

PHIL

Building a Direct-to-Consumer Pharmaceutical Program that Works

A strategic roadmap
for pharma teams

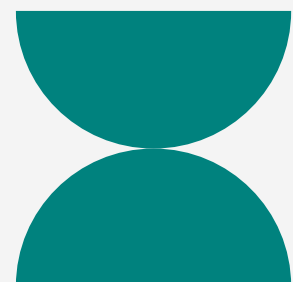


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Executive Summary

The meteoric rise of direct-to-consumer (DTC) models has disrupted “business as usual” across industries, from retail to real estate, financial services to consumer goods. By 2025, DTC sales by established brands in the U.S. are expected to **exceed \$186 billion – a 148% increase since 2020.**¹

Bypassing traditional intermediaries is reshaping consumer behavior – today’s customers are empowered with personalization, convenience, and direct engagement with brands. As a result, companies are benefiting from stronger brand loyalty and the ability to pivot quickly to keep pace with evolving consumer needs.

Consumer expectations for convenience, cost savings, more control over their health, and direct access to healthcare services have driven the development of DTC models in healthcare. Mental health apps, at-home diagnostic tests, wearable health devices, and telemedicine platforms are great examples.

A 2022 consumer survey highlighted the upswing in preferences for non-traditional care, with 45% of respondents choosing virtual care or care via an app over in-person care.²

Pharmaceutical manufacturers are [embracing DTC models](#) as they recognize the tremendous opportunity to better meet patients' changing needs and expectations. However, this transformation comes with challenges and considerations, as it represents a significant shift in how medications are marketed and accessed.

If your pharmaceutical brand team is looking to initiate or improve a DTC program as a component of your channel strategy, this playbook will give you a better understanding and a guiding roadmap for effectively navigating this paradigm shift.

“Pharma manufacturers are adopting DTC models as they recognize a growing opportunity to better support their patients, providers, and teams.”



Jonas Boli

CPO, Phil

State of the Industry: DTC Models in Pharma

The rise of DTC in the pharmaceutical industry is closely tied to broader trends in digital health and changing patient expectations:

- **Digital health growth:** the market value of digital patient engagement was over \$200B in 2022 and is forecasted to grow over 18% annually through 2032³
- **Consumer-centric approach:** Patients increasingly expect healthcare experiences that are personalized, convenient, and aligned with their lifestyles⁴
- **Patient autonomy:** Digital health tools are enabling a shift towards preventive care and better self-management of chronic conditions.
- **Data-driven decision making:** The application of big data in healthcare allows for more personalized and effective treatment plans.⁴

DTC models create new opportunities for pharmaceutical manufacturers to better serve patients and healthcare providers (HCPs) by improving medication access and affordability.

DTC programs that can accomplish these goals include the following components:



DTC marketing strategies



Telemedicine channel



Digital pharmacy services for patients



Simplified PA & prescribing for providers

State of the Industry: DTC Models in Pharma

There are several access barriers in the traditional care delivery model, such as:

- ✗ Long wait times at the doctor's office and pharmacy
- ✗ Large commute time between the patient's home and their provider's office
- ✗ Complex and lengthy medical forms for patients and providers

Digital solutions can help break through these barriers with services such as:

- e-Commerce healthcare
- 24/7 availability and access channels
- Remote care delivery
- User-friendly digital health interfaces

These services can help:

- ✓ Improve patient access, engagement, and adherence
- ✓ Reduce administrative burdens on providers
- ✓ Maximize PA submission rates, driving covered dispenses
- ✓ Empower brand and field teams with real-time data and insights
- ✓ Create a sustainable channel strategy that drives GTN

“DTC models are solving important access hurdles for patients and providers, including addressing insufficient insurance coverage, healthcare staff shortages, geographic and cost barriers, inconvenience in accessing care, and more.”



Renee Kasun

VP Business Development,
Phil

State of the Industry: DTC Models in Pharma

Potential benefits of pharmaceutical DTC program adoption:

- **Simplifying the patient journey** to improve access and adherence to prescribed treatments
- **Streamlining access to medications**, potentially reducing wait times and improving patient outcomes
- **Offering affordable and convenient access** to healthcare services, particularly for conditions that patients might feel uncomfortable discussing in person
- **Fostering trust and loyalty** by enabling manufacturers to establish stronger connections with patients
- **Providing visibility** into the prescription process, insurance coverage, and patient preferences

Major players leading the charge in DTC solutions

- **LillyDirect** - Introduced by Eli Lilly in January 2024, this platform offers disease management resources, direct home delivery of select medications, and access to independent healthcare provider⁵
- **Pfizer for All** - Pfizer plans to launch its own DTC website before the end of 2024, offering treatments for migraines and COVID-19⁶
- **Hims & Hers** - This established telehealth platform connects patients with provider online to receive medical consultations and treatments for sensitive health conditions, including erectile dysfunction, hair loss, mental health, and weight loss.⁷
- **Evinova** - AstraZeneca's suite of digital health solutions aimed at streamlining clinical trials supports virtual visits, direct-to-patient medicine delivery, telehealth, remote monitoring and sample tracking.⁸

Is DTC the Right Approach for Your Brand?

