

WHAT 37 CARDIOVASCULAR PATIENT GROUPS SAY ABOUT PHARMA IN 2023-24

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Overview

PatientView is pleased to publish 'The Corporate Reputation of Pharma—from the Perspective of Cardiovascular Patient Groups, 2023' (the 1st cardiovascular edition in the annual 'Corporate Reputation' series). This 2023 review contains the results of a November 2023 to late-February 2024 survey, answered by 37 cardiovascular patient groups (with the largest representation being from the USA—five patient groups).

The 37 stated that, collectively, they had actively supported and served almost 1 million patients with a cardiovascular condition during the course of 2023/24. A profile of the respondent cardiovascular patient groups can be found at the end of this press release.

Continue reading, for details about ...

- ▶ The headline industry-wide cardiovascular results of the 2023 survey.
- ▶ The performance at corporate reputation of pharma companies included in the 2023 cardiovascular analysis.

SUMMARY OF RESULTS

INDUSTRY WIDE:

Issues during 2023 that may have influenced the opinions of respondent cardiovascular patient groups

In its 2023 report, 'Confronting the World's Number-One Killer', the Geneva-based World Heart Federation (WHF) stated that more than half a billion people around the world were affected by cardiovascular diseases (CVD) in 2021, accounting for 20.5 million deaths that year—or close to a third of all deaths globally. CVD, says WHF, is now the leading cause of premature death among men in 146 countries, and in 98 countries among women. Yet,

many cardiovascular conditions are preventable—lifestyle changes and drug treatment being capable of preventing 80% of premature heart attacks and strokes.¹

Death rates remain high for many reasons. According again to the WHF, four-in-five CVD deaths occur in low- and middle-income countries, chiefly because interventions are mainly practised in high-income countries. Furthermore, common modifiable risk factors—be they air pollution, obesity, smoking, or inadequate exercise—vary among populations, so that interventions need to be tailored accordingly.² Another factor complicating CVD is the accompanying presence of a wide range of other chronic conditions—such as diabetes, kidney disease, or rheumatoid arthritis.³ Many of the world’s national healthcare systems are not organised to accommodate the complexity raised by this level of comorbidity.⁴

On the subject of pharmaceutical interventions, a large repertoire of drugs (and combinations of drugs) is available to treat the different disorders that comprise CVD.⁵ But innovation appears to be proceeding at a slow pace, compared with that in other disease areas. According to 2024 R&D data from Pharmaprojects, the number of cardiovascular products in development—645—rank that pipeline only 18th in 2024. By contrast, oncology (immunological) has 4,860 compounds in development.⁶

Nonetheless, a better understanding of the epidemiology of CVD, with increased data on the molecular basis of the disease, plus the finding that certain diabetes drugs can be repurposed for the treatment of CVD, allied to the emergence of new startup companies dedicated to the development of novel CVD drugs, are, altogether, offering renewed scope and hope that patient outcomes in the field of CVD may be set for improvement.⁷

INDUSTRY-WIDE FINDINGS

As many as 77% of 2023’s respondent cardiovascular patient groups rate the pharmaceutical industry’s reputation “Excellent” or “Good”. This is the first year that PatientView has analysed cardiovascular results separately—so, no historical corporate-reputation data are available. Yet the industry’s reputation in 2023 in the field of cardiovascular conditions compares highly favourably with 2023’s ‘all-diseases’ figure of 57% [see table below].

2023’s respondent cardiovascular patient groups rank pharmaceutical companies first for corporate reputation out of nine healthcare sectors—slightly ahead of retail pharmacies and biotechnology companies (75% and 71%, respectively).

