

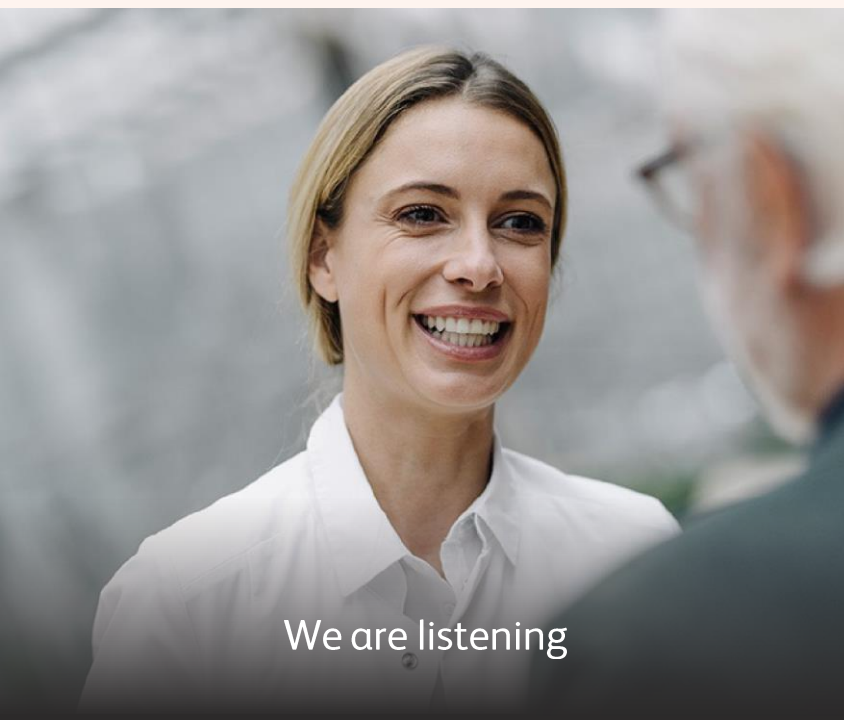
# Because there is more to do



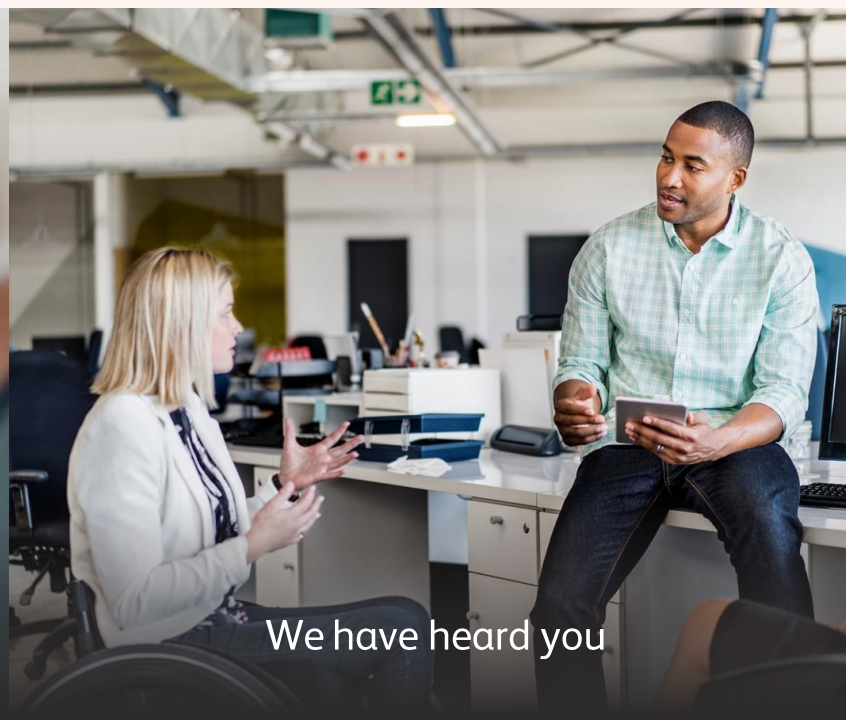
Opening the conversation:

How can pharma companies better respond to the health and wellbeing needs of patients?

We conducted surveys with the public, patients, carers, patient advocates and healthcare professionals across eight European countries, to better understand what more we can do. This report is a synthesis of those findings.



We are listening



We have heard you



Let's act together!

# What more can we do?

Bristol Myers Squibb's mission is to discover, develop and deliver innovative medicines that help patients prevail over serious disease. But we firmly believe that this does not stop with our science and innovative medicines.

As a responsible corporate citizen, we should always strive to do more to support patients along their treatment journeys, and work in partnership across healthcare to enable this. It is this belief that led to the creation of the initiative 'Because there is more to do'.

We wanted to understand:

- What **healthcare challenges and unmet needs** do people and their loved ones have?
- What do you think can be done to **improve peoples' lives** and make a bigger contribution?
- How can pharma companies **better address them**?
- **What is your opinion** of pharma companies and their role in society?

## It all starts with listening:

Our journey started in late 2020 as we reflected on these important questions. This led us to ask **what more can we do** as a leading biopharmaceutical company and member of society? We decided that we cannot determine this alone. To best understand what is needed, we conducted surveys across eight European countries to listen to your views.

## The 'Because There is More To Do' surveys:

- A public survey\* open to everyone.
- A patient & professional survey\*\* This 'deeper-dive' study engaged patients, caregivers, patient advocacy groups and healthcare professionals to gain a better understanding of unmet needs and challenges that people face, asking for their suggestions on how pharma companies can solve them.



### *The 'Because There is More To Do' surveys:*

\* The public survey was an open invitation from Bristol Myers Squibb asking people to share their views and opinions on the pharmaceutical industry and companies, and the challenges people face for healthcare provision. 821 adults responded to an online public survey across eight countries via social media, paid ads on healthcare sites and direct mails from BMS. Respondents were predominantly patients, healthcare & pharma professionals.

\*\* The patient & professional survey was done across eight countries. It was based on two anonymous online surveys: one with feedback from 839 primary care physicians, cardiologists and oncologists; another with responses from 214 oncology or atrial fibrillation patients, and caregivers of patients with these conditions. In addition, exploratory qualitative research was done with 40 patient advocacy groups to gain greater insights.

All surveys were done in Austria, Belgium, Denmark, Finland, The Netherlands, Norway, Switzerland and Sweden.

For full details on the public and patient & professional surveys, please see [the Annex](#).

# First of all: Thank you

To the people, patients, carers and healthcare professionals across eight European countries.

## For taking the time to share

your feedback, thoughts and insight to our surveys, on how you think the pharma industry can provide support, beyond medicines, and what more you think we can do.

## For your transparency and honesty.

This has given us a clear idea of the the unmet needs of patients and their relatives and what more is expected from pharma.

## This gives us a mirror to look at ourselves in a different light.

From the outside in. To see how we can do more to make a positive contribution to:

- The lives of patients and their loved ones
- Supporting patient advocacy groups and healthcare professionals
- Society at large



## We are listening:

Your insights will inspire new approaches

We commit to sharing and discussing these findings with stakeholders in countries where Bristol Myers Squibb serves.

Your insights will inspire us to explore new ideas together for local community initiatives. We will ensure that we communicate to you more on these developments – through our website and social media.

