WHAT 2,500+ PATIENT GROUPS SAY ABOUT PHARMA IN 2023/4

London, 29th April 2024

PatientView is today publishing the results of the latest annual 'Corporate Reputation of Pharma' survey (now in its 13th year). Between November 2023 and late-February 2024, the survey collected the opinions of a record number of patient groups—2,518—from 106 countries, on the performance of the pharmaceutical industry during 2023 and early 2024.

Continue reading, for details about …

> The headline global industry-wide results of the 2023 survey.

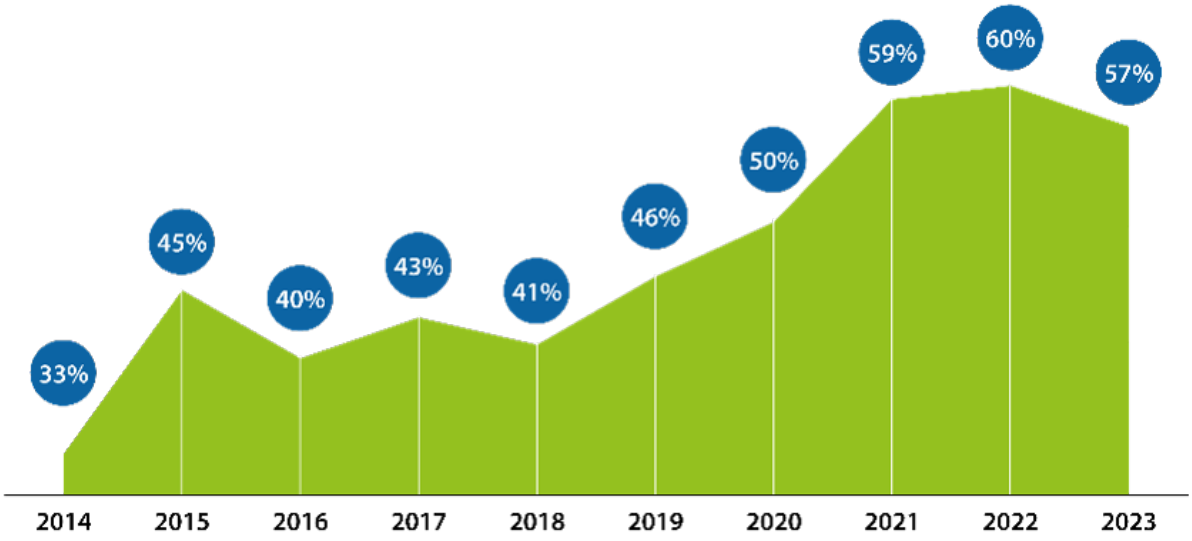
> The performance of the individual pharma companies included in the 2023 analysis.

[The profiles of 2023's respondent patient groups can be found at the end of the press release]

SUMMARY OF RESULTS

INDUSTRY WIDE: 'Pharma corporate reputation falls from Covid highs'Since 2011, when PatientView first launched its annual survey, pharmaceutical companies have significantly increased their efforts with patient groups worldwide, and in new therapy areas. Relations between pharma and patient groups have also matured, as patient groups seek not just funding, but more mutually-beneficial partnerships.During, and immediately after, the Covid-19 pandemic, pharma saw a significant increase in its approval ratings among patients, patient groups, and the public at large. However, the results of the 2023 survey contain early indications that pharma's elevated reputational status may not be sustainable. While respondent patient groups from some countries reported increases in the industry's corporate reputation in 2023, respondent patient groups from Australia, a number of European and Latin-American countries, as well as patient groups from the USA, judged pharma's corporate reputation to have declined in 2023.

The corporate reputation of pharma, 2014-2023, Percentage of patient groups stating "Excellent" or "Good"



Thousands of patient-group commentaries were received by the 2023 survey (for examples see below). A number made clear that a number of pharma companies (typically the smaller ones) have reduced their funding of patient groups post Covid, perhaps in response to economic challenges felt in their countries.

The majority of 2023's respondent patient groups continue to make long-standing requests that:

- drugs are priced more equitably;
- patients around the world are given better access to medicines;
- and (despite considerable focus by pharma) patients gain greater involvement in R&D.

Over half of 2023's 2,518 respondent patient groups believe that pharma is only "Fair" or "Poor" at these activities.

