

PHIL RESEARCH REPORT

The DTP Imperative: Building Direct-to-Patient Programs that Exceed Today's Patient Expectations

Patients expect transparency, choice, affordability, and convenience throughout their medication access experience, now more than ever before. Pharma manufacturers with direct-to-patient programs that effectively meet today's most pressing patient expectations will thrive in the race to the top for brand loyalty, trust, and performance.

1,049

U.S. respondents, aged 18+

February 2026

Field date

Patients expect cost transparency, choice, and convenience throughout their medication access experience, now more than ever before. Despite pharma investing billions in driving awareness, nearly 6 in 10 patients who are interested in a medication never fill a prescription today.

PHIL surveyed 1,049 U.S. patients who have received a prescription medication in the past five years to uncover key barriers and value drivers for patients. This research report reveals the most pressing needs, challenges, and preferences of today's patients in an increasingly digital healthcare environment – and what the next generation of DTP programs must deliver to close the gap.

The findings are clear: patients are ready to engage with manufacturer-led DTP programs, but only when pricing is affordable and transparent, access is frictionless, and the experience mirrors the consumer-grade standard they expect. Pharma leaders that build DTP programs that support these patient needs will find these to be the most meaningful levers for improving therapy starts, adherence, and long-term brand performance.

"Today, consumer-grade direct-to-patient programs that are custom-built to exceed patient expectations are the industry's most powerful strategic lever for improving patient outcomes while driving commercial performance at scale."

DEEPAK THOMAS, CEO & FOUNDER, PHIL INC.

METHODOLOGY

- 1,049 U.S. adults, aged 18+, who have received a prescription medication in the U.S. at some point in the past five years
- Diverse demographic distribution across annual income (\$25k–\$150k+), gender (46% male, 54% female), and age (18–65+)

KEY FINDINGS

6 in 10

patients don't start a therapy they are interested in after seeing an ad

32%

of patients want a fully online or hybrid medication access experience

1 in 3

patients won't pursue a medication they are interested in if they can't go through their preferred access experience

65%

would use DTP programs if they offer the lowest medication cost

95%

of patients want DTP programs to mirror e-commerce experiences

Pharma is Losing Patients Between Interest and Access: Why Awareness Isn't Translating into Therapy Starts and Adherence

Pharma spent \$10 billion on marketing prescription drug ads in 2025, with more than half of this budget going into TV ads (eMarketer, 2026). The research shows that awareness alone is not converting – patients see ads for medications they are interested in, only to drop off before ever filling a prescription. Cost, access friction, and a lack of seamless digital pathways are some of the biggest opportunity areas for reducing avoidable drop-off in DTP experiences.

KEY FINDINGS

6 in 10

patients never fill a prescription after seeing an ad

WHY THIS MATTERS

Cost uncertainty and lack of clear next steps are among the primary drivers of patient drop-off. Surfacing transparent pricing on your brand site, alongside clear pathways to care (find a doctor, telehealth), gives patients the confidence and direction they need to move from interest to action.

WHY PATIENTS DROP OFF

Aside from deciding the medication was not right for them after talking to a doctor, top reasons patients didn't start a therapy they were interested in were:

- #1** Wanted to talk to a doctor but never scheduled an appointment
- #2** Received a prescription but didn't fill it due to cost
- #3** Didn't know how much the medication would cost
- #4** Confused about where to find out if medication was right for them

32%

of patients prefer a fully online or hybrid experience to access their prescription medications

WHY THIS MATTERS

Nearly a third of patients want some degree of digital experience in their medication access journey. For manufacturers that do not have a DTP program, this represents a significant portion of potentially eligible patients that are currently missing their desired access path to therapy.

1 in 3

patients won't pursue a medication they are interested in if they can't go through their preferred access experience

WHY THIS MATTERS

Patients expect choice. Equipping patients with the ability to choose their preferred path to therapy – whether online, in person, or hybrid – influences whether they start or abandon therapy altogether. A flexible DTP program will serve as a critical bridge to connect patient interest and access.

"Pharma's marketing investments are driving awareness. Now's the time to build a scalable infrastructure that removes access barriers to translate intent into therapy. Manufacturers who can successfully close the gap between awareness and access through patient-centric program design will unlock considerable patient growth."