# Synthesis report Public survey

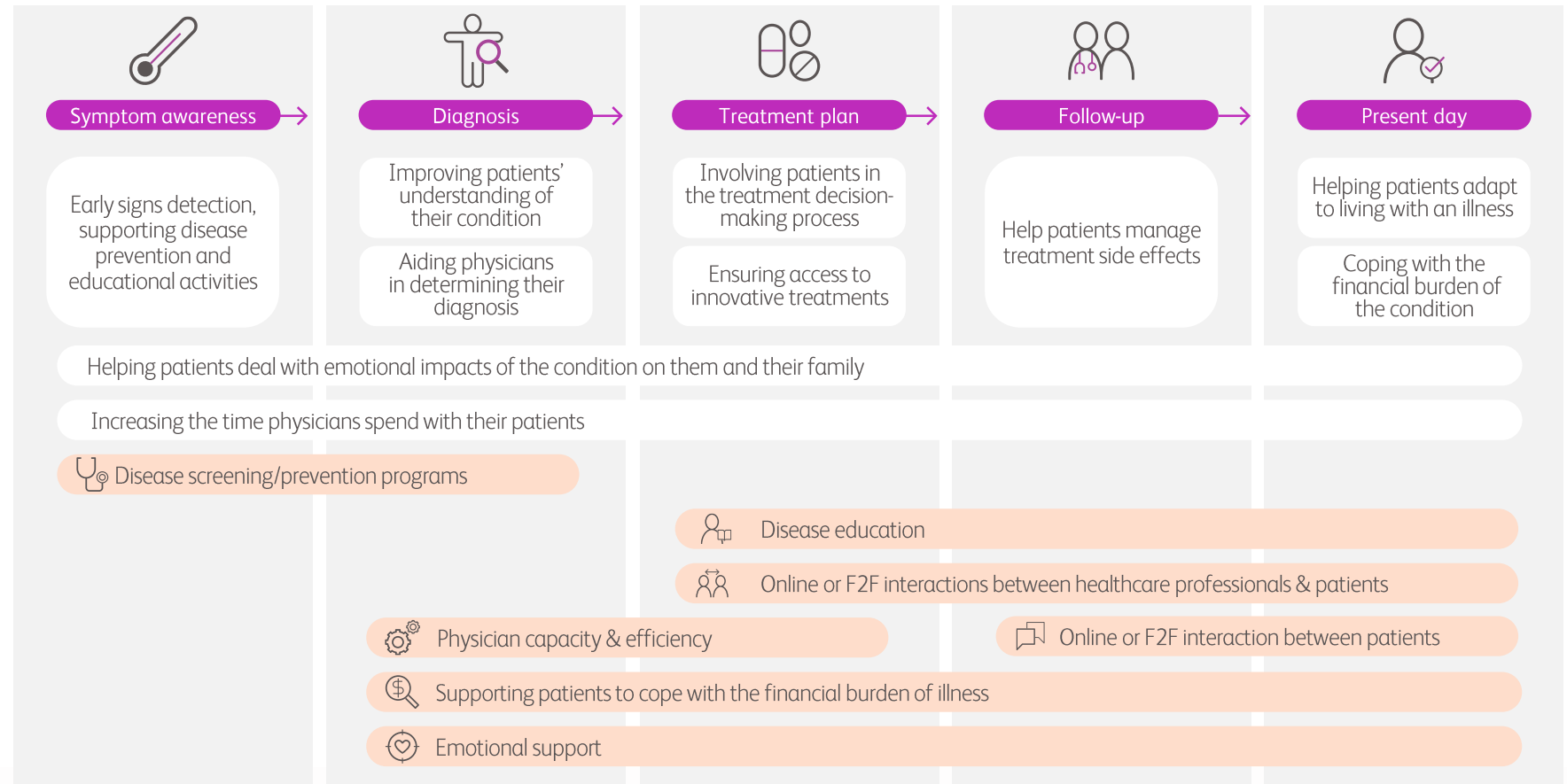


What you told us

# Synthesis report Deep-dive: professional and patient survey

What are the  
current unmet needs?

How can pharma partner to  
help support patients and  
meet these challenges?





Public survey insights

# What you told us

# What you told us:

We can improve impact by better communicating & collaborating with others

People responding to the **public survey\*** are calling for pharma companies to:



Show responsible behaviour in all aspects of business.



Be a responsible corporate citizen.



Support patients beyond treatments.

**We agree. Pharma should play a wider role in healthcare & society.** We are active in all these areas today, and will respond to your insights, to see what more we can do.

\* Public survey open to every one in The Netherlands, Denmark, Finland, Norway, Sweden and Switzerland, 821 adults responded: predominantly patients and carers, healthcare & pharma professionals.

## What the public told us

# Pharma's role is to provide innovative medicines to patients

**77%** of survey respondents agree that the pharma industry's role is to create new medicines which improve the quality of life of patients.

**86%** of survey respondents agree that pharmaceutical companies conduct valuable research and develop new medicines.





## What the public told us

Pharma companies have a responsibility to **improve patients' overall quality of life**

**91%**

of survey respondents agree that pharma companies should improve patients' quality of life.

**55%**

of survey respondents agree or strongly agree that BMS creates new medicines which improve patients' quality of life.



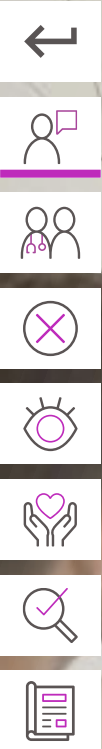
What the public told us

# Pharma should be a responsible corporate citizen

**90%** of survey respondents agree.

**49%** agree pharmaceutical companies  
are responsible corporate citizens.

Clearly, there is  
more to be done here.



## What the public told us

# Pharma in society: contrasting views value, money & responsibility

**50%** of survey respondents agree or strongly agree that pharma is only interested in making money.

**53%** agree that pharma companies care about the patients for whom they produce medicines.

## What respondents expect of us

Clarity on the **value of medicines**  
Some comment that they do not understand pricing, value and the cost of medicines.

A need for **greater transparency**  
Many respondents say they do not know pharma companies or understand what they do.

We will communicate more on this to help improve understanding.

We commit to communicating more clearly.

— A number of responses received to open-ended questions.

A1. To what extent do you agree or disagree with the following statements about pharmaceutical companies? [1=Strongly disagree, 2=Tend to disagree, 3=Neither agree nor disagree, 4=Tend to agree, 5=Strongly agree, Don't know, Prefer not to say] (adults who responded: predominantly patients and carers, healthcare & pharma professionals. n=821)



## What the public told us

# Pharma should play a wider role in healthcare & society

Survey respondents agreed we need to work and collaborate more with healthcare professionals (55%), the scientific community (47%) and patient organisations (48%).

We appreciate this useful perspective: as a next step we will engage with these groups to determine what more we can do.



## What the public told us

# Be more involved in education & information

**52%** of respondents agree that pharma companies provide educational support to patients & their families.

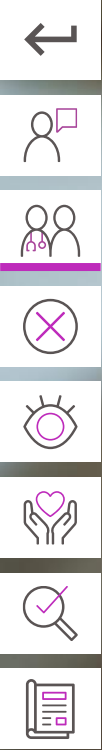
## What respondents expect of us

More support for disease-specific information, for example: web & post-treatment services.

**46%** of survey respondents agreed that disease preventing programs could be better supported by pharma.

— Out of 11 potential services assessed: 41% specified education; 42% screening, 46% better education for disease prevention.





Deep-dive survey insights

# Patient & professional perspectives

# Patient & professional perspectives

What more can we do to support patients along their treatment journeys, and be a partner across the healthcare landscape to enable this?

The **patient & professional survey**\* was a deeper-dive to hear the views of patients and healthcare professionals. They offered feedback about current unmet needs, peoples' views of pharma, and potential areas where Bristol Myers Squibb and pharma can take action.

To do this we asked for feedback from\*:

- **Patients** in oncology and atrial fibrillation and their carers.
- **Patient advocacy groups** working in these disease areas.
- **Primary care physicians, oncologists and cardiologists.**

Some highlights:



**Unmet needs, for example:** Prevention & diagnosis; coping with mental stress; better disease education; a need for more doctor-patient time.



**Perceptions of pharma:** Many are well-informed of pharma companies' activities, and feel pharma can play a wider role – beyond medicines.



