

Unlocking the Strategic Potential of Real-World Evidence in the Asia Pacific Pharmaceutical Market: Executive Insights and Commercial Implications.

Iain A Kaan¹, Katharina Büsch² & Krishna Rajulu³.

¹Aeolian Logic Pte. Ltd., Singapore; University of Roehampton, London, UK. ²KJM Büsch Consulting GmbH, Zug, Switzerland. ³University of Newcastle, Australia; University of Roehampton, London, UK.

BACKGROUND

Real-world evidence (RWE) is increasingly recognised as a critical complement to randomised controlled trials (RCTs), offering insights into treatment effectiveness, healthcare utilisation, and outcomes in routine clinical practice¹.Despite its growing methodological maturity, the adoption and strategic use of RWE remain uneven across the Asia Pacific (APAC) region.

OBJECTIVES

To investigate the attitudes and behaviours of pharmaceutical executives towards the adoption of RWE in decision making processes.

METHODS

This study employed a qualitative, exploratory design using semi-structured interviews with pharmaceutical executives holding commercial decision-making roles. Executives were purposively selected from the Asia Pacific region, focusing on markets with established health technology assessment (HTA) systems. These included Japan, South Korea, Singapore, Taiwan and Australia.

Participants were recruited through professional networks and snowball sampling. Inclusion criteria required substantial experience across multiple APAC countries or in regional leadership. Executives in R&D or medical functions were excluded. Interviews were conducted in English via video conference, recorded with consent, and transcribed verbatim. An interview guide explored leadership conceptions to RWE, internal readiness, external stakeholder expectations, and cross-cultural dynamics. Reflexive thematic analysis² was used to identify key patterns. Member checking was offered, and ethical approval was granted by the University of Roehampton, London.

RESULTS

Participants:

- Thirteen executives were screened; five met inclusion criteria
- All held senior commercial roles with responsibility for RWE-related decision-making.
- Median industry experience was 24 years; median APAC experience was 10 years.
- Roles included commercial operations, strategic planning, and executive leadership.

Thematic Analysis:

- Six core themes were identified: 1.Perceived Definition; 2.Strategic Importance; 3.Challenges in Adoption; 4.Facilitating Utilisation; 5.Executive Mindset & Decision Rational; & 6.Future Trends.
- Sub-themes captured organisational, structural, and cultural factors influencing RWE adoption.
- Data triangulation across markets and company types enhanced analytical validity.

Outputs:

- Themes and sub-themes are summarised in **Table 1**. Illustrative quotes and thematic maps aligned to each core theme are presented as **Figures 1 to 6** .

Table 1. Key Themes and Sub-themes Related to the Use of RWE in APAC

Theme 1. Perceived Definition	<ul style="list-style-type: none">∞ Varied Interpretations: Different definitions and understandings of RWE among executives.∞ Evolution of Concept: Shift from niche post-marketing to broader applications across the drug development cycle.
Theme 2. Strategic Importance	<ul style="list-style-type: none">∞ Internal Decision-Making: Use of RWE for strategic commercial decisions, pricing, and market segmentation.∞ External Stakeholder Engagement: Role of RWE in interactions with payers, regulators, and KOLs.∞ Complement to RCTs: RWE as a complementary tool to RCTs for a comprehensive evidence base.
Theme 3. Challenges in Adoption	<ul style="list-style-type: none">∞ Technological Issues: Fragmentation of electronic medical records and data systems in APAC.∞ Organisational Resistance: Cultural and structural resistance within companies.∞ Budget Constraints: Limited financial resources for RWE in APAC compared to Western markets.∞ Regulatory Variability: Differences in regulatory acceptance and requirements for RWE across APAC countries.∞ Data Quality Concerns: Issues with the quality and reliability of data collected for RWE.
Theme 4. Facilitating Utilisation	<ul style="list-style-type: none">∞ Local Data Generation: Importance of conducting region-specific studies.∞ Partnerships and Collaborations: Building relationships with universities, healthcare systems, and registries.∞ Innovative Techniques: Use of adaptive clinical trials and AI to enhance RWE generation and application.
Theme 5. Executive Mindset and Decision Rational	<ul style="list-style-type: none">∞ Global vs. Local Evidence: Balancing global data with the need for local RWE.∞ Time and Commitment: Impact of short executive tenures on long-term RWE projects.∞ Leadership Advocacy: Role of executive leadership in promoting and integrating RWE into business strategies.
Theme 6. Future Trends	<ul style="list-style-type: none">∞ Integration with Precision Medicine: Growing role of RWE in supporting precision medicine and targeted treatments.∞ Adaptive Market Strategies: Evolution of market access strategies incorporating RWE for better patient access.∞ Cultural Shift: Increasing acceptance and strategic use of RWE within the pharmaceutical industry.

