instar
At the Heart of Brand Performance

Sustainability in Pharma: from concept to practice

Insights from our proprietary survey of Spanish clinicians, supported by recent global evidence.

Instar's survey of **99 healthcare professionals across 7 specialties in Spain** provides a unique look at how clinicians in Spain interpret, prioritise, and adopt sustainability. These findings are contextualised with global trends identified in a review published in *Discover Sustainability* (Springer Nature, 2025).

Core insights: how clinicians interpret sustainability

Top spontaneous associations with 'sustainability':

- Sustainable production / circular economy: 55%
- Community health & equity: 46%
- Education & awareness: 45%

Impact on prescribing:

Half indicate that sustainability / ESG practices increase their likelihood to prescribe a treatment

Circular pharma is top-of-mind

Circular production is the #1 association (**55%**). Open comments reference waste reduction, responsible manufacturing, and material efficiency.

Sustainability = Balance & long-term viability

Clinicians describe sustainability in terms of cost-effectiveness, responsible resource use, equity & access, and environmental protection. Top associations are community equity **(46%)**, health awareness and education **(45%)**, and efficient resource use **(31%)**. "*Sustainability is resource efficiency and equity for all patients.*"

ESG as a signal of trust

HCPs distinguish genuine ESG from 'marketing', highlighting a need for evidence. **50%** say they are more likely to prescribe from companies demonstrating ESG, and **10%** say it has no impact at all on prescribing.

Sustainability rising as a decision driver

57% expect sustainability to influence prescribing within five years. Clinicians describe it as 'increasingly relevant, but not yet habitual.'

Leadership isn't clear to clinicians

Companies making a positive impact: Novartis (**17%**), Roche (**15%**), Pfizer (**14%**), GSK (**12%**), AstraZeneca (**10%**) - many HCPs (**33%**) answered "none" or "don't know." Comments call for *evidence, transparency, and measurable impact*.

Implications and opportunities: from intent to impact

Build sustainability into corporate messaging

Provide clear ESG metrics, life-cycle data, circular design examples, and access initiatives: our research shows that clinicians reward substance over abstract claims.

Treat sustainability as an emerging differentiator

Leverage sustainability credentials as a value enhancer: focus on efficiency, system viability, and access, while leveraging ESG actions reinforces trust and perceptions of corporate responsibility.

Track sustainability perceptions to guide where to focus

Include analysis of ESG in brand and corporate research. Identify which actions and messages resonate to understand whether sustainability is a differentiator or hygiene factor, and guide strategies accordingly.

Sustainability continues to grow in importance, driven in part by the increasing pressure on healthcare systems. Assessing ESG initiatives' impact on clinicians' views and behaviour is key to guiding brand and corporate messaging.

* ESG: Environmental, social, and governance