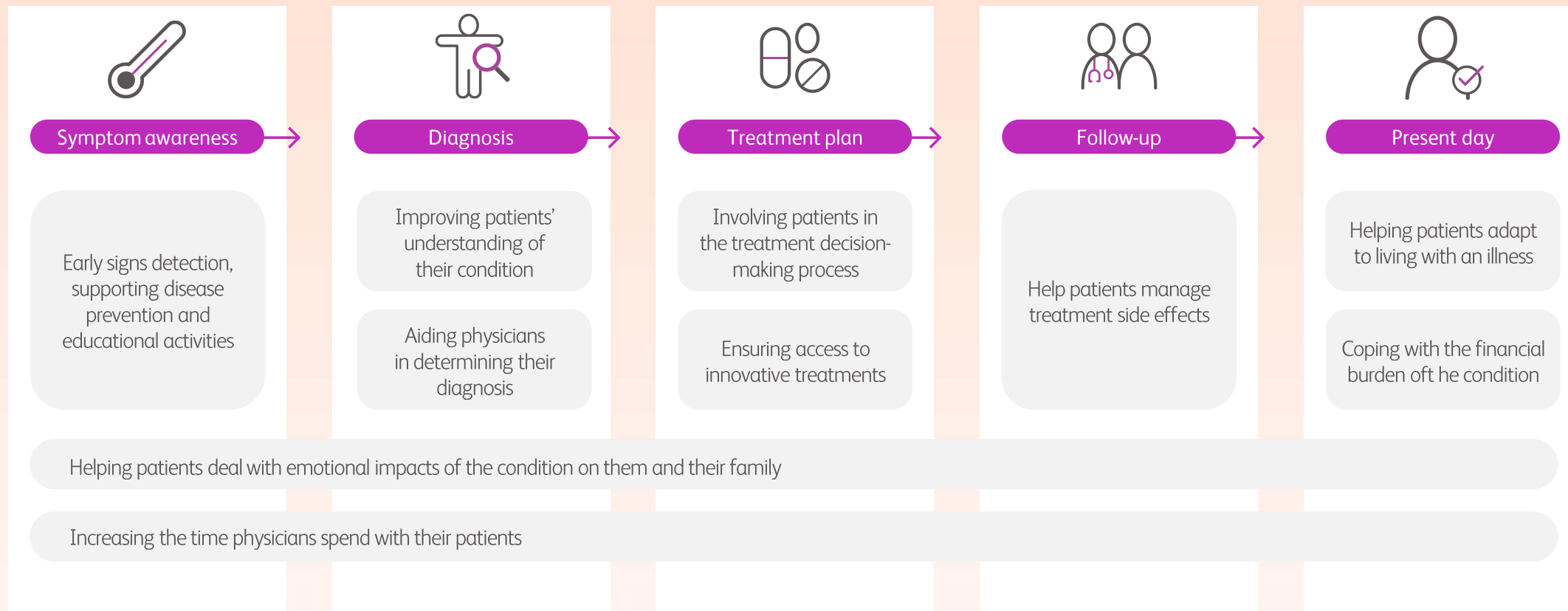
**New areas where pharma can act, for example:** Emotional support & education; financial support; new partnerships with patients, caregivers, professionals; facilitating face-to-face and peer groups interactions.

**Thank you for these valuable insights.**  
They inform what more we can do and the actions we can take together, going forward.

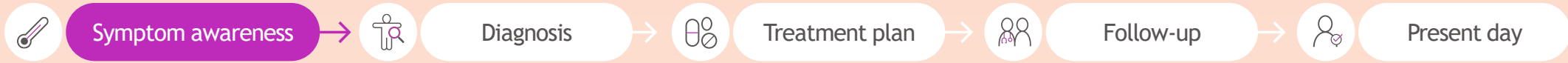
\* Online study with 214 oncology or atrial fibrillation patients and caregivers of patients with those conditions in Austria, Belgium, The Netherlands, Denmark, Finland, Norway, Sweden and Switzerland; all countries weighted equally. Exploratory qualitative research was also done with 40 patient advocacy groups. For full details, [please see the Annex](#)

# Identifying key needs along the patient journey

Across the patient journey there are a broad range of needs, dependent on individuals' exact circumstances and conditions. However patients, patient association groups and physicians identify the following areas as key needs across the patient journey.







Unmet needs

# Disease prevention

Pharma can bring valuable support with education actions



of the healthcare professionals surveyed, who say that pharma should invest in local activities\*,

# 25%

say they would most like to see pharma invest in **‘supporting education initiatives for disease prevention’**.

Selected from a list of 10 points



PAGs



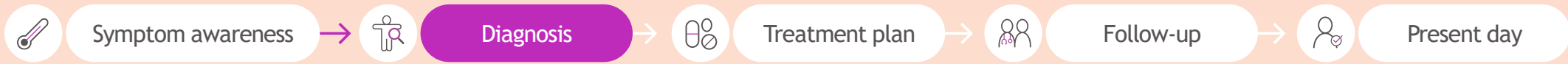
Insights from patient groups

**There is a need for more knowledge on diseases & treatment options.**

Here, a key objective is to raise disease awareness among the public to enable better management at the early stages of an illness. But patient association groups still struggle to spread awareness to a wider audience.

Qualitative research

\* Those who tend to agree or strongly agree that pharmaceutical companies should support activities in partnership with patient groups, or other pharmaceutical companies, or aim to support patients beyond medicinal treatment. B4. You indicated that pharma companies should invest in meaningful local activities, please select which of the following, you would like to see investment into the most. Base: n=831. Those HCPs who selected that pharma companies should support activities with patient groups/other pharma companies/support beyond medicinal treatment



Unmet needs

# Reaching a correct diagnosis

Physicians say this is a key challenge



38%

of physicians surveyed say that **‘determining the diagnosis’** is among the Top-5 most challenging stages for managing patients.

Selected from a list of 28 points

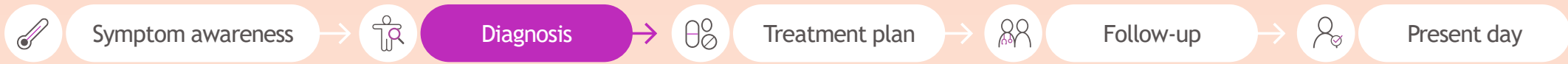


Insights from patient groups

Reaching a correct diagnosis can be difficult.

*“Heart disease is often a silent disease, it can be silent for many years.”  
“Often, the symptoms aren’t being connected to the right disease.”*  
Switzerland

Qualitative research



Unmet needs

# Better disease education is needed

Say patients, caregivers & physicians



23%

of physicians surveyed say that **‘educating the patient about their condition’** is among the Top-5 most challenging stages for managing patients.

Selected from a list of 28 points



25%

of patients and caregivers surveyed say that **‘understanding the condition’** is among their Top-5 most challenging stages of their condition.

Selected from a list of 23 points



Insights from patient groups

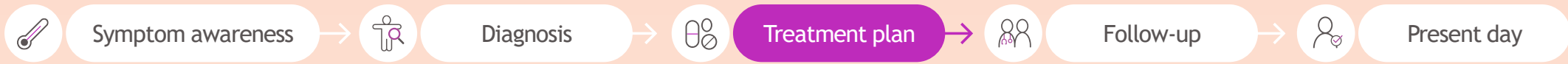
**Empowered patients.**

Some patient association groups acknowledge the difficulties that patients have to understand their disease. These groups aim to raise knowledge, awareness and educate patients. Some groups say they want patients to be more empowered and involved in their treatment decisions.

Qualitative research

QA2. Select item importance (pick max. 5 items out of 23) - which of the following stages, would you say were the most challenging for you/the person you care for with this condition? Base: Patients/caregivers (n=214)

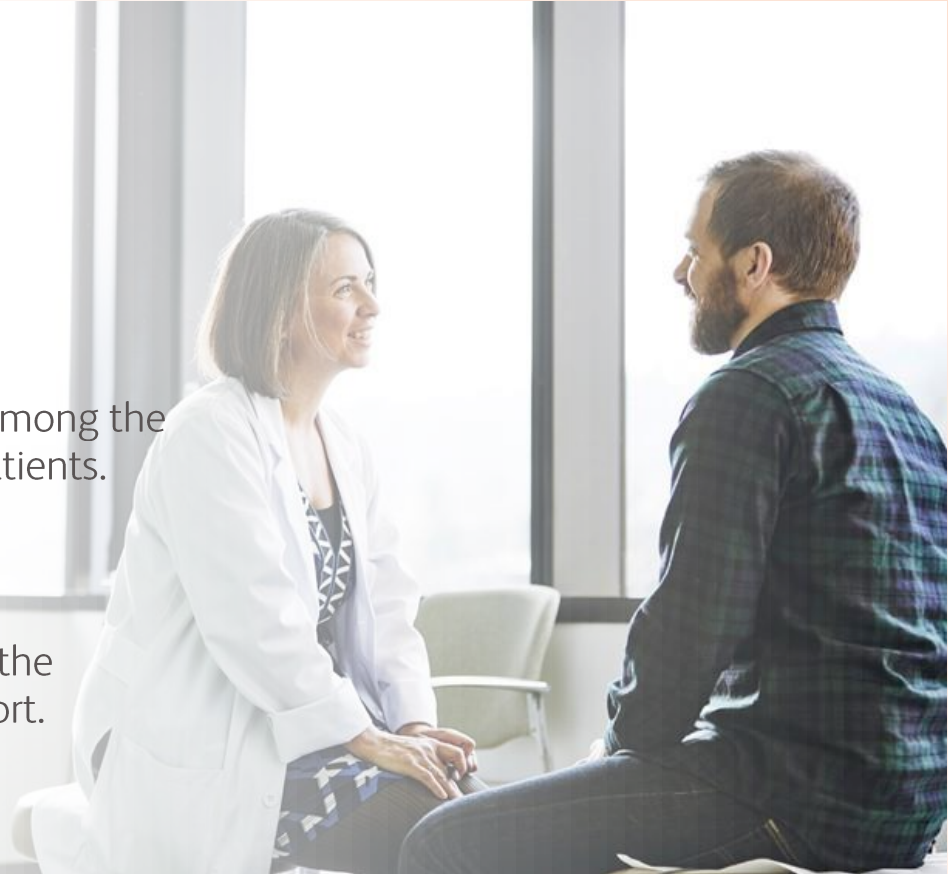
QA1. Select item importance (pick max. 5 items out of 28) - Which of the following stages would you say present the most challenges to you as a physician? Base: Total n=839 physicians



Unmet needs

# Discussions on treatment options

Patients, caregivers & physicians agree this needs improving



HCPs

23%

of physicians surveyed say that **'discussing treatment options with the patient'** is among the Top-5 most challenging stages for managing patients.