Figure 1: Executive Quotes on the Definition and Perception of RWE

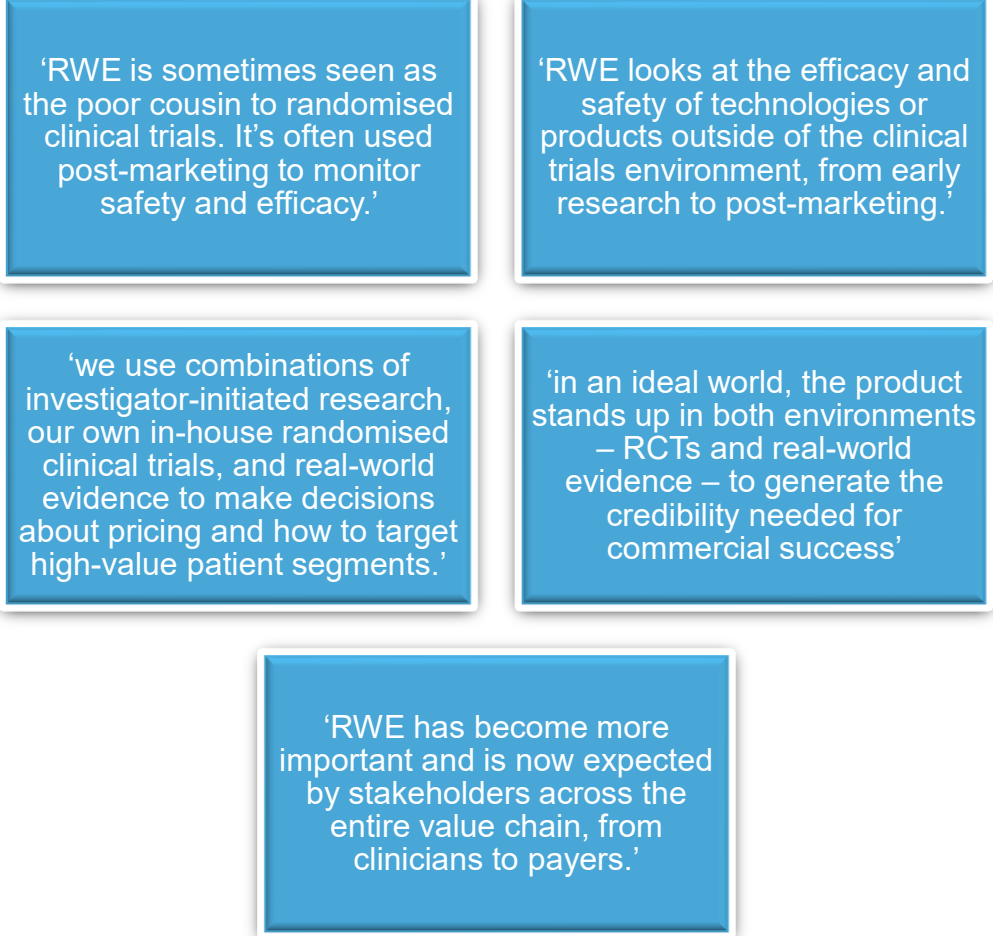


Figure 2: Executive Quotes