Reshaping Healthcare Provider Perceptions: Developing an Integrated Marketing Framework for Biosimilar Adoption in Specialty Care

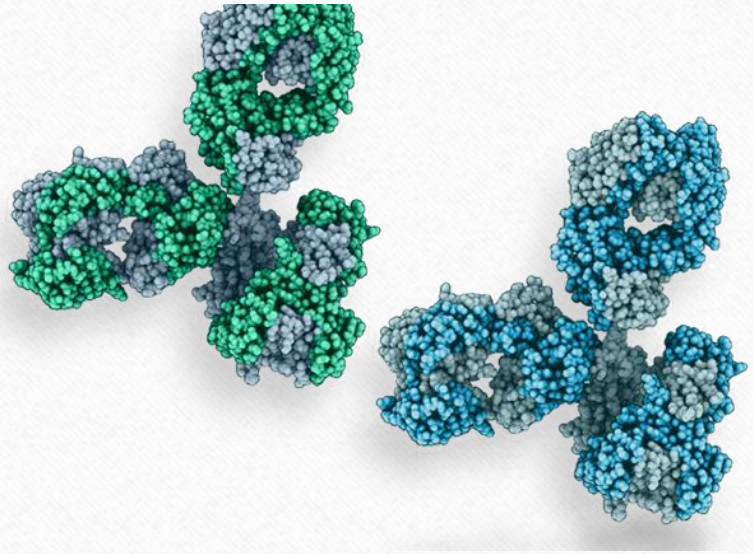
Dissertation Submitted to

IIHMR UNIVERSITY

By: **Sarthak Sudhirrao Joshi**

Under the Supervision and Guidance of
Dr. Sudhinder singh chowhan

Introduction



What are Biosimilars
Biotherapeutic products **highly like** approved biologics
Offer **same safety, purity, and efficacy** at a **lower cost**
Critical for **chronic diseases**: Cancer, Rheumatoid Arthritis, Diabetes

IN India's Role in Biosimilars
60+ biosimilars approved in India
Leading players: **Biocon**, **Dr. Reddy's**, **Zydus**
Regulatory support: **CDSCO–DBT guidelines** (2012, 2016)
Yet, **adoption in specialty care remains low**
Key reason: **Specialist doctors' limited trust & awareness**

Marketing often focuses only on **price**, not on **clinical confidence**
Need for an **Integrated Marketing Communication (IMC)** framework to improve perception and adoption

Problem Identified:

Limited scientific understanding among HCPs
Prescriber hesitation in switching stable patients
Inconsistent marketing (too price-focused, not educational)
Uncoordinated communication among stakeholders

Objective of the study :

Primary Objective
To develop an **Integrated Marketing Communication (IMC) framework** to enhance biosimilar adoption in specialty care in India.

Secondary Objectives
To assess **awareness, attitudes, and perceptions** of healthcare providers (HCPs) regarding biosimilars.
To identify **key barriers and enablers** in prescribing biosimilars.
To review **existing marketing strategies** used by Indian biosimilar manufacturers.
To explore the **impact of regulatory frameworks** (e.g., CDSCO, DBT) on market trust and uptake.

Literature Review – Global & Indian Context

Biosimilars: Biologic medicines similar to an approved reference biologic; no meaningful difference in safety, purity, efficacy (WHO)
Regulatory pioneers:
EMA: Approved 1st biosimilar (Omnitrope) in 2006
US FDA: Approved Zarxio (filgrastim-sndz) in 2015 under BPCIA
India: CDSCO–DBT biosimilar guidelines (2012, updated 2016)
Require comparative studies, clinical trials, and post-marketing surveillance

Adoption & HCP Perceptions
EU: Up to 70% price reduction due to biosimilar competition
US: Slower adoption concerns about interchangeability & reimbursement

IN Indian Scenario
Top players: **Biocon (CANMAb)**, **Dr. Reddy's (Hervycta)**, **Zydus (Exemptia)**
Regulatory gaps: No formal **interchangeability** defined
Challenges:

- HCP misconceptions
- Preference for originators
- Poorly trained sales reps & fragmented messaging

