

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 was 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 PATIENT GROUPS SAY ABOUT PHARMA IN 2022 —THE PATIENT PERSPECTIVE Asia edition

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PatientView is today publishing the results of the latest 'Corporate Reputation of Pharma' survey, focusing on four Asian countries:

- ▶ ANZ (Australia + New Zealand)—58 respondent patient groups.
- ▶ China—62 respondent patient groups.
- ▶ Japan—45 respondent patient groups.

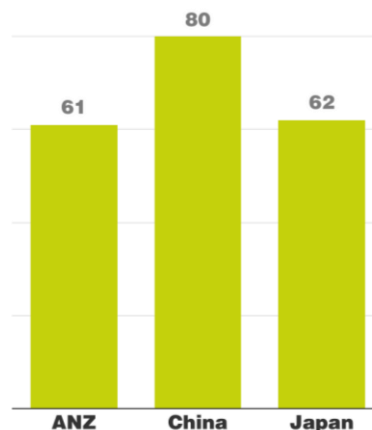
Between November 2022-February 2023, the survey collected the opinions of these 165 patient groups on the performance of the pharmaceutical industry during 2022.

Patient groups responding to 2022's 'Corporate Reputation of Pharma' survey are uniquely positioned to comment on the pharma industry, and on individual pharma companies, as they understand the experiences of patients, and they also network with other stakeholders in the healthcare system—Asian patient groups being no exception to this rule.

INDUSTRY-WIDE RESULTS

► **The corporate reputation of the pharma industry, according to respondent ANZ, Chinese, and Japanese patient groups, 2022**

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



► **Industry wide: shared views**

In all cases, the vast majority of 2022’s respondent patient groups stated that they worked with at least one pharma company:

- 86% from ANZ
- 87% from China; and
- 82% from Japan.

Despite the very-different political, demographic, and epidemiological landscape of the four Asian countries, patient groups share many attitudes about pharma, both positive and negative.

- More than half of the patient groups responding from the four countries were impressed with the pharmaceutical industry’s performance. Chinese patient groups held the industry in the highest regard—as many as 80% thought the pharmaceutical industry had an “Excellent” or “Good” corporate reputation in 2022.

- Similarly, many of the patient groups responding from the four countries regarded the industry as “Excellent” or “Good” in 2022 at providing products that benefit patients. The figures for ANZ, China, and Japan were 75%, 68%, and 71%, respectively.

Equally true, though—only a minority of the patient groups considered pharma “Excellent” or “Good” at

- ensuring access to medicines
- at being transparent
- engaging patients in R&D, and at
- having fair pricing policies.

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

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

| | ANZ | China | Japan |
|-------------------------------------|-----|-------|-------|
| Access to medicines | 33 | 40 | 36 |
| Transparency: clinical data | 26 | 39 | 34 |
| Transparency: funding | 31 | 35 | 49 |
| Transparency: pricing | 5 | 32 | 29 |
| Engaging patients in R&D | 11 | 31 | 38 |
| Fair pricing policies | 7 | 30 | 22 |

► Industry wide: differences

Not surprisingly, though, 2022's patient groups responding from the four countries did hold significant differences of opinion. For example:

- On the subject of the industry's innovation abilities, while roughly 70% of respondent patient groups from ANZ and China believed pharma "Excellent" or "Good" at innovation, only 31% of Japanese patient groups thought the same (the latter citing Japan's lack of publicly-available information about pharma R&D activities; the need for what information is provided to be more trustworthy; and the desire among the country's patient groups for greater patient input into pharma R&D processes).
- On the subject of the industry's levels of patient centricity, while roughly 55% of respondent patient groups from China and Japan believed pharma "Excellent" or "Good" at being patient centric, only 33% of ANZ patient groups thought the same (citing a lack of patient inclusion in most of the pharmaceutical industry's activities).



Below are examples of the many comments made by 2022's respondent Asian patient groups.

"Stop re-inventing the wheel, and partner with patient organisations to deliver evidence-based messages, recruit for clinical trials, and provide support services for population groups."

—**National gastrointestinal-conditions patient group, Australia**

"Reach out to us. Remember that New Zealand isn't Australia."

—**National Pompe-disease patient group, New Zealand**

"我们认为制药公司应该加强基层沟通，一些优质信息也应及时与基层患者组织分享，以便让每一个患者了解相应的信息。"

["We believe that pharmaceutical companies should strengthen grassroots communication, and share high-quality information with grassroots patient groups in a timely manner, so that the relevant information is available to every patient."]

