

WHAT 121 GERMAN PATIENT GROUPS SAY ABOUT PHARMA IN 2023

Germany edition

PRESS RELEASE EMBARGOED until
FRIDAY, JUNE 28th 2024, 6am GMT / 1am EST

Contact: Alex Wyke
Tel: +44-(0)-7960-855-019
Email: report@patient-view.com

London, 28th June 2024

Overview

PatientView is pleased to publish 'The Corporate Reputation of Pharma—from the Perspective of German Patient Groups, 2023' (the 12th German edition in the annual 'Corporate Reputation' series). The 2023 review contains the results of a November 2023 to late-February 2024 survey, answered by 121 German patient groups. 2023's 121 respondent German patient groups were involved in multiple therapy areas—the largest representation (23 respondent patient groups) specialising in rare diseases. The 121 stated that, collectively, they had actively supported and served just over 1 million patients during 2023/24. [See end of this press release for a profile of the respondent German patient groups.]

Continue reading, for details about ...

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

SUMMARY OF RESULTS

INDUSTRY WIDE:

The reputational decline of the pharmaceutical industry in Germany in 2023 echoes the concerns the German public hold about their country's healthcare services in general. A 2023 survey by the Bosch Health Campus of the Robert Bosch Stiftung (a charity that examines social issues) found almost 60% of Germans claiming to have little, or no, trust in the ability of politicians to provide high-quality, affordable healthcare (the equivalent figure in 2020 was only 30%).¹ The pessimism is probably being driven by pending healthcare and workforce crises facing Germany. For example, an estimated 5,000 to 8,000 general-practitioner practices are expected to close in Germany over the next three years, mostly due to practitioner retirement.²

Germany is trying to respond to its growing healthcare problems by emphasising the digital reform of health services—the aim being to push more healthcare services (including physician consultations)

¹ <https://www.bosch-health-campus.de/de/story/forsa-umfrage-grosser-vertrauensverlust-die-gesundheitspolitik>

² <https://www.dw.com/en/how-are-foreign-doctors-faring-in-germany/a-68826201#:~:text=As%20of%202023%2C%2041%25%20of%20close%2C%20largely%20due%20to%20retirements.>

online, thereby hopefully boosting the healthcare system’s productivity and efficiency. To this end, the Bundestag (Federal Parliament) passed a December 2023 Act to Accelerate the Digitalisation of the Healthcare System (Gesetz zur Beschleunigung der Digitalisierung des Gesundheitswesens, Digital-Gesetz, “DigiG”).³

These delivery-of-care issues in Germany are not likely to directly impact the pharmaceutical industry. However, the scale of e-health reforms in Germany is likely to result in significant changes for patients and carers, who will inevitably look to pharma for more digital support—such as quality health education, and treatment management.

Companies included in the 2023 Germany element, ‘Corporate Reputation’ survey

16 companies are included in the Germany 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 • Bristol Myers Squibb • Gilead Sciences • GSK • Janssen • Merck & Co • Novartis • Novo Nordisk • Pfizer • Roche • Sanofi • Takeda • ViiV Healthcare

Note:

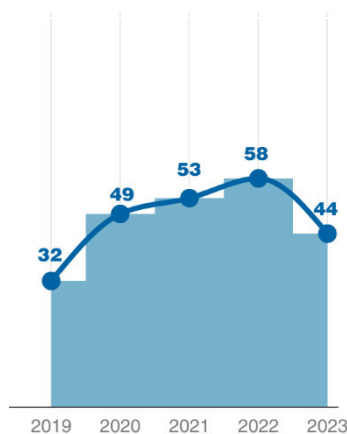
- * AstraZeneca includes Alexion.
- * Gilead Sciences includes Kite Pharma
- * Janssen was renamed Johnson & Johnson Innovative Medicine in late-2023.
- * Merck & Co is known as MSD in Germany.

