



RETHINK:

Biosimilar Adoption in the United States

Physician perspectives on utilization, cost,
and manufacturer support.

The Potential

As lower-cost alternatives for life-changing therapies, biosimilars are poised to make diseases like cancer more affordable to treat. But only if the market is sustainable.

49%
of physicians either agree or
strongly agree that biosimilar
medicines improve patient
lives and provide cost savings



yet
74%
say physician confidence is the
biggest barrier to widespread
adoption of biosimilars

The Challenges

While biosimilar manufacturers may seemingly face the same commercialization challenges as any manufacturer (coverage, competition, and patient access), physician confidence is critical, creating an additional layer of challenges—and launch considerations — for biosimilars:

- 1 How do you create confidence in switching to a biosimilar?
- 2 What is the right mix of education and support services?
- 3 What commercialization investments can help ensure success?

Is it time to rethink how we bring biosimilars to market?



The Survey

AmerisourceBergen surveyed 105 physicians working in oncology, nephrology, and rheumatology to discover their perspectives on biosimilar products and the challenges they anticipate with utilization.

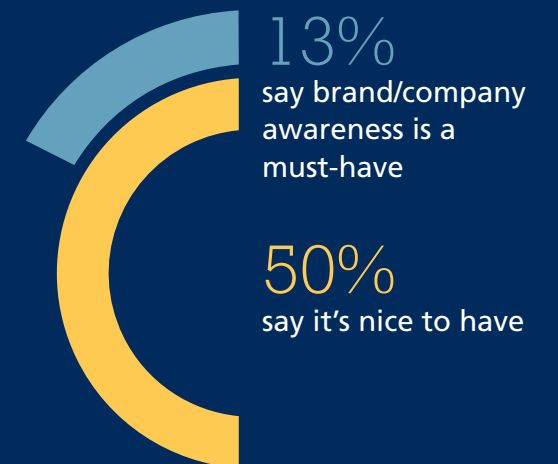
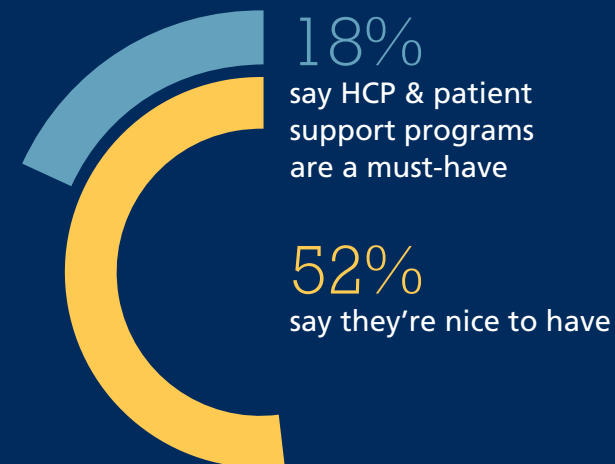
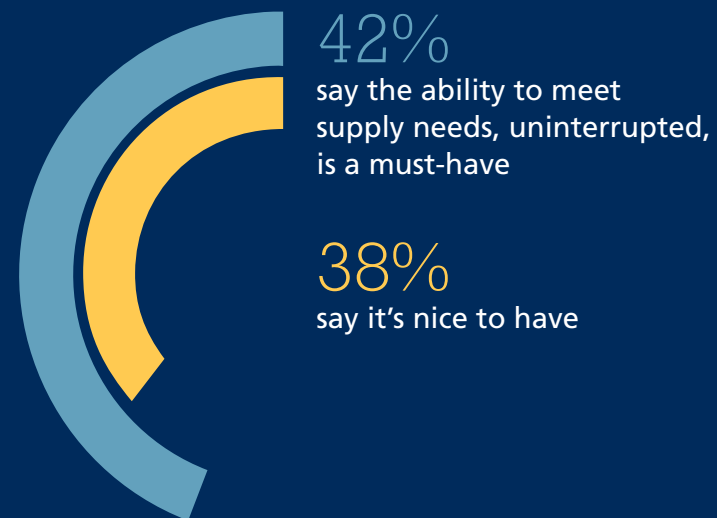
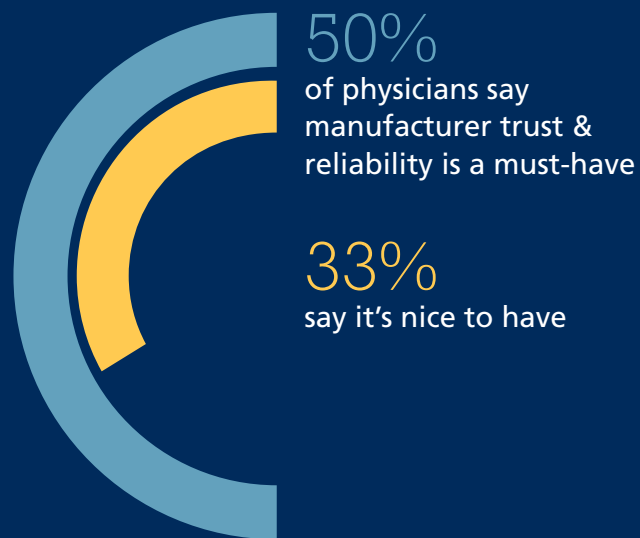