Selected from a list of 28 points



Patients Caregivers

14%

of patients and caregivers surveyed say that **'discussing treatment options'** is among the Top-5 areas where they would value more support.

Selected from a list of 23 points



Insights from patient groups



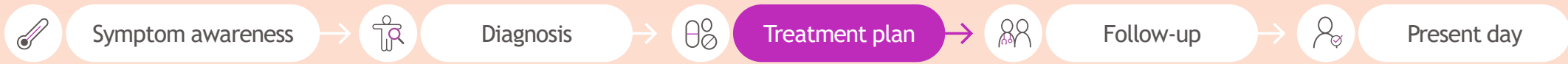
PAGs

Some patient groups say that patients, their friends and families often ask them about current and future 'treatment options', and sometimes feel ill-equipped to educate them.

Qualitative research

QA5. Statement ranking (23 statements) - which of the following stages, would you/the person you care for have appreciated more support? Base: Patients/caregivers (n=214)

QA4. Select item importance (pick max. 5 items out of 28) - At which of the following stages would you like to be able to provide more support to your patients? Base: Total n=839 physicians



Unmet needs

## Access to innovative treatments

Some physicians want to provide more support



HCPs

**26%**

of physicians surveyed say that they want to provide more support to their patients to **'access innovative treatments'**.

Selected from a list of 28 points



Patients  
Caregivers

**11%**

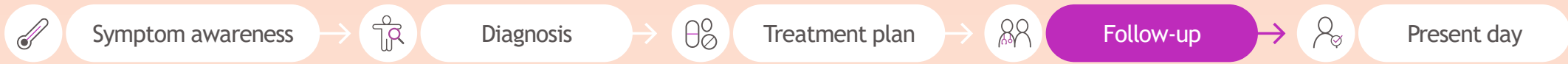
of patients and caregivers surveyed say that **'access to innovative treatments'** is among the Top-5 most challenging stages of their condition.

Selected from a list of 23 points



QA4. At which of the following stages, if any, would you like to be able to provide more support to your patients beyond the provision of medicines and surgery, but are unable to do so currently? [select up to five from a list of 28]

Base: n=839 (All physicians) QA2. Select item importance (pick max. 5 items out of 23) - which of the following stages, would you say were the most challenging for you/the person you care for with this condition? Base patients/caregivers n=214



Unmet needs

# Managing the side effects of treatment

A challenge for patients & physicians



25%

of patients and caregivers surveyed say that **'treatment side effects'** is among the Top-5 most challenging stages of their condition.

Selected from a list of 23 points



24%

of physicians surveyed say that **'managing treatment side effects'** is among the Top-5 most challenging stages for managing patients.

Selected from a list of 28 points



Insights from patient groups

Getting the right treatment and coping with its side effects can be a challenge for patients.

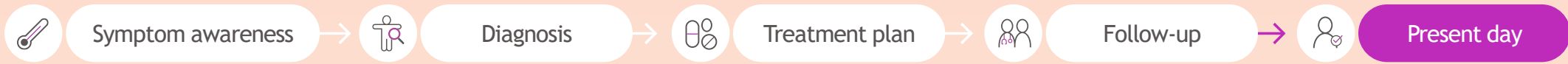
There are two main challenges:

- Getting the right therapy for patients.
- But mostly, it is handling the side effects.

Qualitative research

QA2. Select item importance (pick max. 5 items out of 23) - which of the following stages, would you say were the most challenging for you/the person you care for with this condition? Base: Patients/caregivers (n=214)

QA1. Select item importance (pick max. 5 items out of 28) - Which of the following stages would you say present the most challenges to you as a physician? Base: Total n=839 physicians



Unmet needs

# Dealing with financial impacts of illness

A 'key challenge' for patients & caregivers



22%

of patients and caregivers surveyed say that **'dealing with the financial burden caused by having an illness'** is among the Top-5 most challenging stages of their condition.

Selected from a list of 23 points

19%

of patients and caregivers surveyed say that **'dealing with the financial burden caused by an illness'** is among the Top-5 areas where they would appreciate more support.

Selected from a list of 23 points



PAGs



Insights from patient groups

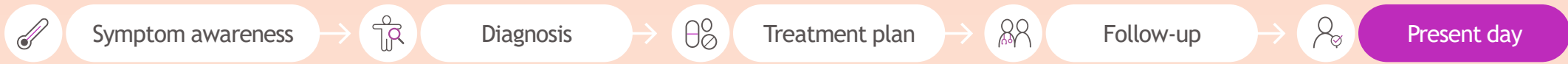
*"There are a lot of patients that need psychological support, others need financial support."*

A Swiss patient association group

Qualitative research

QA2. Select item importance (pick max. 5 items out of 23) - which of the following stages, would you say were the most challenging for you/the person you care for with this condition? Base: Patients/caregivers (n=214)

QA5. Statement ranking (23 statements) - which of the following stages, would you/the person you care for have appreciated more support? Base: Patients/caregivers (n=214)



Unmet needs

# Helping patients live with their condition

More can be done, say patients, caregivers & physicians



Patients  
Caregivers

Of patients and caregivers who shared the Top-5 most challenging stages of their condition,

**13%** say that **'managing the physical impact of the condition on the family'** is a challenge.  
Selected from a list of 23 points

**28%** say that **'learning to adapt to live with the condition'** is a challenge.  
Selected from a list of 23 points

HCPs

Of doctors who shared their Top-5 most challenging stages for managing patients,

**26%** say **'helping patients to adapt to living with the condition'**.  
Selected from a list of 28 points

Citing their Top-5 stages where more support would be valued, beyond the provision of medicines and surgery,

**13%** say **'helping patients cope with the physical impact caused by the condition'**.  
Selected from a list of 28 points

PAGs



Insights from patient groups

Some patient association groups surveyed currently offer a range of practical and emotional support.

*"The psychologist at the hospital... I always try to advise people who are having a hard time to use that."*  
Belgium

Qualitative research

A1. Thinking about your experience of treating and managing your pts, which of the following stages would you say present the most challenges to you as a physician? [select up to 5 from a list of 28] Base: n=839 (All physicians) A4. At which of the following stages, if any, would you like to be able to provide more support to your patients beyond the provision of medicines and surgery, but are unable to do so currently? [select up to 5 from a list of 28] Base: n=839 (All physicians) A5. At which of the following stages, if any, do you think [PN: PATIENT INSERT you] [PN: CARER INSERT the person you care for] would have appreciated more support? [select up to 5 from a list of 23] Base=214 (All patients/caregivers)





Symptom awareness



Diagnosis



Treatment plan



Follow-up



Present day



Unmet needs

# Coping with the mental stress of a condition

A 'key challenge', say patients, caregivers & physicians



HCPs

# 28%

of physicians surveyed say that **'helping patients cope with the mental stress caused by the condition'** is among the Top-5 stages where they would like to provide more support to patients.

Selected from a list of 28 points



Patients Caregivers

# 30%

of patients and caregivers surveyed say that **'coping with mental stress caused by the condition'** is among their Top-5 most challenging stages for them or person they care for.

Selected from a list of 23 points



Insights from patient groups



PAGs

Patient groups say that the **physical burden of the condition has a heavy effect on patients' psychological and emotional wellbeing**, to the extent patients are often unable to go to their immediate support network of family and friends, so peer support is vital.

Qualitative research

QA2. Select item importance (pick max. 5 items out of 23) - which of the following stages, would you say were the most challenging for you/the person you care for with this condition? Base: Patients/caregivers (n=214)

QA4. At which of the following stages, if any, would you like to be able to provide more support to your patients beyond the provision of medicines and surgery, but are unable to do so currently? [select up to 5 from a list of 28] Base: n=839 (All physicians)



Symptom awareness



Diagnosis



Treatment plan



Follow-up



Present day



Unmet needs

## A need for more doctor-patient time

A 'most common challenge' reported by physicians



HCPs

# 41%

of physicians surveyed say that **'having sufficient time to provide adequate care to all the patients I have to manage'** is among the Top-5 most challenging stages for managing patients.

