PATIENT VIEW

WHAT 107 UK PATIENT GROUPS SAY ABOUT PHARMA IN 2022

—The Patient Perspective

UK edition

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PatientView is today publishing the results of the latest 'Corporate Reputation of Pharma' survey (now in its 11th year). Between November 2022-February 2023, the survey collected the opinions of 107 UK patient groups 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 UK results of the 2022 survey.**
- **The 17 pharma companies included in the 2022 UK analysis.**

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 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 that featured in the 2020 and 2021 'Corporate Reputation' surveys has been removed for the 2022 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

UK RESULTS

Industry wide

Patient access to medicines has been adversely impacted in the UK by a complex set of factors, post Covid-19:

• The most-recent data, of 2021, showed that the UK's drug-regulatory authority, the Medicines and Healthcare Products Regulatory Agency (MHRA), approved fewer medicines that year (just 35) than the EU (40), or the US (52).[1]

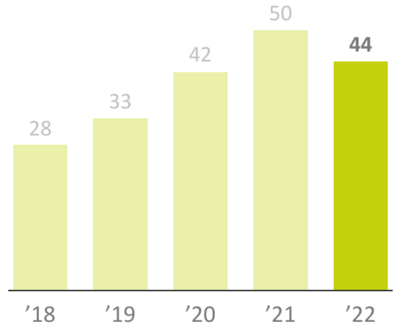
• The UK pharmaceutical-industry's trade body, the Association of the British Pharmaceutical Industry (ABPI), claims that patients in France and Germany were five times more likely in 2021 to access new medicines than equivalent UK patients.[2]

• A Covid-19-related backlog in secondary care has significantly delayed UK patient access to treatment. According to UK-based cancer patient group, Reframe, latest figures (those of September 2022) "*show that only 60% of people are meeting the NHS target to receive their first cancer treatment within two months of an urgent GP referral. The operational standard of 85% has not been met since August 2019. The percentage continues to fluctuate, and has drastically fallen since the beginning of the pandemic.*"[3]

UK patient groups responding to the 2022 'Corporate Reputation' survey acknowledge the difficulties caused by the pandemic, but argue that pharma's response to it overlooks the plight of UK patients—which is mostly why the pharma industry's corporate reputation has declined so sharply among UK patient groups in 2022.

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

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



How good or bad the pharma industry was at carrying out specific activities, UK, 2022

% of respondent UK patient groups stating "Excellent" or "Good"

Figures just for 2022	
Products that benefit patients	62
Ensuring patient safety	50
Innovation	50
Patient-group relations	49
Integrity	36
Transparency: funding	35
Patient centricity	33
Information	29
Services 'beyond the pill'	23
Engaging patients in R&D	16
Access to medicines	16
Transparency: clinical data	10
Fair pricing policies	4
Transparency: pricing	3

Below are three of the many comments from 2022's respondent UK patient groups on the subject of access to medicines. While

[1] https://www.imperial.ac.uk/business-school/ib-knowledge/health/post-brexit-medicine-approvals-what-we-know#:~:text=Our%20review%20reveals%20that%20fewer,and%2052%20in%20the%20US
[2] https://www.abpi.org.uk/value-and-access/uk-medicine-pricing/improving-access-to-medicines-in-the-uk/
[3] https://www.reframe.co.uk/blog/cancer-backlog

the pharmaceutical industry's innovatory activities continue to give UK patients hope of better outcomes, any failure of individual new medicines to gain reimbursement in the UK can instantly switch patient expectation to disappointment. One UK example concerns a new alopecia treatment. A UK national alopecia patient group articulated such hope when it participated in the 2022 'Corporate Reputation' survey. But, on February 28th 2023, one day before the survey was due to close, the UK's reimbursement authority, the National Institute for Health and Care Excellence (NICE), did not recommend the drug for routine commissioning.

2022's respondent UK patient groups would like to see pharma react to this kind of circumstance by showing greater flexibility in pricing (as the blood-cancer patient group below makes clear in its comment to the survey).

Access also means having a reliable supply of existing medicines. A UK advocacy group calls below for pharma to bring production closer to home markets.

"Ensuring adequate supplies of medicines. This entails ensuring a secure supply chain on all components of the medicine. The pandemic showed that too much dependence was put on individual countries (such as China) to provide the raw chemicals, as well as the active pharmaceutical ingredient (API). Europe should become more self sufficient, and supply chains should not be led down a path of 'cheapest-country-to-supply' business model."
Regional advocacy patient group, UK

"We are on the brink of the first-ever treatment for our condition possibly being approved by the National Institute for Health and Care Excellence (NICE). The proof will be in the pudding of the next two years, to see what happens with this new technology."
National alopecia patient group, UK

"Price fairly. Engage early with patient organisations and drug-approval frameworks. Improve data collection, in line with HTA requirements. Ensure early-access schemes are implemented as standard. Addressing inequalities—clinical and demographic. For example, in clinical-trial design (that is, delivering clinical-trial access as widely as possible).
National blood-cancer patient group, UK

▸ Individual company results

The 17 companies assessed in the UK element of the 2022 survey were selected on two main criteria—size of revenue, or on request by companies or patient groups:

• AbbVie • Astellas Pharma • AstraZeneca • Bayer • Boehringer Ingelheim • Bristol Myers Squibb • Eli Lilly • Gilead Sciences • GSK • Janssen • Merck & Co/MSD • Novartis • Pfizer • Roche • Sanofi • Takeda • UCB

86% of 2022's respondent UK patient groups stated that they worked with one or more pharma companies.

