

WHAT 107 FRENCH PATIENT GROUPS SAY ABOUT PHARMA IN 2023

France edition

PRESS RELEASE EMBARGOED until

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Overview

PatientView is pleased to publish 'The Corporate Reputation of Pharma—from the Perspective of French Patient Groups, 2023' (the 4th France edition in the annual 'Corporate Reputation' series). The 2023 review contains the results of a November 2023 to late-February 2024 survey, answered by 107 French patient groups.

2023's 107 respondent French patient groups were involved in multiple therapy areas—the largest representation (25 respondent patient groups) specialising in rare diseases. The 107 stated that, collectively, they had actively supported and served more than 630,000 French patients during 2023/24. [See end of this press release for a profile of the respondent French patient groups.]

Continue reading, for details about ...

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

SUMMARY OF RESULTS

INDUSTRY WIDE:

Several factors could influence the perspectives of French patient groups responding to the 2023 'Corporate Reputation' survey.

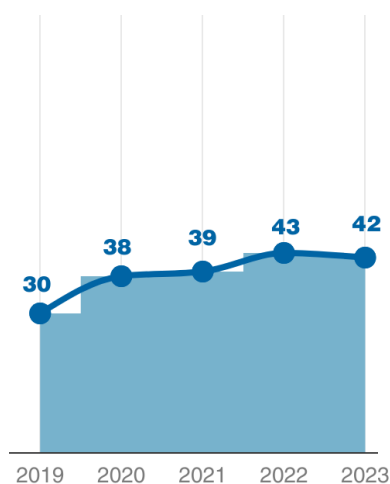
- ▶ The French healthcare system faces the same challenges that beset other healthcare systems in Europe—particularly a shortage of healthcare resources. For instance, the number of French doctors and hospital beds seem to be in constant

decline.¹ The most-recent available data points to 3.2 doctors per 1,000 population in France (well below the EU average of 4.1). Certain regions of France—typically rural areas, or distant suburbs of small towns and big cities in the northwestern parts of France—are even worse served. An estimated 6% of France’s population is located in these so-called ‘medical deserts.’

- ▶ The Agence Nationale de Sécurité du Médicament et des Produits de Santé (ANSM), France’s drug regulator, reported 4,929 drug shortages in 2023 (compared to 3,761 in 2022, and 2,160 in 2021).² Fears about supply failures prompted the country’s government, in June 2023, to release a list of over 450 medicines considered essential, and attach specific measures intended to ensure availability.³

In France, in 2023, the pharmaceutical industry ranked only 3rd for reputation out of nine healthcare sectors (42% of respondent French patient groups seeing the industry’s reputation as “Excellent” or “Good”—about the same as the pharma industry’s immediate post-Covid high in France of 43% in 2022.) The majority of 2023’s respondent French patient groups did not believe the pharma industry to be “Excellent” or “Good” at activities important to French patients and patient groups—with the exception of one activity, innovation [see chart, below]. However, even on the subject of pharma’s innovation, positivity is declining among respondent French patient groups, just 51% of which stated in 2023 that the industry was “Excellent” or “Good” at innovation (the equivalent figure in 2022 had, again, been an immediate post-Covid high of 64%).

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



How good or bad the pharma industry was at carrying out specific activities in France, 2023 v 2022, % of respondent French patient groups stating “Excellent” or “Good”

	2023	Versus 2022
Patient centricity	43	+2
Information	37	+1
Ensuring patient safety	48	+4
Innovation	51	-12
Products that benefit patients	48	±0
Transparency: pricing	11	+2
Transparency: clinical data	15	+2
Transparency: funding	19	+7
Integrity	27	+5
Patient-group relations	33	-11
Services 'beyond the pill'	25	-6
Fair pricing policies	8	-2
Engaging patients in R&D	19	-5
Access to medicines	21	+1