Companies are assessed on issues of importance to patient groups



The corporate reputation of pharma in Germany, 2019-2023

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



German patient groups responding to the ‘Corporate Reputation’ survey marked pharma down for corporate reputation, with just 44%

How good or bad the pharma industry was at carrying out specific activities in Germany, 2023 v 2022

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

	2023	Versus 2022
Patient centricity	44	+2
Information	50	+1
Ensuring patient safety	60	+14
Innovation	43	-13
Products that benefit patients	54	+2
Transparency: pricing	7	-1
Transparency: clinical data	14	-6
Transparency: funding	36	+4
Integrity	38	+4
Patient-group relations	58	-2
Services ‘beyond the pill’	35	-7
Fair pricing policies	4	-8
Engaging patients in R&D	24	+3
Access to medicines	26	-8

2023

³ <https://www.bundesgesundheitsministerium.de/en/digital-healthcare-act>

(compared to 58% in the previous year) calling the industry's reputation "Excellent" or "Good". In addition, 2023's respondent German patient groups ranked pharma only 5th for corporate reputation out of nine healthcare sectors.

By contrast, 2023's German patient groups rated the biotech industry 1st out of nine for corporate reputation (64% of respondent German patient groups seeing that industry's reputation as "Excellent" or "Good")—perhaps because the biotech industry has been rapidly expanding in Germany. According to Statista, Germany had 495 biotech companies in 2006; by 2022, the number stood at 776⁴.

2023's respondent German patient groups also judged pharma's ability to innovate as declining (just 43% of 2023's respondent German patient groups thought pharma "Excellent" or "Good" at innovation)—suggesting that German patient groups regard biotech as better at innovation than pharma

German patient groups advise pharma on how to improve

Most of the comments provided to the 2023 'Corporate Reputation of Pharma' survey by the 121 respondent German patient groups reflect the changing nature of pharma/patient-group relationships. The trend is seen in other countries, too—patient groups worldwide want more engagement in many aspects of pharma's business (particularly R&D).

However, in line with the move by the German government to accelerate the digitisation of the country's healthcare services, 2023's respondent German patient groups made several, specific, requests to pharma for more help in improving the digital health literacy of patients (particularly of older patients). With the government's reforms advancing technological service provision, German patient groups clearly feel that pharma can play a role in helping vulnerable German patients adapt to the technological changes.

„Die Apotheken haben enorme Lieferschwierigkeiten. Man bekommt zeitnah keine Arzttermine mehr. Die Forschung an hilfreichen Medikamenten stagniert.“

[“The pharmacies are having enormous supply problems. It's no longer possible to get doctor's appointments in a timely manner. Research into helpful medications is stagnating.”]

—**National neurological-conditions patient group, Germany**

„Frühere Einbindung der Patientenperspektive in Clinical Trial Study Designs.“

[“Earlier integration of the patient perspective into clinical-trial study designs.”]

—**National rare-disease patient group, Germany**

„Digitale Gesundheitskompetenz der Patienten und Umgang mit elektronischen Patientenakten fördern.“

[“Promote patients' digital health literacy, and the use of electronic patient records.”]

—**National older-people's group, Germany**

⁴ <https://www.statista.com/statistics/579667/biotechnology-companies-germany/>

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

The top-three rankings for corporate reputation in Germany in 2023 (out of all 16 companies)

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

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

The top-three rankings for corporate reputation in Germany in 2023 (out of 12 ‘big-pharma’ companies)

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

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

The top-three rankings for corporate reputation in Germany in 2023 (out of 14 companies)

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

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

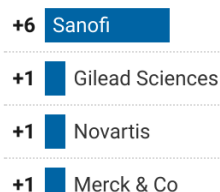
The top-three rankings for corporate reputation in Germany in 2023 (out of 11 ‘big-pharma’ companies)

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

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

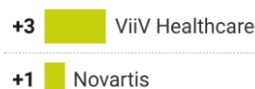
The companies rising the most in the upper rankings (out of all 16 companies), 2023 v. 2022

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



The companies rising the most in the upper rankings (out of 14 companies), 2023 v. 2022

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



Finally, PatientView would like to thank the 121 German patient groups that gave up their time to respond to the 2023 ‘Corporate Reputation of Pharma’ survey.

The respondent German 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 16 pharma companies featured in Germany 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 Germany report, please use contact details at the head of the press release.

END OF PRESS RELEASE

Appendix

Profile of respondent German patient groups, 2023, by speciality

Number of respondent German patient groups