Selected from a list of 28 points

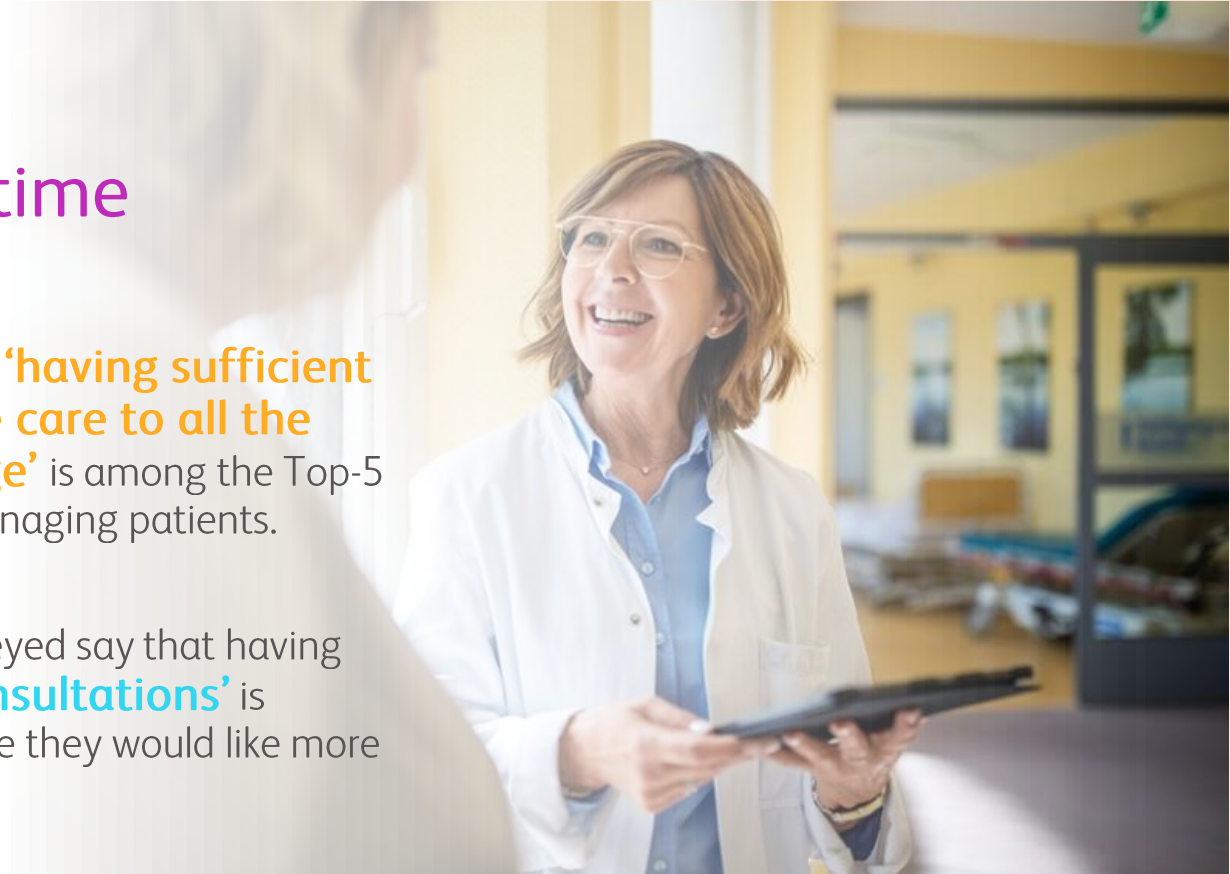


Patients Caregivers

# 24%

of patients and caregivers surveyed say that having **'more time in medical consultations'** is among the Top-5 services where they would like more access.

Selected from a list of 19 points



Insights from patient groups



PAGs

### Critical challenges to tackle.

Patients want to feel heard by healthcare professionals, and need outlets to discuss their emotional response – following often stressful and short consultations.

Qualitative research

QA1. Select item importance (pick max. 5 items out of 28) - Which of the following stages would you say present the most challenges to you as a physician? Base: Total n=839 physicians

A8. Which of the following services, if any, would you/the person you care for like access to? Base: Total patients/caregivers n=214

## Views & perceptions of pharma

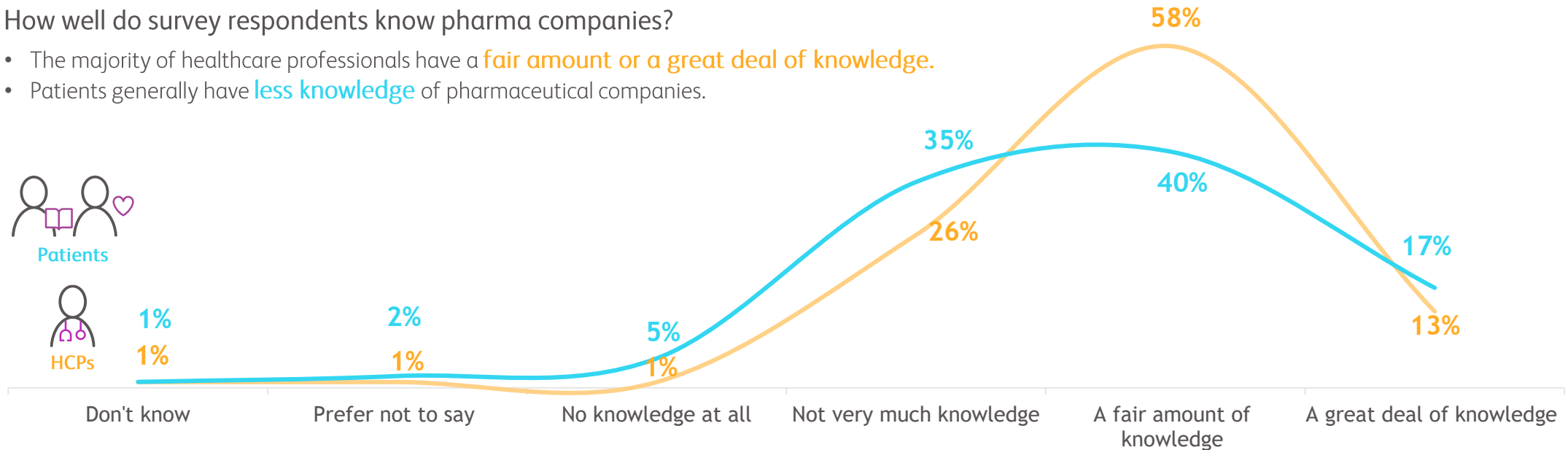
# Toward new roles for pharma

## How can we best take action to support patients' unmet needs?

Reflecting on the unmet needs voiced by patients and professionals in this survey, the rich and informative feedback that was shared reveals new areas where respondents think pharma can do more. *The following two sections present these groups' current views of pharma and their suggestions for how pharma can support in new ways.*

### How well do survey respondents know pharma companies?

- The majority of healthcare professionals have a **fair amount or a great deal of knowledge**.
- Patients generally have **less knowledge** of pharmaceutical companies.





Views & perceptions of pharma

## Very few physicians currently see pharma as a partner for providing patient care



HCPs

Only  
**6%**

of healthcare professionals surveyed say that pharma is **currently important in providing overall care to patients.**

But they do see hospital nurses (59%), other physicians (56%), and community nurses (34%), as the most important partners.

