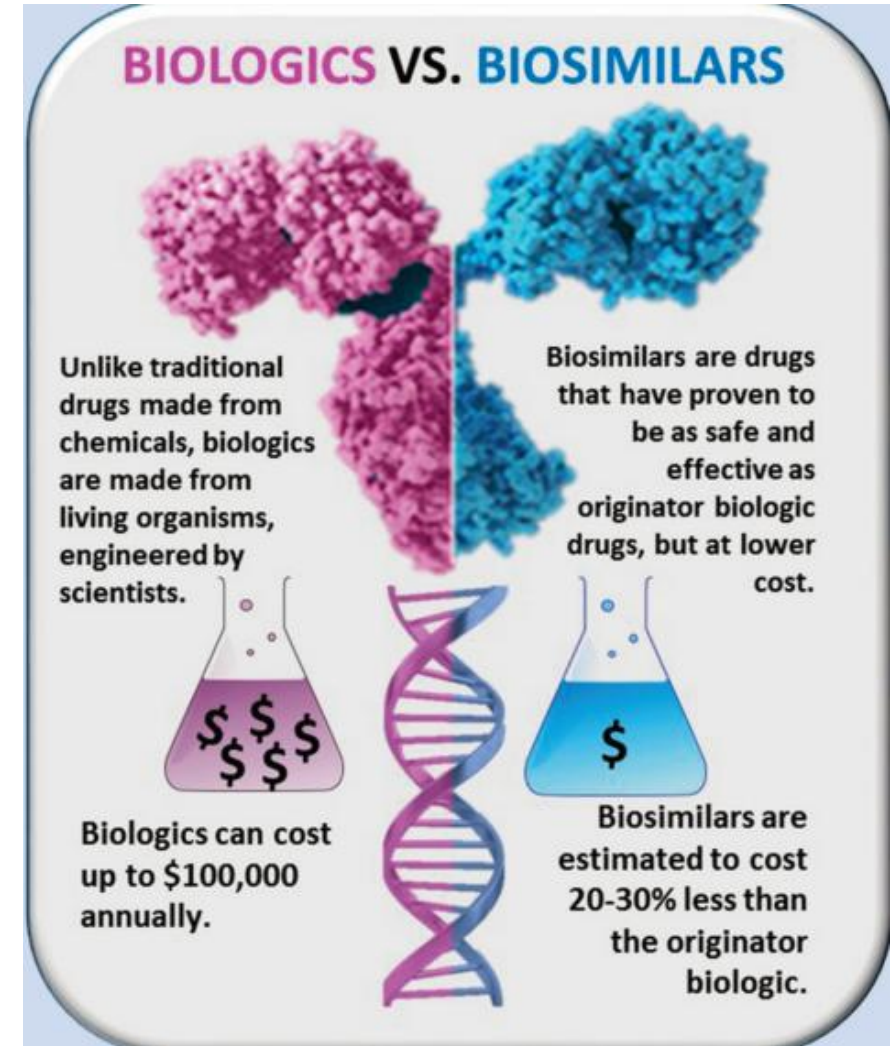


RESHAPING HEALTHCARE PROVIDER PERCEPTIONS: DEVELOPING AN INTEGRATED MARKETING FRAMEWORK FOR BIOSIMILAR ADOPTION IN SPECIALTY CARE

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Introduction to Biosimilar and Biologics

- ▶ A biosimilar is an approved version of a biological medicine with an identical primary amino acid sequence to the originator and developed with the intention to be as close to the originator as possible
- ▶ primarily in the areas of rheumatology and oncology as well as endocrinology, cardiology, dermatology, gastroenterology, and neurology
- ▶ Biologic medicines are critical but expensive, especially in India.
- ▶ Biosimilars offer an affordable alternative but face adoption challenges



