

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 104 ITALIAN PATIENT GROUPS SAY ABOUT PHARMA IN 2022

—The Patient Perspective

ITALY edition

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PatientView is today publishing the Italian results of the latest 'Corporate Reputation of Pharma' survey (Italian version now in its 9th year). Between November 2022-February 2023, the survey collected the opinions of 104 Italian 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 Italian results of the 2022 survey.**

▶ **The 13 pharma companies included in the 2022 Italy analysis.**

ITALY RESULTS

Pharma’s corporate reputation has significantly improved in Italy since 2018:

- 75% of 2022’s respondent Italian patient groups believed pharma’s corporate reputation to be “Excellent” or “Good” (compared with 66% in 2021).

- 67% of 2022’s respondent Italian patient groups thought pharma “Excellent” or “Good” at innovation (the equivalent figure in 2021 was 62%).

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

- Just 11% of respondent Italian patient groups believed pharma “Excellent” or “Good” at setting fair pricing policies.

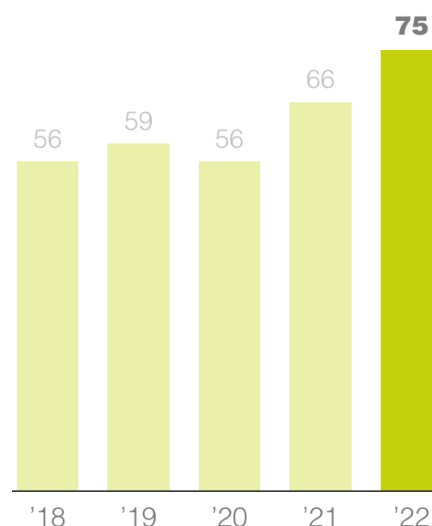
- Similarly, only 30% of 2022’s respondent Italian patient groups saw pharma’s ability to offer greater access to its medicines as “Excellent” or “Good”.

Key issues for 2023: Transparency, and access to medicines

The pharma industry remains under scrutiny in Italy for a historic lack of transparency. The Italian Sunshine Act (Law 62/2022) came into force in June 2022, aiming to improve transparency (and to tackle corruption) across all healthcare sectors, by mandating the disclosure of corporate financial relations with external stakeholders—including patient groups. Thus far, only pharma companies registered with Farmindustria, the Italian industry’s trade organisation, have made such declarations, though the new law requires all pharma companies to follow. The Act specifies that companies need to report and disclose transfer of values (TOV) on a biannual basis via a central reporting platform, called Sanità Trasparente.¹

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

% of respondent Italian patient groups, per year, stating “Excellent” or “Good”



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

% of respondent Italian patient groups stating “Excellent” or “Good”

Figures just for 2022

Innovation	67
Products that benefit patients	61
Patient centricity	50
Ensuring patient safety	49
Patient-group relations	49
Services 'beyond the pill'	46
Integrity	45
Information	44
Access to medicines	30
Transparency: funding	29
Engaging patients in R&D	23
Transparency: clinical data	20
Transparency: pricing	16
Fair pricing policies	11

¹ https://www.salute.gov.it/portale/ministro/p4_10.jsp?lingua=italiano&label=trasparenza

Other challenges on access to medicines

In the meantime, Italy is obliged to implement by 2025 EU legislation which intends to harmonise health-technology assessments (HTAs), and to improve patient access to novel medicines [Regulation (EU) 2021/2282].⁴ But to comply, Italy's currently-decentralised healthcare system, running on a regional basis, will have to undergo big changes. Italian patient groups are already vocal in calling for an end to regional inequalities.²



Italian patient groups responding to the 2022 'Corporate Reputation of Pharma' survey urge pharmaceutical companies to improve in the areas of transparency and access to (new) medicines.

"Proporre i medicinali alle stesse condizioni in tutte le regioni."

["Offer drugs to people in all regions, with the same conditions."]

—**Regional diabetes patient group, Italy**

“Implementare la collaborazione tra cittadino, paziente, società scientifiche, mondo accademico, industria, agenzia regolatoria, Istituzioni perché si trovino soluzioni e risposte concrete a una situazione complessa come quella attuale, con forte disomogeneità nei tempi di accesso ai farmaci tra cittadini, territori e strutture. Una collaborazione essenziale per ottimizzare i percorsi e raggiungere migliori risultati in termini di equità, velocità e sburocratizzazione a livello nazionale e regionale.”

