




Healthcare Collaboration Report



Introduction & Methodology

Collaboration is essential for innovation.

While this is true for all industries, it is particularly important for healthcare, where at the end of the day, collaboration is not only helping to improve how patients experience and receive care, but also changing their outcomes. By bringing expertise and perspectives together across the different areas that make up healthcare, partnerships between key players like drug companies, patient advocacy groups, hospitals, and insurance companies are helping solve healthcare's biggest challenges. At the earliest point in healthcare, collaboration is the driving force behind novel platforms that require unique discovery and development strategies that go beyond traditional approaches. The scientific community's response to the COVID-19 pandemic demonstrated just how powerful collaboration can be with stakeholders across healthcare working together to develop, approve, manufacture, and distribute a vaccine at record speed.

Following the height of the COVID-19 pandemic, Charles River and The Harris Poll polled 1,508 Americans to determine their perceptions of the strengths and weaknesses in our healthcare system, general knowledge of drug and vaccine development and approvals, and key areas that adults in the United States would like to see prioritized in years to come. The survey will be conducted annually and provide benchmark data on the public's perception of the industry and key areas for improvement,

which will be outlined in Charles River's Healthcare Collaboration Report each year.

While collaboration is generally seen as necessary toward improving healthcare, this survey reveals that Americans are more likely to think U.S. healthcare is broken than not and that there is a disconnect in how much people know and understand about drug and vaccine development. In relation to the pandemic, views on how the U.S. handled its response are mixed and are in favor of more collaborative efforts. Americans generally agree that in order to prevent a future pandemic, collaboration is needed between governments, health insurance companies, pharmaceutical companies, healthcare providers and patients.

The Healthcare Collaboration survey was conducted online by The Harris Poll on behalf of Charles River Labs between May 11 and 24, 2021 among 1,508 adults over the age of 18 years living in the United States. Respondents for this survey were selected from among those who have agreed to participate in The Harris Poll surveys. The data have been weighted to reflect the composition of the U.S. adult population. Because the sample is based on those who agreed to participate in The Harris Poll panel, no estimates of theoretical sampling error can be calculated.



Collaboration from All Perspectives

The value of collaboration

Developing new drugs and treatments isn't easy, and it can't be done alone. The meaning and value of collaboration varies across stakeholders, but perspectives are all anchored in the shared vision of accelerating the development and delivery of innovative treatments to give patients access as soon as possible.



“ The key to bringing innovative, safe, and effective medicines to patients as quickly and efficiently as possible is collaboration. For us as an industry to continue to improve the quality of people's lives through medicine, we need to better understand where we are when it comes to collaboration and identify the areas where more work is needed. This report underscores our commitment to collaboration and provides a level of insight that will help the industry navigate how we can work together moving forward. ”

– **Jim Foster,**

Chairman, President and Chief Executive Officer of Charles River Laboratories



“ By reimagining how we can quickly develop, test and advance highly effective yet safe drugs, we can apply the principles that tech-companies utilize: learn and fail fast. With time as the greatest challenge and resource, it's essential that we identify key experiments and execute them quickly, powering our design and process with our collaborator's interdisciplinary decades of collective expertise. Lean drug development is a team sport and one in which collaborative minds excel. By collaborating, we are able to transform decades into years and ultimately help not only tomorrow's patients, but also today's. ”

– **Rich Horgan,**

Founder and President of Cure Rare Disease

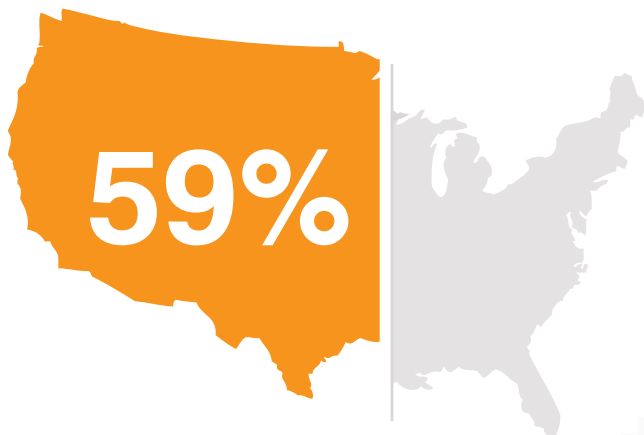


Healthcare is Broken, Collaboration is Key

While the majority of Americans believe the healthcare system is broken, it is believed that collaboration has the potential to be transformative.

