



DTP Trends in Pharma

The Benefits, The Opportunities & The Barriers

September 2025 Research Results

Key Takeaways



WIDESPREAD ADOPTION

DTP programs are rapidly becoming a **central strategy for pharma brands** across a range of therapeutic areas

CURRENT SERVICES OFFERED

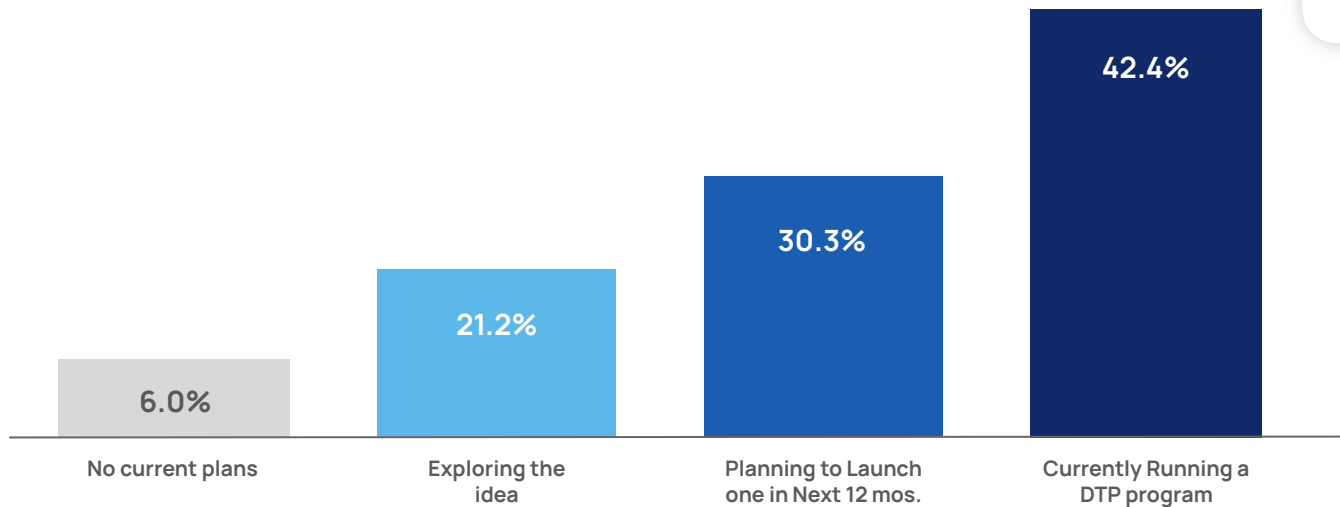
Cost / payment support and access to HCP scheduling and telehealth top today's DTP program inclusions

GOAL OF PHARMA DTP EFFORTS

For pharma – this is all about **delivering exceptional patient experience** – Making healthcare easier to access.