Selected from a list of 14 points



Views & perceptions of pharma

# But others think pharma can play a wider role: beyond providing medicines

Voices from a majority of patients, caregivers & healthcare professionals

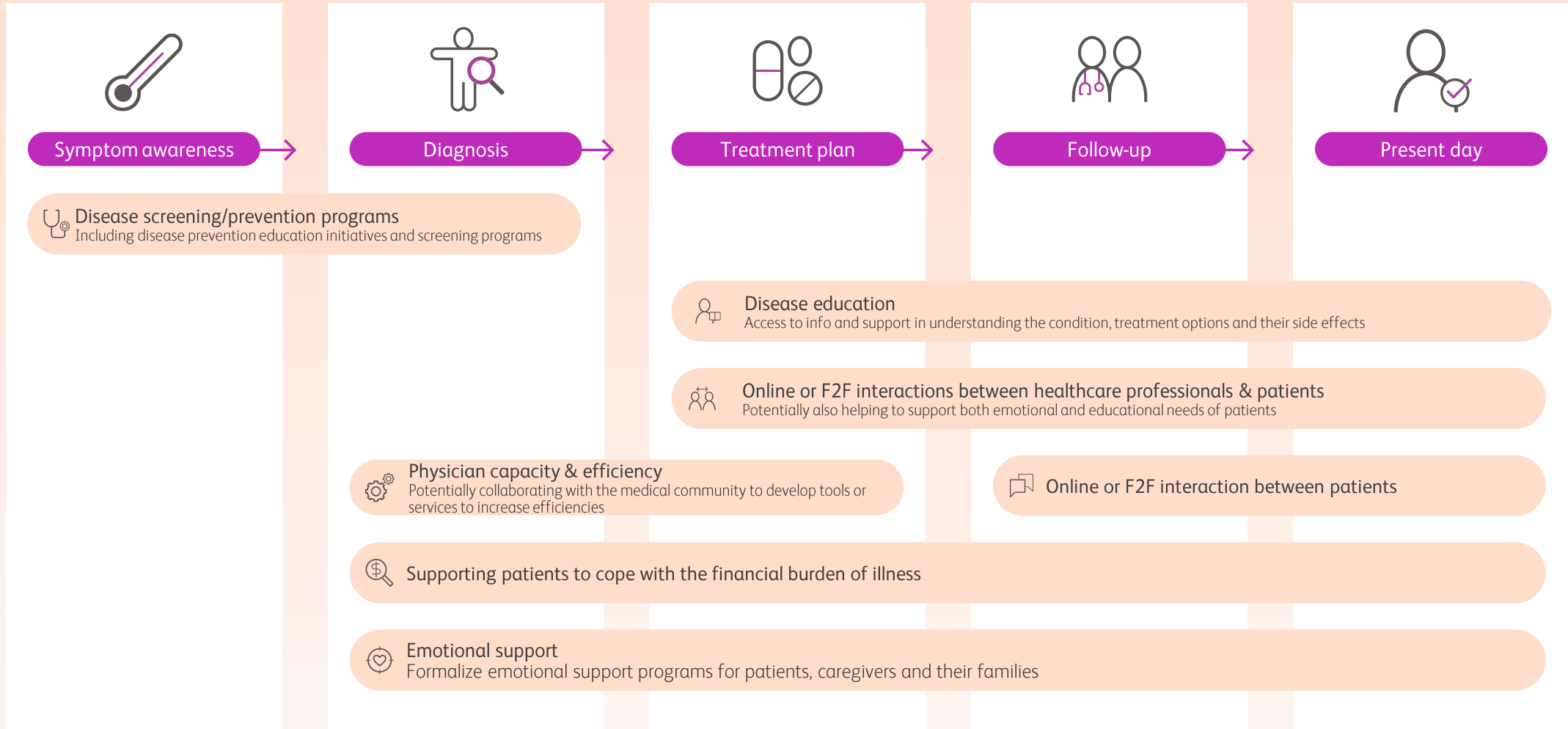
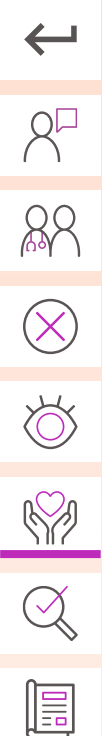
	HCPs	Patients Caregivers	
Deliver innovative medicines	94%	82%	Ensure that all patients get fast access to new medicines and therapies
Be responsible corporate citizens in my country	88%	81%	Support activities in partnership with healthcare professionals
Improve patients' quality of life	86%	80%	Improve patients' quality of life
Ensure that all patients get fast access to new medicines and therapies	85%	79%	Be responsible corporate citizens in my country
Take an active part in contributing to a cost-effective healthcare system	85%	78%	Deliver innovative medicines

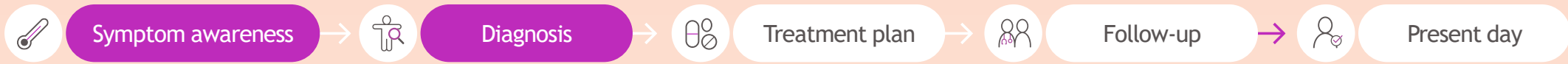
Percentage of respondents who agree or strongly agree on a 5-point scale with each statement.

B3/B4. To what extent do you agree or disagree that pharmaceutical companies should do the following? [1=Strongly disagree, 2=Tend to disagree, 3=Neither agree nor disagree, 4=Tend to agree, 5=Strongly agree, Don't know, Prefer not to say] (Total patients/caregivers n= 214, physicians n=839)

# How can BMS support patients, carers and physicians?

Patients, carers, patient association groups and physicians identified solutions that can improve patient experiences along their journey.





How pharma can support

# A call for more disease prevention & screening

Patients say pharma can provide better support



HCPs

21%

of physicians surveyed say that **'disease prevention programs'** are among the Top-5 services that will improve patients' experience of living with their condition.

Selected from a list of 19 points



Patients  
Caregivers

23%

of patients and caregivers surveyed say that **'disease screening'** is among the Top-5 services that they want to see better supported by pharma.

Selected from a list of 13 points

23%

of patients and caregivers surveyed say that **'disease prevention programs'** are among the Top-5 services that they want to see better supported by pharma.

Selected from a list of 13 points



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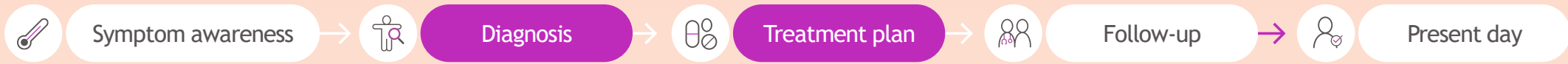


Insights from patient groups

Some groups cite **lobbying** as a key objective. Others focus on **prevention and early detection** of the specific cancer that they address.

Qualitative research

QC2. Select item importance (pick max. 5 items out of 13) - Which, if any, of the following services would you like to see better supported by pharmaceutical companies? Base: Patients/caregivers (n=214)  
 QA7. Select item importance (pick max. 5 items from 19) - Which, if any, of the following services would improve patients' experiences living with their conditions? Base: Physicians (n=839)



How pharma can support

# Potential to build physicians' capacity; create new tools & services

Benefits of medical community & health-tech partnerships



- ←
- 👤
- 👥
- ⊗
- 👁️
- 👉
- 🔍
- 📄

 **22%**

of physicians surveyed who selected **'insufficient physician time and capacity'** as an unmet need, think it can be addressed in collaboration with the pharmaceutical industry.  
Selected from a list of 12 points

 **38%**

of patients and caregivers surveyed say that **'health technology companies'** are among the Top-5 groups with whom they think pharma companies can collaborate more.  
Selected from a list of 12 points

**54%**

of patients and caregivers surveyed say that **'healthcare professionals and the medical community'** are among the Top-5 groups with whom they think pharma companies can collaborate more.  
Selected from a list of 12 points

 **PAGs**

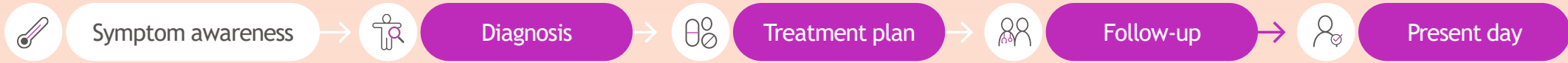
“ Insights from patient groups  
**Pharma can support hospitals by helping patients along their treatment journeys.**

Some patient groups commented that pharma can help with **psychological support, training and services**, for example by launching rehabilitation centres and helping with skilling of healthcare professionals.