There's general agreement of the specific positive impacts of increased collaboration across healthcare entities. Respondents felt that the quality of healthcare would increase with more collaboration, as would the amount of innovation. But when it comes to lowering healthcare costs and improving time-to-market for new drugs, Americans are less certain of the effects of greater collaboration.

Americans believe this united effort could improve the healthcare system, drive innovation in healthcare, and help drug development move more quickly. Americans are unsure of the role that government plays, but they do believe it is a key player in taking responsibility for this shift.



59% of Americans say healthcare in the United States is broken.

The cost of healthcare is most often cited as the biggest problem facing the system



34% of Americans say healthcare (including health insurance) being too expensive is the biggest issue facing the U.S. healthcare system today

18% say the high cost of prescription drugs is the biggest issue, the second highest-response

Americans believe...

90%

It will take a united effort of all key players to improve the healthcare system

88%

More communication between the groups within our healthcare system would improve the system overall

87%

Greater collaboration across all groups would lead to more innovation in healthcare

84%

Greater collaboration across all groups involved in healthcare would help new drug development move more quickly

64%

The quality of healthcare would improve with closer collaboration

52%

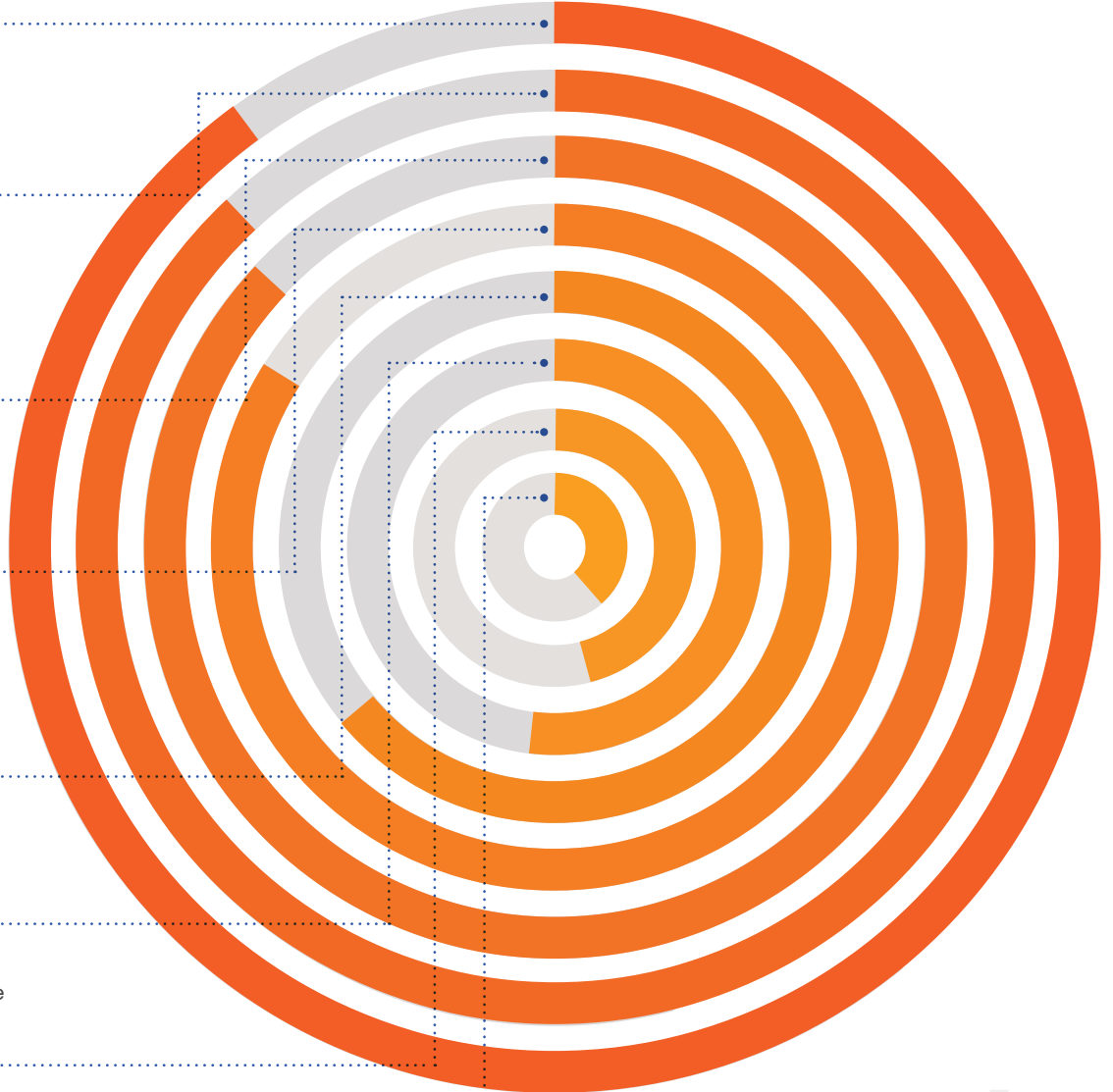
Closer collaboration would increase the amount of healthcare