on the Strategic Importance of RWE



Figure 3: Executive Quotes on Challenges in RWE Adoption

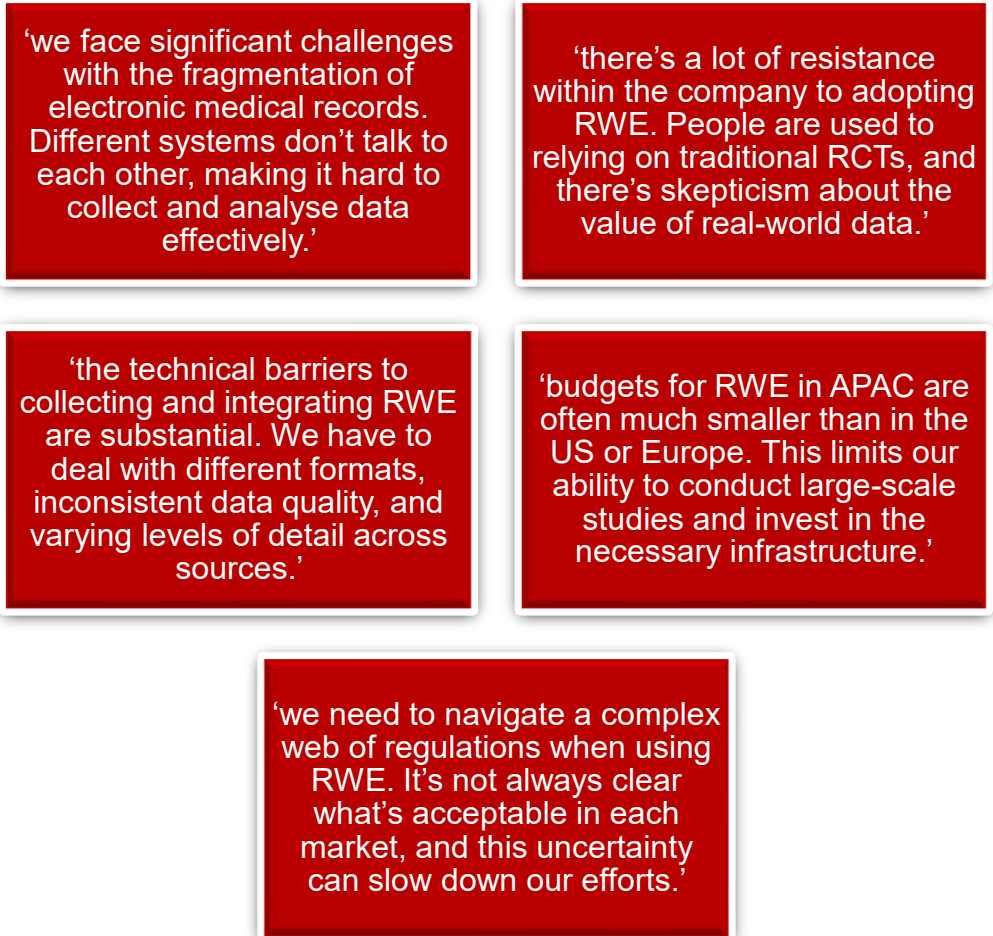