DTP Programs are Here to Stay

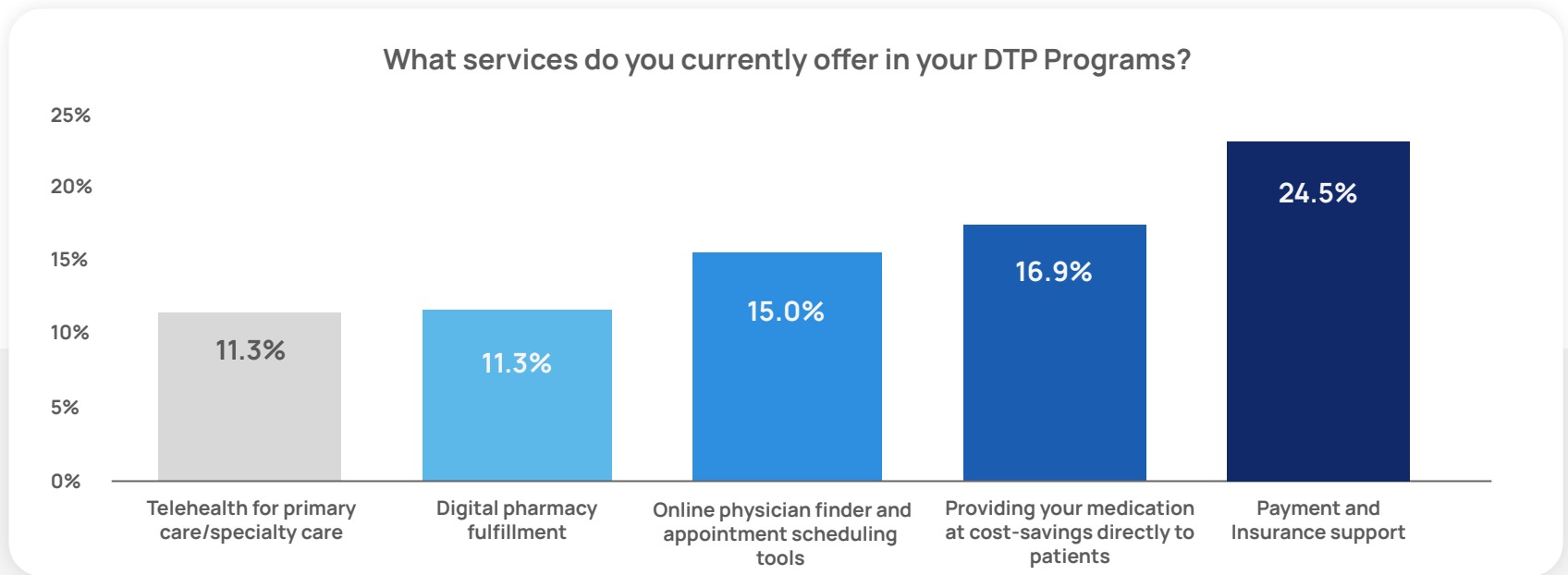
Are you currently running a DTP program or considering one for any therapy your organization offers?



94%

have launched, are planning to launch or are exploring DTP Programs

Core Offerings of Today's DTP Programs





Services Patients Would Find Specifically **Beneficial** if Offered by Pharma Companies

81%

Pharmaceutical companies should provide resources to patients to help them get the care and medicines they need

75% Patient Assistance / Affordability

69% Easier Access for Lab Testing

65% Tools / Resources to Help Access Medication

64% Telehealth Services

ixinsights 2025 / Ipsos Patient research, Top 2 Box, Base All n=414 - On a scale from 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please rate how much you agree or disagree with the following statements: "Pharmaceutical companies should provide resources to patients to help them get the care and medicines they need."

ixinsights 2025 / Ipsos Patient Research, Top 2 box, base All n=414: A40[S] On a scale from 1 to 5, where 1 is not beneficial and 5 is extremely beneficial, how beneficial, if at all, would it be if a pharma company offered the following:



If you could add **one capability** to your brand's patient engagement offering tomorrow, what would it be?



Compare medication cost across multiple channels

I would add **digital patient engagement** through AI chatbots, omnichannel (SMS, WhatsApp, apps, etc.)

Bring more awareness to the existence and sustainability of it to patient and HCPs

AI assistance for HCPs in completing clinical sections of **prior authorization forms**

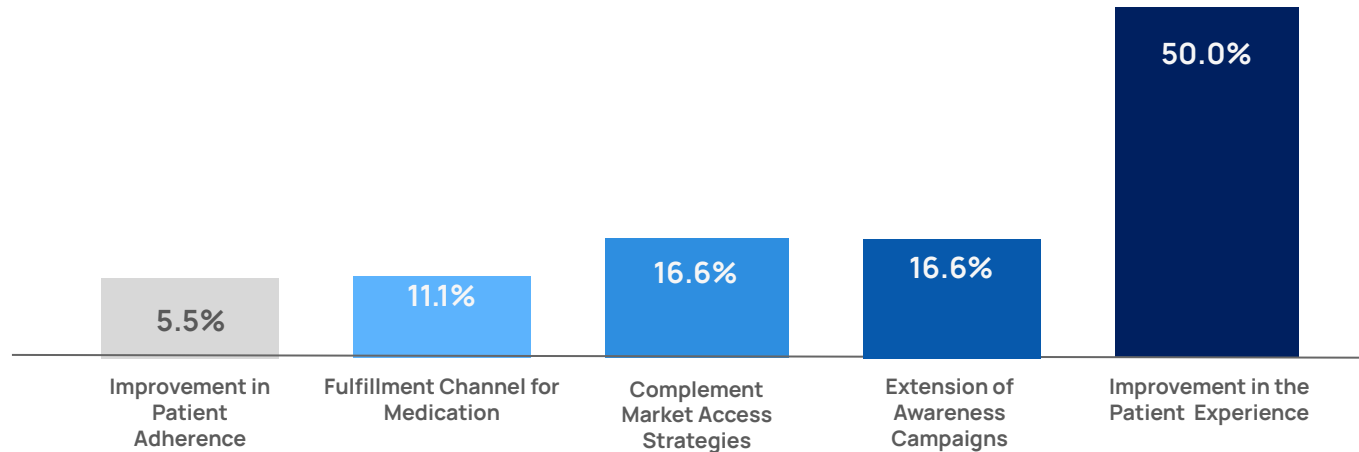
Access to diagnostics; curated healthcare technology tools for patients **outside of just medication**