46%

The government is the group least likely to be trusted to do what's best for Americans – less than half trust the government somewhat or completely to do so

39%

The government is most likely to be assigned with the responsibility for improving the state of U.S. healthcare





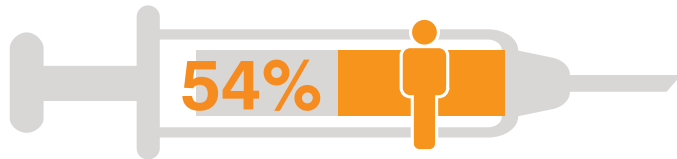
The Knowledge Gap

While half of Americans think they are knowledgeable about the drug development process, there is an opportunity for education.

Results reveal that there is little understanding of the time or cost required to develop drugs, or even the number of drugs rejected or approved by the FDA. However, the FDA is highly regarded and its involvement builds trust and confidence in the safety of drugs, even though many Americans don't fully understand the role it plays.

Following a year where these topics were covered extensively by the media and addressed by many

organizations, a gap exists between the information shared and what was absorbed by the general public. Following the pandemic and several other pivotal approvals, the FDA's decision-making process has been widely discussed. The results in this report provide a benchmark when it comes to perceptions of the FDA and how Americans view the role of the agency in setting the standard for safety, efficacy and innovation in the field.



Around half of adults say their knowledge of the vaccine development process has increased since the pandemic. **However, this knowledge is debatable.**

Timeline for drug development and approval for US market (yrs)

When it comes to the amount of time it takes for a potential drug to be developed and it is approved, the most common response was between 4 and 10 years, when in reality, its between 10 and 15 years [1]

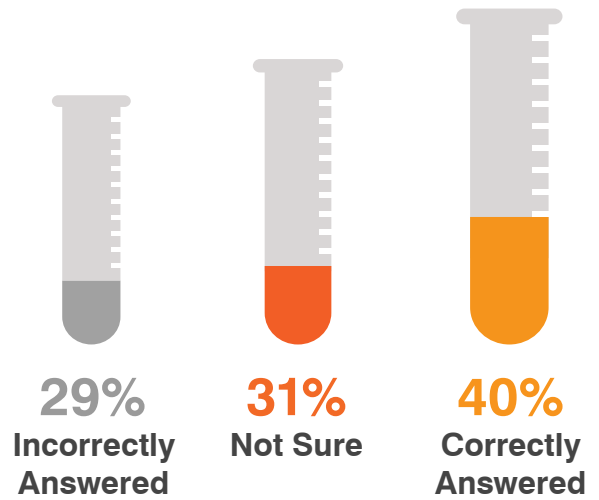


Respondents estimated:

