

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 113 RESPIRATORY PATIENT GROUPS SAY ABOUT PHARMA IN 2022

—The Patient Perspective

Respiratory edition

**PRESS RELEASE EMBARGOED until
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PatientView is today publishing the respiratory results of the latest 'Corporate Reputation of Pharma' survey (respiratory-conditions version now in its 8th year). Between November 2022-February 2023, the survey collected the opinions of 113 respiratory 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 respiratory results of the 2022 survey.**

▶ **The 15 pharma companies included in the 2022 respiratory analysis.**

RESPIRATORY RESULTS

Respiratory patient groups responding to annual 'Corporate reputation' surveys have reported the pharma industry's corporate reputation as steadily improving since 2018:

- 64% of 2022's respondent respiratory patient groups believed pharma's corporate reputation to be "Excellent" or "Good" (compared with 61% in 2021).
- 63% of 2022's respondent respiratory patient groups thought pharma "Excellent" or "Good" at providing products that benefit patients (the same figure as reported in 2021).

The pharma industry's lowest-scoring attributes in the field of respiratory conditions are the setting of fair pricing policies, and the relative inability of many patients living with a respiratory condition to access the medicines they need:

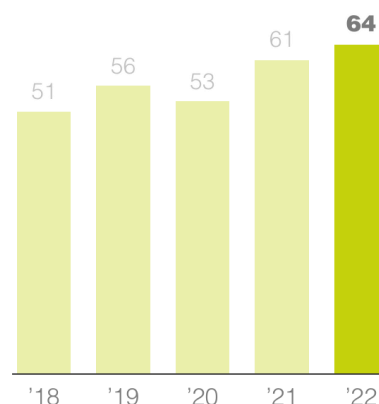
- Just 8% of 2022's respondent respiratory patient groups believed pharma "Excellent" or "Good" at setting fair pricing policies.
- Similarly, only 30% of 2022's respondent respiratory patient groups saw pharma's ability to offer greater access to its medicines as "Excellent" or "Good".

Key issues for 2023 in the field of respiratory conditions: transparency, and access to medicines

The Covid-19 pandemic continued in 2022 to impact all aspects of care in the field of respiratory conditions, and had a particularly negative effect on COPD diagnosis rates, according to a 2022 survey undertaken by UK-based patient group, Asthma + Lung UK. The survey found COPD diagnoses in the UK to have fallen by 51% in 2022 as a result of the pandemic. By the end of 2022, Covid-induced barriers to the restarting of crucial diagnostic services in respiratory care remained in many of the world's countries.

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

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



► **How good or bad the pharma industry was at carrying out specific activities in the field of respiratory conditions, 2022**

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

Figures just for 2022	
Products that benefit patients	63
Ensuring patient safety	59
Patient-group relations	55
Innovation	54
Patient centricity	45
Information	45
Integrity	44
Services 'beyond the pill'	36
Transparency: funding	35
Access to medicines	30
Transparency: clinical data	29
Engaging patients in R&D	24
Transparency: pricing	13
Fair pricing policies	8

Despite novel developments in the field—from biologics to zephyr valves for COPD (tiny valves positioned in the airways to block off diseased parts of the lungs)—respiratory patient groups responding to PatientView's 2022 'Corporate Reputation of Pharma' survey PatientView, Press Release, July 2023

insisted that patients with chronic-respiratory diseases are poorly served, even in richer countries, due to difficulties in accessing treatments.

Comments offered to the 2022 'Corporate Reputation' survey by respondent respiratory patient groups

Access to medicines, and fair pricing, are both subjects featuring significantly in the written feedback provided by respiratory patient groups responding to the 2022 'Corporate Reputation' survey.

A US national allergy patient group raised the issue of pharma's lack of transparency in explaining company pricing policies. The patient group argued that patient communities may be more accepting of higher prices if they better understood the true costs of company R&D. Other respondent respiratory patient groups think that pharma companies should take greater account of the spending power of patients and national healthcare systems.



“No incrementar en forma excesiva, por encima de los índices inflacionarios y del cobro de las jubilaciones de los pacientes mayores de 65 años. Hay aumentos desmedidos y reducción de las cantidades en grageas y líquidos, incluidas las cremas. Envases cada vez más chicos, o sea, con menor cantidad.”

["They should avoid excessive price increases that exceed rates of inflation, and pension payments for patients over the age of 65. There have been excessive price increases, and a reduction in quantities in pills and liquids, including creams. Packs are getting smaller and smaller, which means smaller quantities."]

National asthma/COPD patient group, Argentina

“ 1 . 医療経済学評価分析と患者評価（満足度）についての研究と社会へ発信を継続的に行う。 2 . 家計における治療係数の算出とGDPとの関係性。 3 . 的確な治療薬を享受できない青壮年貧困層の実態調査・把握への共同研究。 ”

["1) They should continue to research, and to inform society about economic-evaluation analysis in healthcare, and patient evaluation (satisfaction). 2) Calculate the therapeutic index in the household economy, and its relationship with GDP. 3) Conduct collaborative, fact-finding research, to ascertain the situation of young and middle-aged poor people, who cannot access appropriate medication."]