¹ <https://world-heart-federation.org/wp-content/uploads/World-Heart-Report-2023.pdf>

² <https://world-heart-federation.org/wp-content/uploads/World-Heart-Report-2023.pdf>

³ <https://cks.nice.org.uk/topics/cvd-risk-assessment-management/background-information/risk-factors-for-cvd/>

⁴ <https://pmc.ncbi.nlm.nih.gov/articles/PMC6532812/>

⁵ <https://www.heart.org/en/health-topics/heart-attack/treatment-of-a-heart-attack/cardiac-medications>

⁶ https://www.citeline.com/-/media/citeline/resources/pdf/white-paper_annual-pharma-rd-review-2024.pdf

⁷ <https://www.pharmaceuticalcommerce.com/view/innovation-in-heart-disease-a-deep-dive>

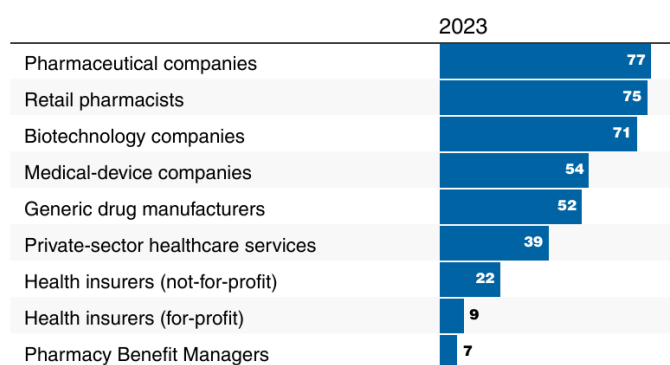
- ▶ 2023’s respondent cardiovascular patient groups judge pharma’s performance at ‘providing products of benefit to patients’ as the industry’s highest achievement among the various indices of corporate reputation—77% state an “Excellent” or “Good” corporate reputation here. ‘Innovation’ is seen by cardiovascular patient groups as the industry’s second-best area (67% seeing an “Excellent” or “Good” corporate reputation here). 2023’s comparable ratings therapy wide are 63% and 59%.
- ▶ However, 2023’s respondent cardiovascular patient groups do mark the pharma industry down for ‘transparent pricing’, and for ‘fair pricing policies’—with only 21% of cardiovascular patient groups seeing the industry’s corporate reputation in these areas as “Excellent” or “Good”.

Percentage of patient groups from different therapy areas stating that pharma has an “Excellent” or “Good” corporate reputation, 2023

Immune disorders	83%
Cardiovascular diseases	76%
Other autoimmune conditions	75%
Urinary conditions	75%
Gastrointestinal conditions	66%
Respiratory conditions	66%
Transplants	65%
Women’s health	65%
Visual impairment	63%
Bleeding disorders	62%
Men’s health	62%
Neuromuscular conditions	62%
Endocrine conditions	60%
Kidney diseases	60%
Rheumatic diseases	60%
Cancer	59%
General health	59%
Rare diseases	56%
Gynaecological conditions	55%
Skin conditions	55%
Carers, family, friends	54%
Neurological conditions	54%
Neurodegenerative diseases	53%
HIV/AIDS	52%
Allergic conditions	50%
Blood disorders	50%
Chronic diseases in general	48%
Children’s health	47%
Hepatitis	45%
Heart conditions	44%
Liver diseases	43%
Bone conditions	40%
Mental health	37%
Other disabilities	36%
Older people	25%

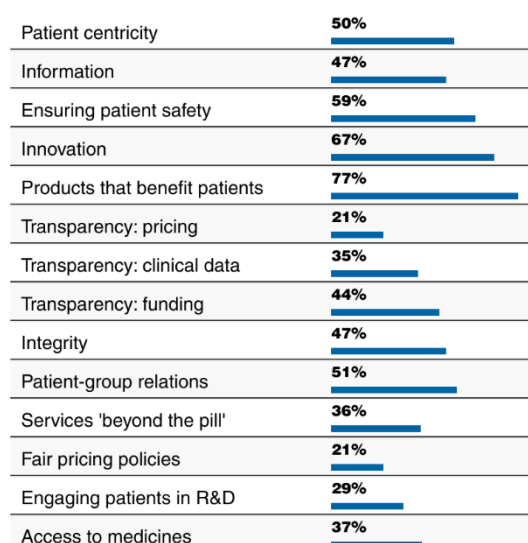
The corporate reputation of the pharma industry, compared with that of other healthcare sectors, 2023—according to cardiovascular patient groups

% of respondent cardiovascular patient groups, per year, stating “Excellent” or “Good”



How good or bad the pharma industry was at carrying out specific activities of importance to cardiovascular-conditions patient groups and patients, 2023

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





Advice from cardiovascular patient groups on how pharma can improve

« En décentralisant. Les associations régionales ne bénéficient plus d'actions spécifiques ou très peu. »
[*“Decentralising. Regional associations no longer benefit from specific activities—or only benefit to a limited extent.”*]

—Regional cardiovascular-conditions patient group, France

“Information should, ideally, be freely available, easy to access, easy to read, and in clear, uncomplicated language, please. Always helpful to ask patients to proof-read information too, where possible, please.”

