

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 that featured 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 361 US PATIENT GROUPS SAY ABOUT PHARMA IN 2022 —The Patient Perspective USA edition

**PRESS RELEASE EMBARGOED until
TUESDAY, MAY 9th 2023, 5 AM EST**

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London, May 9th 2023

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 361 US 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 US results of the 2022 survey.**

▶ **The 41 pharma companies included in the 2022 US analysis.**

US RESULTS

► Industry wide

The last major peak in Covid-19 deaths in the US occurred in January 2022. While many of the structural effects of the pandemic continued to impact US healthcare systems throughout 2022, the subject of Covid-19 itself will have had relatively-little bearing on the responses to the 2022 survey (which opened in November 2022).

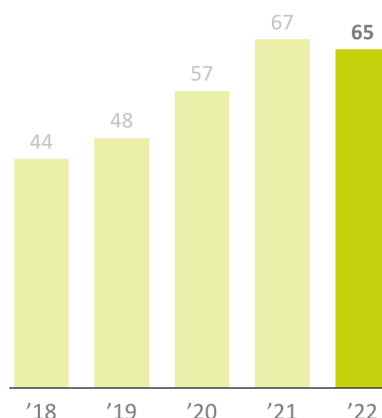
With 2022 seeing the highest rise in inflation in the US in 40 years, and a reported 38% of Americans either skipping, or delaying, healthcare due to financial pressures, the 2022 survey results illustrate how all of the challenges confronting patients and patient groups post-pandemic have been overshadowed by the enduring topic of affordability. The unique problems imposed by the pandemic only served to emphasise already-existing health inequalities around the world—and, in the US (as with most countries), the primary issue of affordability remains stubbornly dominant.

Pharma continues its mission to develop innovative medicines. The latest figures (for 2021) show 50 new drugs approved by the Food and Drug Administration (FDA), including 36 new chemical entities, nine of which were biologics. Among the latter are two new breakthrough drugs: the first KRAS inhibitor for cancer, to treat people with non-small-cell lung cancer; and the first anti-amyloid antibody for Alzheimer’s disease. These are significant milestones, and pharma’s reputation among patient groups is helped by such innovation. However, the public cost of new medicines in a straightened economic climate also exerts a major influence on patient perspectives.

The Inflation Reduction Act, which contained government-sanctioned efforts to reduce drug costs, was signed into law in August 2022, despite a number of healthcare companies (including pharma), lobbying against the passage of the Act. The reputational fallout of these lobbying activities against the Act is, as yet, uncertain, but US patient groups responding to the 2022 survey continue to mark pharma down on issues of pricing.

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

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



► How good or bad the pharma industry was at carrying out specific activities, 2018-2022

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

Figures just for 2022	%
Products that benefit patients	81
Ensuring patient safety	75
Patient-group relations	73
Innovation	72
Information	70
Patient centricity	65
Integrity	62
Services 'beyond the pill'	59
Access to medicines	54
Transparency: clinical data	41
Transparency: funding	41
Engaging patients in R&D	40
Transparency: pricing	22
Fair pricing policies	16



Below are some of the comments from 2022's respondent US patient groups on the subject of access to medicines.

“Broaden patient-assistance programs, or provide support for grants from advocacy organizations. Also, quit pretending that the treatments/drugs aren't expensive—they are—and then, the rest will fall into place. We need a pharma to step up, and put into place a way that everyone can access—not just those of privilege.”

National breast-cancer patient group, USA

“Talk to, and support, the people who are providing, or trying to provide, services to cancer patients and families, and let us work with you/them collaboratively. Doctors and researchers are competing more than they are collaborating, and, often, duplicating ‘efforts’—which is costly, and means that money and time are being wasted, with companies that aren't competent, or making real progress.”

National carers, family, and friends group, USA

“The patient-assistance programs (PAPs), and how people qualify for assistance, are a little clouded in secrecy. Another thing that companies could be applauded for—but the lack of transparency inhibits that. I don't work with Gilead in my work role, but I do personally volunteer work, and am grateful for the access programs for people with HIV/AIDS.”