Percentage of 2023's respondent patient groups stating that pharma is only "Fair" or "Poor" at …	
Equitable pricing policies	56%
Engaging patients in R&D	56%
Access to medicines	54%

Percentage of patient groups in different countries stating that pharma has an "Excellent" or "Good" corporate reputation, 2023 v. 2022

Countries from which PatientView received 15 or more patient-group responses per year

	2022	2023	Diff
Netherlands	20%	42%	+22%
Denmark	29%	41%	+12%
Taiwan	71%	83%	+12%
Sweden	34%	46%	+12%
UK	44%	55%	+11%
Colombia	50%	58%	+8%
Canada	65%	72%	+7%
Brazil	74%	80%	+6%
Japan	62%	67%	+5%
Switzerland	65%	69%	+4%
Belgium	45%	48%	+3%
Greece	83%	85%	+2%
Austria	67%	68%	+1%
France	43%	42%	-1%
China	80%	77%	-3%
Korea	71%	67%	-4%
Mexico	66%	58%	-8%
USA	65%	57%	-8%
Spain	59%	49%	-10%
Argentina	64%	52%	-12%
Australia	65%	52%	-13%
Germany	58%	44%	-14%
Turkey	62%	48%	-14%
Poland	76%	58%	-18%
Italy	75%	56%	-19%
Portugal	75%	56%	-19%
Norway	35%	15%	-20%
Ireland	73%	45%	-28%
Finland	68%	39%	-29%

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

The top-three rankings in 2023—out of all 41 companies

As assessed by respondent patient groups familiar with the company:

- ViiV Healthcare, 1st
- Gilead Sciences, 2nd
- Roche, 3rd

As assessed by respondent patient groups working with the company:

- ViiV Healthcare, 1st
- Gilead Sciences, 2nd
- Roche, 3rd

The top-three rankings in 2023 —out of 15 'big-pharma' companies

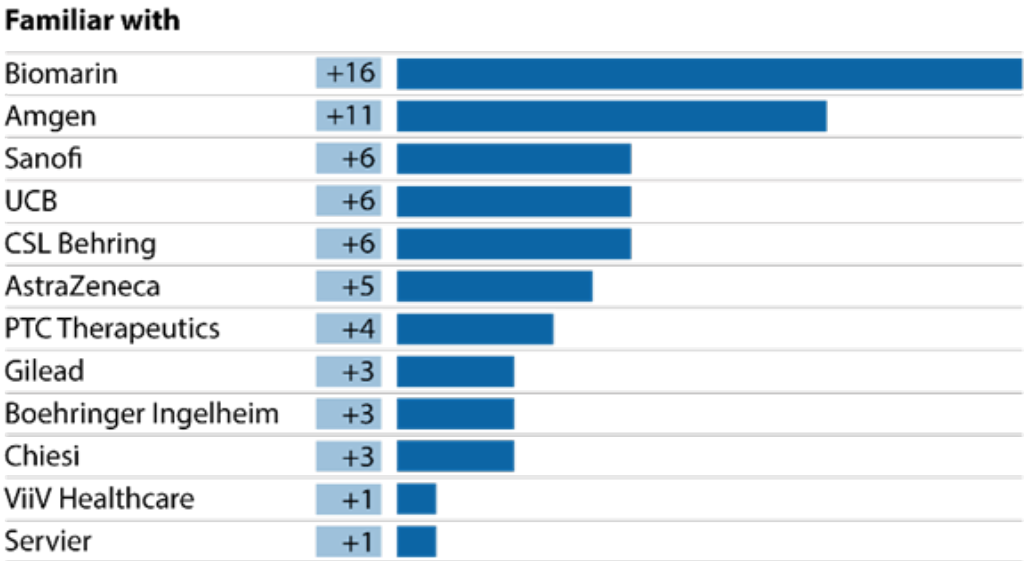
As assessed by respondent patient groups familiar with the company:

- Gilead Sciences, 1st
- Roche, 2nd
- Pfizer, 3rd

As assessed by respondent patient groups working with the company:

- Gilead Sciences, 1st
- Roche, 2nd
- AstraZeneca, 3rd

The companies rising the most in the upperrankings (out of all 41 companies), 2023 v. 2022, as assessed by respondent patient groups familiar with the company