Example

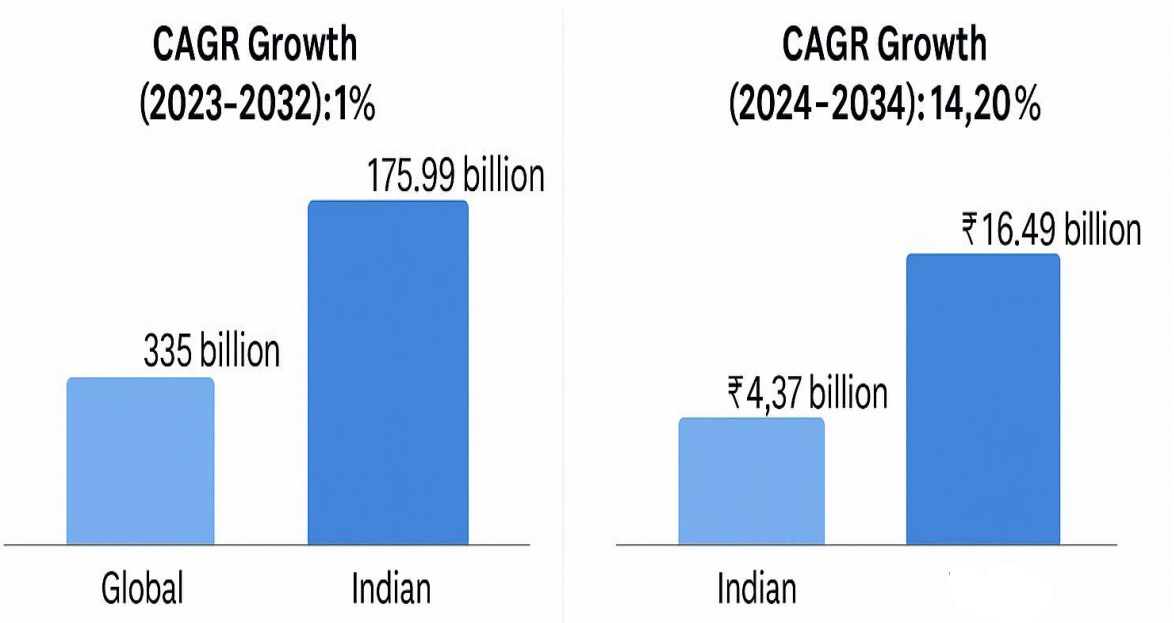
- ▶ Genotropin (Somatropin or somatotropin)-Peptide human growth hormone for children with growth failure due to growth hormone deficiency (GHD). Prader-Willi syndrome. small for gestational age. Turner syndrome, and idiopathic short stature and for adults with either adult onset or childhood onset GHD.
- ▶ Herceptin (trastuzumab)-Monoclonal antibody. Human epidermal receptor 2 (neu) receptor antagonist for aggressive HER positive metastatic and adjuvant breast cancer, for aggressive HER positive metastatic stomach or gastroesophageal junction cancer
- ▶ Humira (Adalimumab)-Anti-TNF- α monoclonal antibody for moderate to severe rheumatoid arthritis, moderate to severe chronic plaque psoriasis, moderate to severe Crohn's disease: moderate to severe ulcerative colitis, ankylosing spondylitis psoriatic arthritis, moderate to severe polyarticular juvenile idiopathic arthritis.



MARKET SIZE AND GROWTH

Global Biosimilars Market	Indian Biosimilars Market	Regional Insights
Market Size (2022): USD 35 billion	Market Size (2024): INR 4.37 billion	Europe: Largest market share (38.23% in 2024).
Projected Market Size (2032): USD 175.99 billion	Projected Market Size (2034): INR 16.49 billion	Asia-Pacific: Fastest-growing region (CAGR of 28.91%).
CAGR Growth (2023–2032): 13%	CAGR Growth (2024–2034): 14.20%	Oncology Biosimilars: Largest segment (24.58% market share).

