The Numerof 2019 Global Pharma Outlook

Key Action Steps
- Develop high value products/services backed by evidence.
- Craft compelling economic & clinical value propositions.
- Redesign commercial models, targeting and segmentation to reach new customers.
- Align R&D, Medical Affairs, Commercial functions.
- Recruit, train talent to engage executive decision makers.
- Elevate business acumen, diagnostic, influence skills.
- Create collaboration opportunities with payers/providers.

Regulator (FDA, EMA, etc.)
- Tough enforcement of rules. Coordinated global supply chain oversight. EMA IDMP, FDA ePedigree data requirements. 21st Century Cures accelerates approval and competition. FDAMA114 enables economic data discussion.

Public Payer/Benefit Evaluator
- Price controls, reference, risk-based pricing, access limits. More EU direct drug pricing agreements. More CER, RWE. National pricing (e.g. Germany) impacting global pricing. Greater transparency. In the US, political and legislative uncertainty creates risk and opportunity.

Private Payer/PBM

Employer

Consumer

Employed physicians guided by institutional formularies, care paths, less influential in drug purchase, utilization decision making.

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Product decisions increasingly made by cross-functional committees. Adherence to care paths limit access. Cardio, oncology, ortho, and diabetes remain top priority areas. Interest in models that reduce risk.

Strong support for restricted formularies, pushback on high price specialty drugs & high cost therapeutic areas. Increased interest in DTE contracting with providers.


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