International diabetes (type 2) patient group, USA

“In the US, Medicare must allow for patients to receive discount vouchers for new medications. The people most in need of help affording medications are disallowed this important help, due to absurd regulations.”

International migraine/headache patient group, USA

► **Individual company results.** The 41 companies assessed in the US element of the 2022 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/EMD Serono • Novartis • Novo Nordisk • Octapharma • Otsuka • Pfizer • Pierre Fabre • PTC Therapeutics • Roche/Genentech • Sanofi • Sarepta Therapeutics • Servier • Takeda • UCB • Vertex

97% of 2022's 361 respondent US 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.

The top-three-ranking companies, USA, 2022

Out of all 41 companies

→ As assessed by respondent US patient groups *familiar* with the company

- 1st: Horizon Therapeutics**
- 2nd: Roche (Genentech)**
- 3rd: Servier**

Out of 34 companies

→ As assessed by respondent US patient groups *working* with the company

- 1st: Horizon Therapeutics**
- 2nd: Vertex**
- 3rd: Roche (Genentech)**

Out of 15 'big-pharma' companies

→ As assessed by respondent US patient groups *familiar* with the company

- 1st: Roche (Genentech)**
- 2nd: Merck & Co**
- 3rd: Pfizer**

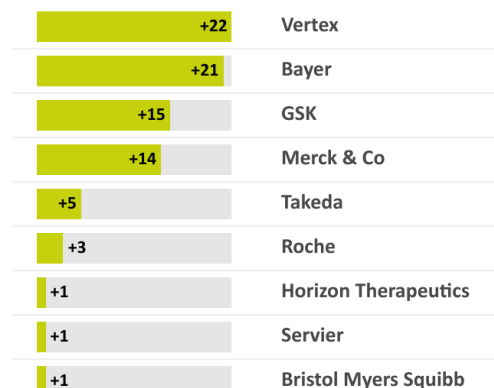
→ As assessed by respondent US patient groups *working* with the company

- 1st: Roche (Genentech)**
- 2nd: Merck & Co**
- 3rd: Bristol Myers Squibb**

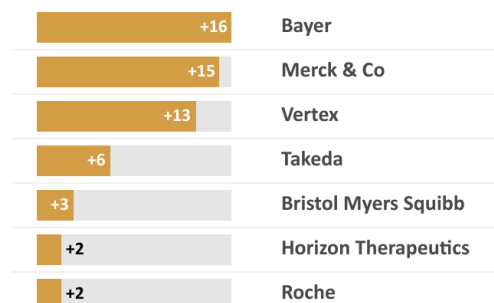
Note:

- Roche is known as Genentech in the United States

► The companies rising the most in the upper part of the US rankings (out of all 41 companies), 2022 v. 2021, as assessed by respondent US patient groups *familiar* with the company



► The companies rising the most in the upper part of the US rankings (out of all 34 companies), 2022 v. 2021, as assessed by respondent US patient groups *working* with the company



PROFILES OF RESPONDENTS

361 US patient groups responded to the US element of the 2022 ‘Corporate Reputation of Pharma’ survey—a record number in the survey’s 11-year history.

The respondent US patient groups stated that they had reached out to approximately 11.5 million US patients during 2022.

► **Specialities of 2022’s respondent US patient groups**
Number of respondent US patient groups

Arthritis / rheumatic	24
Autoimmune: other	6
Bleeding disorders	5
Blood disorders	8
Bone conditions	1
Cancer	173
Cardio-cerebrovascular	1
Carers, family, and friends	17
Children’s conditions	20
Disabilities	8
Endocrine conditions	6
Gastrointestinal conditions	2
General healthcare issues	13
Heart conditions	2
HIV/AIDS	5
Infectious	3
Kidney disease	12
Liver conditions	1
Mental health	5
Neurological conditions	29
Other	8
Rare diseases	54
Respiratory / allergy	9
Skin conditions	5

Finally, PatientView would like to thank the 361 US patient groups that gave up their time to respond to the 2022 'Corporate Reputation of Pharma' survey.

The respondent US 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 41 pharma companies featured in the US 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 US report, please use contact details at the head of the press release.

END OF PRESS RELEASE

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