Biosimilars Market



Key Drivers

- Rising prevalence of chronic diseases (cancer-autoimmune disorders, diabetes)
- Cost-effectiveness compared to biologics
- Increasing regulatory approvals worldwide

Key Trends

- India is a leading biosimilar manufacturer (Biocon, Intas, Dr. Reddy's)
- Physician hesitation due to trust issues and the nocebo effect

PROBLEM AND OBJECTIV E OF THE STUDY

Research Problem

- There is a critical disconnect between biosimilar availability and healthcare provider confidence in India.
- Studies have shown that even when biosimilars are significantly cheaper, Indian physicians may hesitate to switch from originators due to uncertainty over efficacy, immunogenicity, or interchangeability

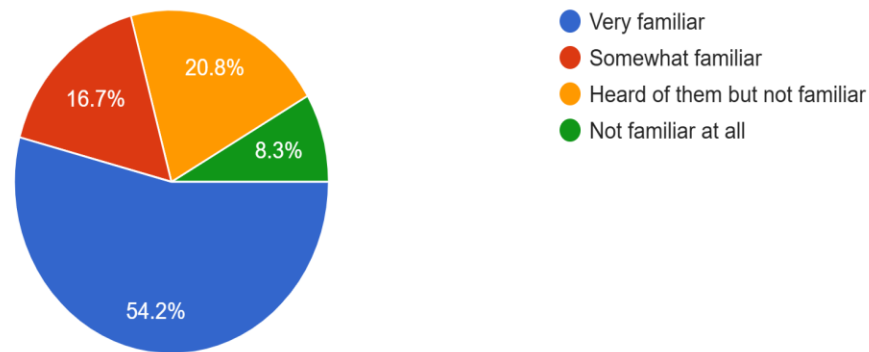
Objectives of the Study

- To understand the perception among healthcare providers about biosimilars in India
- To assess current barriers to specialty use of biosimilars
- To create an IMC plan to enhance biosimilar adoption among



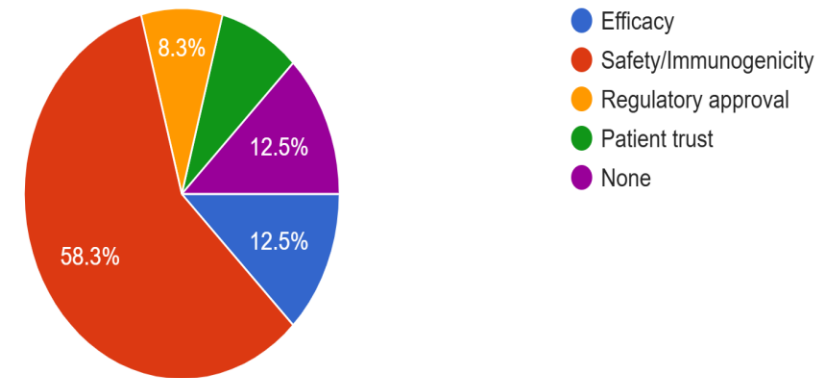
MARKET SURVEY ANALYSIS

How familiar are you with biosimilar drugs used in specialty care (e.g., oncology, rheumatology, endocrinology)?



