

WHAT 148 ITALIAN PATIENT GROUPS SAY ABOUT PHARMA IN 2023

Italy edition

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Overview

PatientView is pleased to publish ‘The Corporate Reputation of Pharma—from the Perspective of Italian Patient Groups, 2023’ (the 10th Italy edition in the annual ‘Corporate Reputation’ series). The 2023 review contains the results of a November 2023 to late-February 2024 survey, answered by 148 Italian patient groups.

2023’s 148 respondent Italian patient groups were involved in multiple therapy areas—the largest representation (42 respondent Italian patient groups) specialising in rare diseases. The 148 stated that, collectively, they had actively supported and served 1.6 million Italian patients during 2023/24. [See end of this press release for a profile of the respondent Italian patient groups.]

Continue reading, for details about ...

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

SUMMARY OF RESULTS

INDUSTRY WIDE:

Turbulence is sweeping Italy’s healthcare system:

- ▶ The OECD reports that the country’s National Health Fund (Fondo Sanitario Nazionale) aims to spend less than 6.5% of GDP in 2024-20253—a sum considerably lower than the average of 7.7% invested by EU nations.¹

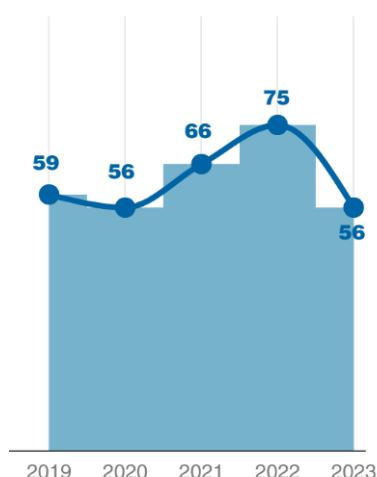
¹ https://stats.oecd.org/index.aspx?DataSetCode=HEALTH_REAC

► A January 2024 commentary in The Lancet² identified further challenges to Italy’s national healthcare system (founded on concepts of universalism, solidarity, and distributive justice). The country’s increasingly-ageing population is turning for many of its healthcare needs to the private healthcare sector—the spend on which has reached €66bn a year (by comparison, the National Health Fund budget is €130bn a year). Such a high a ratio of private-to-public spend suggests Italy’s national healthcare system is riven with inequalities.

► Healthcare in Italy is currently undergoing reforms aimed at reducing corruption³ and enhancing infrastructure.⁴

Italian patient groups responding to the 2023 ‘Corporate Reputation’ survey clearly believe that pharma can offer the country healthcare solutions capable of making a positive contribution (most notably by introducing pricing policies capable of improving access to treatment for Italian patients). Just 56% of 2023’s respondent Italian patient groups saw the pharmaceutical industry’s corporate reputation in Italy as “Excellent” or “Good” that year (the equivalent figure in 2022 had been a high for Italy of 75%)—meaning that the pharma industry’s reputation in the country fell back in 2023 to that of pre-pandemic levels of 2019. The decline is largely due to a conviction by 2023’s respondent Italian patient groups that the industry is failing on two fronts. Firstly, it is not sufficiently delivering on its core activity—providing products of benefit to patients. Secondly, the majority of individual pharma companies trading in Italy are not grasping the opportunity to provide effective services ‘beyond the pill.’

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



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

	2023	Versus 2022
Patient centricity	43	-7
Information	42	-2
Ensuring patient safety	47	-2
Innovation	59	-7
Products that benefit patients	46	-15
Transparency: pricing	20	+5
Transparency: clinical data	22	+1
Transparency: funding	28	-1
Integrity	38	-6
Patient-group relations	46	-4
Services 'beyond the pill'	30	-16
Fair pricing policies	14	+3
Engaging patients in R&D	22	-1
Access to medicines	26	-4

Italian patient groups advise pharma on how to improve

² [https://www.thelancet.com/journals/lanpub/article/PIIS2468-2667\(23\)00277-3/fulltext](https://www.thelancet.com/journals/lanpub/article/PIIS2468-2667(23)00277-3/fulltext)

³ <https://www.regulatorypharmanet.com/sunshine-act-promoting-transparency-in-the-italian-healthcare-landscape/>

⁴ https://commission.europa.eu/business-economy-euro/economic-recovery/recovery-and-resilience-facility/country-pages/italys-recovery-and-resilience-plan_en

Many of the commentaries provided to the 2023 'Corporate Reputation of Pharma' survey by the 148 respondent Italian patient groups detail their desire to be more involved in another of pharma's key activities—R&D. And, as mentioned above, they would also like pharma to focus attention on the challenge of equitable access to medicines—especially on the task of reducing drug shortages in Italy. According to Statista⁵, as many as 3,200 drugs were mostly unavailable in Italy at the beginning of 2023. Around half of these shortages were down to product discontinuation (a factor commented on by 2023's respondent Italian patient groups).

