



## A NEW ANALYSES FROM PATIENTVIEW

# Pharma and ESG: the Patient Perspective, 2023

The views of 832 patient groups from around the world

**PRESS RELEASE EMBARGOED UNTIL:** TUESDAY, NOVEMBER 28<sup>th</sup> 2023, 6 AM GMT / 2AM EST

**Contact:** Alex Wyke

**Tel:** 07960 855019

**Email:** [alexwyke@patientview.com](mailto:alexwyke@patientview.com)

---

**London, 28<sup>th</sup> November 2023**

‘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<sup>1</sup>. Pharma retains a generally-low reputation for sustainability, in particular.

To test pharma’s reputation at ESG, PatientView has been conducting, over the last two years, an annual survey of patient groups globally. The survey aims to collate patient opinions on the ESG practices of pharma companies. The latest PatientView ESG survey, run between July and October 2023, received responses from 832 patient groups interested in the subject of ESG and pharma. The respondent patient groups covered 173 therapy areas from across 79 countries [more details on respondent profiles are available at the end of this email]. **The size and breadth of the patient-group response to PatientView’s 2023 ESG survey reflects the growing awareness and importance of ESG to the patient groups that interact with the pharma industry (and to the patients these patient groups represent).**

The 2023 ESG questionnaire was created with the support of both patient groups and pharma. The study explored patient-group feedback on the following ESG-related topics:

- ▶ The importance of pharma’s ESG goals to patient groups (and to the patients these patient groups represent).
- ▶ The importance of having patient input into pharma’s ESG strategies. And ...
- ▶ What pharma *should* be doing in ‘E’, in ‘S’, and in ‘G’—all from a patient perspective.

The questionnaire was translated into 21 languages, and circulated online to patient groups.

---

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

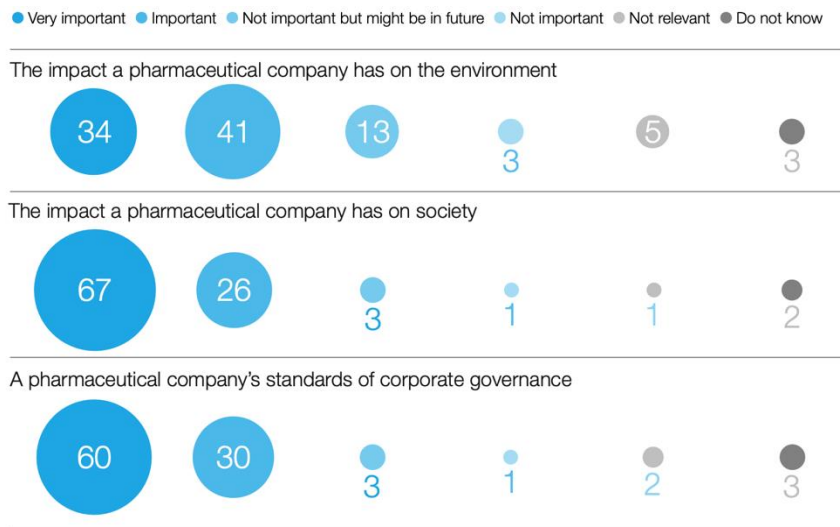
PatientView also invited a number of pharmaceutical companies to share their ESG activities with the study: • AbbVie; • Bayer; • Boehringer Ingelheim; • Gilead Sciences; • Merck KGaA / EMD Serono; • Pfizer; and • ViiV Healthcare.

## WHAT PATIENT GROUPS RESPONDING TO PATIENTVIEW’S 2023 ESG SURVEY SAY

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.**

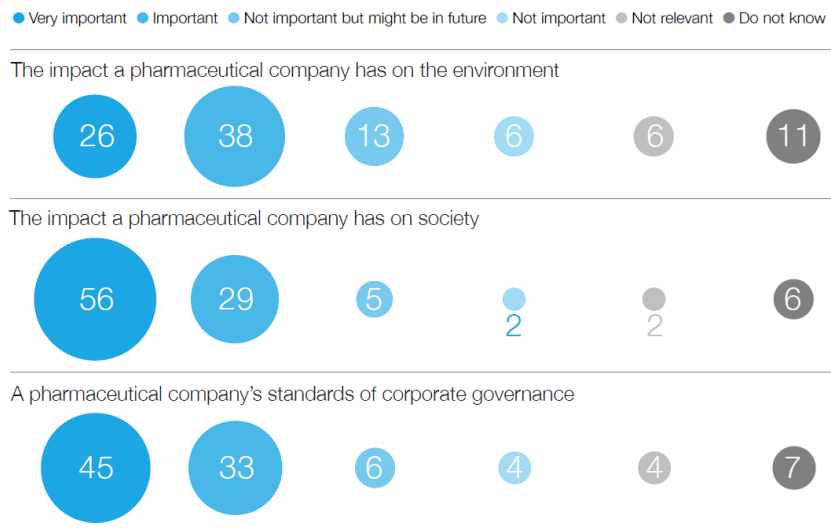
### How important to your patient organisation are the following?