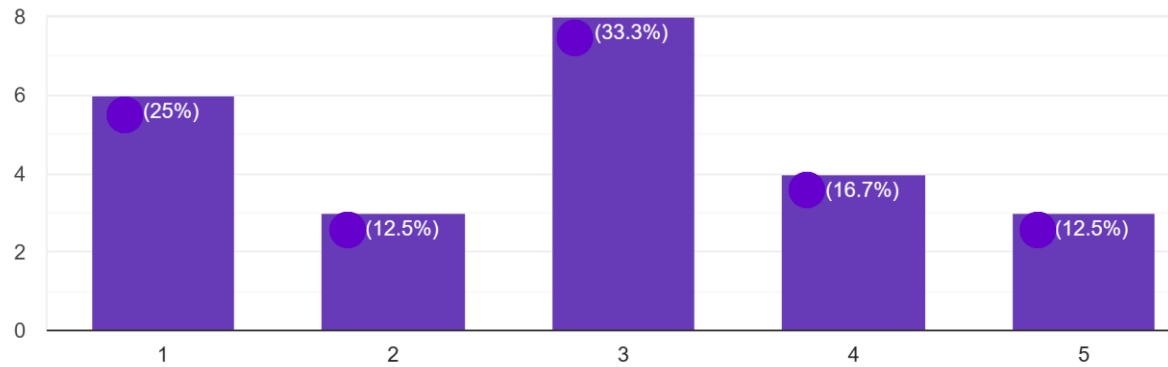
- Most respondents (**approximately 54%**) reported being **very familiar** with biosimilar drugs
- About **21%** said they had **heard of biosimilars but were not familiar**, indicating moderate awareness but a need for deeper clinical knowledge.
- round **17%** of participants identified as **somewhat familiar**
- A smaller segment (**8%**) stated they were **not familiar at all**

What are your primary concerns (if any) regarding prescribing biosimilars?



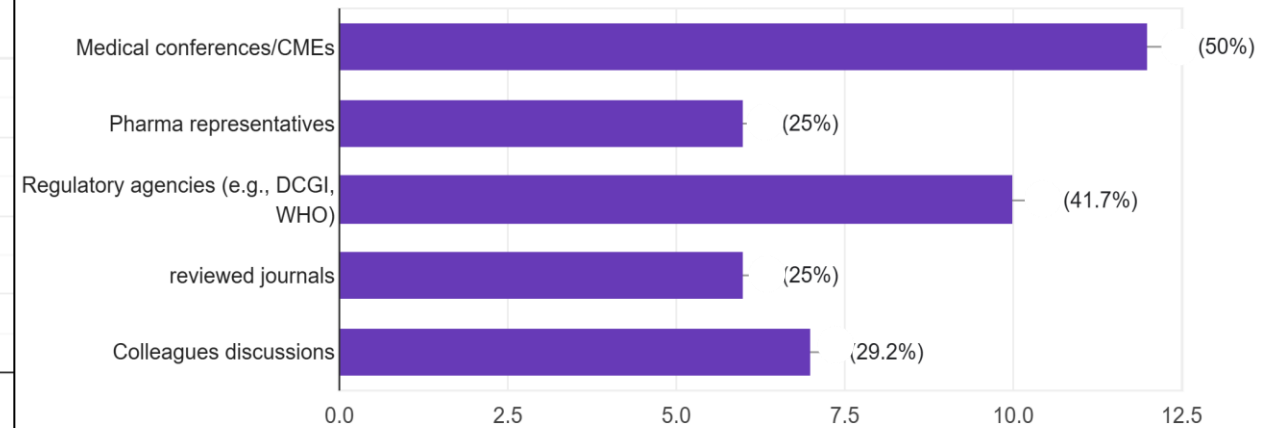
- The majority of healthcare professionals (around **58%**) cited **safety and immunogenicity** as their primary concern when prescribing biosimilars
- About **12%** of respondents expressed concerns regarding **efficacy**
- Interestingly, **12%** of participants reported having **no concerns**
- Smaller segments (approximately **8% each**) were concerned about **regulatory approval**

To what extent do you trust the clinical data supporting biosimilar efficacy and safety compared to reference biologics?



