

THE NUMEROF 2021 GLOBAL PHARMA OUTLOOK

Key Action Steps

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



Explosion in AI and predictive analytics. More product development collaborations, **combining drugs, devices and diagnostics**.



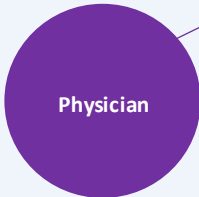
Device

Retail clinics continue to expand, and pharmacies increase primary care role. Growing disruption from **new distribution models**. Focus on chronic disease management, medication adherence.



Retail

Physicians guided by institutional formularies, care paths, less influential in decision making. Engagement requires **new approaches**.



Physician

Product decisions increasingly made **by cross-functional committees**. Adherence to care paths limits adoption. Access restrictions continue. Increased focus on **chronic disease management**.

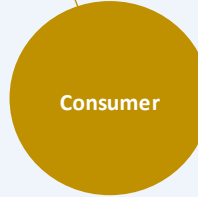


Healthcare Delivery

Strong support for **restricted formularies**, pushback on high price specialty drugs and **high cost therapeutic areas**. Increased interest in reducing total cost of care/improving outcomes.

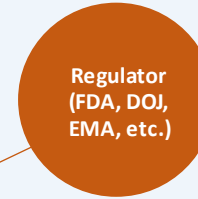


Employer



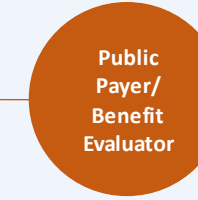
Consumer

More **engaged in healthcare**. **Higher self pay** due to deductibles, copays. **Adherence** remains a big target, new consumer apps. More interest in **clinical trial** participation, outcomes.



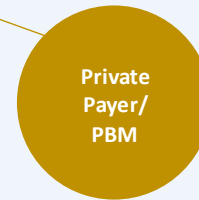
Regulator (FDA, DOJ, EMA, etc.)

Covid-19 redefines expectations for drug development. Coordinated **global supply chain oversight**. **Tough enforcement** of rules. **FDAMA114** enables economic data discussion.



Public Payer/Benefit Evaluator

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



Private Payer/PBM

Strong pushback on **drug prices**. Evidence requirements increasing, including RWE. **Restricted formularies**. Exploring risk & indication-based pricing. More **collaborations**. **Increased partnerships** with delivery. Narrow networks continue.