

WHAT 157 SPANISH PATIENT GROUPS SAY ABOUT PHARMA IN 2023

Spain edition

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Overview

PatientView is pleased to publish 'The Corporate Reputation of Pharma—from the Perspective of Spanish Patient Groups, 2023' (the 10th Spain edition in the annual 'Corporate Reputation' series). The 2023 review contains the results of a November 2023 to late-February 2024 survey, answered by 157 Spanish patient groups.

2023's 157 respondent Spanish patient groups were involved in multiple therapy areas—the largest representation (37 respondent Spanish patient groups) specialising in rare diseases. The 157 stated that, collectively, they had actively supported and served some 800,000 Spanish patients during 2023/24. [See end of this press release for a profile of the respondent Spanish patient groups.]

Continue reading, for details about ...

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

SUMMARY OF RESULTS

INDUSTRY WIDE:

Two dominant issues could have influenced the views of pharma held by Spanish patient groups during 2023:

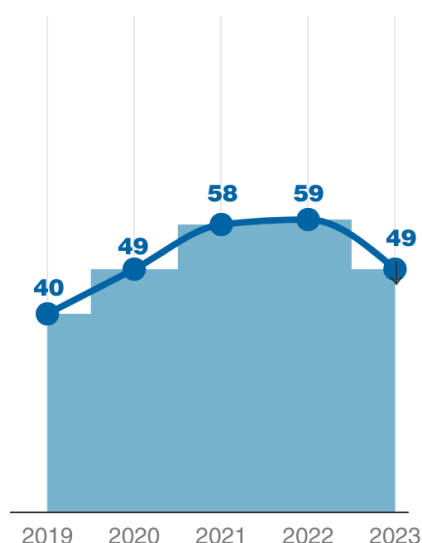
- (1) EFPIA's W.A.I.T. (Waiting to Access Innovative Therapies) Indicator records 167 new medicines approved across 36 European countries between 2019-2022. By January 2024, Spain had made available 103—better than the EU average of 74, but far fewer than Germany's 147.¹

¹ <https://efpia.eu/media/vtapbere/efpia-patient-wait-indicator-2024.pdf>

(2) The pharma industry clashed in 2023 with Spain’s healthcare policymakers on the topic of introducing mechanisms for the inclusion of cost-effectiveness criteria when approving new drugs. Following legal challenges by Farmaindustria (Spanish pharmaceutical trade association), the Spanish National Court (AN) declared in 2023 the Spanish government’s cost-effectiveness scheme (REValMed) to be invalid.^{2 3} Nonetheless, Spain’s Ministry of Health continues to push for a system that allows medicines to be evaluated for cost effectiveness (as do many other countries in Europe struggling with rising drugs bills).⁴

The percentage of Spanish patient groups responding to the annual ‘Corporate Reputation of Pharma’ survey, and calling the pharma industry’s reputation “Excellent” or “Good”, fell from an immediate post-pandemic high of 59% in 2022, to 49% in 2023. Unsurprisingly (given the disagreements in 2023 between the pharma industry and Spain’s Ministry of Health and drug-reimbursement authorities), just 10% of 2023’s respondent Spanish patient groups thought pharma “Excellent” or “Good” at being transparent at pricing (2022’s figure was 20%). In addition, only 27% of 2023’s respondent Spanish patient groups considered pharma “Excellent” or “Good” at increasing patient access to medicines (2023’s figure globally was 31%).

The corporate reputation of the pharma industry in Spain, 2019-2023
% of respondent Spanish patient groups, per year, stating “Excellent” or “Good”



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

	2023	Versus 2022
Patient centricity	47	-1
Information	40	-4
Ensuring patient safety	53	-4
Innovation	58	-2
Products that benefit patients	58	-6
Transparency: pricing	10	-10
Transparency: clinical data	23	-1
Transparency: funding	33	-1
Integrity	43	+1
Patient-group relations	51	±0
Services 'beyond the pill'	35	+1
Fair pricing policies	11	-2
Engaging patients in R&D	27	-1
Access to medicines	27	+1

² [https://windrosecg.com/posts/spain-hta-ipt#:~:text=IPts%20\(Informes%20de%20Posicionamiento%20Terap%C3%A9utico,objective%2C%20impartial%20and%20centralized%20evaluation.](https://windrosecg.com/posts/spain-hta-ipt#:~:text=IPts%20(Informes%20de%20Posicionamiento%20Terap%C3%A9utico,objective%2C%20impartial%20and%20centralized%20evaluation.)