National allergy patient group, Japan

▶ Individual company results in the field of respiratory conditions, 2022

The 15 companies assessed in the respiratory-conditions element of the 2022 'Corporate reputation' survey were selected on two main criteria—size of revenue, or on request by companies or patient groups:

• AbbVie • AstraZeneca • Bayer • Boehringer Ingelheim • Chiesi Farmaceutici • Grifols • GSK
• Janssen • Merck & Co/MSD • Novartis • Pfizer • Roche/Genentech/Chugai • Sanofi • Takeda • Vertex.

84% of 2022's 113 respondent respiratory patient groups stated that they worked with at least one pharma company.

The top-three-ranking companies, respiratory conditions, 2022

Out of all 15 companies

As assessed by respondent respiratory patient groups *familiar* with the company

- 1st: Vertex**
- 2nd: Boehringer Ingelheim**
- 3rd: Chiesi Farmaceutici**

Out of all 12 companies

As assessed by respondent respiratory patient groups *working* with the company

- 1st: AstraZeneca**
- 2nd: Boehringer Ingelheim**
- 3rd: Sanofi**

Out of 11 'big-pharma' companies

As assessed by respondent respiratory patient groups *familiar* with the company

- 1st: Boehringer Ingelheim**
- = 2nd: AstraZeneca**
- = 2nd: GSK**

Out of 10 'big-pharma' companies

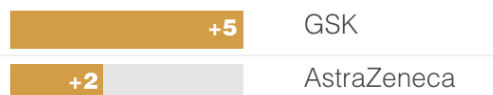
As assessed by respondent respiratory patient groups *working* with the company

- 1st: AstraZeneca**
- 2nd: Boehringer Ingelheim**
- 3rd: Sanofi**

The companies rising the most in the upper rankings in the field of respiratory conditions (out of all 15 companies), 2022 v. 2021—as assessed by respondent respiratory patient groups *familiar* with the company



The companies rising the most in the upper rankings in the field of respiratory conditions (out of 12 companies), 2022 v. 2021—as assessed by respondent respiratory patient groups *working* with the company



PROFILES OF RESPONDENTS

113 respiratory patient groups responded to the respiratory-conditions element of the 2022 'Corporate Reputation of Pharma' survey.

The 113 respiratory patient groups stated that, collectively, and worldwide, they had reached out to almost 2 million patients with a respiratory condition during 2022.

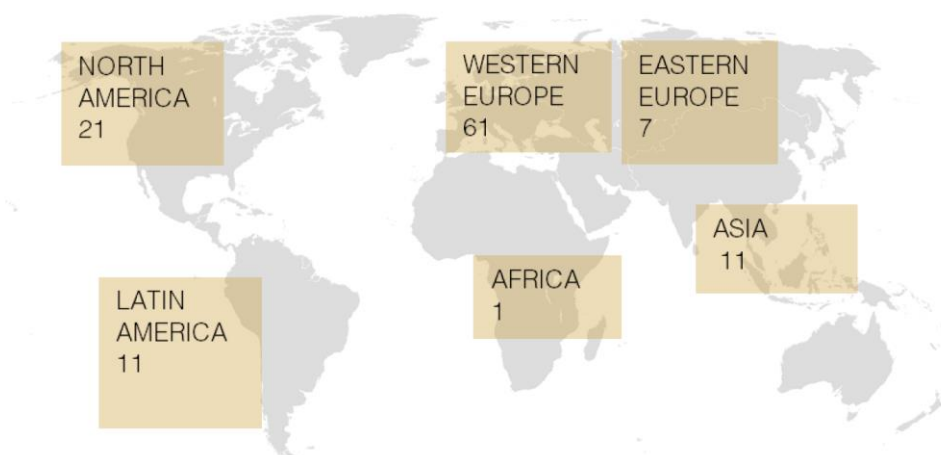
► Specialities of 2022's respondent respiratory patient groups

Number of respondent respiratory patient groups

Allergy	10
Alpha-1	7
Asthma	2
Asthma and allergy	10
Asthma and COPD	6
COPD	10
Cystic fibrosis	19
Lung disease: other	8
Pulmonary fibrosis	12
Pulmonary hypertension	11
Respiratory: most conditions	11
Respiratory: other	1
Rare: respiratory	5
Interstitial lung disease (ILD): other	1

► Location of headquarters of 2022's respondent respiratory patient groups, by continent

Number of respondent respiratory patient groups



Finally, PatientView would like to thank the 113 respiratory patient groups that gave up their time to respond to the 2022 'Corporate Reputation of Pharma' survey.

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

Because many of the 15 pharma companies featured in the respiratory-conditions 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 respiratory-conditions report, please use contact details below.

END OF PRESS RELEASE

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