—National cardiovascular-conditions patient group, UK

“As much as possible, help promote the work of patient-advocacy organizations with healthcare professionals and hospitals. Many organizations do great work that could be adopted by HCPs and healthcare facilities, rather than them re-inventing the same materials.”

—National cardiovascular-conditions patient group, USA

FINDINGS FOR INDIVIDUAL COMPANIES, 2023 v. 2022

Companies featured in the cardiovascular element of the 2023 survey results
10 companies are included in the cardiovascular 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:

- Amgen • AstraZeneca • Bayer • Boehringer Ingelheim • Bristol Myers Squibb • Novartis
- Novo Nordisk • Pfizer • Roche / Genentech / Chugai • Sanofi.

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



ALL PHARMA

The top-three overall rankings for corporate reputation in the field of cardiovascular conditions in 2023 (out of all 10 companies)

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

- ▶ **1st**, Boehringer Ingelheim
- ▶ = **2nd**, Amgen
- ▶ = **2nd**, Novartis

'BIG PHARMA'

The top-three overall rankings for corporate reputation in the field of cardiovascular conditions in 2023 (out of 8 'big-pharma' companies)

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

- ▶ **1st**, Boehringer Ingelheim
- ▶ = **2nd**, Amgen
- ▶ = **2nd**, Novartis

The top-three overall rankings for corporate reputation in the field of cardiovascular conditions in 2023 (out of 5 companies)

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

- ▶ **1st**, Boehringer Ingelheim
- ▶ **2nd**, Amgen
- ▶ **3rd**, Novartis

The top-three overall rankings for corporate reputation in the field of cardiovascular conditions in 2023 (out of 5 'big-pharma' companies)

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

- ▶ **1st**, Boehringer Ingelheim
- ▶ **2nd**, Amgen
- ▶ **3rd**, Novartis

Finally, PatientView would like to thank the 37 cardiovascular patient groups that gave up their **time to respond to the 2023 'Corporate Reputation of Pharma' survey.**

The respondent cardiovascular patient groups feel that the sharing of their evaluation and experiences on whether the pharma industry (and individual pharma companies) meets patient needs and expectations will help the industry gain valuable insights into improvement.

Because the ten pharma companies featured in the 2023 'Corporate Reputation of Pharma' cardiovascular edition 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 report, please use contact details below.

END OF PRESS RELEASE

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Appendix

Profile of respondent cardiovascular patient groups, 2023—by country headquarters
 Number of respondent cardiovascular patient groups

AFRICA	#
Total	1
South Africa	1

ASIA / PACIFIC	#
Total	2
Australia	1
China	1

EASTERN EUROPE	#
Total	6
Hungary	1
Latvia	1
Poland	3
Romania	1

LATIN AMERICA	#
Total	2
Brazil	1
Costa Rica	1

NORTH AMERICA	#
Total	6
Canada	1
USA	5

WESTERN EUROPE	#
Total	20
Austria	1
France	4
Greece	2
Ireland	2
Italy	2
Netherlands	1
Spain	4
Sweden	1
Switzerland	2
UK	1

Profile of respondent cardiovascular patient groups, 2023—by specialty
 Number of respondent cardiovascular patient groups, N = 37

CARDIOVASCULAR	#
Total	37
Cardiovascular and lung diseases	1
Cardiovascular: carers, family, friends	1
Cardiovascular: coronary heart disease	2
Cardiovascular: most types	20
Cardiovascular: other	4
Cardiovascular: rehabilitation	1
Cardiovascular: women's	1
Familial hypercholesterolaemia (FH)	7