CHANDER VISWANATHAN, CHIEF TECHNOLOGY, PRODUCT, AND OPERATIONS OFFICER

Affordable, Transparent Pricing Moves the Needle Most on Patient Adoption & Adherence of DTP Programs

Pharma manufacturers have made meaningful investments in affordability programs to help patients access and adhere to the medications they need. The research shows that continuing to push the envelope with affordable and transparent pricing is pharma's single biggest lever for driving adoption and adherence. DTP programs that dynamically surface the lowest available price for each patient, reconciling insurance coverage and eligible discounts in one place, have a significant opportunity to maximize patient starts and long-term therapy adherence.

KEY FINDINGS

Top drivers for DTP program adoption

Lower cost **52%**

Quicker access **30%**

Better quality of care **26%**

WHY THIS MATTERS

Affordable pricing is the single most decisive factor of whether a patient chooses to engage with a DTP program, outpacing every other value driver by a wide margin. Manufacturers that prioritize surfacing the lowest available price will see the greatest lift in adoption and adherence.

1.42

"Lower cost" scored **1.42** in ranked influence — more than **2x** the next-highest value driver for patients

RANKED INFLUENCE SCORE

#	DRIVER	SCORE
1	Lower cost	1.42
2	Quicker access	0.65
3	Better quality of care	0.58

96% say it's important to see a price including insurance coverage and eligible discounts before pursuing a medication

WHY THIS MATTERS

Nearly all patients need a clear price before committing. Best-in-class DTP programs surface multiple pricing options in one place, so patients can make a decision that fits their needs.

34% have fully abandoned a medication for a cost-related reason — either from not knowing the cost or not filling due to cost

WHY THIS MATTERS

DTP programs that proactively surface transparent pricing early, with insurance coverage options where appropriate, can meaningfully reduce this drop-off.

"Affordable, transparent pricing is pharma's single biggest opportunity for maximizing patient starts and adherence. Manufacturers who surface multiple payment pathways with the most affordable price, customized to the individual patient, in their DTP programs will see the greatest improvements in overall patient outcomes and commercial impact."

SAHIL NAIK, CHIEF GROWTH OFFICER, PHIL INC.

eCommerce-like DTP Experiences are the New Standard for Building Patient Trust

The consumerization of healthcare has fundamentally raised the bar for patient expectations – patients now benchmark their medication access experience against the digital experiences they receive everywhere else. The research shows that patients are ready to engage with manufacturer-led programs that meet a high standard of digital excellence. DTP programs built with e-commerce-grade convenience and branding are meaningful drivers of patient trust.

KEY FINDINGS

78%

are open to a manufacturer-led online prescription experiences

WHY THIS MATTERS

With nearly 4 in 5 patients receptive to brand-led DTP programs, the demand for DTP is clear. Manufacturers that haven't yet implemented a DTP program are missing an opportunity to serve a significant portion of patients in their preferred access channel.

95%

want DTP programs to mirror similar e-commerce experiences

WHY THIS MATTERS

Patients benchmark DTP programs against the digital experiences they have every day. Nearly all patients want pharma's online programs to reflect the easy, convenient, and transparent foundation they know and expect from e-commerce.

59%

say manufacturer branding in DTP programs positively impacts their trust

WHY THIS MATTERS

While the majority of patients prefer manufacturer branding in DTP programs, nearly a quarter of patients say manufacturer branding is essential: they won't trust a program without it. There's a key opportunity for manufacturers to adopt brand-led DTP programs that drive patient trust and confidence.

IMPACT OF MANUFACTURER BRANDING ON PATIENT TRUST

25%

Essential – won't trust the service without seeing the manufacturer

35%

Reassuring – makes the experience feel more legitimate and safe

35%

Neutral – doesn't change their level of trust

"A brand-led DTP channel is one of the most underleveraged opportunities in pharma today – it's how manufacturers win patient trust, drive adherence, and build lasting brand loyalty."

ALLISON BRIDGES, SVP CLIENT SUCCESS, PHIL INC.

PHIL

MAXIMIZING DTP IMPACT

Build The Direct-to-Program that Drives Starts, Adherence, and Impact

The data is clear. Patients want transparent and affordable pricing, seamless access, and manufacturer-led experiences they can trust. Pharma manufacturers who build their DTP programs to meet this standard will lead the industry with best-in-class brand performance.

PHIL Direct was built to improve patient starts, adherence, and outcomes. We help leading pharma brands launch custom DTP programs that exceed patient expectations and improve commercial impact at scale.

See What's Possible for Your Portfolio

90%+

Patient Enrollment

2X+

Covered Dispenses

3X+

Higher Adherence

3X+

Gross-to-Net

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