Figure 4: Executive Quotes on the Facilitating RWE Utilisation

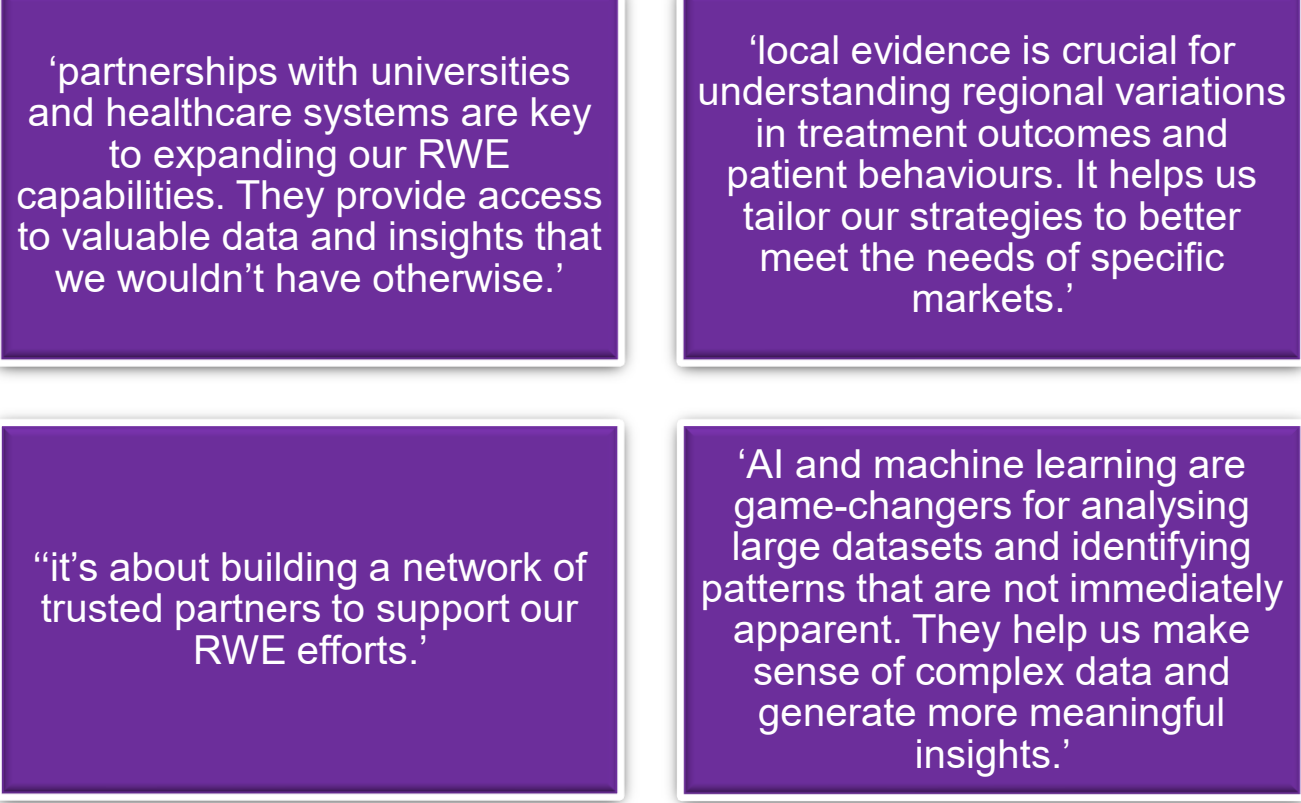


Figure 5: Executive