measures pharma's corporate reputation from a patient perspective

PatientView's annual 'Corporate Reputation of Pharma' survey measures various aspects of pharma's performance—all from a patient and patient-group perspective.

The 'Corporate Reputation' survey has been running every year since 2011, and maintains a global reach through being conducted in 21 languages.

The survey is financially independent (funded solely by PatientView) and offers respondent patient groups full anonymity (if they wish). The survey results, therefore, are highly likely to reflect honest, true, respondent feedback.

In this latest survey:

☑ The question on Covid-19 featuring in the 2020 and 2021 surveys has been removed for the 2022 'Corporate Reputation' survey.

☑ The Covid-19 pandemic threw into sharp relief existing long-term global (and even national) inequities facing patients who wish to gain **access to medicines**. So, the 2022 survey includes a new indicator on access to medicines (with 'equitable access' defined as 'access for more patients').

The 10 indicators by which patient groups assess pharma's corporate reputation, 2022

WHAT 2000+ PATIENT GROUPS SAY ABOUT PHARMA IN 2022

—The Patient Perspective Global edition

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London, 28th April 2022

PatientView is today publishing the results of the latest 'Corporate Reputation of Pharma' survey (now in its 12th year). Between November 2022-February 2023, the survey collected the opinions of 2,207 patient groups worldwide on the performance of the pharmaceutical industry during 2022.

Patient groups responding to 2022's 'Corporate Reputation of Pharma' survey are uniquely positioned to comment on the pharma industry, and individual pharma companies, as they understand the experiences of patients, and they also network with all other stakeholders in the healthcare system.

Continue reading, for details about ...

► **The headline Global results of the 2022 survey.**

► **The companies included in the 2022 analysis.**

SUMMARY OF RESULTS

► Industry wide

Concerns about Covid-19 receded worldwide during 2022, but the increased positivity towards the pharmaceutical industry encouraged in 2020 and 2021 by the pandemic remained unchanged in 2022. Patient groups around the world still saw pharma as the most-highly regarded among healthcare's stakeholders during 2022. Pharma also continued to improve its record (and has been doing so since 2018) at carrying out activities of importance to patients—notably, pharma's relationships with patient groups.

Despite these achievements, just 32% of 2022's respondent patient groups thought pharma "Excellent" or "Good" at improving patient access to medicines [a new measure introduced to the 'Corporate Reputation' survey for 2022]. With pandemic-related issues no longer prominent in most countries in 2022, more long-lasting health concerns—particularly, delays facing patients wishing to receive treatment—returned to the fore again. Worldwide as many as 52% of respondent patient groups felt that pharma was only "Fair or Poor" at improving patient access to medicines. The problem of access was felt especially keenly in Africa (and respondent African patient groups saw unfair pricing as merely one reason among many for this).



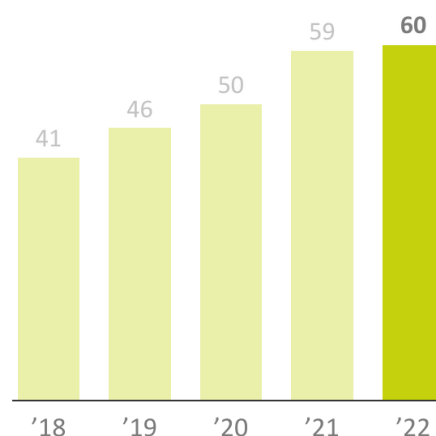
"QALY [Ed. quality adjusted life years] values can't always be substantiated, especially for biopharmaceuticals. Many countries in Europe (never mind in Africa) only have access to a very-limited range of medications."

National respiratory patient group, Netherlands

► Individual companies

► The corporate reputation of the pharma industry, according to respondent patient groups worldwide, 2018-2022

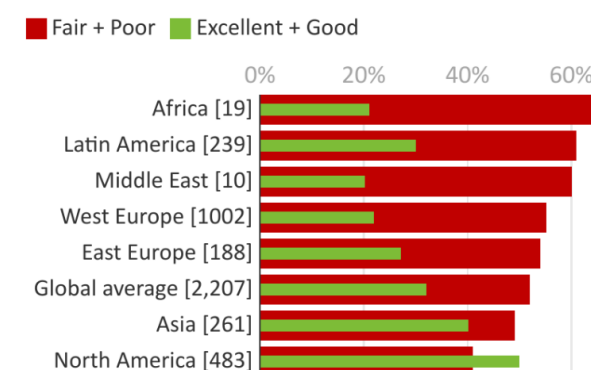
% of respondent patient groups, per year, stating "Excellent" or "Good"