The results reveal that, although the biosimilars market is not yet mature, it has great potential to deliver on the promise of cost savings. Biosimilar manufacturers have ample opportunity to align their commercialization efforts with the education and support needs of physicians.

Rethink: Positioning Findings

While we've seen aggressive originator positioning to date, and even large biologic manufacturers entering the biosimilars space, a known name doesn't mean as much to the physicians we surveyed as a trusted manufacturer with a reliable supply of product. The survey results also support the current parity in patient support programs between biosimilars and reference products.

Based on your current experience, what data, evidence, and resources around manufacturer capabilities should biosimilar manufacturer(s) invest in to support further utilization?



Rethink: Positioning

Guidance



“Implementing a bridge program, which covers therapies until a prior authorization is processed, can differentiate a drug's support services by removing access hurdles and improving speed to therapy (essential for critical illnesses). A robust patient copay support program, on par with the originator's, has also proven to be critical to provider and patient uptake of biosimilars. These programs give providers peace of mind in administering the first doses of a biosimilar while they await benefit verification.”

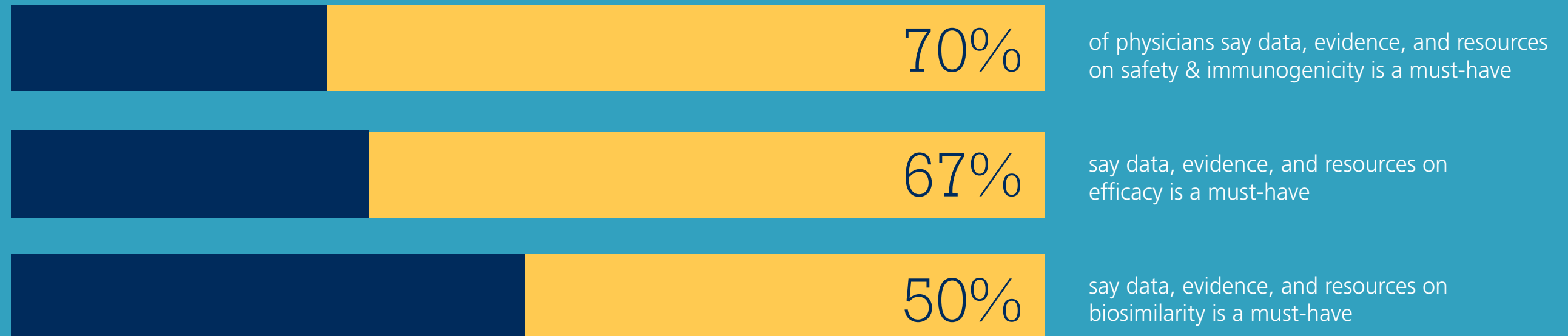
Melissa Mulchahey

Vice President, Field Services Client Engagement and Business Development
Xcenda

Rethink: Education Findings

Clinical confidence is critical to ensuring the successful uptake of biosimilars. Survey results reveal that physicians want product education and data to support clinical decision-making.

Based on your current experience, what clinical data, evidence, and resources should biosimilar manufacturer(s) invest in to support further utilization?



Rethink: Education Guidance

As you consider the design of provider education, consider:

- 1 The growing appetite for digital education resources
- 2 Marketing and education opportunities available through GPOs



Rethink: Payer Strategy and Real-World Evidence Findings

While it may not be news that the value proposition of biosimilars is centered on economics, survey insights reveal that physicians value cost savings for patients over practice economics. And when it comes to post-launch data, they're interested in ongoing evidence for switching and value for outcomes.