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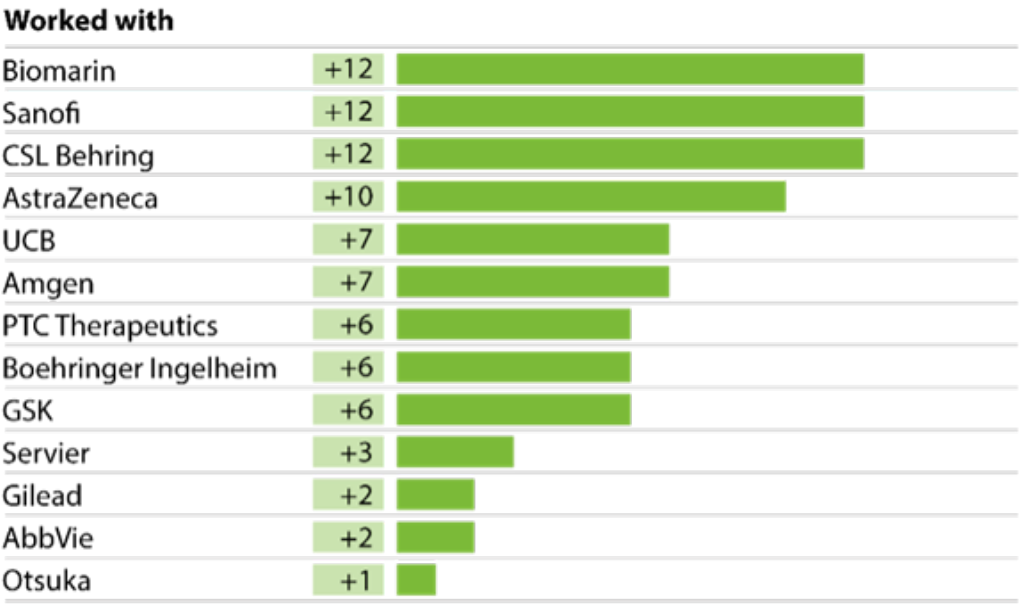

Companies included in the 2023 'Corporate Reputation' survey

The 41 companies featured in the 2023 'Corporate Reputation of Pharma' survey are selected on the criteria of size of revenue, or, by request from companies or patient groups. They include:

• AbbVie • Amgen (including Horizon Therapeutics) • Astellas Pharma • AstraZeneca • Bayer • Biogen • Biomarin • Boehringer Ingelheim • Bristol Myers Squibb • Chiesi Farmaceutici (including Amyrt Pharma) • CSL Behring • Daiichi Sankyo • Eisai • Eli Lilly • Ferring • Gilead Sciences • Grifols • Grünenthal • GSK • Ipsen • Janssen (now known as Johnson & Johnson Innovative Medicine) • LEO Pharma • Lundbeck • Menarini • Merck & Co / MSD • Merck KGaA / EMD Serono • Novartis • Novo Nordisk • Octapharma • Otsuka • Pfizer • Pierre Fabre • PTC Therapeutics • Roche / Genentech / Chugai • Sanofi • Sarepta Therapeutics • Servier • Takeda • UCB • Vertex • and ViiV Healthcare.

Companies are assessed by issues of importance to patient groups

Patient groups raised their concerns and priorities for improvement across a range of issues. Examples are below:
"Il est difficile d'émettre un avis qui s'applique à tous dans leur ensemble. Elle est bonne dans les entreprises qui déploient et consacrent des moyens solides et concrets pour cela pour construire une relation sur le longcours, elle peut être pitoyable et ponctuelle, purement pratique, pour ceux qui emploient des personnes souvent non qualifiées dans la perspective de la soumission d'un dossier aux autorités de santé."

