

## Independent PatientView Study: 'The Corporate Reputation of Pharma in 2023/4 —From a Patient Perspective'



NEW ANALYSES FROM PATIENTVIEW  
'The Corporate Reputation of Pharma, 2023'  
*How patient-group perceptions of pharma are evolving rapidly*

## PATIENT SUMMARY

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PatientView has been surveying patient groups about their attitudes towards the corporate reputation of the pharma sector for 13 years now, and presenting the findings in annual 'Corporate Reputation of Pharma' reports. The latest Global-wide publication, that of 2023, gives (as in past years) a snapshot of how patient organisations are currently viewing the performance of both the industry as a whole, and individual pharma companies. In analysing the 2023 results, PatientView also looks to dissect the changing relationships between pharma and patient groups over more than a decade, by drawing on a rich bank of historic data accumulated during previous 'Corporate Reputation' surveys.

The 2023 Global report gathers together the findings of a November 2023 to late-February 2024 survey of 2,518 patient groups from 106 countries.

The 2023 Global report additionally contains views on pharma/patient-group relations invited by PatientView from a number of pharmaceutical companies (or company divisions):

- Bayer AG; • Boehringer Ingelheim; • Gilead Sciences; • Novartis; • Novo Nordisk (Obesity Division); • Pfizer; • Pfizer (Immunology and Inflammation Division); and • ViiV Healthcare.

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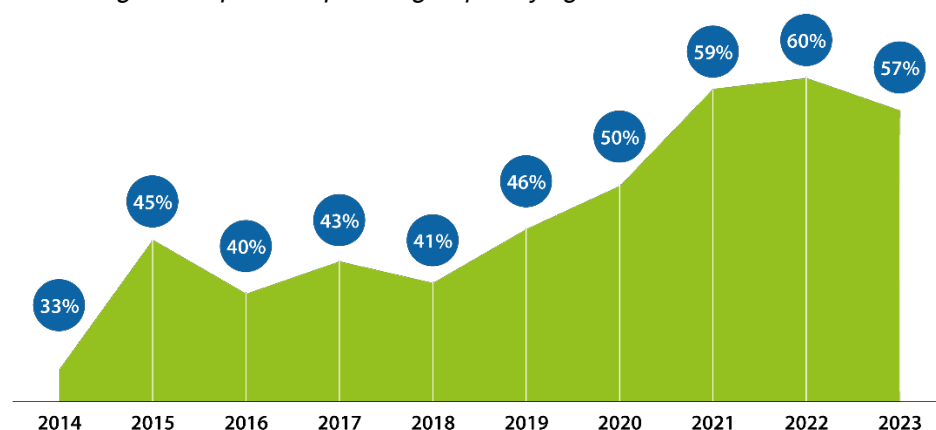
1. How patient-group attitudes toward pharma have changed since 2014.
2. How the scale of patient-group relations with pharma has changed since 2014.
3. How the quality of patient-group relations with pharma has changed since 2014.
4. How pharma can improve—according to patient groups.

## 1. Pharma's reputation among patient groups has improved since 2014—but some signs indicate that the improvement might not be sustainable

The proportion of patient groups considering the corporate reputation of the pharma industry to be either “Excellent” or “Good” has risen markedly over recent years—from 33% in 2014, to 57% in 2023. As the accompanying graphic shows, though, upward progress has not been even. In 2023, just as seemed to happen between 2016 and 2018, earlier gains appear to have, at the least, stalled. In the case of 2023, the beneficial reputational impact of a ‘Covid-19 boost’ might perhaps be wearing off.

### The corporate reputation of pharma, 2014-2023

Percentage of respondent patient groups saying “Excellent” or “Good”