Based on your current experience, what real-world evidence should biosimilar manufacturer(s) invest in to support further utilization?



50%

of physicians say evidence for interchangeability and switching is a must-have



38%

say evidence of cost relative to patient outcomes is a must-have



34%

say post-marketing evidence generation is a must-have

Please rank the following practice objectives for biosimilar adoption (1 = most important, 4 = least important)

50% of physicians ranked cost savings to patient #1

21% ranked savings to overall healthcare system #1

17% ranked metric/measure attainment (payer, value-based, etc.) #1

12% ranked improved practice economics #1

Rethink: Payer Strategy and Real-World Evidence Guidance



“Payers and PBMs continue to evolve their coverage strategies, which can be both good and bad news for biosimilar manufacturers. Investing in a payer strategy is a wise move as the market continues to mature.”

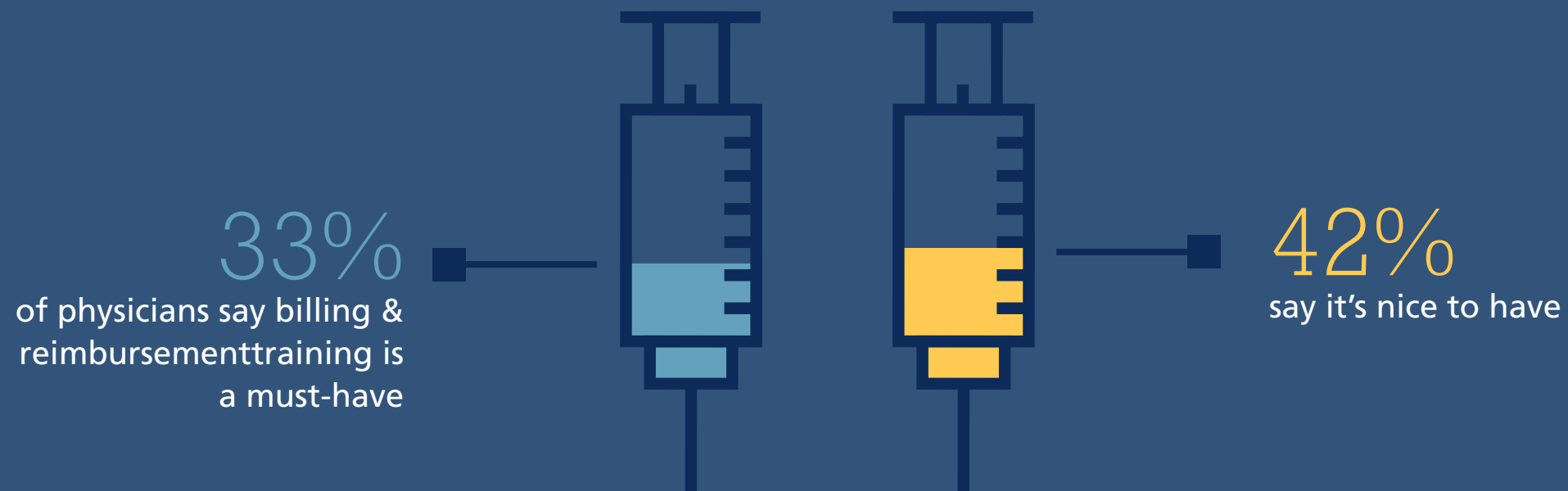
Sean McGowan

Sr. Director, Biosimilars
AmerisourceBergen

Rethink: Provider Support Findings

The most valued component of manufacturer-sponsored physician support continues to be services that help providers navigate the currently murky waters of biosimilar reimbursement.

Based on your current experience, what are your operational support needs to support further biosimilar utilization?



Rethink: Provider Support

Guidance



“Physicians want accessible products with a straightforward claims payment structure. If a biosimilar requires a formulary exception, clinicians aren't likely to see the value in choosing the longer process over the simplicity of an originator drug that the patient can start immediately.”

Melissa Mulchahey

Vice President, Field Services Client Engagement and Business Development
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Learn More

Access more survey results and biosimilar insights [here](#).

Talk to an expert about how AmerisourceBergen's integrated commercialization services can position your product for success.

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