"Sistematizzare e calendarizzare la conoscenza delle associazioni di pazienti per ascoltare le loro richieste mantenendo una cadenza regolare. Essere più propense alla collaborazione interaziendale per quanto riguarda campagne di sensibilizzazione che partano dalle esigenze dei pazienti e non da un prodotto. Coinvolgere direttamente i pazienti per la definizione delle real-world data e real-world evidence per sviluppare i propri trattamenti".

["Scheduling and systematising knowledge-sharing sessions for patient groups, to listen to their needs regularly. Being more open to inter-company collaboration, in terms of awareness campaigns that stem from the patients' needs, and not from the product. Directly involving patients in establishing real-world data and real-world evidence, to develop their treatments."]

—National rare-disease patient group, Italy

"Il tempo in cui parlare di centralità del paziente è ormai superato, a mio avviso. Bisognerebbe darlo per scontato. Io parlerei, invece, di ricaduta sul paziente, iniziando a garantire un equo accesso ai farmaci, anche grazie all'inclusione dei rappresentanti di pazienti dagli studi in vitro".

["The time for discussing patient centricity has already passed, in my opinion. It should be taken as a given. I would discuss the impact on the patients, instead, starting with ensuring equal access to drugs, and thanks to the inclusion of patient representatives in in-vitro studies."]

—National skin-conditions patient group, Italy

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

19 companies are included in the Italy 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 • Biomarin • Boehringer Ingelheim • Bristol Myers Squibb
- Chiesi Farmaceutici • Eli Lilly • Gilead Sciences • GSK • Janssen • Menarini • Merck & Co/MSD
- Novartis • Novo Nordisk • Pfizer • Roche • Sanofi • Takeda

Note:

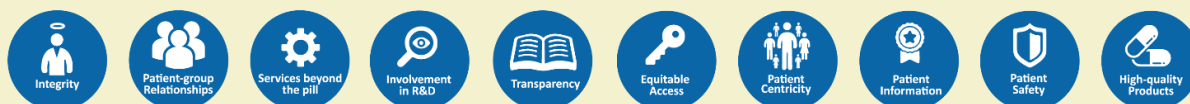
* AstraZeneca includes Alexion.

* Gilead Sciences includes Kite Pharma

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

* Merck & Co is known as MSD in Italy.

Companies are assessed on issues of importance to patient groups



⁵ <https://www.statista.com/statistics/1310810/number-of-drugs-hardly-available-in-italy/>

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

The top-three rankings for corporate reputation in Italy in 2023 (out of all of the 19 companies analysed)—as assessed by respondent Italian patient groups [familiar](#) with the company:

- ▶ 1st, Roche
- ▶ 2nd, BioMarin
- ▶ 3rd, AstraZeneca

The top-three rankings for corporate reputation in Italy in 2023 (out of 16 companies)—as assessed by respondent Italian patient groups [working](#) with the company:

- ▶ 1st, Roche
- ▶ 2nd, AstraZeneca
- ▶ 3rd, BioMarin

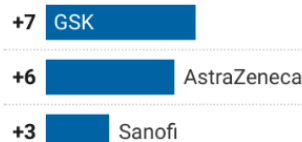
The top-three rankings for corporate reputation in Italy in 2023 (out of 14 ‘big-pharma’ companies)—as assessed by respondent Italian patient groups [familiar](#) with the company:

- ▶ 1st, Roche
- ▶ 2nd, AstraZeneca
- ▶ 3rd, GSK

The top-three rankings for corporate reputation in Italy in 2023 (out of 13 ‘big-pharma’ companies)—as assessed by respondent Italian patient groups [working](#) with the company:

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

The companies rising the most in the [upper](#) rankings in Italy (out of all 19 companies), 2023 v. 2022, as assessed by respondent Italian patient groups [familiar](#) with the company



Finally, PatientView would like to thank the 148 Italian patient groups that gave up their time to respond to the 2023 ‘Corporate Reputation of Pharma’ survey.

The respondent Italian 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 19 pharma companies featured in Italy 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 Italy report, please use contact details at the head of the press release.

END OF PRESS RELEASE

Appendix

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