% of total responses



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

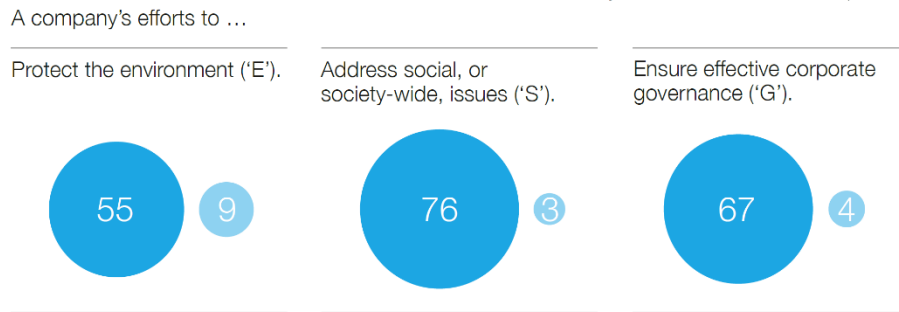
% of total responses



**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

● Always + Sometimes ● No but we plan to



**The majority of patient groups responding to the 2023 ESG survey state that they consider a pharma company's performance at E, at S, or at G before deciding whether to form a relationship with the company**

- 90% of the 52 HIV/AIDS patient groups responding to the 2023 ESG survey “always” or “sometimes” consider a pharma company’s social performance (‘S’) when deciding whether to form a relationship with the company, and 85% will take into account its corporate governance (‘G’). The survey results from respondent HIV/AIDS patient groups likely reflect the long tradition of activism in the HIV/AIDS NGO sector.
- 67% of the 42 allergy and respiratory-conditions patient groups responding to the 2023 ESG survey “always” or “sometimes” consider a pharma company’s efforts to protect the environment (‘E’) when deciding whether to form a relationship with the company.
- 73% of the 78 patient groups from Latin-American countries responding to the 2023 ESG survey “always” or “sometimes” consider a pharma company’s social performance (‘S’) when deciding whether to form a relationship with the company.
- For some patient groups, the use of ESG as a gauge of corporate soundness can only currently be aspirational. As one UK-based rare-disease patient group notes: “We operate in the rare-disease space, so we don’t have the luxury of choice when it comes to working with companies.” Nonetheless, 45% of the 128 rare-disease patient groups responding to the 2023 ESG survey still try to consider a company’s social performance (‘S’) before deciding whether to form a relationship with the company.

**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.**

“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*

“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*

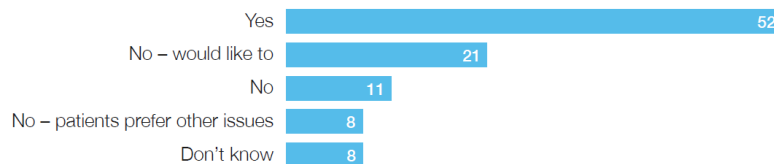
“Our Association (ACBG Brasil) has been a signatory to the ‘Santa Catarina National Movement for Sustainable Development Goals’ since 2020. In this time, the association has made improvements in dealing with the topic of ESG, in order to understand ESG’s scope of influence, the positive and negative 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), Brazil*

**Patient groups want to be part of pharma’s ESG decision-making processes.** Over half (52%) of the patient groups responding to the 2023 ESG survey say that their organisations conduct advocacy for greater inclusion of patient groups in pharma’s ESG decision-making processes (a further 21% say that they would like to carry out such advocacy). Patient groups with an international geographic remit are the most active in this regard (63% engaging in such advocacy now). Only 8% of the patient groups responding to the 2023 ESG survey say that they regard the issue of patient groups participating in pharma’s ESG decision-making processes as not a concern for the patients they represent.

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

% of total respondents



**Patient groups judge the pharma industry ineffective at communicating its ESG activities to patient groups. Only 16% of patient groups responding to the 2023 ESG survey state that “all” or “most” pharma companies are effective at such communication.**

The ‘Pharma and ESG: the Patient Perspective, 2023’ report, published November 2023, 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 also articulate the steps which need to be implemented if pharma companies are to be sure of embracing the patient perspective in company ESG activities.**

If you wish to purchase a copy of the report ‘Pharma and ESG: the Patient Perspective, 2023’ (which includes full details of the 2023 survey results and analyses, plus ESG case studies supplied by seven leading pharmaceutical companies), contact [alexwyke@patientview.com](mailto:alexwyke@patientview.com)

## PROFILE OF RESPONDENT PATIENT GROUPS

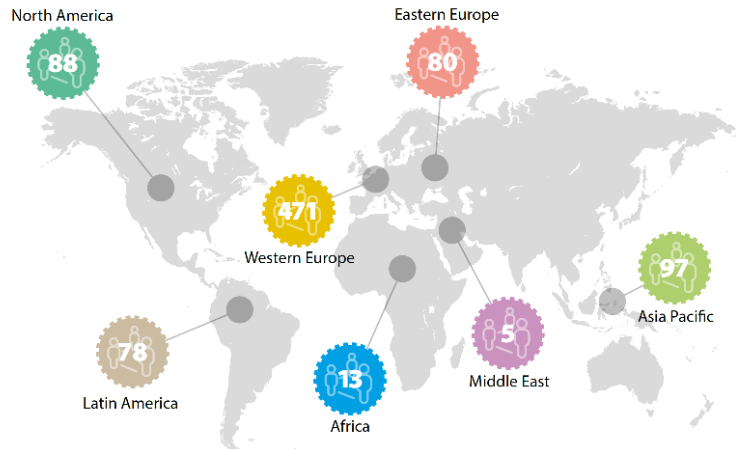
### Therapy areas

% 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 participating patient groups, and 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).

PatientView Ltd  
Registered office: One Fleet Place, London, EC4M 7WS, UK  
Tel: +44-(0)1547-520-965  
Email: [report@patient-view.com](mailto:report@patient-view.com)  
Registered in England, Number: 3944382  
Data protection registration number: Z7133076  
VAT registration number:  
GB-760-985-885

**END OF PRESS RELEASE**