



OPEN HEALTH

Unlocking the Full Potential of GLP-1 Agonists: Transforming Perspectives

The Evolution of GLP-1 Agonists

With industry experts predicting sales of GLP-1 agonists (glucagon-like peptide 1 agonists) to reach \$50 billion by the decade's end,¹ various pharmaceutical companies are looking to seize their share of this lucrative market. However, the road to unlocking the full potential of these drugs in treating chronic conditions is paved with obstacles.

The full potential of GLP-1 agonists can be realized by transforming perspectives of patients, healthcare professionals, payers, and the pharmaceutical industry. We've gathered several experts from across OPEN Health to provide their take on the major challenges faced by key stakeholders and how these challenges could be approached to forge a successful path forward.



Annemarie Clegg, MD
Chief Medical Officer

"The use of GLP-1 agonists is rapidly evolving. As new agents and dosing options come to market, pharma companies will need to be agile in their thinking and approach to maximize access and outcomes for patients. With a range of experts across medical affairs, market access, commercialization, HEOR, and patient engagement, OPEN Health is uniquely suited to partner with our clients to achieve these goals."





Transforming Perspectives: Patients



Current State

- Adherence and persistence are often challenging for patients prescribed GLP-1 agonists.² It is important to understand patients' motivations, beliefs, and perceptions regarding treatment with GLP-1 agonist therapy



Key Challenges

- Misinformation and a lack of understanding about GLP-1 agonists among patients are two of the issues that prevent informed discussions between patients and their physicians about GLP-1 agonists as a treatment option for their condition³
- Once a patient is receiving GLP-1 agonist therapy, a lack of education on the management of side effects and medication titration often triggers discontinuation⁴
- The psychological burden of maintaining weight loss after GLP-1 agonist withdrawal needs to be better addressed⁵

[Learn more](#)



The way forward



Sumira Riaz, CPsychol
Patient Engagement Lead

"Integrating health psychology principles and developing a holistic intervention combining pharmacologic and behavioral science will be key in sustaining a long-term change in obesity. The importance of building patient support which is sustainable versus short term will demonstrate longitudinal improved quality of life. This is the approach we take within the patient engagement team."



Transforming Perspectives: Healthcare Professionals



Current State

- As obesity rates continue to rise,⁶ prescriptions for GLP-1 agonists are exponentially increasing.⁷ However, HCPs are inundated with information and data, making it difficult for them to distill and incorporate the latest strategies into practice



Key Challenges

Educational gaps for HCPs include:

- Working knowledge of evidence-based guidelines, including proper dietary counseling,⁸ to implement in an integrated primary care setting^{9,10}
- Keeping abreast of the latest data to appropriately inform treatment decisions
- Recognition of the risk/benefit profile of new assets, including GLP-1 agonists and their duration of use

[Learn more](#)



The way forward



Dana Franznick, PharmD
Senior Director,
Medical Strategy

"Omnichannel-based approaches to HCP obesity education provide strategically focused, evidence-based, digestible, and accessible content to integrated care teams, which can be used to inform treatment decisions, create patient-centric long-term management plans, and ultimately impact overall patient health."



Transforming Perspectives: Payers



Current State

- Uptake of GLP-1 agonists has the potential to revolutionize the treatment of obesity and diabetes, but could raise healthcare spending substantially, posing a problem for payers looking to control costs
- Current access and reimbursement systems are not equipped to assess, reimburse, and integrate indirect innovations, such as GLP-1 agonist therapy, with large budgetary and social impacts
- Recent assessments in European countries, including Norway, Denmark, and Germany, show there is a trend of payers refusing reimbursement for drugs that are generally considered lifestyle/cosmetic products^{11,12,13}



Key Challenges

Educational gaps for HCPs include:

- One of the key issues when determining the value of GLP-1 agonists is that obesity impacts a multitude of health conditions in terms of increased risk of occurrence¹⁴
- Stronger evidence on unmet needs is required via qualitative studies on the multifactorial and multidimensional nature of obesity (which is difficult to capture in quantitative studies)
- Evidence suggests that obesity is more common among people of low socioeconomic status.¹⁵ Therefore, treating obesity means addressing health inequalities and, most importantly, inequalities in avoidable mortality



The way forward



Elisabeth Fenwick, PhD
Chief Scientific Officer

"It can be quite challenging to model the impact of weight changes on all of the various conditions where obesity increases risk, especially when you add in the heterogeneity in the patient group and hence the baseline risk of these conditions. Focusing on specific patient groups who are at increased risk of certain conditions will make the task more manageable and contained."



Emanuele Arcà
Scientific Lead,
Strategic Market Access

"Over the longer term, adoption of digital health technologies within the GLP-1 agonist landscape could represent the turning point for discussions and partnerships between developers and payers. Future partnerships could be built around value-based agreements based on the achievement of health objectives."



Transforming Perspectives: Pharmaceutical Companies



Current State

- The surge in demand for GLP-1 agonists has led to supply issues, with off-label use limiting the availability of GLP-1 agonist therapy for eligible patients
- Recent studies, such as the SELECT trial, have proven that in addition to providing weight loss in people with obesity, GLP-1 agonists can also lead to a reduction in the risk of cardiovascular (CV) events such as heart attack, stroke, or CV death
- Emerging safety concerns are surfacing, such as whether GLP-1 agonists are associated with psychiatric issues and rare but serious gastrointestinal complications. Following reports of psychiatric issues, the FDA concluded that there is no evidence of a causal link between these and the use of GLP-1 agonists, with the EMA due to report on this in April 2024



Key Challenges

- Given the increasing growth of this market and the rapidly expanding pipeline, pharmaceutical companies will need to carefully consider how they are best able to demonstrate their added value
- There is a lack of long-term follow-up studies and resultant data in this space
- Pharmaceutical companies that develop and manufacture GLP-1 agonists will have an important role to play in combating misinformation



The way forward



Lynn Forrest, MBA

Partner at Acel Health,
an OPEN Health Company

"This is just the beginning for GLP-1 agonists and other novel assets pursuing the rapidly growing obesity market. There continues to be a need for novel assets that improve upon the profiles delivered today. Additionally, there is further opportunity to accelerate the value of existing assets by pursuing new adjacencies."



Hannah Matthews, PhD

Head of RWE Europe

"Our RWE team understands the complexities of utilizing RWD in the obesity space. Elements such as variability in coding of BMI data introduces additional hurdles, but knowing these factors upfront means we're able to incorporate solutions into our plans and still successfully utilize RWD to gain meaningful real-world insights to inform treatment decisions."

Meet the OPEN Health Team



Annemarie Clegg, MD
Chief Medical Officer



Lynn Forrest, MBA
Partner at Acsel Health,
an OPEN Health Company



Elisabeth Fenwick, PhD
Chief Scientific Officer



Hannah Matthews, PhD
Head of RWE Europe



Sumira Riaz, CPsychol
Patient Engagement Lead



Emanuele Arcà
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Dana Franznick, PharmD
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About OPEN Health

OPEN Health unites deep scientific knowledge with wide-ranging specialist expertise to unlock possibilities that improve health outcomes and patient wellbeing. Working in partnership with our clients, we embrace our different perspectives and strengths to deliver fresh thinking and solutions that make a difference.

OPEN Health is a flexible global organization that solves complex healthcare challenges across consulting, HEOR and market access, scientific communications, patient engagement, and creative omnichannel communications.

Please contact us to discuss how we can collaborate and maximize your strategy to treat cardiometabolic diseases and/or obesity.

For more information, visit www.openhealthgroup.com or follow us on [LinkedIn](#).

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