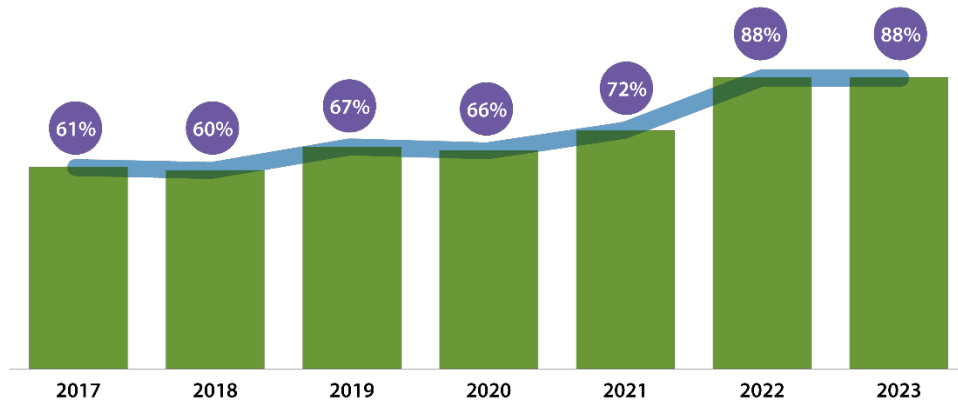
Moreover, even if the historically-high percentages of 2021, 2022, and 2023 remain stable in the years ahead, they will still have to be regarded as somewhat problematic, since roughly four-in-10 patient groups continue to hold a mixed, or poor, opinion of the pharma industry's corporate reputation.

## 2. Despite such ambivalence toward the industry, patient groups and pharma companies have noticeably expanded the scale, and breadth, of their relationships

During the period 2017 to 2023, patient groups and pharma companies alike have increased the degree to which they partner with each other. In 2017, 61% of patient organisations reported working, or having some form of relationship, with at least one pharma company. The latest ‘Corporate Reputation’ survey shows the percentage to have risen to 88% in 2023.

### The increasing numbers of patient groups working with pharma, 2017-2023

Percentage of respondent patient groups, per year, stating a working relationship with at least one pharma company

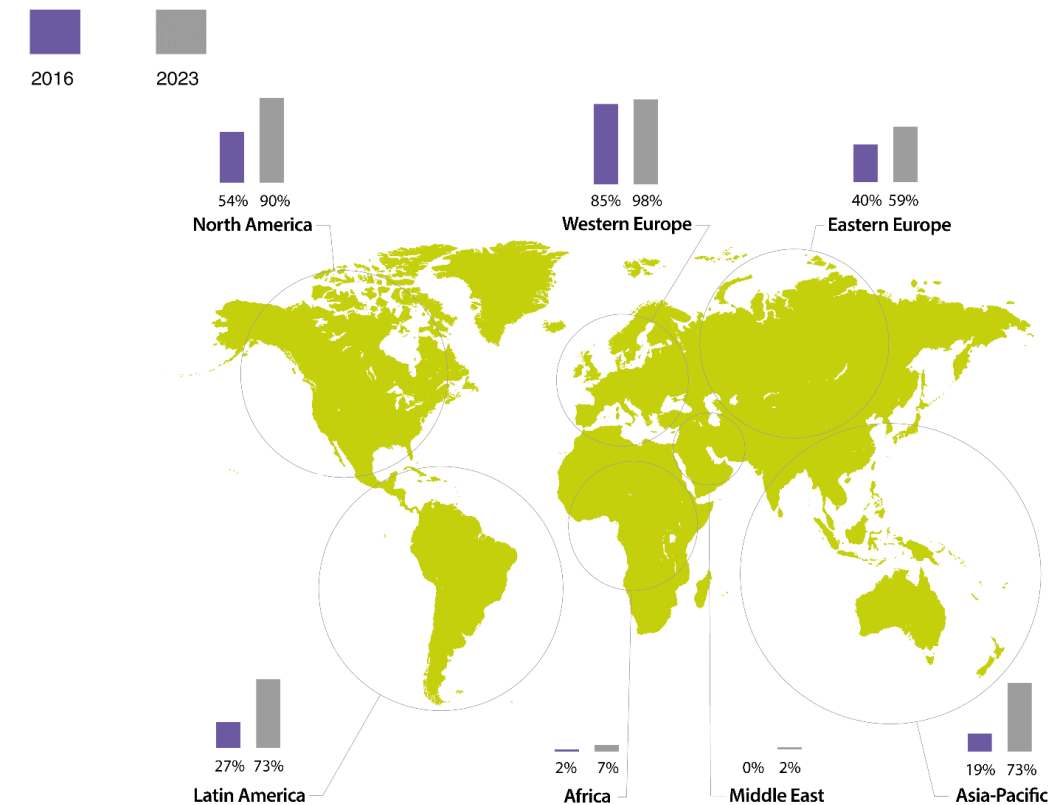


Pharma companies, meanwhile, are also engaged in partnering with more patient groups. To cite three examples in 2023: 882 of the patient groups responding to that year’s ‘Corporate Reputation’ survey reported working with Novartis; 977 with Pfizer; and 950 with Roche—up from 395, 329, and 316, respectively, of the patient groups responding to the 2016 ‘Corporate Reputation’ survey.