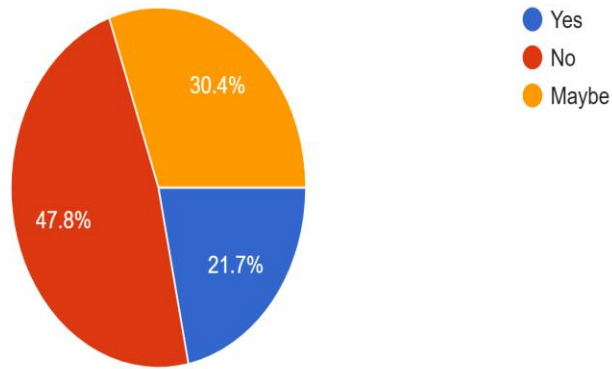
- The **majority of respondents (approx. 33%)** rated their trust level at, reflecting a **moderate level of confidence** in clinical data supporting biosimilars.
- About **25% of participants** expressed **low trust**
- On the other hand, **around 17%** gave a **trust level of**, while **13%** selected (**very high trust**) indicating that a **small but notable group strongly supports the current evidence base.**
- **12.5% rated their trust level**, showing mild hesitation, possibly due to concerns regarding long-term data or comparative trials.

What are the most influential sources of information for you regarding biosimilars?



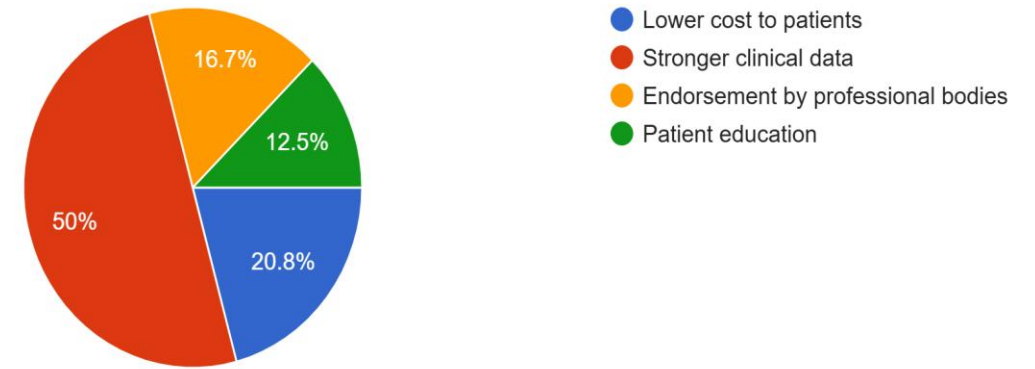
- **Medical conferences and CMEs** were identified as the **most influential source** by approximately **50%** of respondents
- **Regulatory agencies** such as DCGI and WHO were cited by around **42%** of participants, indicating a strong reliance on **official guidelines**
- About **29%** mentioned **colleague discussions** as influential, suggesting that **peer-to-peer learning**
- Both **pharma representatives** and **peer-reviewed journals** were acknowledged by **25%** of respondents each, reflecting the dual role of industry communication

Have you ever prescribed a biosimilar in your practice?



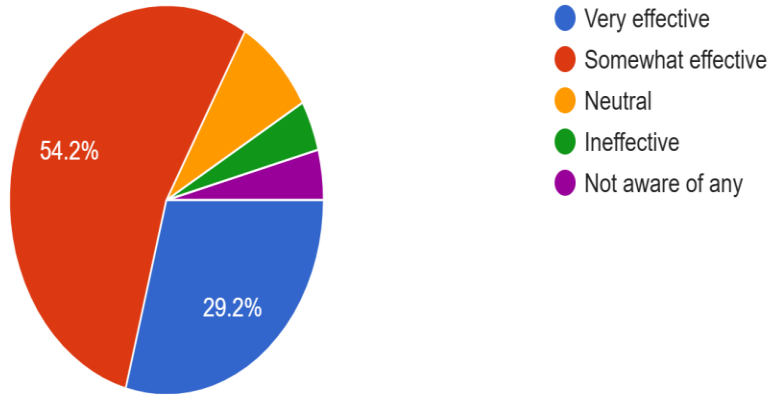
- A majority, **approximately 24 respondents (47.8%)**, reported that they **have not prescribed** a biosimilar in their clinical practice, reflecting possible **hesitation or unfamiliarity** with biosimilars.
- Only **around 11 respondents (21.7%)** indicated they **have prescribed** a biosimilar, suggesting that **real-world clinical adoption is still limited**.
- About **15 respondents (30.4%)** answered **“Maybe”**, highlighting **uncertainty or ambiguity** in their prescribing habits—potentially due to lack of clarity

What factors would most encourage you to increase your use of biosimilars?



