

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

WHAT 101 GERMAN PATIENT GROUPS SAY ABOUT PHARMA IN 2022 —The Patient Perspective GERMANY edition

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PatientView is today publishing the German results of the latest 'Corporate Reputation of Pharma' survey (German version now in its 11th year). Between November 2022-February 2023, the survey collected the opinions of 101 German 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 German results of the 2022 survey.**

► **The 13 pharma companies included in the 2022 Germany analysis.**

GERMANY RESULTS

Pharma's corporate reputation has steadily improved in Germany since 2018:

■ 58% of 2022's respondent German patient groups believed pharma's corporate reputation to be "Excellent" or "Good" (compared with 53% in 2021).

■ Patient-group relationships with pharma have also advanced: 61% of 2022's respondent German patient groups thought pharma "Excellent" or "Good" at such relations (the equivalent figure in 2021 was 44%).

However, the industry's lowest-scoring attributes in Germany remain fair pricing policies, and the ability of German patients to access medicines. In 2022:

■ Just 11% of respondent German patient groups believed pharma "Excellent" or "Good" at setting fair pricing policies.

■ Similarly, only 34% of 2022's respondent German patient groups saw pharma's ability to offer greater access to its medicines as "Excellent" or "Good".

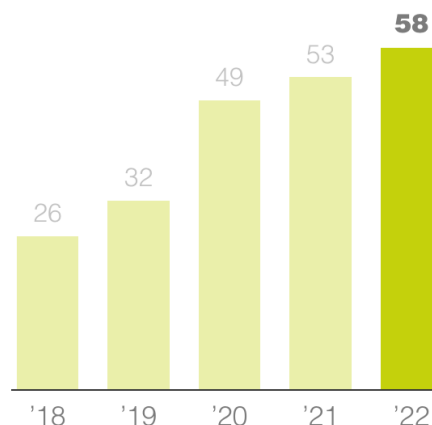
Key issues for 2023: drug pricing and access to medicines

In mid 2022, only 6% of hospitals in Germany believed themselves in an economically-solvent position, according to a survey conducted by the Deutsches Krankenhausinstitut (German Hospital Institute, DKI). And, in mid 2022, according to the same survey, almost 90% of German hospitals had problems filling vacant nursing positions in general wards.¹

Faced with ongoing structural problems in the German healthcare system, the German parliament passed legislation in November 2022 to offer financial stability to Germany's statutory health-insurance policies (GKV), the mainstay of funding for patient care. The new

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

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



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

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

Figures just for 2022 ▼

Patient-group relations	61
Innovation	56
Products that benefit patients	52
Information	49
Ensuring patient safety	46
Patient centricity	42
Services 'beyond the pill'	42
Integrity	35
Access to medicines	34
Transparency: funding	32
Transparency: clinical data	20
Engaging patients in R&D	20
Fair pricing policies	11
Transparency: pricing	8

¹ <https://www.telesurenglish.net/news/German-Hospitals-Fear-Wave-of-Insolvencies-in-2023-Survey-20221227-0019.html>

rules, the GKV-Finanzstabilisierungsgesetz (GKV Financial Stabilization Act, GKV-FinStG), will affect almost all players in the German healthcare system, including health insurers, doctors, hospitals, pharmacies—and, especially, the pharmaceutical industry, as the law encompasses significant cost-containment measures. This 2022 legislation includes far-reaching changes to the legal framework for pricing and reimbursement of innovative pharmaceuticals.²

Whether the GKV-FinStG will make any impact on German patient access to innovative medicines remains to be seen. For now, German patient groups' perceptions of pharma remain driven primarily by the industry's good relationships with patient groups, and by its ability to innovate, and deliver, products of benefit to German patients—but that may alter with the new national focus on drug pricing.



German patient groups responding to the 2022 'Corporate Reputation of Pharma' survey urge pharmaceutical companies to improve in the areas of fair and transparent pricing, and pricing policies, and access to (new) medicines.

“Aufklärung - Aufklärung - Aufklärung! Die Patienten wissen zu wenig über die Forschung und die Entwicklungskosten von Medikamenten. Ebenso kaum etwas über die Vermarktung und die Endkosten, sowie die Erstattungsbeträge.”

[“Inform, inform, inform. Patients know too little about the research-and-development costs of drugs. The same is true for the marketing and end costs, as well as the reimbursement amounts.”]