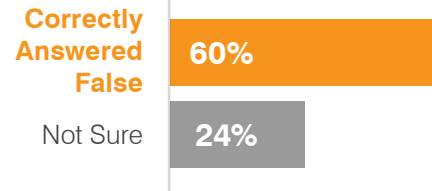
	✓	✗
Drug development approval timeline	<p>10% Correctly estimated that it takes 10 to less than 15 years.</p>	<p>35% Response was 4 to less than 10 years</p>
Amount of money necessary to bring a potential new drug from initial creation to be available on the market	<p>\$2.6 B is the actual average estimate cost for developing a new prescription medicine that gains marketing approval [1]</p>	<p>28% of adults say \$10 - \$25M</p> <p>29% of adults say \$25 - \$100M</p>
Percentage of new drugs that are approved and make it to market	<p>0.02% The actual percentage [2]</p>	<p>36.4% The average percentage reported</p>

Gauging what Americans know

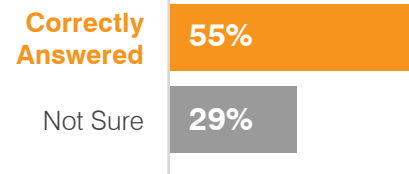
Only **2/5** adults know the development process for new drugs and vaccines are not the same



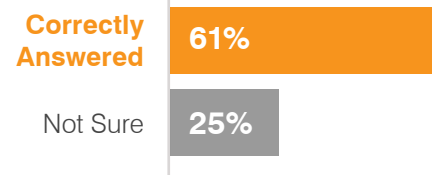
While most know all new vaccines and drugs will not be approved as quickly as the coronavirus vaccines, **there is still a fair number of adults who are not sure**



Similarly, when asked about the role of existing research on the creation of the coronavirus vaccines, **only about half of adults knew the creation of coronavirus vaccines relied on existing research**

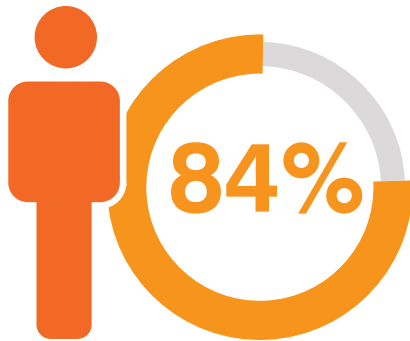


Most say collaboration between groups in the healthcare system was a reason the coronavirus vaccines were able to be approved so quickly



Attitudes toward the FDA

The majority of adults think the FDA has an overall positive impact on the U.S. healthcare system



Adults are most likely to say they are knowledgeable about:



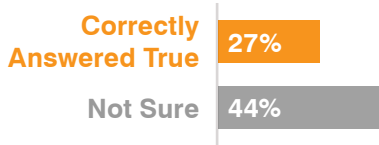
They are less likely to say they are knowledgeable about:



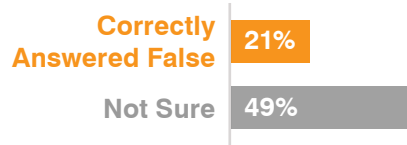
Even though the majority of adults say they are knowledgeable about the FDA, there is an abundance of misconceptions and a relative lack of knowledge when it comes to specific facts about the FDA. **Less than half knew the correct answer** when shown the following statements:



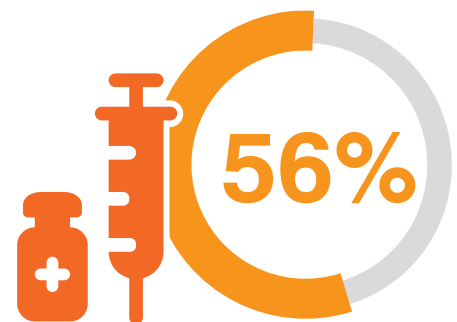
The FDA requires animal testing for all new prescription drugs