—**National haemophilia patient group, China**

"製品開発、特に患者支援事業において、初期段階で患者・患者会の意見を聞いてほしい。大企業があるがゆえに小さなズレの修正が効かず、患者会に相談にきたときは手立てがないケースがあまりにも多い。"

["We would like them to listen to the opinions of patients and patient associations in the early stages of product development, especially with regard to patient-support projects. In many cases, things slip, little by little—and, because the companies are so large, their adjustments are ineffective; and, by the time they consult the patient association, there is nothing that can be done."]

—**National IBD patient group, Japan**

► Individual company results

The three pharma companies rated top for corporate reputation in four Asian countries, 2022

[Numbers in brackets are the number of companies included in the total rankings per country/region]

| Rank | ANZ [8] | China [10] | Japan [5] |
|---|-----------------|--------------|--------------|
| As assessed by respondent patient groups familiar with the company | | | |
| 1 st | Pfizer | Roche/Chugai | Roche/Chugai |
| 2 nd | Gilead Sciences | Takeda | Pfizer |
| 3 rd | Janssen | Novartis | Novartis |
| | | | |
| Rank | ANZ [3] | China [9] | Japan [3] |
| As assessed by respondent patient groups working with the company | | | |
| 1 st | Pfizer | Roche/Chugai | Roche/Chugai |
| 2 nd | Janssen | Takeda | Pfizer |
| 3 rd | AstraZeneca | Novartis | Astellas |

Footnote:

List of companies included in the analyses:

- ANZ: • AbbVie • AstraZeneca • Bristol Myers Squibb • Gilead Sciences • Janssen • Novartis • Pfizer • Roche.
- China: • AstraZeneca • Bayer • Bristol Myers Squibb • Janssen • MSD • Novartis • Pfizer • Roche • Sanofi • Takeda.
- Japan: • Astellas • Novartis • Pfizer • Roche (known as Chugai in Japan) • Takeda.

PHARMA'S RELATIONSHIPS WITH ASIAN PATIENT GROUPS

Pharmaceutical-company relationships with patient groups in ANZ, China, and Japan appear to be of a contrasting nature, depending upon which of the four Asian countries the patient groups are based (a factor that may reflect the disparate nature of the patient movement across those countries).

For example, unlike patient groups in Europe and the United States, Chinese patient groups do not typically challenge regulatory authorities (although some do maintain close links with local government). Instead, they serve as mediators between medical institutions and patients, and work to find practical solutions for patients within the existing system. Interestingly, a small number of Chinese patient groups (particularly those with an interest in rare diseases) have started, in the last few years, to petition central healthcare authorities for better treatment and care for the patients they represent.

Also noteworthy is that patient groups from ANZ, China, and Japan share a common wish—greater patient, and patient-group, engagement in pharma R&D. The results below confirm that few patient groups in the four countries currently have this type of relationship with pharma.

The types of relationships that respondent patient groups have with pharma companies, 2022

Percentage of respondent patient groups working/partnering with the company that stated “Yes”
The coloured square indicated the highest percentages.

| | ANZ | China | Japan |
|---------------------------------------|-----|-------|-------|
| Providing funding | 72 | 46 | 54 |
| Helping organise events | 22 | 46 | 57 |
| Inviting to conferences/events | 48 | 74 | 59 |
| Training in advocacy | 4 | 33 | 8 |
| Other types of training | 8 | 13 | 19 |
| Providing information | 46 | 52 | 38 |
| Support for advocacy | 56 | 52 | 19 |
| Support for campaigns | 50 | 59 | 11 |
| Co-creating projects | 24 | 61 | 27 |
| Create/design support tools | 26 | 44 | 32 |
| Support with publicity | 28 | 57 | 19 |
| Helping network | 46 | 31 | 14 |
| Support for professionals | 24 | 30 | 8 |
| Help in non-medical research | 6 | 11 | 5 |
| Involvement in R&D | 16 | 20 | 16 |
| Support of web resources | 16 | 28 | 8 |
| Creating health apps | 4 | 9 | 3 |

Finally, PatientView would like to thank the patient groups from ANZ, China, and Japan that gave up their time to respond to the 2022 ‘Corporate Reputation of Pharma’ survey.

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

Since many of the pharma companies featured in the Asia 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 2022’s three Asia reports—ANZ, China, and Japan—please use contact details at the head of the press release.

END OF PRESS RELEASE

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