► How effective the pharma industry was at improving patient access to medicines, 2022

% of respondent patient groups stating "Excellent + Good" or "Fair + Poor"

Numbers in brackets are the number of respondent patient groups



Note: remaining respondents stated "Do not know"

"Continue to develop programs to educate patients on how to access medicine, and how to work with HCPs."

National rheumatoid-arthritis patient group, USA

"We are facing a lot of shortages lately on the medicine market. Companies should be more transparent regarding the reasons of the shortages, and more involved in actively finding solutions that prevent shortages happening."

National immune patient group, Romania

The 42 companies assessed in this survey were selected on the following criteria: size of revenue; or on request by companies or patient groups:

• AbbVie • Amgen • Astellas Pharma
• AstraZeneca • Bayer • Biogen
• Biomarin • Boehringer Ingelheim
• Bristol Myers Squibb • Chiesi Farmaceutici
• CSL Behring • Daiichi Sankyo • Eisai
• Eli Lilly • Ferring • Gilead Sciences • Grifols
• Grünenthal • GSK • Horizon Therapeutics
• Ipsen • Janssen • LEO Pharma • Lundbeck
• Menarini • Merck & Co • Merck KGaA
• Novartis • Novo Nordisk • Octapharma
• Otsuka • Pfizer • Pierre Fabre
• PTC Therapeutics • Roche • Sanofi
• Sarepta Therapeutics • Servier • Takeda
• UCB • Vertex • ViiV Healthcare

88% of 2022's 2,207 respondent patient groups stated that they work directly with pharma—suggesting that patient groups and pharma alike accept pharma/patient-group relationships as a normal and acceptable trend in healthcare.

Top-three rankings worldwide

Out of all 42 companies:

➔ As assessed by respondent patient groups familiar with the company

1st: Roche
2nd: ViiV Healthcare
3rd: Horizon Therapeutics

➔ As assessed by respondent patient groups working with the company

1st: ViiV Healthcare
2nd: Horizon Therapeutics
3rd: Roche

Out of 15 'big-pharma' companies:

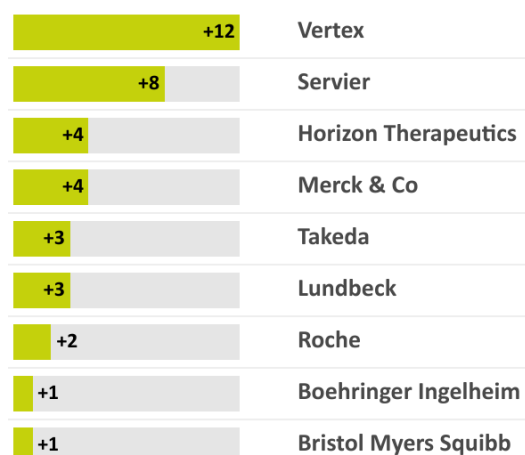
➔ As assessed by respondent patient groups familiar with the company

1st: Roche
2nd: Pfizer
3rd: Gilead Sciences

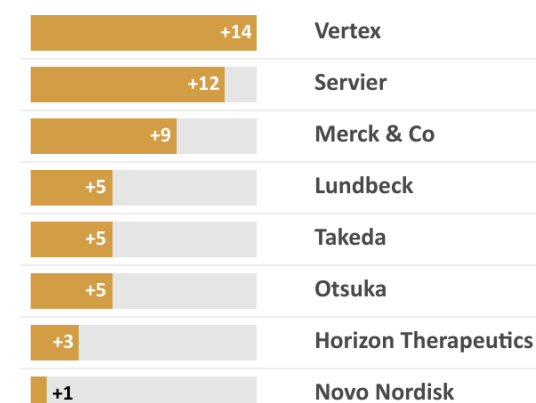
➔ As assessed by respondent patient groups working with the company

1st: Roche
2nd: Gilead Sciences
3rd: Pfizer

► The companies rising the most in the upper part of the rankings (out of all 42 companies), 2022 v. 2021, as assessed by respondent patient groups familiar with the company



► The companies rising the most in the upper part of the rankings (out of all 42 companies), 2022 v. 2021, as assessed by respondent patient groups working with the company



Note:

■ Gilead Sciences includes Kite Pharma.
■ Merck & Co is known as MSD outside of Canada and the United States.
■ Roche is known as Genentech in the United States, and as Chugai in Japan.