¹ <https://doi.org/10.1787/07c48f9f-en>

² <https://www.euronews.com/health/2024/05/16/french-health-groups-put-forward-proposals-to-limit-the-damage-of-worsening-drug-shortages>

³ <https://healthcarelifesciences.bakermckenzie.com/2023/06/28/the-french-government-advances-its-pawn-in-the-battle-to-prevent-medicine-shortages-and-releases-the-first-list-of-essential-medicines/>

French patient groups advise pharma on how to improve

Concerns over drug shortages in France were mentioned frequently by 2023's respondent French patient groups, echoing the sense of powerlessness experienced by patients confronting uncertainty of supply. French patient groups understand the issue of supply to be complex, and not just a problem limited to France. Nonetheless, the feeling among 2023's respondent French patient groups was that the pharma industry has a duty to support affected patients, through clear communication and advice.

« Patients totalement démunis face à l'approvisionnement très irrégulier de médicaments ALD. »

["Patients are totally helpless in the face of a very-sporadic supply of medication for chronic diseases."] Local diabetes patient group, France

« En évitant des pénuries de certains produits. Peut être une fabrication de production européenne. »

["Avoiding shortages of certain products. Perhaps creating European production facilities."] National heart-conditions patient group, France

« Éviter les pénuries, innover et multiplier le choix des traitements. »

["Avoiding shortages, innovating, and making a wider choice of treatments available."] National heart-conditions patient group, France

Companies included in the France **element of the 2023 'Corporate Reputation' survey**

21 companies are included in the France edition of the 2023 'Corporate Reputation of Pharma' survey results. 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/MSD • Merck KGaA • Novartis
- Novo Nordisk • Pfizer • Pierre Fabre • Roche • Sanofi • Servier • Takeda • UCB

Note:

* Amgen includes Horizon Therapeutics

* AstraZeneca includes Alexion.

* Gilead Sciences includes Kite Pharma

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

* Merck & Co is known as MSD in France.

Companies are assessed on issues of importance to patient groups



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

The top-three rankings for corporate reputation in France in 2023 (out of all of the 21 companies analysed)
—as assessed by respondent French patient groups **familiar** with the company:

- ▶ **1st**, Pfizer
- ▶ **2nd**, UCB
- ▶ **3rd**, Novartis

The top-three rankings for corporate reputation in France in 2023 (out of 12 companies)
—as assessed by respondent French patient groups **working** with the company:

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

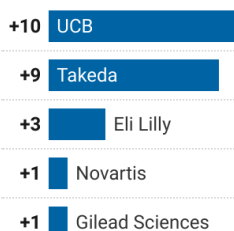
The top-three rankings for corporate reputation in France in 2023 (out of 15 ‘big-pharma’ companies)
—as assessed by respondent French patient groups **familiar** with the company:

- ▶ **1st**, Pfizer
- ▶ **2nd**, Novartis
- ▶ **3rd**, Gilead Sciences

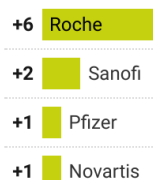
The top-three rankings for corporate reputation in France in 2023 (out of 11 ‘big-pharma’ companies)
—as assessed by respondent French patient groups **working** with the company:

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

The companies rising the most in the **upper** rankings in France (out of all 21 companies), 2023 v. 2022
—as assessed by respondent French patient groups **familiar** with the company



The companies rising the most in the **upper** rankings in France (out of 12 companies), 2023 v. 2022
—as assessed by respondent French patient groups **working** with the company



Finally, PatientView would like to thank the 107 French patient groups that gave up their time to respond to the 2023 ‘Corporate Reputation of Pharma’ survey.

The respondent French 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 21 pharma companies featured in France 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 France report, please use contact details at the head of the press release.

PatientView, Press Release, embargoed for July 16th, 2024, 6am GMT

END OF PRESS RELEASE

Appendix

Profile of respondent French patient groups, 2023—by speciality

Number of respondent French patient groups