The geographic breadth of company relationships, too, has spread widely across developed, and emerging, market regions. According to 2023’s respondent patient groups, the majority of the pharma companies assessed in the ‘Corporate Reputation’ survey work with at least 10 patient-group partners in every region of the world (except Africa and the Middle East).

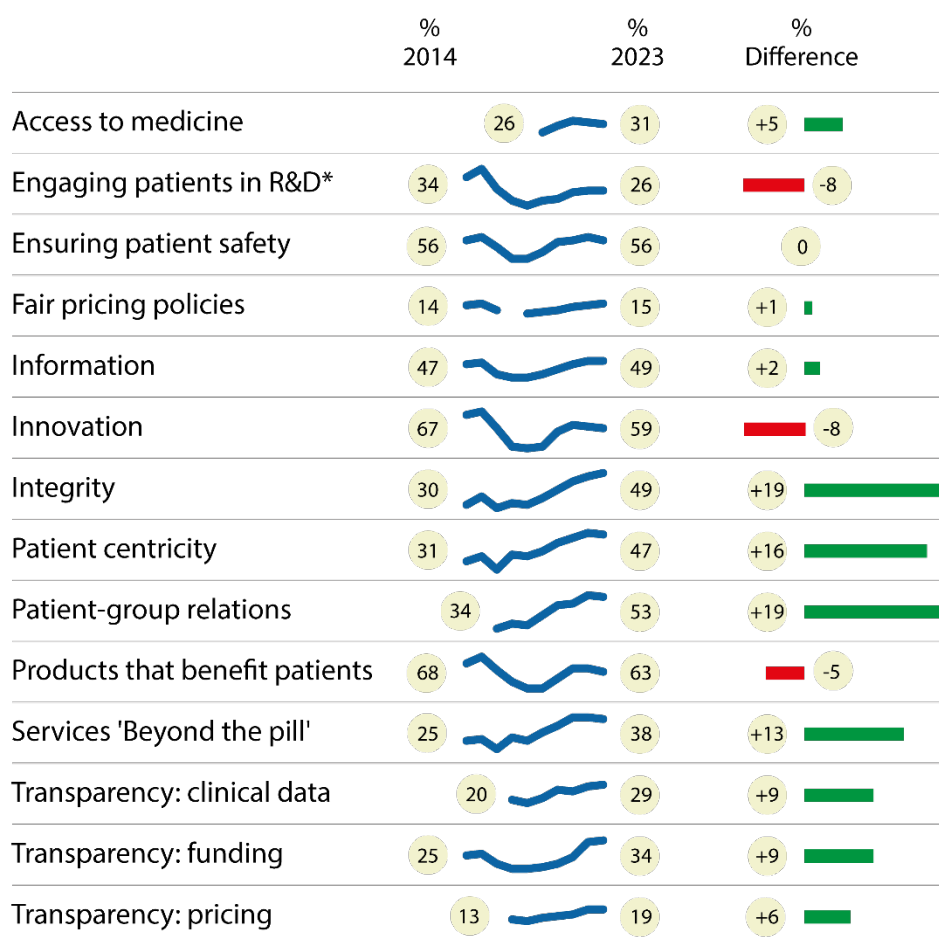
### Geographic breadth of company relationships with patient groups, 2023 v. 2016

Percentage of pharma companies with 10 or more patient-group partners, by geographic region



**3. The quality, and the content, of these company/patient-group relations have improved — but tokenism remains present**

**Percentage of respondent patient groups describing pharma as “Excellent” or “Good” at activities of importance to patients and patient groups, 2014-2023**



\* From 2014 to 2021, the question was: 'Engaging patients in clinical trials'

53% of 2023’s respondent patient groups described the pharma industry as “Excellent” or “Good” at patient-group relations—up from the 34% of 2014’s respondent patient groups saying the same. Meanwhile, 47% stated in 2023 that pharma was “Excellent” or “Good” at being patient centric; 31% said the same in 2014.