The FDA approves fewer drugs now than they did 10 years ago



Slightly more than half of adults say they expect the FDA will **approve new drugs and vaccines quicker** than it did before the coronavirus pandemic



The majority of adults say they can “trust the prescription drugs [they] take because of the FDA’s approval process”



...and that “prescription drugs in the United States are safer because they are reviewed and approved by the FDA”



Collaboration in a Post-pandemic World

The pandemic brought the need for future investment and collaboration in vaccine development to the forefront for Americans.

Adults are somewhat split on their views about how well they felt the U.S. handled the coronavirus pandemic compared to other countries; however, the majority of Americans – across all political parties – actually support higher taxes in exchange for better healthcare.

Bottom line: Adults understand the importance of collaboration, as the vast majority say pandemic prevention requires a collaborative effort between governments, health insurance companies, pharmaceutical companies, healthcare providers and patients.

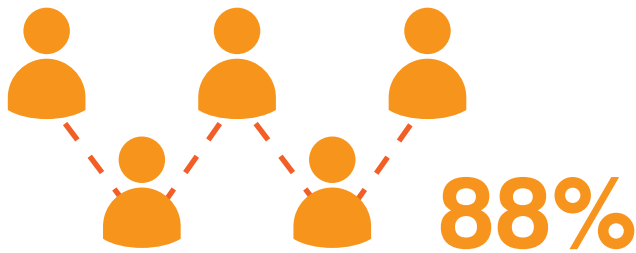
Most Americans...



Most adults would support an increase in taxes if it led to

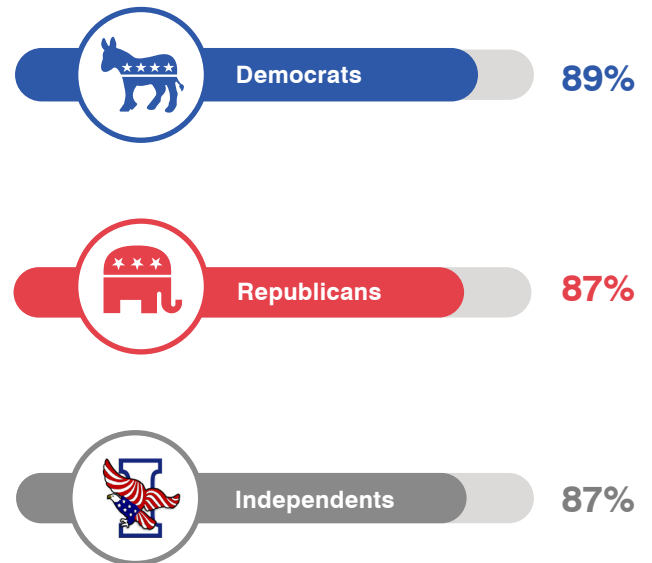


COVID-19 prompted a more unified approach



of adults understand the importance of collaboration, as the vast majority say pandemic prevention requires a collaborative effort between governments, health insurance companies, pharmaceutical companies, healthcare providers, and patients.

This sentiment holds across political party affiliation



When asked what, if anything, should be done differently if there is another pandemic:



Adults are most likely to say they think there should be increased collaboration between all parts of the U.S. healthcare system



As well as a unified global approach to end the pandemic



And a unified national approach to end the pandemic

About Charles River

Charles River provides essential products and services to help pharmaceutical and biotechnology companies, government agencies and leading academic institutions around the globe accelerate their research and drug development efforts.

Our dedicated employees are focused on providing clients with exactly what they need to improve and expedite the discovery, early-stage development, and safe manufacture of new therapies for the patients who need them. To learn more about our unique portfolio and breadth of services, visit www.criver.com.

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eureka

[1] [Innovation in the pharmaceutical industry: New estimates of R&D costs](#), *ScienceDirect*

[2] [Accelerating drug discovery](#), *EMBO*

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