

WHAT 87 UK PATIENT GROUPS SAY ABOUT PHARMA IN 2023

UK edition

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Overview

PatientView is pleased to publish 'The Corporate Reputation of Pharma—from the Perspective of UK-Based Patient Groups, 2023' (the 12th UK edition in the annual 'Corporate Reputation' series). The 2023 review contains the results of a November 2023 to late-February 2024 survey, answered by 87 UK-based patient groups.

2023's 87 respondent UK patient groups specialised in a wide range of therapy areas—the largest representation (22 respondent patient groups) being rare-disease patient groups. The 87 stated that, collectively, they had actively supported and served almost 2 million UK patients during 2023/24. [See end of this press release for a profile of the respondent UK patient groups.]

Continue reading, for details about ...

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

SUMMARY OF RESULTS

INDUSTRY WIDE:

Several issues in 2023 may have influenced the opinions of UK patient groups responding to the 2023 'Corporate Reputation of Pharma' survey, including: the affordability of prescription drugs, and shortages of prescription drugs in the UK.

- ▶ The UK's pharmacists noted supply difficulties in 2023. Community Pharmacy England, a body representing pharmacies, reported that 92% of English pharmacies experienced daily

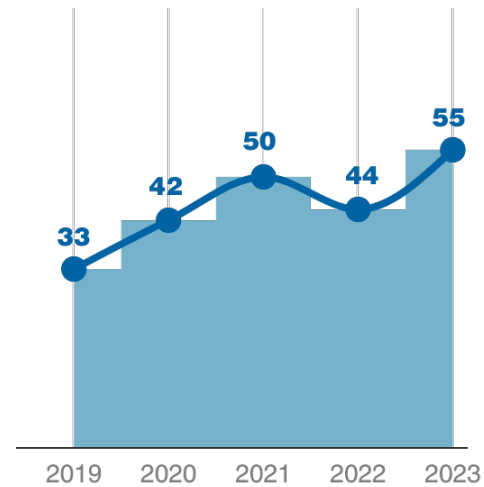
shortages of some drugs in 2023 (an increase of 67% over the previous year)—shortages which 87% of these same pharmacies believed was putting patient health at risk.¹

► British citizens have free healthcare (with as many as 89% of prescription items free, too). However, the UK was enduring one of its periodic cost-of-living crises in 2023. A survey of 4,000 English people with long-term conditions, run by patient group Parkinson’s UK, found that prescription cost had forced 1-in-10 respondents to skip medication in 2023. 12% said that they had to eke out their medicines by halving consumption.²

UK patient groups perceive the pharmaceutical industry’s corporate reputation to have improved steadily during the last five years. In this 2023 ‘Corporate Reputation’ survey, 55 % of respondent UK patient groups rated the industry’s reputation as “Excellent” or “Good”—higher than even the strong increase of the Covid period (when, at a 2021 peak, 50% of UK patient groups rated pharma’s reputation as “Excellent” or “Good”). Despite the improvement, areas still exist in which sentiment towards the industry remains low. In 2023, only 2% of respondent UK patient groups perceived the industry to be “Excellent” or “Good” at ‘Having fair pricing policies’; only 3% at ‘Transparency of pricing’; and just 7% at ‘Being transparent with clinical data’.

The corporate reputation of pharma in the UK, 2019-2023

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



How good or bad the pharma industry was at carrying out specific activities in the UK, 2019-2023

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

	'19-'23	Diff
Transparency: funding	22 43	+21
Integrity	33 52	+19
Products that benefit patients	50 67	+17
Innovation	44 59	+15
Patient centricity	34 47	+13
Patient-group relations	39 52	+13
Information	36 48	+12
Engaging patients in R&D	20 27	+7
Ensuring patient safety	58 64	+6
Access to medicines	25 31	+6
Services 'beyond the pill'	26 29	+3
Transparency: clinical data	15 17	+2
Fair pricing policies	8 6	-2
Transparency: pricing	11 5	-7

¹ . <https://cpe.org.uk/wp-content/uploads/2024/03/Medicine-Shortages-Prescriber-Briefing.pdf>