Quotes on Executive Attitudes and Decision-Making

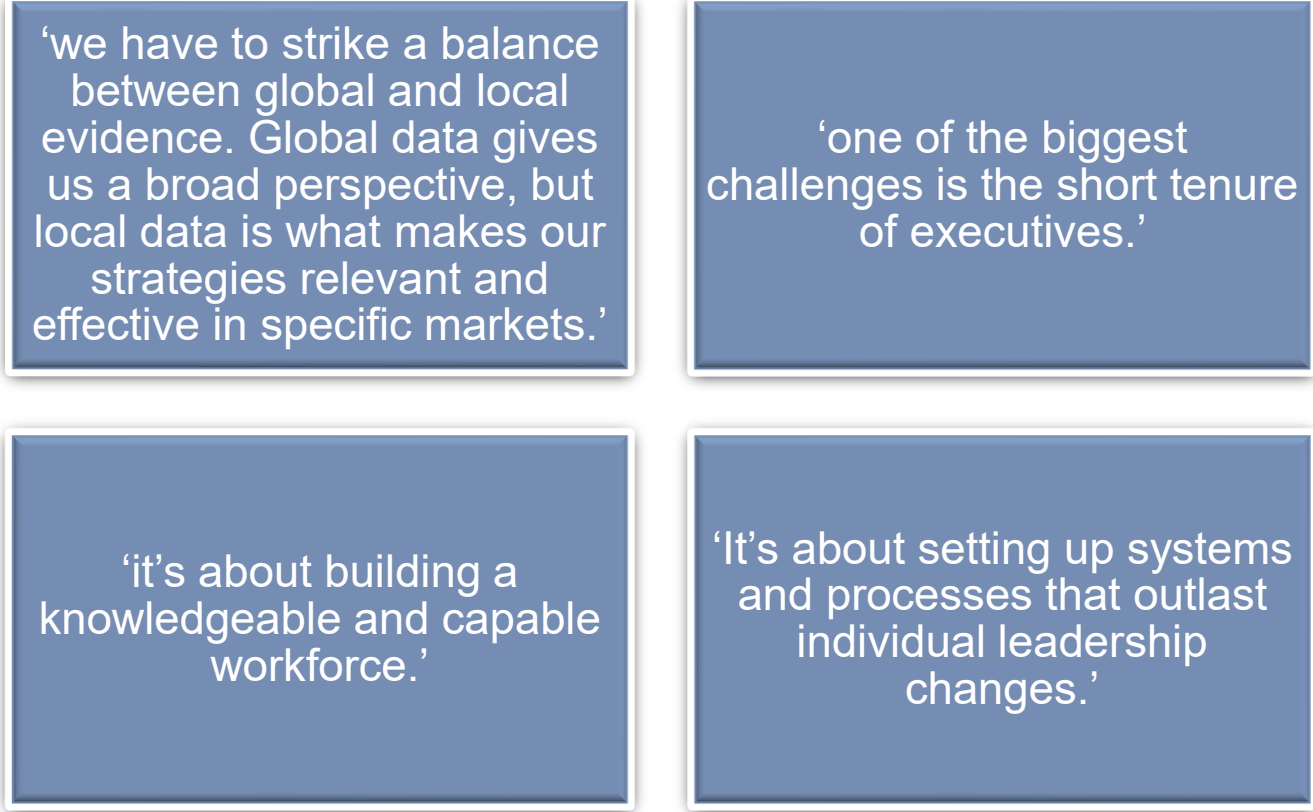
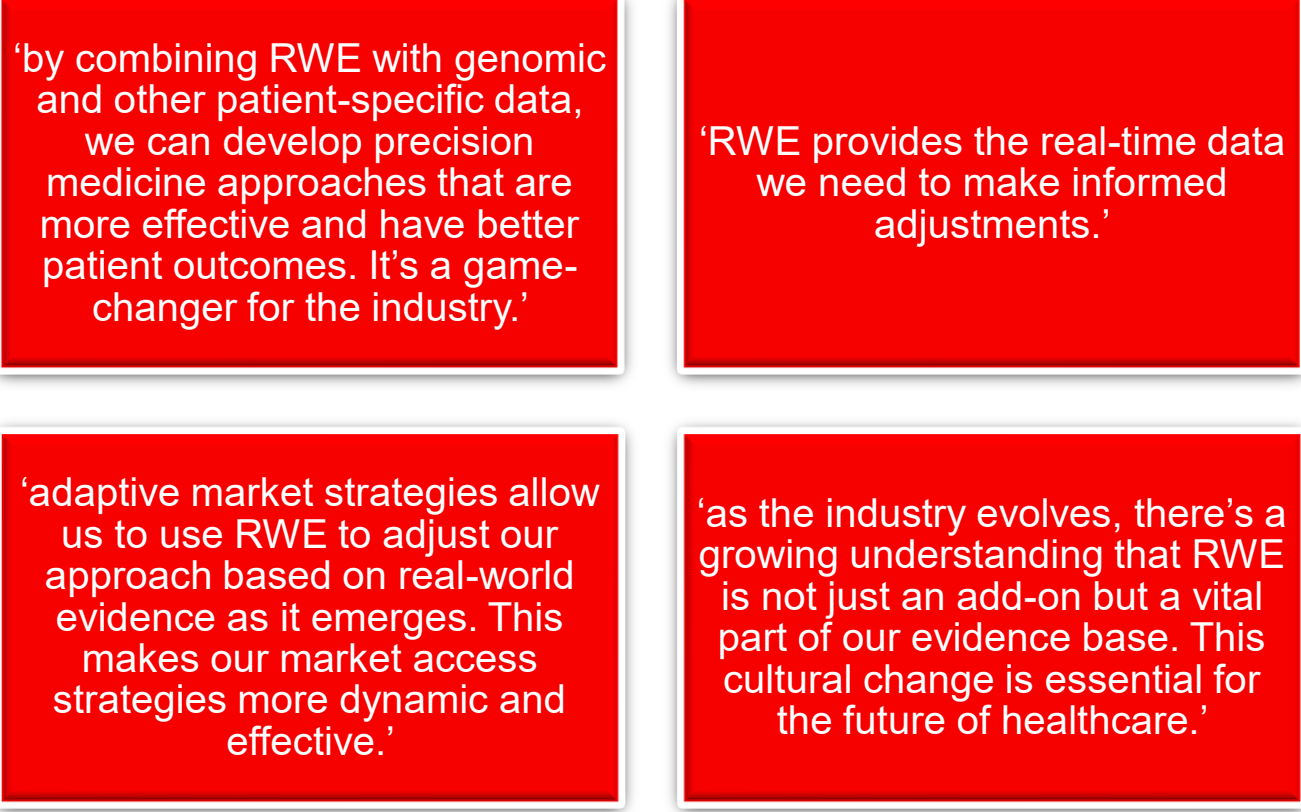


