



NEW ANALYSES from PATIENTVIEW

PHARMA and ESG—the PATIENT PERSPECTIVE 2nd Edition

The views of 832 patient groups from around the world

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‘Environmental, Social, and Governance’ (ESG) factors have, in recent decades, become increasingly used alongside financial results as a measure of corporate performance. The pharmaceutical industry, however, is traditionally known to have performed more poorly than other industries on many of the metrics associated with good practice in ESG.¹

Patient groups, on the other hand, are increasingly knowledgeable about ESG topics, and focus their interest on linking improvements in corporate ESG policies to better outcomes for patients. As such, patient groups are advocating for greater representation for patient groups in the ESG decision-making processes of pharma companies.

The interest shown by today’s patient groups in pharma’s ESG activities stems partly from the reality that patients and patient groups have typically been excluded from these activities—leading many of the patient groups responding to PatientView’s 2023 ESG survey to candidly articulate their feelings on the matter:

“No one has bothered to actually include our organization or patients on these factors [discussions about ESG]. It is long past due.”

—International allergy patient group, USA

Against such a backdrop, PatientView’s ‘Pharma and ESG—the Patient Perspective, 2023’ report, published November 2023, seeks to address the oversight of patient-group non-involvement in pharma ESG. The report draws from, and analyses, the expertise and knowledge of 832 patient groups across the world, with the aim of ensuring that the patient voice is more fully represented in pharma’s ESG activities in the future.

¹ <https://www.rbccm.com/en/gib/biopharma/episode/is-pharma-at-an-esg-turning-point>

The ‘Pharma and ESG—the Patient Perspective, 2023’ report is based on the results of an independent survey, conducted by PatientView between July and October 2023, of 832 patient groups worldwide [see end of email for a profile of respondent patient groups].

The ‘Pharma and ESG, 2023’ report also contains contributions from seven leading pharmaceutical companies invited by PatientView to outline their ESG activities: • AbbVie; • Bayer; • Boehringer Ingelheim; • Gilead Sciences; • Merck KGaA / EMD Serono; • Pfizer; and • ViiV Healthcare.

PATIENT GROUPS BELIEVE ESG IS IMPORTANT TO THEM, AND TO PATIENTS

ESG—while being a relatively-new focus for the pharma industry—already matters to most patients and patient groups. The vast majority of the 832 patient groups responding to the 2023 ESG survey state as such.

How important to your patient organisation are the following?

% of total responses

● Very important ● Important ● Not important but might be in future ● Not important ● Not relevant ● Do not know

The impact a pharmaceutical company has on the environment



The impact a pharmaceutical company has on society



A pharmaceutical company's standards of corporate governance



How important to the patients, your organisation represents, are the following?

% of total responses

● Very important ● Important ● Not important but might be in future ● Not important ● Not relevant ● Do not know

The impact a pharmaceutical company has on the environment



The impact a pharmaceutical company has on society



A pharmaceutical company's standards of corporate governance



Patients and patient groups are interested in pharma’s performance at ESG because they see many of their own long-standing goals as intimately linked to pharma’s ESG activities:

“Our Association (ACBG Brasil) has been a signatory to the ‘Santa Catarina National Movement for Sustainable Development Goals’ since 2020. In this time, the association has made improvements in dealing with the topic of ESG, in order to understand ESG’s scope of influence, the positive and negative impacts of ESG, and, in particular, the shared value that can be produced through ESG projects. As an association of oncology patients, specialising in head and neck cancer, our volunteers believe that health is one of the key factors to consider when seeking to build a more-sustainable society.”

—Associação Brasileira de Câncer de Cabeça e Pescoço (ACBG Brasil)

“Standards, ethics, and integrity in pharmaceutical companies are very important, because those are the bases for high-quality research papers, scientific credibility and quality, and better-designed clinical studies. The resultant increased likelihood of product approval could directly benefit our members’ quality of life through new treatments.”

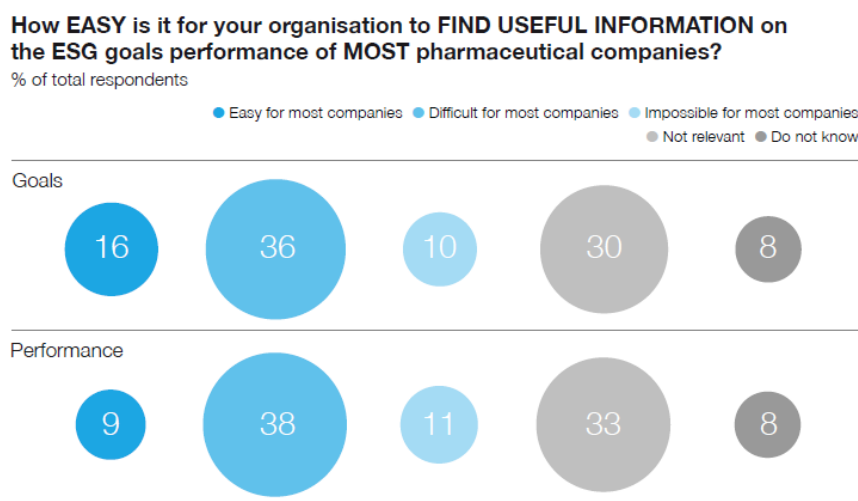
—National rare-disease patient group, Slovenia

“The issues of environment, society, and accountability are critical to the future of our planet, our species, and where we live.”

—Regional HIV/AIDS and hepatitis patient group, UK

BUT PHARMA IS NOT GOOD AT COMMUNICATING ITS ESG ACTIVITIES

The majority of the 832 patient groups responding to the 2023 ESG survey say that information on pharma’s ‘E’, ‘S’, and ‘G’ activities is hard to find.