² <https://www.parkinsons.org.uk/news/prescription-charges-are-barrier-keeping-people-well-and-work-survey-reveals>

UK patient groups advise pharma on how to improve

Advice from 2023's respondent UK patient groups on how the industry could improve covers several areas—including a request for pharma companies to improve their relationships with patient groups (one respondent UK patient group even wondering whether they were just part of a mere “tick-box exercise”). Another topic, mentioned by many UK patient groups, is earlier engagement in R&D (with respondent UK patient groups critical of ‘near-to-market’ research at the expense of early-phase research—the latter being where patient groups suspect that they, and patients, can make the most difference).

“Work with us on a sustained, or regular, basis. We do odd pieces of work, now and then, but we would much rather have a continuous relationship. At present, we are a tool in their toolkit; we’d rather be a partner in their processes.”

—National cancer patient group, UK

“Consider patient groups’ capacity, and staff time. Be less demanding of multiple staff-members’ time. Ask for less, and respect the decision-making and time commitments of patient-group staff (including travel commitments).”

—National respiratory-conditions patient group, UK

“A lot of organisations [companies] talk about having a patient-centred strategy, but tend to only focus on this at the end of the product production (for instance, once it is going to market). There is much-less inclusion of patients early on in deciding what drugs are needed, and how the side effects, and long-term impact of drugs, can be managed.”

—National cancer patient group, UK

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

13 companies are included in the UK 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 • AstraZeneca • Bristol Myers Squibb • Eli Lilly • Gilead Sciences • GSK • Janssen
- Merck & Co/MSD • Novartis • Pfizer • Roche • Sanofi • Takeda

Note:

* AstraZeneca includes Alexion.

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

* Merck & Co is known as MSD outside of Canada and the USA.

All the above companies also fall into the classification of ‘big pharma’

Companies are assessed on issues of importance to patient groups



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

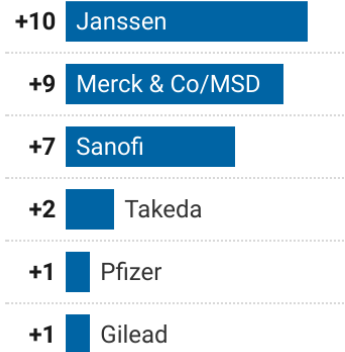
The top-three rankings in the UK in 2023
(out of 13 companies—all ‘big pharma’)
As assessed by respondent UK patient groups
familiar with the company:

- ▶ 1st, Pfizer
- ▶ 2nd* Gilead Sciences
- ▶ = 3rd* Merck & Co/MSD
- ▶ = 3rd* Takeda

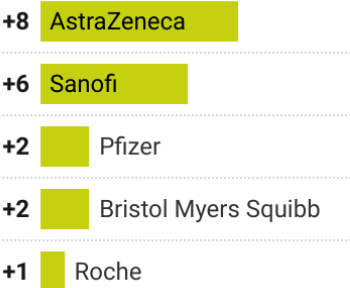
The top-three rankings in the UK in 2023
(out of 10 companies—all ‘big pharma’)
è _q _qqcqqcb ` wpcqnm bcl rSl n_rgl r
epnsnq **working** ugf rf c ank n_l w8

- ▶ 1st* Pfizer
- ▶ 2nd* Sanofi
- ▶ 3rd* AstraZeneca

The companies rising the most in the **upper** rankings in
the UK (out of all 13 companies—all ‘big pharma’),
2023 v. 2022, as assessed by respondent UK patient
groups **familiar** with the company



The companies rising the most in the **upper** rankings in
the UK (out of 10 companies—all ‘big pharma’),
2023 v. 2022, as assessed by respondent UK patient
groups **working** with the company



Finally, PatientView would like to thank the 87 UK patient groups that gave up their
time to respond to the 2023 ‘Corporate Reputation of Pharma’ survey.

The respondent UK 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 13 pharma companies featured in the UK 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 UK report, please use contact details at the head of the press release.

END OF PRESS RELEASE

Appendix

Profile of respondent UK patient groups, 2023, by speciality
Number of respondent UK patient groups