Figure 6: Executive Quotes on Future Trends in RWE



DISCUSSION AND CONCLUSIONS

- Executives see RWE as increasingly valuable but note uneven adoption across the Asia Pacific region. Five priorities emerged. First, improving data quality and standardisation. Without a strong foundation, insights may not be trusted. Second, companies are encouraged to invest in local data capabilities to ensure relevance for market-specific decisions. Third, internal culture remains a barrier. Leadership may benefit from embedding RWE into everyday business and providing teams with training and tools. Fourth, collaboration with academic and clinical partners may help overcome fragmentation and improve access to data. Finally, fifth, emerging technologies such as generative AI and adaptive designs could offer new ways to generate timely, useful evidence.
- Executives also called for policy change, both within organisations and in the external environment. Regional harmonisation and alignment between regulatory and reimbursement processes could reduce complexity and encourage wider RWE use.
- RWE is more likely to deliver value when it is integrated, resourced, and actively applied in decision-making. Companies that prioritise this shift may be better positioned to strengthen access, support innovation, and contribute to improved patient outcomes. These qualitative findings highlight the need for continued exploration of how executive conceptions shape the adoption and strategic use of RWE across evolving leadership and market landscape

Study Limitations: This study is limited by a small, purposive sample and the use of English-language interviews, which may not fully reflect all regional perspectives.

References: 1:U.S. Food and Drug Administration. (2018). *Framework for FDA's real-world evidence program*. <https://www.fda.gov/media/120060/download> 2:Braun, V., & Clarke, V. (2021). *Thematic analysis: A practical guide*. SAGE Publications.

Disclosures: IK is an employee of Aeolian Logic Pte Ltd. At the time of this research, he was a graduate student at the University of Roehampton, London, UK. KB is an employee of KJM Büsch Consulting GmbH. KR is affiliated with the University of Newcastle, Australia, and the University of Roehampton, London, UK. **Acknowledgement:** We thank the participants for their time and insights. No financial funding was received for this research.