Along with these overall improvements, the nature of company/patient-group relationships is maturing. For example, more than twice as many patient groups were able to say in 2023 than in 2017 that their relationship with pharma companies includes the task of project co-creation (37% in 2023, versus 16% in 2017). Similarly, 44% of 2023’s respondent patient groups noted that company partners were providing them with valuable information for patients—up from 23% in 2017.

Of course, even these positive figures cannot obscure the presence of other areas in which pharma companies continue to fall short, even after ten years. Two of the most-notable topics are

transparency and drug pricing—prompting 2023’s respondent patient groups to issue numerous expressions of dissatisfaction (one respondent going so far as to suggest that interactions with companies remain a tokenistic “tick-box” exercise).

“[The partnership can be] good with companies which deploy, and devote, solid and concrete means to build a long-term relationship. It can be pitiful and intermittent with those which employ often-unqualified people in the context of submitting a file to the health authorities.”

— National cancer patient group, France

“Too many [companies] ring up, or have meetings, and waste hours of our time—but never, then, allow the relationship to develop into something that improves both the patient organisation, and outcomes for patients.”

— National allergy/respiratory-conditions patient group, Australia

#### 4. The three-current top priorities for patient groups: drug pricing; medicines availability; and greater patient involvement in R&D

The majority of the patient groups responding to the 2023 ‘Corporate Reputation’ survey think that three areas of improvement are needed from the pharma industry in general, and from pharma companies in particular.

► **Drug pricing:** Only 15% of 2023’s respondent patient groups believed the pharma industry’s pricing policies to be “Excellent” or “Good”. Pharma’s recent focus on the development of drugs for smaller-target patient populations has resulted in treatments which end up being priced beyond the financial reach of individual patients (and even of some healthcare systems).

► **Medication availability:** Pricing is one well-known component of the process of ensuring that patients can gain access to medicines—but so, also, is the very physical presence of drugs on the market. Inventory shortages, however, appear to have increased across much of the world (as well as in many therapy areas) during 2023—leading 54% of the patient groups responding to the 2023 ‘Corporate Reputation’ survey to see current levels of patient access to medicines as inequitable. Some respondent patient groups argue that approving existing treatments for new mass indications (for example, diabetes drugs for obesity), without an accompanying increase in production, has exacerbated 2023’s supply problems.

► **Patient involvement in R&D:** Just 26% of 2023’s respondent patient groups rated the pharma industry “Excellent” or “Good” at involving patient groups in R&D. A particular criticism is a lack of diverse representation in clinical research (for example, by age, ethnicity, gender, location).

Pharma companies could play a role in better communicating the reasons [for drug shortages], and the actions being taken to resolve the shortages. Otherwise, people are left in the dark.”

— **National neurological-conditions patient group, Canada**

“Overall, most companies will publicly claim their strategies are patient focused—but that’s just what’s written into documents, and does not translate into meaningful actions across different areas of the company. They will say that they engage patients in R&D—when, in actual fact, this might be a 3-hour ‘advisory board’ in a phase-III trial, etc.”

— **International cardiovascular-conditions patient group, the Netherlands**

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*PatientView would like to thank the patient groups, health campaigners, and industry representatives who gave up their time to respond to the 2023 ‘Corporate Reputation of Pharma’ survey.*

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For further information on how to obtain a copy of PatientView’s 2023 Global ‘Corporate Reputation of Pharma’ report, please email: [report@patient-view.com](mailto:report@patient-view.com)

For further resources supplied by PatientView to support patient-group activities, go to: <https://www.patient-view.com/patient-resources/>

**Note on PatientView:**



Since its founding in 2000, UK-based PatientView has undertaken regular evidence-based research into the differing perspectives of patient organisations around the world on a range of issues. PatientView’s reach among these groups is unique, with as many as 40,000 patient organisations listed in its informal network. Details of this research are available at: <https://www.patient-view.com/>

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