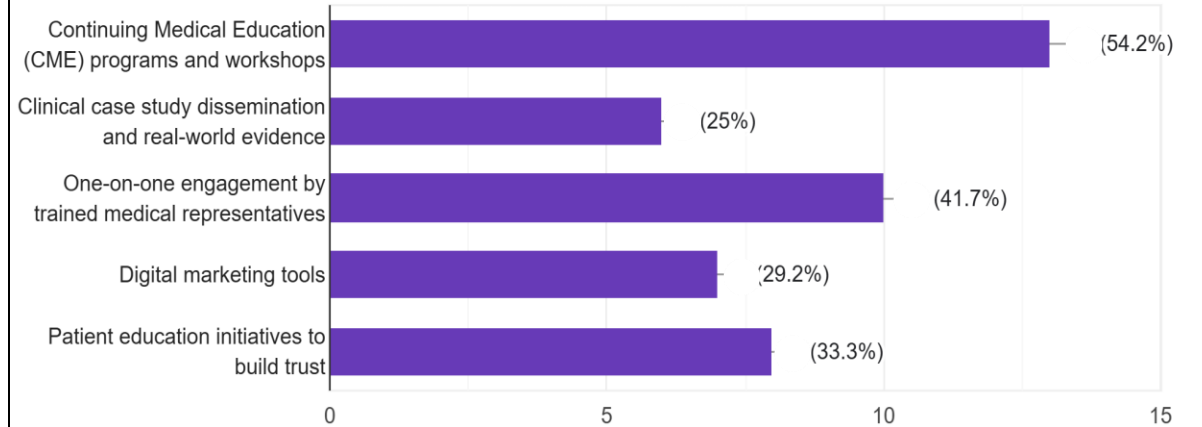
- the majority (50%) indicated that **stronger clinical data** would most encourage them to increase their use of biosimilars.
- This was followed by **lower cost to patients**, which was cited by 20.8%
- **Endorsement by professional bodies** was a motivating factor for 16.7%
- while **patient education** was selected by 12.5% as a key driver for increasing biosimilar use.

How effective do you find current marketing efforts by pharmaceutical companies in educating providers about biosimilars?



- the majority **54.2%** felt that current marketing efforts by pharmaceutical companies to educate providers about biosimilars were **somewhat effective**
- Another **29.2%** considered them **very effective**
- A smaller proportion remained **neutral** at **8.3%**
- while **ineffective** and **not aware of any marketing efforts** were each selected by **4.2%**

What marketing strategies do you believe would most improve biosimilar adoption in specialty care?



- a majority of respondents **54.2%** favored **Continuing Medical Education (CME) programs and workshops**.
- **one-on-one engagement by trained medical representatives** at **41.7%**
- **Patient education initiatives to build trust** were selected by **33.3%**
- **digital marketing tools** were chosen by **29.2%**
- **clinical case study dissemination and real-world evidence** were preferred by **25%**

KEY POINTS



Affordable Alternatives: Biosimilars offer 30–70% cost savings vs originators; vital for chronic and specialty care.



India Leads in Production: 100+ biosimilars approved; major exporters include Biocon & Intas.



Adoption Gap: Low physician awareness, brand loyalty, and lack of switching protocols hinder usage.



Regulatory Challenges: No clear CDSCO guidelines on interchangeability; weak post-marketing data.