—**National cancer patient group, Germany**

“Man hört Patienten nur klagen, dass die Medikamente zu teuer sind, man weiß nicht, warum das so ist und in Nachbarländern ist es viel günstiger - unverständlich!”

[“You just hear patients complain that the drugs are too expensive, and you are not sure why this is the case, when they are much cheaper in neighbouring countries—incomprehensible.”]

—**National fertility patient group, Germany**

“Sie sollten den ernsthaften Versuch unternehmen, ihre Produkte in allen (europäischen) Ländern zu vermarkten (kein Cherry-Picking); faire transparente Preisbildung.”

[“They should make a serious attempt to market their products in all European countries, no cherry picking, with fair and transparent pricing.”]

—**National rare-disease patient group, Germany**

► Individual company results

The 13 companies assessed in the Germany element of the 2022 survey were selected on two main criteria—size of revenue, or on request by companies or patient groups:

• AbbVie • AstraZeneca • Bayer • Bristol Myers Squibb • Gilead Sciences • GSK • Janssen • Merck & Co/MSD • Novartis • Pfizer • Roche • Sanofi • ViiV Healthcare.

89% of 2022's 101 respondent German patient groups stated that they worked with at least one pharma company.

² <https://www.globalpolicywatch.com/2022/10/germany-significantly-tightens-drug-pricing-and-reimbursement-laws/>

The top-three-ranking companies, Germany, 2022

Out of all 13 companies

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

1st: Pfizer
2nd: ViiV Healthcare
3rd: Gilead Sciences

Out of 10 companies

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

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

Out of 11 'big-pharma' companies

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

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

Out of 9 'big-pharma' companies

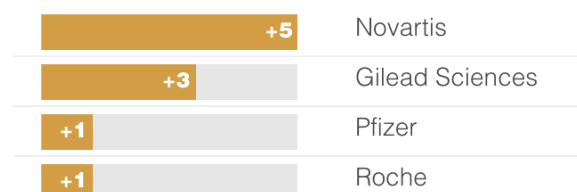
➔ As assessed by respondent German patient groups *working* with the company

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

► The companies rising the most in the upper part of the Germany rankings (out of all 13 companies), 2022 v. 2021, as assessed by respondent German patient groups *familiar* with the company



► The companies rising the most in the upper part of the Germany rankings (out of 10 companies), 2022 v. 2021, as assessed by respondent German patient groups *working* with the company



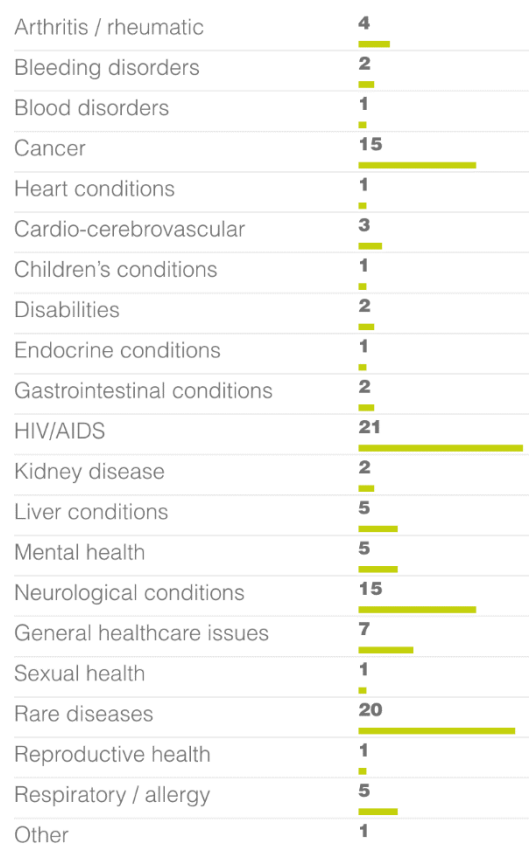
PROFILES OF RESPONDENTS

101 German patient groups responded to the Germany element of the 2022 'Corporate Reputation of Pharma' survey.

The respondent German patient groups stated that they had reached out to approximately 1.2 million German patients during 2022.

► Specialities of 2022's respondent German patient groups

Number of respondent German patient groups



Finally, PatientView would like to thank the 101 German patient groups that gave up their time to respond to the 2022 'Corporate Reputation of Pharma' survey.

The respondent German 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 13 pharma companies featured in the Germany 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 Germany report, please use contact details below.

END OF PRESS RELEASE

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