

WHAT 100 CANADIAN PATIENT GROUPS SAY ABOUT PHARMA IN 2023

Canada edition

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Overview

PatientView is pleased to publish 'The Corporate Reputation of Pharma—from the Perspective of Canadian Patient Groups, 2023' (the 6th Canada edition in the annual 'Corporate Reputation' series). The 2023 review contains the results of a November 2023 to late-February 2024 survey, answered by 100 Canadian patient groups.

2023's 100 respondent Canadian patient groups specialised in a wide range of therapy areas—the largest representation (20 respondent patient groups) being cancer patient groups. The 100 stated that, collectively, they had actively supported and served almost 2 million Canadian patients during 2023. [See end of this press release for a profile of the respondent Canadian patient groups.]

Continue reading, for details about ...

- ▶ The headline industry-wide results of the 2023 survey for Canada.
- ▶ The performance of the individual pharma companies included in the 2023 Canadian analysis.

SUMMARY OF RESULTS

INDUSTRY WIDE:

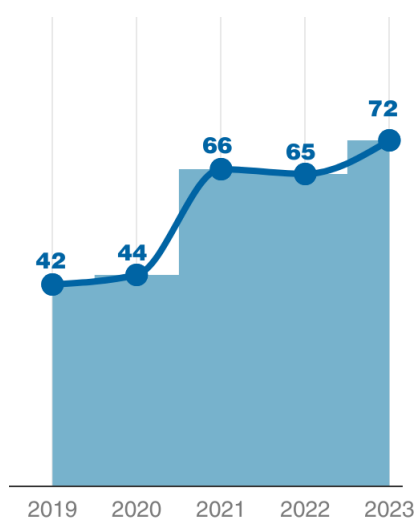
Canadian patients have relatively-poor access to new drug treatments—a fact that may have had an impact on the 2023 survey results in Canada. A 2024 study by the Canadian Health Policy Institute (CHPI) described several of the problems behind Canada's unimpressive record of access to new drugs¹:

¹ <https://www.canadianhealthpolicy.com/posts/news-release-access-to-new-medicines-in-canada-europe-and-the-united-states-study-finds-less-availability-and-longer-waits-for-canadian-patients/>

- **Canada is a “low-priority market for new drug launches.”** New drug applications submitted in Canada between 2018 to 2022 numbered just 54% of those in the US, and 62% of those in the EU.
- **Regulatory delays.** “Only 69% of the new drugs authorized for marketing in the US were also approved in Canada. Of the drugs authorized for marketing in the EU, 78% were also approved in Canada.”
- **Lack of reimbursement.** “Canada’s public drug plans covered only 12% of the new medicines covered” in the US by Medicare (for the elderly), and “14% of the new drugs covered by European public drugs plans.”

The Canadian government admits that the country has the “third-highest drug prices among the 38 OECD countries.”² High prices are a major barrier to patient access. Yet efforts by Canada to control pricing (price-negotiation process) have, according to a national public-policy think-tank, the Macdonald-Laurier Institute (MLI), made it even harder for Canadian patients to gain access to pharma innovation—especially in the case of drugs for rare diseases.³

The corporate reputation of pharma in Canada, 2019-2023
% of respondent Canadian patient groups stating “Excellent” or “Good”



How good or bad the pharma industry was at carrying out specific activities in Canada, 2019-2023
% of respondent Canadian patient groups stating “Excellent” or “Good”

	'19-'23	Diff
Transparency: funding	23 → 48	+25
Patient centricity	40 → 63	+23
Innovation	53 → 75	+22
Integrity	42 → 64	+21
Products that benefit patients	60 → 79	+19
Ensuring patient safety	53 → 70	+17
Engaging patients in R&D	25 → 39	+15
Information	55 → 69	+14
Transparency: pricing	17 → 29	+12
Services 'beyond the pill'	40 → 52	+11
Patient-group relations	55 → 64	+10
Fair pricing policies	10 → 19	+10
Transparency: clinical data	38 → 47	+9
Access to medicines	38 → 47	+9

Despite all of the above, Canadian patient groups perceive the pharmaceutical industry’s corporate reputation to have steadily increased over the past five years. 72% of the Canadian patient groups responding to the 2023 ‘Corporate Reputation’ survey rated the industry’s reputation as “Excellent” or “Good” (the figure was just 42% in 2019)—ranking pharma first for reputation in Canada out of nine major healthcare stakeholders.

² <https://www.canada.ca/en/health-canada/services/health-care-system/pharmaceuticals/costs-prices.html>

³ <https://macdonaldlaurier.ca/waiting-for-new-drugs-for-rare-disorders-in-canada-part-3-price-negotiation-nigel-lawson-and-john-adams-for-inside-policy/>

Pharma’s ‘core’ indicators of reputation—products, innovation, and safety—all increased significantly in Canada, 2022 to 2023. Indeed, almost 80% of 2023’s respondent Canadian patient groups felt pharma to be “Excellent” or “Good” at ‘providing products that benefit patients’. The lowest-scoring indicators of corporate reputation in Canada in 2023 were ‘fair pricing policies’, ‘transparency of pricing’, and ‘engaging patients in R&D’.