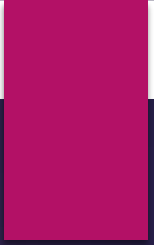
Trust & Education Lacking: 73% of doctors concerned about safety/efficacy; only 15% formally trained.



Patient Resistance: Nocebo effect from poor communication affects trust and outcomes.



IMC Solution Proposed: Targeted, multilingual, and peer-led communication to drive uptake.



Integrated Marketing Framework for Biosimilar Adoption

1. Segmentation & Targeting

Effective adoption begins by identifying and categorizing key prescriber segments:

- **Innovators** – Already prescribing biosimilars. Require advanced data to remain engaged.
- **Fence-Sitters** – Aware but hesitant due to clinical doubts or lack of switching protocols.

Institution Type Focus –

- **Corporate hospitals** (e.g., Fortis, Apollo): Cost-driven messaging
- **Government hospitals** (e.g., AIIMS, Tata): Emphasis on access and public health benefit
- **Private clinics**: Focus on patient trust and simplified decision tools

2. Strategic Messaging Approach

To influence physician behavior, biosimilar communication must go beyond product features and address emotional and peer-driven concerns:

- **Scientific Validation** – Highlight CDSCO approval, trial equivalence, and immunogenicity safety
- **Peer Influence** – Share endorsements from top consultants (e.g., oncologists at Tata Memorial)
- **Localized Confidence-Building** – Use language-specific content (Hindi, Marathi, Tamil, etc.)
- **Patient-Centric Framing** – Emphasize treatment continuity and affordability: “30–50% cost savings without compromising quality.”

3. Multichannel Communication Strategy

To reinforce consistent messaging across various touchpoints:

- **Medical Representatives** – Face-to-face scientific detailing
- **CME/Webinars** – KOL-led educational sessions focused on real-world clinical cases
- **WhatsApp/Email** – Regular updates, summaries, downloadable PDFs
- **Digital Apps** – Provide safety dashboards, dose comparison tools, and e-learning content
- **Hospital Roundtables** – Collaborative, case-based evidence sharing at the institutional level

4. KOL & Influencer Engagement Strategy

Indian medical decision-making is strongly influenced by respected senior physicians and institutional leaders.

- **Engage National KOLs** – Organize real-world evidence discussions with heads of departments (e.g., nephrology, oncology)
- **Publish Indian Use Cases** – Highlight successful outcomes in Indian patients to counter hesitancy
- **Involve Clinical Pharmacists** – Conduct internal biosimilar education sessions and support prescription decision-making
- **Leverage Conferences** – Use national and regional platforms (e.g., ISCR, ICON) to mainstream biosimilar advocacy

5. Patient Communication Toolkit

Patient mistrust, the nocebo effect, and misinformation are major contributors to biosimilar resistance. Equip HCPs with:

- **Simplified FAQs** – “What is a biosimilar?”, “Is it safe?”, “Why is it cheaper?”
- **Infographics** – Visual comparison of originator vs biosimilar in simple language
- **Doctor Dialogue Scripts** – For multilingual use, to ensure consistent and reassuring explanation
- **Testimonial Videos** – Real patients sharing successful biosimilar treatment experiences
- **Hospital Co-branding** – Add credibility with hospital logos alongside pharma branding

6. Feedback Loop & Continuous Improvement

An adaptive approach ensures long-term success:

- **Collect Field Feedback** – Regular updates from MRs and hospital teams to identify barriers
- **Monitor KPIs** – Prescription rates, CME participation, content usage metrics
- **Update Tools & Messaging** – Revise content based on physician questions, resistance themes, or regulatory changes
- **Realign Strategy Quarterly** – Based on evolving perceptions and competitive market landscape

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Conclusion

Biosimilar adoption in specialty care requires more than just cost advantage it demands **trust-building, education, and tailored communication**. This 6-pillar IMC framework offers a **strategic, practical, and localized approach** to engage prescribers, empower patients, and drive sustainable adoption across India's healthcare ecosystem.