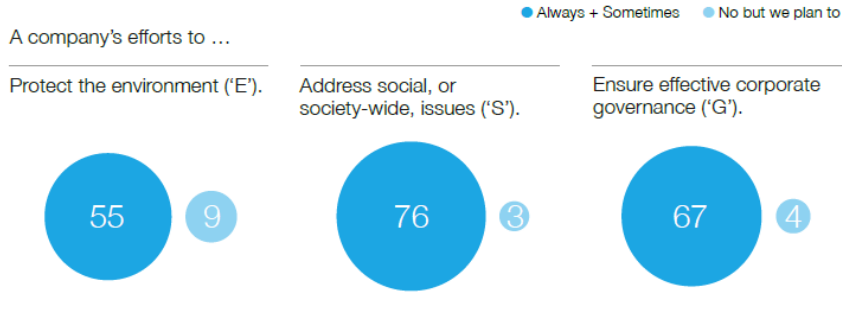
“It [ESG] has never come up in conversations with the pharma representatives we work with. So, I wonder if it’s on their agenda at all.”

—National arthritis patient group, UK

Patient groups responding to the 2023 ESG survey express a strong preference of working with pharma companies which excel in ESG—not least due to the signalling role that ESG plays in helping these patient groups decide which pharma companies might be suitable as prospective partners.

When deciding with which pharmaceutical company you would like your organisation to form a relationship, do you take into consideration any of the following?

% of total respondents



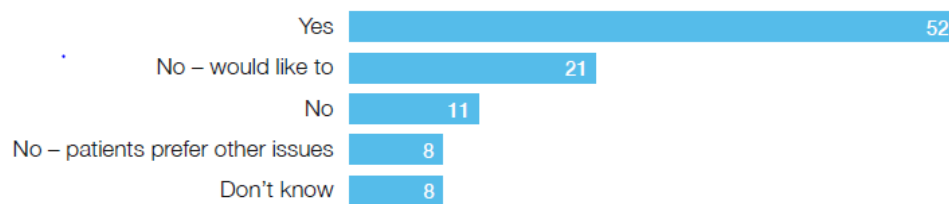
BRIDGING THE GAP: ENSURING THAT THE EXPERTISE OF PATIENT GROUPS IS INCLUDED IN PHARMA'S ESG STRATEGY

The 'Pharma and ESG: the Patient Perspective, 2023' report contains candid expressions by respondent patient groups of their willingness to engage in pharma's ESG processes. Similarly, respondent patient groups offer clear and pragmatic advice on how the pharma industry can bridge the gap between the industry and patient groups on matters relating to ESG—advice extending beyond simple 'good-faith' dialogue. Respondent patient groups provide pharma with definitions for 'E', for 'S', and for 'G'—all from a patient perspective. They articulate the steps which need to be implemented if pharma companies are to be sure of embracing the patient perspective in company ESG activities.

Patient groups, it seems, are no longer merely waiting to be asked by the pharma industry to join its conversations on ESG. Instead, they are increasingly insistent on taking a role in shaping pharma-company ESG policies—all with the aim of supporting patients' interests. Patient groups are taking matters into their own hands.

Does your organisation advocate for great inclusion of patient groups in pharmaceutical company efforts to improve their ESG?

% of total respondents



The 2023 ‘Pharma and ESG: the Patient Perspective, 2023’ report is not available in the public domain, as PatientView funds its research through the sales of its reports to governments, national and international regulators, and pharmaceutical and medical-device companies—thereby ensuring its independence. However, patient groups can obtain a full copy of the report, free of charge. If you are a patient group, and would like a copy of the report, please contact Dr Alexandra Wyke, PatientView’s CEO, at alexwyke@patient-view.com

PROFILE OF RESPONDENT PATIENT GROUPS

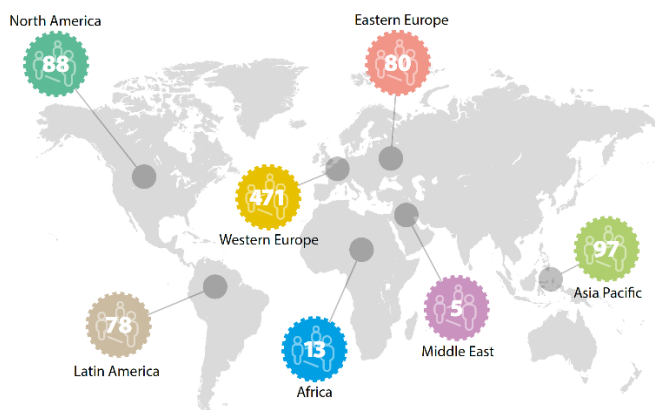
Therapy areas

% of responses

Cancer	19%
Cardio/cerebrovascular	2%
Diabetes	4%
Gastrointestinal	2%
HIV/AIDS	6%
Liver conditions	3%
Mental health	6%
Neurological	11%
Rare disorders	15%
Respiratory / allergy	5%
Rheumatic conditions	6%
Skin conditions	3%
Other	18%

Geographic location

% of responses



PatientView would like to thank the participating patient groups, and the participating pharmaceutical companies, for their contributions to the ‘Pharma and ESG, 2023’ study.

PatientView hopes that the study’s findings might be of interest to any of the corporate, public, or professional bodies looking to develop and refine positive-impact ESG policies from the perspective of patients.



Note on PatientView:

Throughout the past two decades, UK-based PatientView has undertaken regular evidence-based research into the different perspectives of patient organisations around the world. PatientView’s reach among patient organisations is unique (with as many as 40,000 such patient groups in PatientView’s informal network).

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