Canadian patient groups advise pharma on how to improve
Advice from 2023’s respondent Canadian patient groups on how the industry could improve focuses on several concerns—chief among them the difficulties experienced by Canadians wishing to access new medicines. Patient-group comments acknowledge the obstacles to access created by both government and industry alike. 2023’s respondent Canadian patient groups confirm a willingness on their part to help with HTA submissions—but they also stress that limited resources mean they require both time, and support, if they are to do so. Canadian patient groups note that they can often feel excluded from complex policy areas in which many healthcare stakeholders are involved. They believe that the industry can (and should) help them with introductions to key contacts.

“Drug pricing continues to be one of the most significant barriers to drug access. This is not entirely a result of the pharmaceutical industry; governments need to take some responsibility in better addressing this issue—but it’s still a key issue.”

—National neurological-conditions patient group, Canada

“Companies could definitely give patient organizations more notice of submitting a product for that patient population to the CADTH [Canadian Agency for Drugs and Technologies in Health] for review, so that they have adequate time to prepare to do a patient submission.”

—National rare-disease patient group, Canada

“Better support and engagement of patient groups. Shift focus to co-creation, not just having patient groups review something that was developed. Ask us what we need, or what would be most impactful, and help us create it.”

—National obesity patient group, Canada

Companies included in the Canadian **element of the 2023 ‘Corporate Reputation’** survey

17 companies are included in the Canada edition of the 2023 ‘Corporate Reputation of Pharma’ survey. The companies were selected on the following criteria: size of revenue; or on request by companies or patient groups:

- AbbVie • Amgen • AstraZeneca • Bayer • Boehringer Ingelheim • Bristol Myers Squibb • Eli Lilly
- Gilead Sciences • GSK • Janssen • Merck & Co • Novartis • Novo Nordisk • Pfizer • Roche • Sanofi
- Takeda

Note:

* AstraZeneca includes Alexion.

* Janssen was renamed Johnson & Johnson Innovative Medicine in late 2023.

Companies are assessed on issues of importance to patient groups



INDIVIDUAL COMPANY FINDINGS FOR CANADA, 2023 —AND THE FASTEST RISERS IN THE RANKINGS, 2023 v. 2022

The top-three rankings in Canada in 2023 (out of 17 companies)

—as assessed by respondent Canadian patient groups **familiar** with the company:

- ▶ **1st**, Pfizer
- ▶ **2nd**, Boehringer Ingelheim
- ▶ **3rd**, AstraZeneca

The top-three rankings for corporate reputation in Canada in 2023 (out of 15 companies)

—as assessed by respondent Canadian patient groups **working** with the company:

- ▶ **1st**, Pfizer
- ▶ **2nd**, Merck & Co
- ▶ **3rd**, Boehringer Ingelheim

The top-three rankings for corporate reputation in Canada in 2023 (out of 15 ‘big-pharma’ companies)

—as assessed by respondent Canadian patient groups **familiar** with the company:

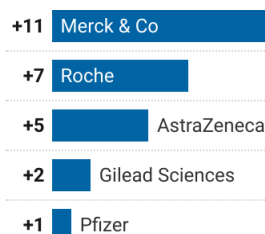
- ▶ **1st**, Pfizer
- ▶ **2nd**, Boehringer Ingelheim
- ▶ **3rd**, AstraZeneca

The top-three rankings for corporate reputation in Canada in 2023 (out of 14 ‘big-pharma’ companies)

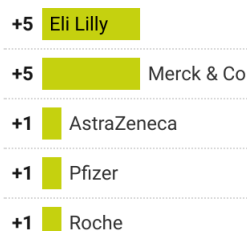
—as assessed by respondent Canadian patient groups **working** with the company:

- ▶ **1st**, Pfizer
- ▶ **2nd**, Merck & Co
- ▶ **3rd**, Boehringer Ingelheim

The companies rising the most in the **upper** rankings in Canada (out of 15 companies—all ‘big pharma’), 2023 v. 2022, as assessed by respondent Canadian patient groups **familiar** with the company



The companies rising the most in the **upper** rankings in Canada (out of 14 companies—all ‘big pharma’), 2023 v. 2022, as assessed by respondent Canadian patient groups **working** with the company



Finally, PatientView would like to thank the 100 Canadian patient groups that gave up their time to respond to the 2023 ‘Corporate Reputation of Pharma’ survey.

2023’s respondent Canadian patient groups feel that the sharing of their evaluation of the pharma industry, and their experiences on whether the industry (and individual pharma companies) meet patient needs and expectations, will help the industry gain valuable insights into improvement.

Because many of the 17 pharma companies featured in the Canadian element of the 2023 ‘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 Canadian report, please use contact details at the head of the press release.

END OF PRESS RELEASE

Appendix

Profile of respondent Canadian patient groups, 2023—by specialty
 Number of respondent Canadian patient groups