IMC & Research Gaps

Integrated Marketing Communication (IMC) in Healthcare
Definition: Unified messaging across education, PR, sales, and digital platforms
Hierarchy-of-Effects Model:

- Awareness → Knowledge → Preference → Conviction → Adoption

IMC Tools for Biosimilars:

- CME programs, KOL endorsement, RWE distribution
- Sales force training, patient support programs

Research Gaps Identified
1.Lack of **India-specific IMC frameworks** for biosimilars
2.Scarcity of **longitudinal HCP perception studies**
3.Absence of **stakeholder-aligned communication strategies**
4.Limited data on **behavioural drivers** of biosimilar adoption
5.Existing studies focus more on **policy & manufacturing**, not clinical behaviour

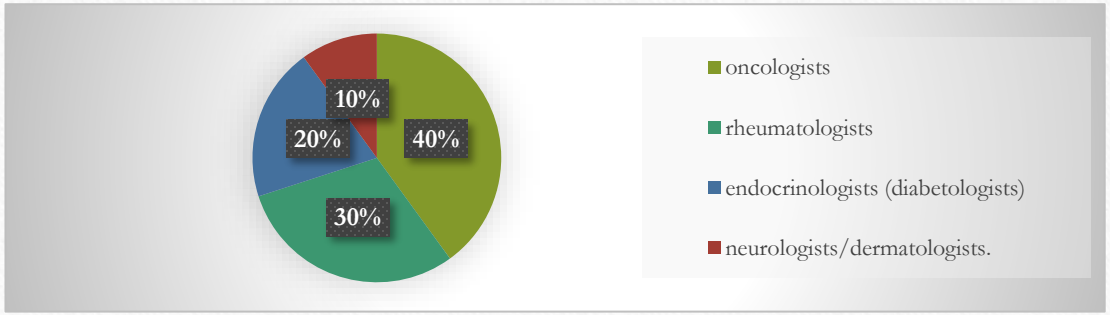
Methodology: Mixed-Methods Approach

Study Design
Mixed-methods: Literature review + Simulated & Physical survey
PRISMA-guided secondary research (PubMed, WHO, CDSCO)
35 relevant sources selected from ~1250 records

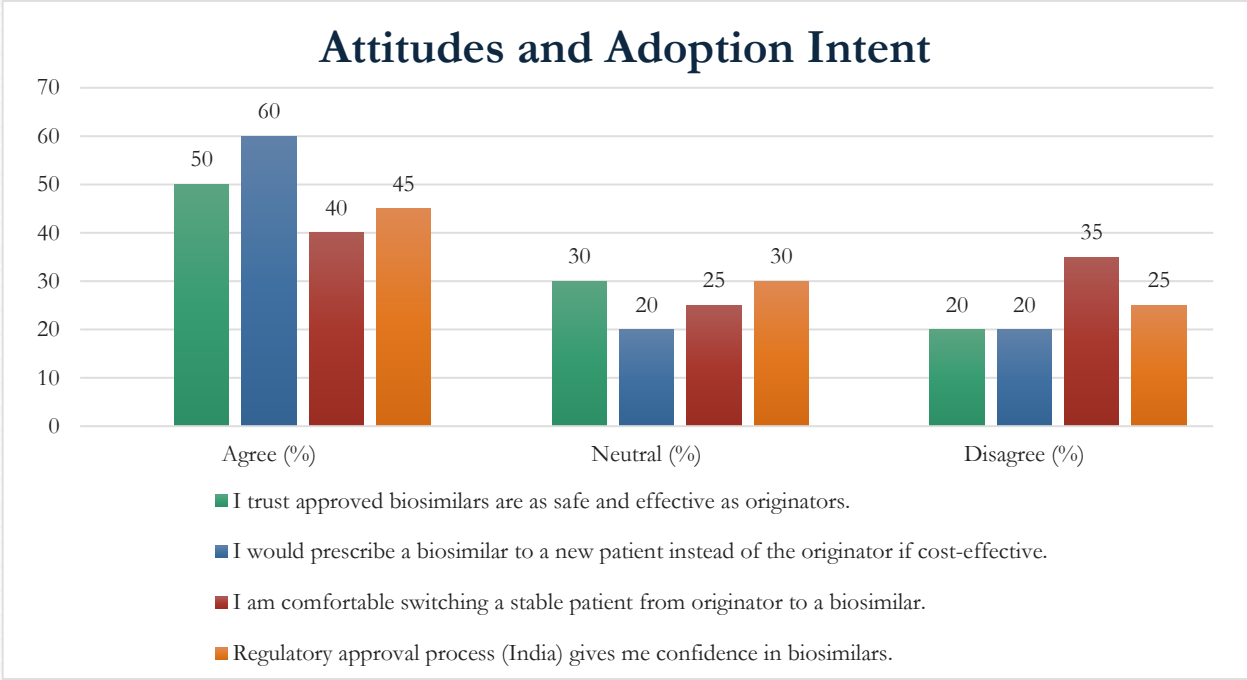
Survey Design
Structured questionnaire: Demographics, Knowledge, Attitudes, Info channels