["Implement collaboration between ordinary people, patients, scientific communities, the academic world, industry, regulatory agencies, and institutions, so that they can find solutions and concrete answers to the complex situation we currently have, with such huge differences with regard to waiting times for access to drugs across different people, regions, and facilities. Vital collaboration to optimise access routes, and achieve better results in terms of equity, speed, and prevention of bureaucratisation at a regional and national level."]

—**National stroke/ictus patient group, Italy**

"Providing transparent information regarding pricing policy, clinical trials, and research data."

—**International breast-cancer patient group, Italy**

► Individual company results

The 13 companies assessed in the Italy 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 • Eli Lilly • GSK • Janssen • Merck & Co/MSD
- Novartis • Pfizer • Roche • Sanofi • Takeda.

91% of 2022's 104 respondent Italian patient groups stated that they worked with at least one pharma company.

² https://health.ec.europa.eu/health-technology-assessment/regulation-health-technology-assessment_en#

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The top-three-ranking companies, Italy, 2022

Out of all 13 companies

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

- 1st: Roche**
- 2nd: Bristol Myers Squibb**
- 3rd: Merck & Co/MSD**

Out of 9 companies

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

- 1st: Roche**
- 2nd: AstraZeneca**
- 3rd: Merck & Co/MSD**

Out of 12 'big-pharma' companies

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

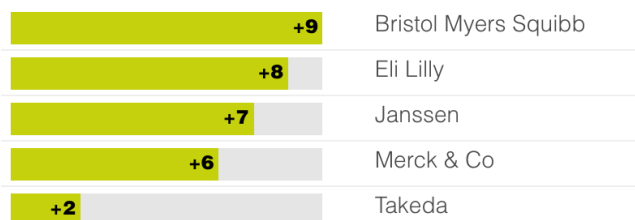
- 1st: Roche**
- 2nd: Bristol Myers Squibb**
- 3rd: Merck & Co/MSD**

Out of 9 'big-pharma' companies

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

- 1st: Roche**
- 2nd: AstraZeneca**
- 3rd: Merck & Co/MSD**

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



The companies rising the most in the upper rankings in Italy (out of 9 companies), 2022 v. 2021—as assessed by respondent Italian patient groups *working* with the company



* Merck & Co is known as MSD in Italy.

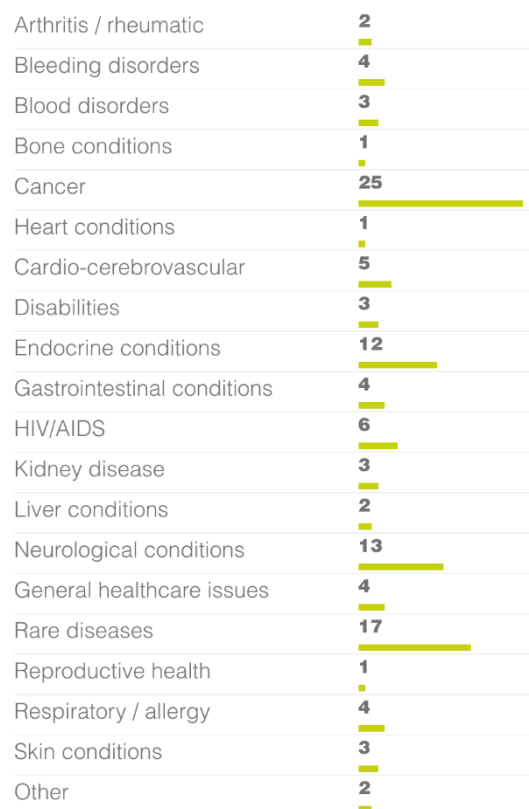
PROFILES OF RESPONDENTS

104 Italian patient groups responded to the Italy element of the 2022 'Corporate Reputation of Pharma' survey.

The respondent Italian patient groups stated that they had reached out to approximately 426,700 Italian patients during 2022.

► Specialities of 2022's respondent Italian patient groups

Number of respondent Italian patient groups



Finally, PatientView would like to thank the 104 Italian patient groups that gave up their time to respond to the 2022 'Corporate Reputation of Pharma' survey.

The respondent Italian 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 Italy 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 Italy report, please use contact details below.

END OF PRESS RELEASE

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