

WHAT PATIENT GROUPS SAY ABOUT PHARMA IN 2023/4—Asia edition

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Overview

PatientView is today publishing the results of the latest ‘Corporate Reputation of Pharma’ survey, focusing on four Asian countries:

- ▶ ANZ (Australia + New Zealand) – 64 respondent patient groups.
- ▶ China – 64 respondent patient groups.
- ▶ Japan – 48 respondent patient groups.

Between November 2023 and February 2024, the survey collected the opinions of these 176 Asian patient groups on the pharmaceutical industry’s performance in Asia during 2023.

Patient groups responding to 2023’s ‘Corporate Reputation of Pharma’ survey are uniquely positioned to comment on the pharma industry, and on individual companies, as they understand the experiences of patients, and they also network with the many other stakeholders in the healthcare system—Asian patient groups being no exception to this rule.

Pharma’s relationship with patient groups in Asia

Pharma has recently been engaged in enlarging the scale and breadth of its partnerships with patient groups in Asia. Back in 2016, just 19% of the companies featured in that year’s ‘Corporate Reputation’ survey partnered with 10 or more patient groups from the Asia-Pacific region. By 2023, however, some 73% of featured pharma companies did. The vast majority of 2023’s respondent patient groups from the four Asian countries stated that they worked with at least one pharma company:

- ▶ 92% of the respondent ANZ patient groups;
- ▶ 94% of those from China; and
- ▶ 96% from Japan.

Continue reading, for details about ...

- ▶ The headline Asian industry-wide results of the 2023 ‘Corporate Reputation’ survey.
- ▶ Asian patient-group advice on how pharma can improve in Asian countries.
- ▶ The performance of the individual pharma companies included in the 2023 Asia analysis.

INDUSTRY-WIDE RESULTS

Patient groups from the four Asian nations—despite these countries’ differing political, demographic, and epidemiological landscapes—share many attitudes about pharma (both positive and negative) [see charts below].

- ▶ The majority of the patient groups responding from the four Asian countries were positive about the pharmaceutical industry’s performance in general. As in 2022, patient groups from China held the industry in the highest regard—as many as 77% of 2023’s respondent Chinese patient groups thought the pharmaceutical industry’s corporate reputation “Excellent” or “Good”.
- ▶ A majority of the patient groups responding from the four countries also believed the industry “Excellent” or “Good” at providing products that benefit patients. The figures for ANZ, China, and Japan were 65%, 66%, and 72%, respectively.
- ▶ However, only a minority of 2023’s respondent Asian patient groups considered pharma “Excellent” or “Good” at:
 - access to medicines;
 - engaging patients in R&D;
 - pricing;
 - and
 - transparency.
- ▶ Where 2023’s respondent patient groups from the four countries did differ in their opinions on pharma was on the subjects of pharma’s innovation, and the industry’s integrity.

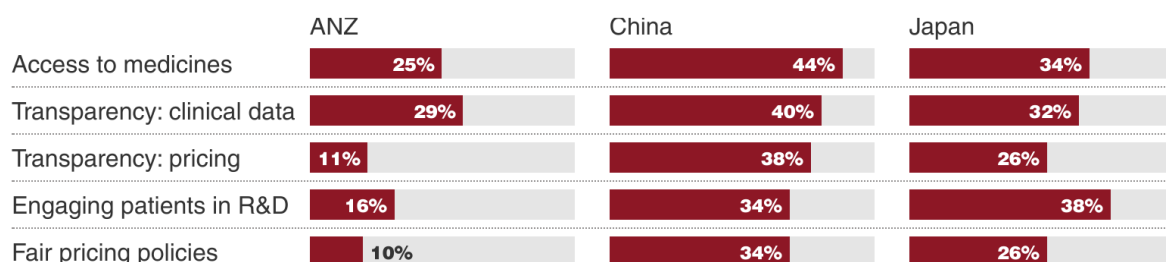
The corporate reputation of the pharma industry, 2023—according to respondent ANZ, Chinese, and Japanese patient groups

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

Country	2023	Versus 2022
ANZ	61	-8%
China	77	-3%
Japan	67	+5%

How good was the pharma industry at carrying out specific activities in Asia?
% of respondent patient groups stating “Excellent” or “Good”

Only a minority of patient groups believe pharma to be "Excellent" or "Good" at the following:



Countries in Asia vary in their opinions about pharma



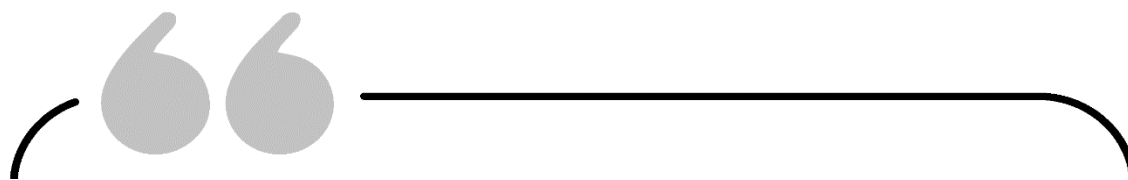
HOW CAN PHARMA IMPROVE IN ASIA? Moving Forward