Data Collection (n = 100)
Physical Survey (n = 40): 16 Oncologists, 14 Rheumatologists, 10 Endocrinologists
Simulated Survey (n = 60): Based on literature & field insights

Biosimilar Adoption in India: Key Findings & Strategic Insights



Simulated Survey Results
Awareness: 80% heard of biosimilars.
Knowledge Gaps: Only 40% knew biosimilars ≠ generics.



Trust & Willingness:

50% trust biosimilar efficacy

60% willing to prescribe for new patients

40% comfortable switching stable patients

57% said they would adopt more if educated properly.

Major Challenges to Biosimilar Adoption

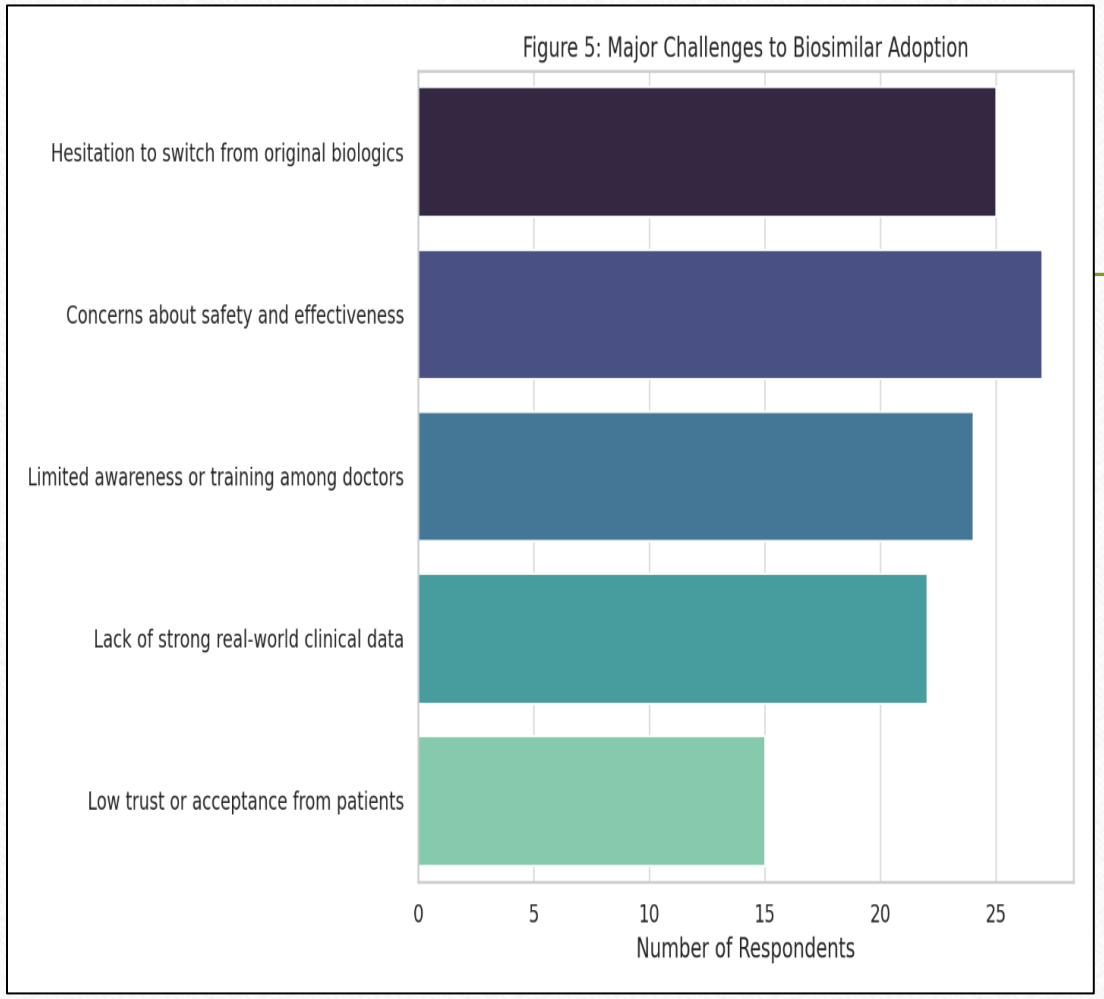
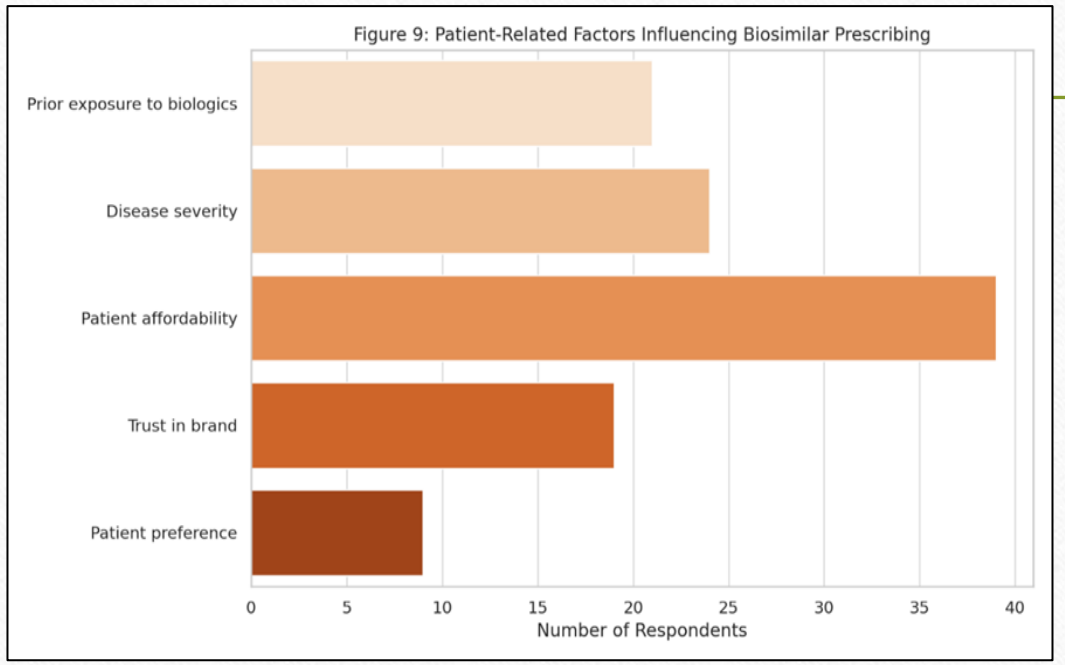


Figure 5 : Major challenges to Biosimilar Adoption

- **Safety & Effectiveness**
- **Reluctance to Switch**
- **Lack of Training**
- **Limited Real-World Data**