["It is difficult to give an opinion that applies to everyone as a whole. It is good in companies which deploy and devote solid and concrete means for this to build a long-term relationship. It can be pitiful, and punctual, purely practical, for those which employ people who are often unqualified in the perspective of submission of a file to the health authorities."] **—National patient group specialising in cancer, France**

"There are drug shortages in various anti-seizure medications. The pharma companies could play a role in better communicating the reasons, timelines to resolve, and actions being taken to resolve the shortages. Otherwise, people are left in the dark." **— National patient group specialising in neurological conditions, 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 they engage patients in R&D, when, in actual fact, this might be a 3-hours 'advisory board' in phase-3 trial, etc."**—International patient group specialising in cardiovascular conditions, the Netherlands**

"The general public has lower trust with pharma and medical professionals since Covid." **—National cancer patient group, USA**

END OF PRESS RELEASE

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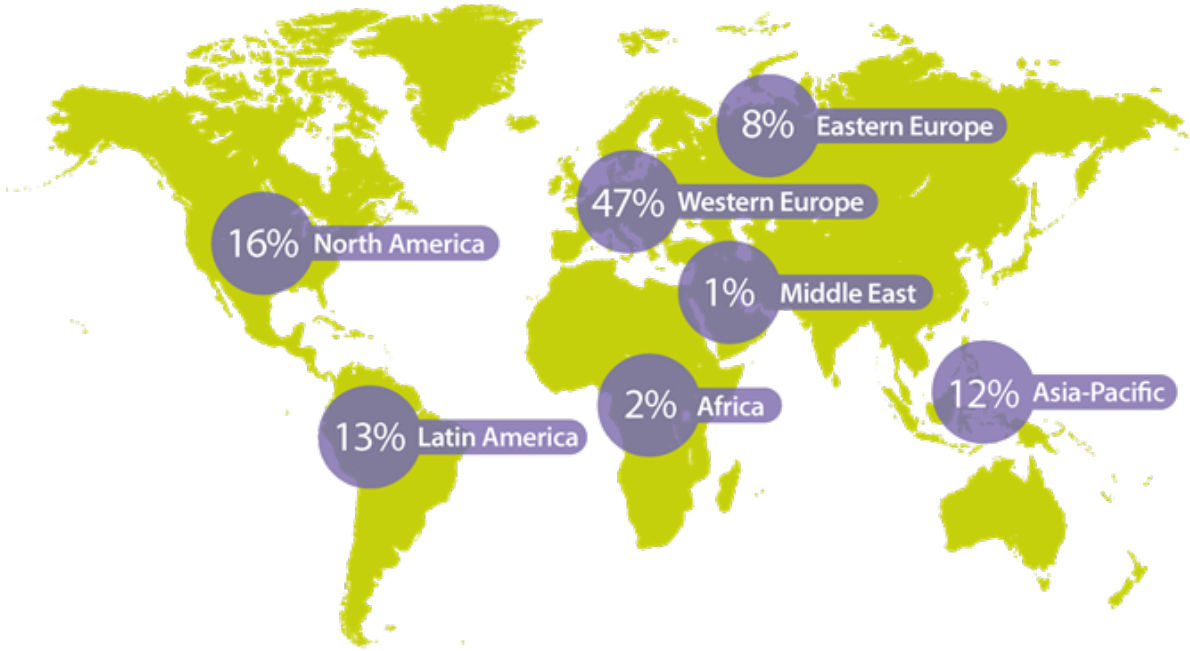
Appendix: Profile of respondent patient groups, by geographic region, and by speciality Percentage of total respondent patient groups



	%		%
Allergic conditions	1.1	Learning disorders	0.2
Autoinflammatory diseases	0.2	Liver diseases	4.5
Bleeding disorders	3.1	Medical research	0.1
Blood disorders	1.8	Men's health	1.5
Bone conditions	0.7	Mental health	3.1
Cancer	22.7	Neurodegenerative diseases	7.1
Cardiovascular diseases	1.5	Neurological conditions	13.5
Carers, family, friends	2.2	Neuromuscular conditions	2.3
Cerebrovascular diseases	1.1	Older people	0.6
Children's health	1.9	Other autoimmune conditions	1.7
Chronic diseases in general	0.8	Other disabilities	0.4
Circulatory conditions	0.2	Patient advocacy	0.3
Endocrine conditions	4.1	Patient safety	0.2
Gastrointestinal conditions	2.5	Rare diseases	21.2
General health	1.6	Reproductive health	0.3
Gynaecological conditions	0.8	Respiratory conditions	7.3
Hearing loss	0.2	Rheumatic diseases	5.8
Heart conditions	1.5	Skin conditions	4.2
Hepatitis	3.8	Transplants	1.1
HIV/AIDS	8.0	Urinary conditions	0.6
Immune disorders	0.5	Visual impairment	1.6
Infectious diseases	0.5	Women's health	6.3
Kidney diseases	1.8		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