Before embarking down the DTC road, pharmaceutical brand teams should evaluate several factors to ensure this type of program will align with their strategic goals and effectively address the needs of the target patient population. We recommend reflecting on the following questions:

1. Patient population

- What are the demographics and characteristics of the target patient group(s)?
 - What are the specific health needs and challenges related to the condition?
 - What are the medication access barriers patients face in this therapeutic area?
 - What are patient preferences for prescription delivery, communication, and refills?
 - Are there digital literacy or technology access gaps within the patient population?
-

2. Brand strategy and operations

- How does a DTC approach align with the brand's broader strategic goals and market positioning?
 - Can we integrate the program with existing healthcare systems and workflows?
 - What internal capabilities do we have vs. the need for external partnerships?
 - Do we have the operational capabilities required to support a DTC program, including logistics, customer service, and technology infrastructure?
 - Do we have the budget and resources to sustain DTC efforts?
-

3. Market dynamics

- What is the competitive landscape and other DTC efforts in this therapeutic area?
- What is the potential impact on market share and pricing?
- Where in the product lifecycle does the brand fall?

Is DTC the Right Approach for Your Brand?

4. Healthcare provider relationships

- What impact could a DTC model have on existing and new HCP relationships?
 - How could the program impact provider-patient relationships?
 - How could this program benefit providers?
 - How can we support healthcare providers in addressing patient awareness?
 - Can we integrate DTC efforts with HCP marketing?
-

5. Therapy considerations

- Are the dosage requirements, administration complexity, and duration of treatment compatible with a DTC program?
 - How would we manage any special storage or handling requirements?
 - What level of support is needed to address potential risk profile and side effects, ongoing monitoring, and medication adjustments?
 - Is this treatment compatible with remote prescribing and telemedicine?
-

6. Regulatory compliance

- What are the FDA regulations for DTC marketing?
- How will we ensure HIPAA compliance and address other data privacy concerns?
- What are the state-specific telemedicine laws and regulations?
- How will we present risk information clearly and conspicuously in a DTC model?

“Introducing DTC is the definition of change management. Engage your legal and compliance partners with the question: ‘if that organization was able to introduce DTC, why can’t we?’ Approaching them with this proactive lens can be really powerful.”



Miten Soni

Associate Director of
Brand Marketing,
Sun Pharma

Designing a Comprehensive DTC Program

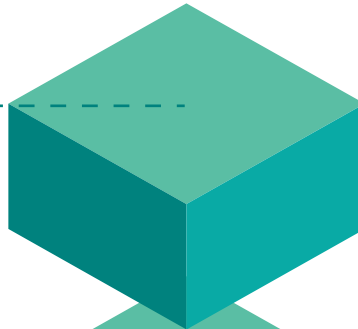
A comprehensive DTC program is designed to support the end-to-end patient experience, uniting stakeholders across the healthcare journey, and promoting better health and access outcomes.

1

Multiple access channels

Offers flexible options for patients to connect with HCPs via in-person visits or telemedicine.

- ✓ Expand reach to underserved or remote populations
- ✓ Improve convenience, cost, and choice
- ✓ Streamline access to timely care

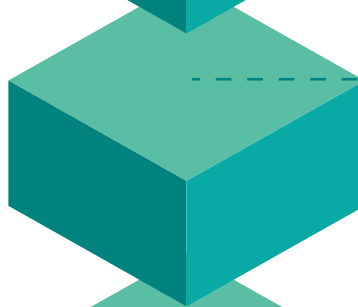


2

Digital prescription platform for patients

Streamlines medication access and improves the patient experience.

- ✓ Facilitates medication management and refill processes
- ✓ Improves communication with status updates and education content
- ✓ Offer access resources, such as copay assistance and prescription delivery



3

Digital prescribing platform for providers

Reduces the administrative burden on providers, allowing more time for patient care.

- ✓ Accelerates treatment initiation with a simplified PA process
- ✓ Improves access with an integrated prescribing process
- ✓ Boosts HCP experience and loyalty

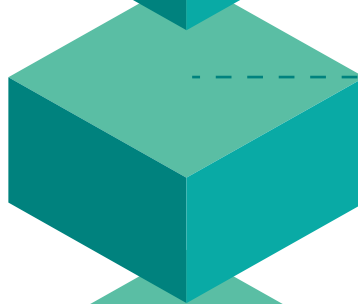


4

Awareness, education, and support

Facilitates patient access to treatment and helps providers better serve patient needs.