The top-three-ranking companies, UK, 2022

Out of all 17 companies

➔ As assessed by respondent UK patient groups *familiar* with the company

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

Out of 15 companies

➔ As assessed by respondent UK patient groups *working* with the company

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

Out of 14 'big-pharma' companies

➔ As assessed by respondent UK patient groups *familiar* with the company

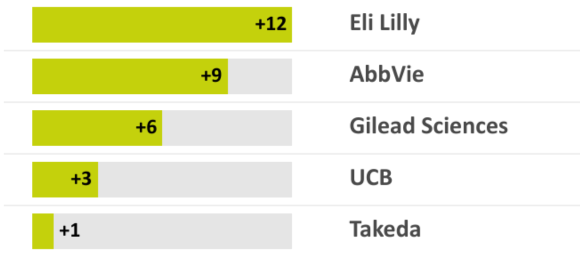
1st: Pfizer
2nd: Gilead Sciences
3rd: AbbVie

Out of 13 'big-pharma' companies

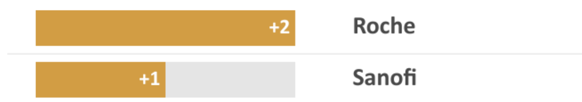
➔ As assessed by respondent UK patient groups *working* with the company

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

▸ The companies rising the most in the upper part of the UK rankings (out of all 17 companies), 2022 v. 2021, as assessed by respondent UK patient groups familiar with the company



▸ The companies rising the most in the upper part of the UK rankings (out of 15 companies), 2022 v. 2021, as assessed by respondent UK patient groups working with the company

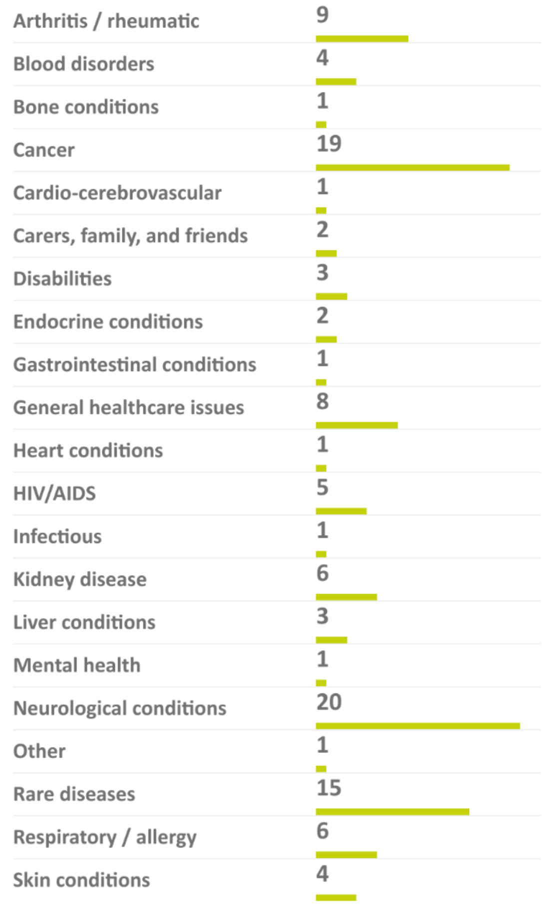


PROFILES OF RESPONDENTS

107 UK patient groups responded to the UK element of the 2022 'Corporate Reputation of Pharma' survey.

The respondent UK patient groups stated that they had reached out to approximately 2.4 million UK patients during 2022.

Specialities of 2022's respondent UK patient groups
Number of respondent UK patient groups



PATIENT VIEW

Finally, PatientView would like to thank the 107 UK patient groups that gave up their time to respond to the 2022 'Corporate Reputation of Pharma' survey.

The respondent UK patient groups feel that the sharing of their evaluation and experiences on whether the pharma industry (and individual pharma companies) meets patient needs and expectations will help the industry gain valuable insights into improvement.

Because many of the 17 pharma companies featured in the UK element of the 2022 'Corporate Reputation of Pharma' survey are currently building strategies around patients, the respondent feedback provided by the survey results can influence company models and approaches, enabling closer alignment with patient needs and perspectives.

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

END OF PRESS RELEASE

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