Qualitative research

C3. Which, if any, of the following people or groups do you think pharmaceutical companies should be cooperating with more? (pick max. 5 items from 12) - People or groups patients and caregivers think pharma should be cooperating with more Base: Patients/caregivers (n=214) A9. Beyond medication, which if any, of these unmet needs do you think could be addressed in collaboration with the pharmaceutical industry to support your patients? Base: Physicians who think there are needs that can be addressed by pharma (n=792)

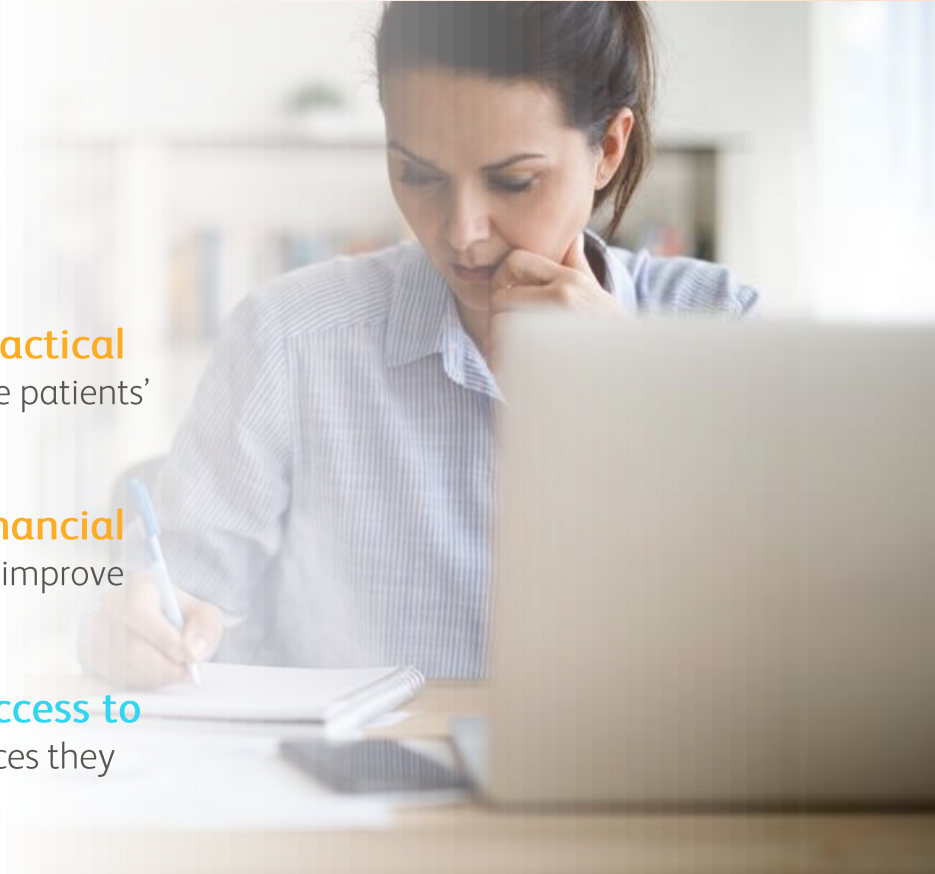




How pharma can support

# Direct financial support from pharma

Requested by some patients



HCPs

25%

of physicians surveyed say that **'direct access to practical support'** is among the Top-5 services that will improve patients' experience of living with their condition.  
Selected from a list of 19 points

10%

of physicians surveyed say that **'direct access to financial support plans'** is among the Top-5 services that will improve patients' experience of living with their condition.  
Selected from a list of 19 points



Patients  
Caregivers

20%

of patients and caregivers surveyed say that **'direct access to financial support plans'** is among the Top-5 services they would like to access.  
Selected from a list of 13 points



Insights from patient groups



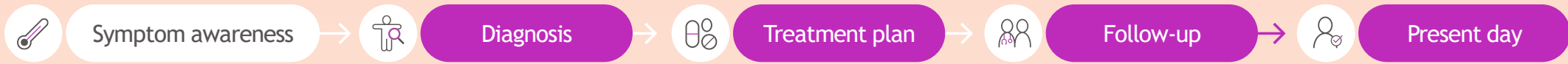
PAGs

While not all patient association groups interviewed can provide financial support to patients, some say they **want to set up funds** to help patients during tough times. They commented that support from pharma is mainly financial. Some groups say this tends to be **limited to financing events and information materials** for events, such as flyers.

Qualitative research

A8. Which of the following services would you/the person you care for like access to? (pick max. 5 items out of 19) Base: Patients/caregivers (n=214)

QA7. Select item importance (pick max. 5 items from 19) - Which, if any, of the following services would improve patients' experiences living with their conditions? Base: Physicians (n=839)



How pharma can support

# Emotional support for patients, carers & their families

Pharma facilitation would be useful



28%

of physicians surveyed say that **'helping patients cope with mental stress caused by the condition'** is among the Top-5 areas where they would like to provide more support to their patients.  
Selected from a list of 28 points



31%

of patients and caregivers surveyed say that **'emotional support for patients'** is among the Top-5 services they would like to see better supported by pharma.  
Selected from a list of 13 points

31%

of patients and caregivers surveyed say that **'post-treatment services'** are among the Top-5 services they would like to see better supported by pharma  
Selected from a list of 13 points



PAGs



Insights from patient groups

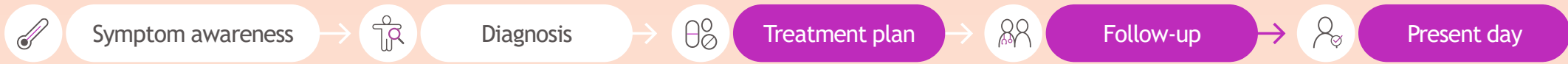
Some groups agree that emotional support is key and a partially unmet need for many people. But is this an area where pharma should be directly involved?

*"I don't know what role a pharmaceutical company can play. The emotional support comes more from the other peers; I don't think a pharmaceutical company can contribute anything to that."*

Belgium

Qualitative research

QA4. Select item importance (pick max. 5 items out of 28) - At which of the following stages, if any, would you like to be able to provide more support to your patients beyond the provision of medicines and surgery, but are unable to do so currently? Base: Total n= 839 Physicians QC2. Select item importance (pick max. 5 items out of 13) - Which, if any, of the following services would you like to see better supported by pharmaceutical companies? Base: Patients/caregivers (n=214)



How pharma can support

# Patient education is an area where pharma can support

All stakeholders agree



HCPs

19%

of physicians surveyed who selected **'insufficient disease information for patients'** as an unmet need think it could be addressed together in collaboration with the pharma industry.

Selected from a list of 12 points



Patients Caregivers

14%

of patients and caregivers surveyed say that **'disease education'** is among the Top-5 services they would like to see better supported by pharma.

Selected from a list of 13 points



PAGs

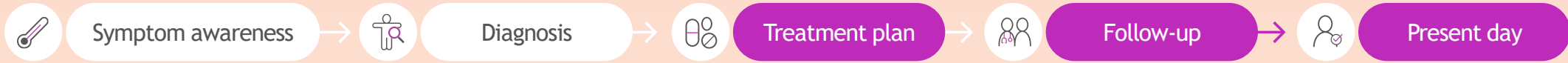


Insights from patient groups

In addition to disease awareness and early-signs detection, patient groups also stressed the need to educate patients on the treatment options available to them. The groups responding feel that education is a clear opportunity for greater collaboration with pharma. Here, pharma can provide information on side effects of existing medications' and expectations for emerging new treatments.

Qualitative research

A9. Beyond medication, which if any, of these unmet needs do you think could be addressed in collaboration with the pharmaceutical industry to support your patients? Base: Physicians who think there are needs that can be addressed by pharma (n=792) QC2. Select item importance (pick max. 5 items out of 13) - Which, if any, of the following services would you like to see better supported by pharmaceutical companies? Base: Patients/caregivers (n=214)



How pharma can support

# Pharma can support platforms for patient-physician interactions

Patients, carers and physicians see opportunities for face-to-face and online line approaches



Face-to-face

**22%**

of patients and caregivers surveyed say that **'face-to-face support groups with physicians'** are among the Top-5 services they would like to see better supported by pharma. Selected from a list of 13 points



Face-to-face

**27%**

of physicians surveyed say that **'face-to-face support groups with physicians'** are among the Top-5 services that they think will improve patients' experience of living with their condition. Selected from a list of 19 points



Online support

**23%**

of patients and caregivers surveyed say that **'online support groups with physicians'** are among the Top-5 services they would like to see better supported by pharma. Selected from a list of 13 points



Online support

**12%**

of physicians surveyed say that **'online support groups with physicians'** are among the Top-5 services that will improve patients' experience of living with their condition. Selected from a list of 19 points



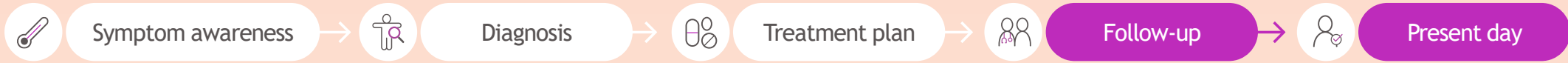
Insights from patient groups

Groups flagged the prospect of online sessions with healthcare professionals and expert panels as popular. These sessions are appreciated as they enhance collaboration among stakeholders.