- ✓ Increases adoption and adherence
- ✓ Enhances the treatment journey for patients
- ✓ Mitigates potential concerns and misconceptions

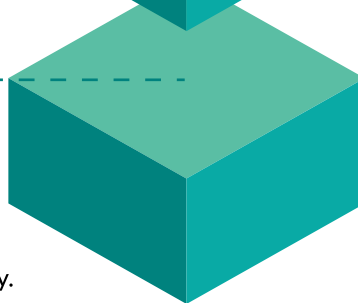


5

Actionable program data and insights

Empowers manufacturers to identify trends, gaps, and opportunities across the access journey.

- ✓ Provides full visibility into patient, provider, and program activity
- ✓ Supports field team enablement through territory-level insights
- ✓ Offers real-time data for continuous program optimization



A Roadmap to DTC Success

Common roadblocks to DTC program success include regulatory compliance, data privacy and security, and a lack of program awareness and adoption. By following this roadmap of best practices, your brand team can proactively mitigate these challenges while enhancing the overall effectiveness and impact of the DTC initiative.

1

Lead with patient centricity

Build a patient education, engagement and empowerment by creating content that addresses patient needs, concerns, and questions. Consider using patient stories and testimonials to make the messaging more relatable. Ensure these resources are provided in the formats and channels that patients use.

2

Build a robust omnichannel strategy

Utilize multiple channels, such as DTC marketing, telemedicine, and digital hub to support patients and providers. When optimized with consistent messaging and an integrated approach, this strategy will help brands interact with patients, promote program awareness, and facilitate treatment access effectively.

3

Leverage data and analytics

Identify KPIs, such as patient enrollments, time to fill, and covered dispenses, to [monitor how well your program is performing](#). Implementing analytics will provide more insight into the prescription journey and help teams optimize program performance.

4

Ensure regulatory compliance

Adhere strictly to FDA and HIPAA regulations, including fair balance of risks and benefits, consistency with approved labeling, inclusion of disclosures and safety information, and securing protected health information.

5

Implement a phased rollout

Test and refine strategies as the DTC program is expanded, tracking the defined KPIs for each aspect of the program and regularly analyzing performance data to adjust strategies accordingly.

6

Engage healthcare providers

Educate HCPs about the program and benefits and provide materials and resources to support patient-provider discussions. [Read our playbook, *Innovating Your HCP Engagement Model*](#), to discover how you can tap into data to empower the field team to engage with HCPs more effectively.

By incorporating these best practices for a patient-centric, omnichannel DTC program, your team can drive impactful direct-to-consumer initiatives that better serve patients and healthcare providers while improving brand performance.

Customer Success Snapshot

Background

The brand team for an innovative therapy with an FDA-approved indication to treat hypoactive sexual desire disorder (HSDD) in women wanted to launch a telemedicine access channel that paired with the option for prescription delivery to meet their target patient population's preferences for discretion and convenience.

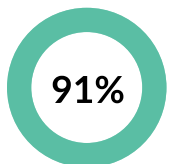
Partnering with Phil

The brand partnered with Phil to provide an integrated telemedicine and digital hub with an end-to-end prescription access journey that meets the e-Commerce-like expectations of today's patients while maintaining strict regulatory compliance.

They implemented a responsive solution built around the following key deliverables:

- Marketing the channel on the brand's patient website for a consistent experience
- Integrating via API to compliantly share patient data between the telemedicine and digital hub platforms, facilitating benefits investigations and prior authorizations
- Enabling seamless access to therapy with differentiated dispense programs (copay, bridge, PAP) based on varying coverage needs
- Providing patients options for home delivery or local pickup

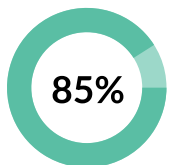
Program Results



New patient enrollment rate



Refill adherence vs. retail



PAs successfully sent to health plan



Pull through vs. retail

Dive into the full case study [here](#).

Make DTC Your Brand's Growth Strategy

DTC offers the potential to better support patients and providers, improving outcomes across the access journey. As brand teams navigate the complexities of implementing a successful pharmaceutical DTC model, here are 6 key takeaways to keep top of mind:

1. **With the right strategy, tools, and resources**, a comprehensive DTC program can help you differentiate your brand in the market while improving access to treatment
2. **A patient-centric approach** should be the center of your DTC initiative – an omnichannel strategy can help you meet patient expectations more effectively
3. **Digital hubs** can help boost the patient experience and HCP engagement, while providing valuable data and insights to help manufacturer brand and field teams drive brand outcomes

Ready to drive success with DTC? With PhilRx as your alternative channel partner, you can create a seamless access experience for patients and providers integrate with your telemedicine partner of choice, and gain comprehensive insight across the prescription lifecycle.

[Get in touch](#) to discover how partnering with Phil can help you successfully introduce a performance-driven channel with a strong DTC component.

Learn more by
[booking a demo](#)

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