Patient related factors influencing Biosimilars



74%

Cost to Patient

Major influence on prescribing decisions

45%

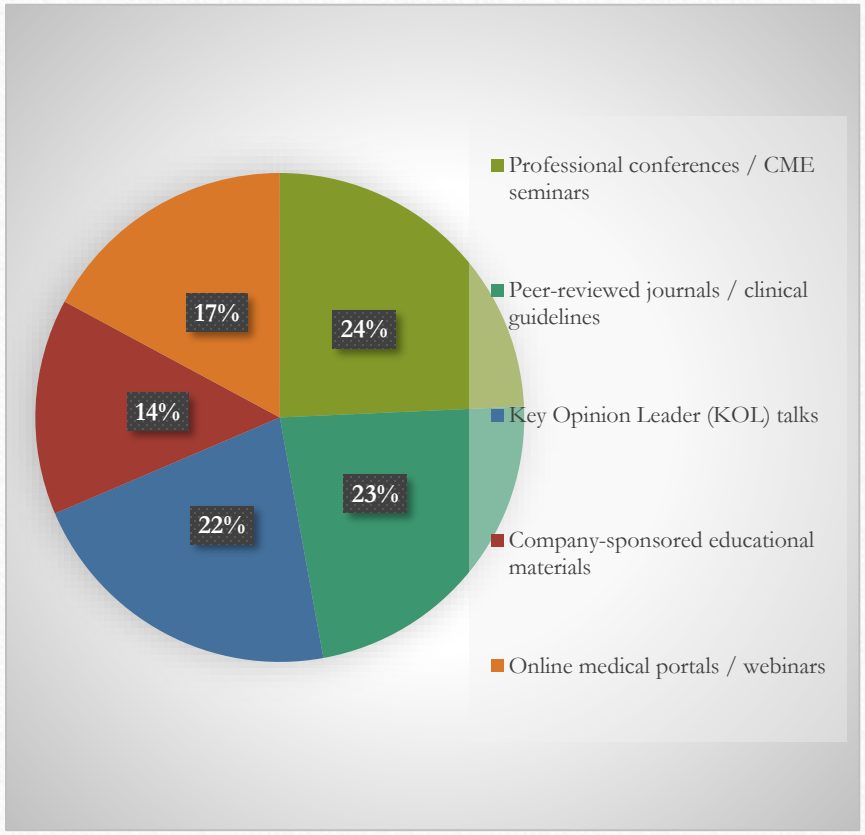
Condition Severity

Impacts cautiousness in prescribing.

40%

Prior Treatment

Influences decision to switch or continue.



Key Barriers to Adoption

❌ No formal interchangeability pathway
❌ Poor HCP awareness & weak institutional support
❌ Overreliance on price, inconsistent scientific detailing
❌ Limited real-world evidence & weak digital presence

IMC Strategy for Driving Adoption

Trust Through Evidence – A Multichannel Approach
Regulatory Messaging: CDSCO-backed clarity
Medical Education: CME, KOL-led sessions
Digital Media: Webinars, interactive platforms
Advocacy: Patient groups, hospital policy briefs
Focus: Repeat, consistent messaging via trusted channels

RECOMMENDATIONS

1. National IMC Campaign
Consortium of CDSCO + AIIMS + industry leaders (Biocon, Zydus)
Unified message: "Trust Through Evidence"
Public webinars, journal features, expert panels

2. Structured CME Modules
Certified trainings via IIHMR, AIIMS
Progression: Awareness → Interest → Evaluation → Adoption
Regional workshops and YouTube-based CMEs for young HCPs

3. Policy Advocacy & Interchangeability Clarity
CDSCO to release official switching guidelines
Include biosimilars in institutional formularies

4. Real-World Data Sharing
Publish post-marketing studies
Showcase Indian success stories (CANMAb, Hervycta) in peer-reviewed platforms

CONCLUSION

India leads biosimilar production but lags in **adoption**

Knowledge gaps and **trust deficits** among HCPs are core barriers

Cost advantage is not enough—**scientific communication is essential**

Role of IMC:
Enables consistent, credible, and multichannel messaging
Aligns stakeholders—**Regulators, Industry, Clinicians, Patients**
Reinforces evidence-backed trust over price-based selling

"Reshaping HCP perceptions is not just marketing—it's medical education.
Through a unified IMC strategy, biosimilars can move from resistance to routine."

Thank You..