*"Well, I think we also need to involve pharmaceutical companies and treat the patient from a holistic care perspective; and the doctor doesn't have the time to do it. Another difficulty is that doctors are not trained to collaborate. I think we really need to foster a spirit of collaboration, which the industry can help with."*  
Switzerland

Qualitative research

QA7. Select item importance (pick max. 5 items from 19) - Which, if any, of the following services would improve patients' experiences living with their conditions? Base: Physicians (n=839)  
QC2. Select item importance (pick max. 5 items out of 13) - Which, if any, of the following services would you like to see better supported by pharmaceutical companies? Base: Patients/caregivers (n=214)



How pharma can support

# Online & face-to-face peer groups

Patients and caregivers call for better support



Face-to-face

# 24%

of patients and caregivers surveyed say that **‘face-to-face support groups with other patients with the same condition’** are among the Top-5 services they would like to see better supported by pharma.

Selected from a list of 13 points

Online support

# 23%

say that **‘online support groups with other patients with the same condition’** are among the Top-5 services they would like to see better supported by pharma.

Selected from a list of 13 points



PAGs



Insights from patient groups

Online forums that encourage contact between patients and peer support networks give them reassurance that they are not alone and many others like them are coping. Patient support networks such as family and friends can also benefit from forums.

*“They are looking for information, exchange with people with the same disease. Usually, the second or third time they come to tell their own story and the others tell them about their experiences.”*

Austria

Qualitative research



Reflections & conclusions

# Our commitment to next steps

# Feedback from Patient Association Groups: Key findings

Groups would welcome support from pharma; but their thinking is often limited to financial interactions, though there is certainly scope to partner



## Education

Groups see a need to help raise awareness and provide increased knowledge on diseases, and on available and new treatments. Some want to increase their knowledge, support patients for disease-specific and treatment-related questions.

### Suggestion from patient groups:

Pharma can help by advocating for better quality education, and testing for earlier diagnosis of some cancers.



## Collaboration

Some groups welcome greater collaboration with pharma companies, for example for information sharing and education.

Most see pharma as side-line supporter, rather than in visible 'on-the-pitch' activities directly with patients.



## Facilitation

Groups say that emotional support to patients and their loved ones is a top priority.

Here, more can be done to support and connect peers, optimise existing resources.

### Suggestion from patient groups:

Pharma can facilitate – supporting patients with forums and providing resources for peer support meetings.



## Funding

Some groups suggest that a fund could help patients access treatment, provide money if they are unable to work, or help with travel costs to treatment.

### Suggestion from patient groups:

Pharma can launch rehabilitation centres; help with skilling and capacity building for healthcare professionals; or provide funding for psychological support staff that's accessible to patients.

# Our starting point for new partnerships

We have heard you, and commit to taking action together with you



## What we have heard from you

The feedback that you have shared in the public and patient & professional surveys is enlightening. We appreciate your candid input.

With the initiative ‘Because there is more to do’ we embarked on a journey to learn more about your situations, your concerns, **what you expect of us, and where you think pharma can do more to support patients and society.**

## Our journey together starts today

We will now build on what we have learned from you. The next step is deeper engagement, to explore where we can most effectively support your needs.

In the coming months we will open a wider dialogue with the healthcare industry.

## Is there a role for BMS & pharma?

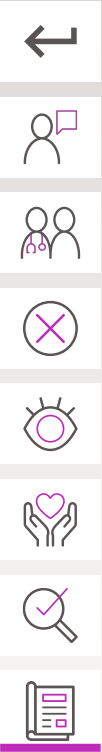
We wanted to understand if there is a role for BMS and pharma beyond delivering innovative medicines. And if so, what is it?

Your responses tell us that pharma has a role to play.

## Our commitment: what you can expect from BMS

The conclusion of this report is the beginning of our future journey together. We commit to working with you to take action in areas you have defined, including: new partnerships with patient organisations and healthcare professionals.





# Technical notes

# Technical notes



## Technical Note - Patient and Caregiver Survey

On behalf of Bristol Myers Squibb, Ipsos MORI carried out an online survey with a sample of 214 patients and caregivers (oncology patients, oncology caregivers, atrial fibrillation patients, atrial fibrillation caregivers) across eight European countries (Austria, Belgium, Denmark, Finland, Netherlands, Norway, Sweden, Switzerland). Online surveys were conducted between 11th January 2021 and 26th April 2021.

Respondents were recruited via online panels, and as such, the sample contains respondents who are engaged with market research panels and chose to take part in the survey.

The sample includes the following per country:

	AT	BE	DK	FI	NL	NO	SE	CH
<b>Total</b>	30	30	20	30	30	15	29	30
<b>Oncology patients</b>	8	8	8	8	8	10	8	8
<b>Oncology caregivers</b>	7	7	7	7	7	5	7	7
<b>Atrial fibrillation patients</b>	8	8	3	8	8	0	8	8
<b>Atrial fibrillation caregivers</b>	7	7	2	7	7	0	6	7

When reporting on country results survey data are weighted to ensure equal contribution of oncology patients/caregivers and atrial fibrillation patient/caregivers within a country\*. When reporting at a total level data are additionally weighted to ensure equal contribution per country.

\* Except in Norway, where the sample consists only of oncology patients/caregivers, and so no weighting was applied.

## Technical Note - Healthcare Professional Survey

On behalf of Bristol Myers Squibb, Ipsos MORI carried out an online survey with a sample of 839 healthcare professionals (primary care physicians, cardiologists and oncologists/haematologists) across eight European countries (Austria, Belgium, Denmark, Finland, Netherlands, Norway, Sweden, Switzerland). Online surveys were conducted between 11th January 2021 and 26th April 2021.

Respondents were recruited via online panels, and as such, the sample contains respondents who are engaged with market research panels and chose to take part in the survey.

The sample includes the following per country:

	AT	BE	DK	FI	NL	NO	SE	CH
<b>Total</b>	105	120	100	93	120	70	116	115
<b>PCPs</b>	50	50	50	51	50	42	50	50
<b>Cardiologists</b>	30	40	30	22	40	18	40	40
<b>Oncologists /haematologists</b>	25	30	20	20	30	10	26	25

When reporting on country results, survey data are weighted to ensure equal contribution from primary care physicians, cardiologists and oncologists/haematologists. When reporting on total results survey data are additionally weighted to ensure equal contribution per country.

## Technical Note - Patient Advisory Group Qualitative Research:

On behalf of Bristol Myers Squibb, Ipsos MORI conducted exploratory qualitative research in eight European markets (Austria, Belgium, Denmark, Finland, Netherlands, Norway, Sweden, Switzerland). In total, 40 respondents completed a web-assisted telephone in-depth interview (37 respondents were working for an oncology patient advisory group, 3 for an atrial fibrillation patient advisory group). Respondents were recruited via telephone through third party panel providers. Interviews were carried out between 11th January 2021 and 26th April 2021.

Please note that this qualitative research approach explores the range of attitudes and opinions of participants in detail and that the findings are descriptive and illustrative, not statistically representative.

## Technical Note - Single-blinded Open Invitation Digital 'Humanity' Survey:

On behalf of Bristol Myers Squibb, Ipsos MORI carried out an online survey with a sample of 821 adults aged 16 and over, across nine European countries (Austria, Belgium, Denmark, Finland, Luxembourg, Netherlands, Norway, Sweden, Switzerland). Interviews were conducted between 20th November 2020 and 18th January 2021.

Respondents were invited to respond to an open invitation from Bristol Myers Squibb to share their views and suggestions on their opinions of the pharmaceutical industry, pharmaceutical companies and the challenges they face regarding healthcare provision in their country. This invitation was shared in a range of paid advertising channels on websites and social media, but also direct emails and organic posts:

- paid post on LinkedIn;
- organic posts on LinkedIn;
- direct email to BMS employees;
- hosting on Bristol Myers Squibb websites.

As such, the sample includes a mix of respondents who responded to the online campaign and chose to take part and is not a representative sample of the population of the countries included in the campaign. It is also likely respondents are already engaged with Bristol Myers Squibb and/or the pharmaceutical industry in general. The sample includes members of the public, patients, caregivers, healthcare professionals, pharmaceutical industry employees and their friends and family. Results are indicative in nature and reflect the responses of the survey participants only. Participants outside of the countries listed were screened out and could not participate.

In total there were 129,688 clicks onto the survey, with 821 respondents completing the survey.

The sample includes the following per country:

	AT	BE	DK	FI	LU	NL	NO	SE	CH
<b>Total</b>	82	325	33	30	0	193	35	55	68
<b>Healthcare professionals</b>	20	60	14	11	0	19	9	10	16
<b>Patients or caregivers</b>	16	105	8	6	0	79	11	13	19
<b>Pharma company employees</b>	22	96	4	8	0	39	7	7	24
<b>Other</b>	34	119	13	14	0	79	12	33	23

When reporting on global results, all participants are included and no weighting has been applied to the data

# Because there is more to do