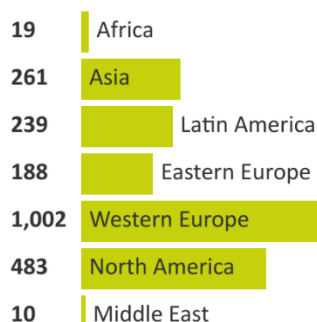
PROFILES OF RESPONDENTS

2,207 patient groups responded to the 'Corporate Reputation of Pharma' survey in its 12th year—a record number.

The respondent patient groups had reached out to approximately 32 million patients during 2022.

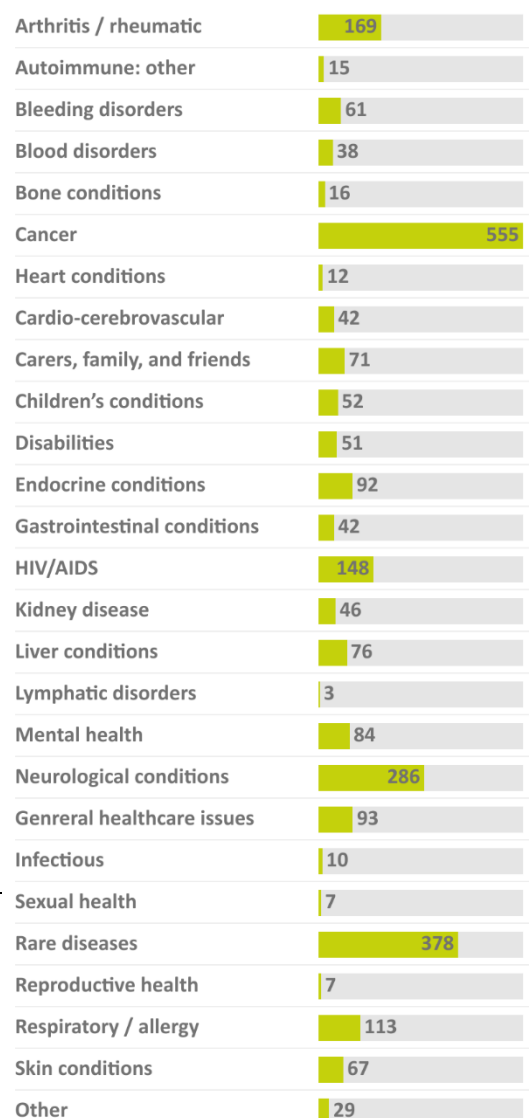
► Headquarters of 2022's respondent patient groups

Number of respondent patient groups



► Specialities of 2022's respondent patient groups

Number of respondent patient groups



Companies' own stories on their patient-related activities in 2022 (and planned for 2023)

This publication includes the results of a December 2022-February 2023 survey of pharma companies, asking them to refer to their patient-centric activities. The survey included a question about company support provided to Ukraine in 2022 (and planned for 2023). We would like to thank the following companies for their participation in this research:

- AbbVie
- Alexion (AstraZeneca Rare Disease)
- Boehringer Ingelheim
- Bayer AG
- Merck KGaA / EMD Serono
- Novartis
- Pfizer
- ViiV Healthcare.

Finally, PatientView would like to thank the 2,207 patient groups and health campaigners who gave up their time to respond to the 'Corporate Reputation of Pharma' survey 2022 (published 2023).

The respondent patient groups feel that the sharing of feedback and experiences on whether the pharma industry (and individual pharma companies) meet their needs and expectations will help the

industry gain valuable insights into improvement.

Since many of the 42 pharma companies featured in the 2022 'Corporate Reputation of Pharma' survey are currently building strategies around patients, the feedback the survey results provide can influence company models and approaches, enabling more close alignment with patient needs and perspectives.

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

END OF PRESS RELEASE

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