³ <https://www.linkedin.com/pulse/spanish-national-court-annuls-ministry-healths-plan-ipt-currell/>

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Spanish patient groups advise pharma on how to improve

Despite the ongoing efforts of pharmaceutical companies in Spain to be patient centric over recent years, a clear message emerges from the quotes offered to the 2023 ‘Corporate Reputation’ survey by respondent Spanish patient groups—that the industry could be working more closely with patient groups. One noticeable theme was that pharma could try harder to gain further understanding of the patient groups themselves (and the patients associated with these organisations). The industry, say 2023’s respondent Spanish patient groups, also needs to become more transparent—both in its pricing, and in its funding of healthcare stakeholders. Even though the industry is mandated by legislation to disclose its funding of healthcare stakeholders, the actual information published may not yet be sufficiently visible—according to 2023’s respondent Spanish patient groups. Nonetheless, these Spanish patient groups obviously value, and welcome, involvement with pharma, and seem to have real desire for closer co-operation.

«Los últimos dos años han visto un declive importante en el respaldo, implicación y colaboración con las orgs de pacientes. Ésta situación desanima a las orgs comprometidas con objetivo de mejorar la validez de vida y el acceso equitativo a pacientes. No logramos conseguir un camino sostenible a un futuro mejor sin transparencia y compromiso especialmente con organizaciones preparadas para ser actores en la transformación digital».

["The last two years have seen a significant decline in support, involvement, and collaboration with patient organisations. This situation discourages patient organisations that are committed to improving quality of life, and to providing equitable access for patients. We cannot achieve a sustainable path to a better future without transparency and engagement, especially with patient organisations prepared to be actors in the digital transformation."]

—National respiratory-conditions patient group, Spain

«Acercarse y mostrar interés con el 3ª sector sociosanitario, de manera sostenible y planificada».

["Get involved—and show an interest in the health- and social-care third sector, in a sustainable, and structured, manner."]

—Regional rare-diseases patient group, Spain

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

20 companies are included in the Spain 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 • AstraZeneca • Bayer • Biogen • Boehringer Ingelheim • Bristol Myers Squibb
- Chiesi Farmaceutici • Eli Lilly • Gilead Sciences • GSK • Janssen • Merck & Co/MSD
- Merck KGaA • Novartis • Novo Nordisk • Pfizer • Roche • Sanofi • Takeda • ViiV Healthcare

Note:

* 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 Spain.

Companies are assessed on issues of importance to patient groups



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

The top-three rankings for corporate reputation in Spain in 2023 (out of all 20 companies)

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

- ▶ **1st**, ViiV Healthcare
- ▶ **2nd**, Gilead Sciences
- ▶ **3rd**, Chiesi Farmaceutici

The top-three rankings for corporate reputation in Spain in 2023 (out of 17 companies)

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

- ▶ **1st**, ViiV Healthcare
- ▶ **2nd**, Gilead Sciences
- ▶ **3rd**, GSK

The companies rising the most in the **upper** rankings in Spain (out of all 20 companies), 2023 v. 2022

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

The companies rising the most in the **upper** rankings for corporate reputation in Spain (out of 17 companies), 2023 v. 2022

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

The top-three rankings for corporate reputation in Spain in 2023

(out of 14 'big-pharma' companies)

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

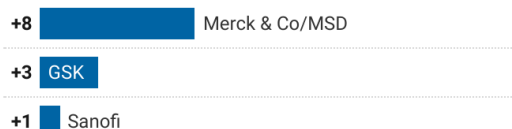
- ▶ **1st**, Gilead Sciences
- ▶ **2nd**, GSK
- ▶ **3rd**, Sanofi

The top-three rankings for corporate reputation in Spain in 2023

(out of 13 'big-pharma' companies)

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

- ▶ **1st**, Gilead Sciences
- ▶ **2nd**, GSK
- ▶ **3rd**, Sanofi



Finally, PatientView would like to thank the 157 Spanish patient groups that gave up their time to respond to the 2023 ‘Corporate Reputation of Pharma’ survey.

The respondent Spanish 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 20 pharma companies featured in Spain 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 Spain report, please use contact details at the head of the press release.

END OF PRESS RELEASE



Appendix

Profile of respondent Spanish patient groups, 2023—by speciality

Number of respondent Spanish patient groups