In August 2024, PatientView launched a new toolkit for pharma companies interested in improving their patient relations and patient centricity, called ‘Moving Forward’. By analysing the numerous commentaries and feedback supplied to PatientView from respondent patient groups, the ‘Moving Forward’ toolkit identifies and emphasises the key priorities of patient groups of different countries and specialties. For instance, in the case of the Asia-Pacific region (and ANZ, China, and Japan, in particular), patient-group priorities for pharma are summarised in the table below. Just over 100 of the patient groups responding from the Asia-Pacific region supplied around 1,000 comments in ‘Moving Forward’ on what matters most to them regarding the 10 indicators of pharma corporate reputation.

Two key issues in Asia Pacific stand out. Asian patient groups would like to see pharma make progress in its relations with them—notably, by instituting sustainable, long-term relationships. On the topic of patient access to medicines, the chief advice from Asian patient groups is enhancements in the speed, and the quality, of both HTA and approvals. The commentaries below offer a small sample snapshot of what these Asian patient groups mean.

Asian patient-group priority list for pharma
 [number of patient group respondents]
 % of all respondent patient-group commentaries from each geographic region/country

	Asia-Pacific [111]	ANZ [34]	China [17]	Japan [22]
Patient centricity	7	7	6	10
Patient information	14	13	13	14
Patient safety	6	5	6	5
Products of benefit to patients	6	8	4	4
Transparency	10	10	7	14
Integrity	6	8	7	5
Patient-group relations	18	14	18	20
Services 'beyond the pill'	8	8	11	4
Engaging patient in R&D	10	9	6	15
Access to medicines	15	18	22	9



Patient-group relations

“Cooperate in establishing strong patient groups that facilitate a deeper understanding of patients—and support them.”

National respiratory-conditions patient-group, Japan

“Strengthen the non-profit purposes of maintaining collaboration. Stop using collaboration as a marketing exercise.”

National HIV/AIDS patient-group, China

Access to medicines

“To be honest [about] where they are at with the approval process. To have respect for patient organizations, and the patient community.”

National liver-diseases patient-group, Australia

“Including feedback from patients in submissions to the PBAC [Pharmaceutical Benefits Advisory Committee].”

National neurological-conditions patient-group, Australia

“Work with patients, and patient-advocacy groups [on products]. Share information and learning, globally, to speed up processes.”

National cancer patient-group, New Zealand

THE RESULTS FOR INDIVIDUAL PHARMA COMPANIES

The three pharma companies rated top for corporate reputation in ANZ, China, and Japan, 2023—according to Asian patient groups familiar, and which work, with the companies

[Numbers in brackets are the number of companies included in the total rankings, per country/region]

<i>Familiar with:</i>			
Rank	ANZ [13]	China [13]	Japan [8]
1st	Gilead Sciences	Gilead Sciences	Novartis
2nd	Roche	Takeda	Boehringer Ingelheim
3rd	AstraZeneca	Roche	Roche/Chugai

<i>Working with</i>			
Rank	ANZ [9]	China [7]	Japan [8]
1st	Gilead Sciences	Gilead Sciences	Novartis
2nd	AstraZeneca	Roche	Roche/Chugai
3rd	GSK	Takeda	AstraZeneca

Footnote:

List of companies included in the analyses:

- ▶ ANZ: • AbbVie • Amgen • AstraZeneca • Bayer • Bristol Myers Squibb • Eli Lilly • Gilead Sciences • GSK • Janssen • Novartis • Pfizer • Roche • Sanofi.
- ▶ China: • AbbVie • AstraZeneca • Bayer • Boehringer Ingelheim • Gilead Sciences • GSK • Janssen • Merck & Co/MSD • Novartis • Pfizer • Roche • Sanofi • Takeda.
- ▶ Japan: • Astellas • AstraZeneca • Boehringer Ingelheim • Eisai • Novartis • Pfizer • Roche (called Chugai in Japan) • Takeda.

Companies are assessed by 10 indicators of corporate reputation developed between patient groups and pharma.

Issues of importance to patient groups—as defined by patient groups



Finally, PatientView would like to thank the 176 Asian patient groups that gave up **their time to respond to the 2023 'Corporate Reputation of Pharma' survey.**

2023's respondent Asian 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 Asian patients' needs and expectations, will help the industry gain valuable insights into improvement.

Because many of the pharma companies featured in the Asia element of the 2023 'Corporate Reputation of Pharma' survey are currently building strategies around patients, the respondent feedback provided by the survey's Asian results can influence company models and approaches, enabling closer alignment with the needs and perspectives of Asian patients.

For further information on this 2023 Asia report, please use contact details at the head of the press release.

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