Expanded **choice of products**

Greater awareness among Patients and HCPs regarding DTP offerings.

What is the Purpose of Implementing a DTP Program

What is the primary purpose of a DTP program?



Poor Patient Experience Impacts DTC Effectiveness

Disconnected / fragmented
healthcare experiences
reduce the effectiveness of
our DTC advertising spend

82%

To what degree do you agree / disagree that the following
reduces the effectiveness of your DTC spend (agree):

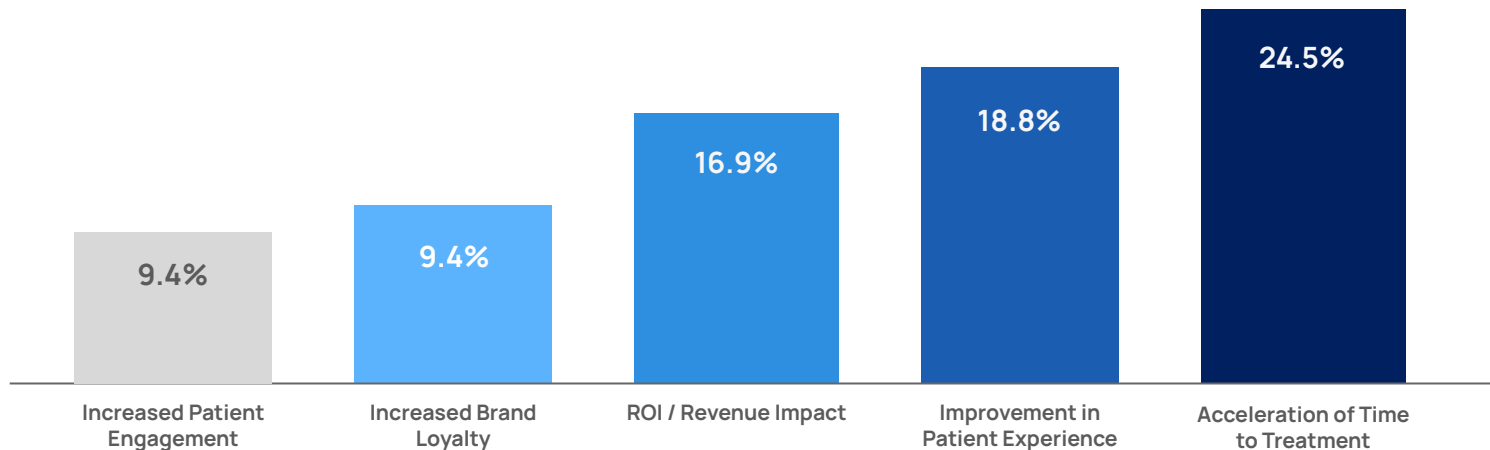
76% Prior authorization requirements

53% Product accessibility

8 | Source: DHCG / ixlayer DTC Research results sample respondents from pharma manufacturers; Over the past 10 years, average DTC ROI has been declining due to inefficiencies in our healthcare system. Please let us know to what extent you agree or disagree with the following statements as it relates to impact on your DTC advertising: (Agree)

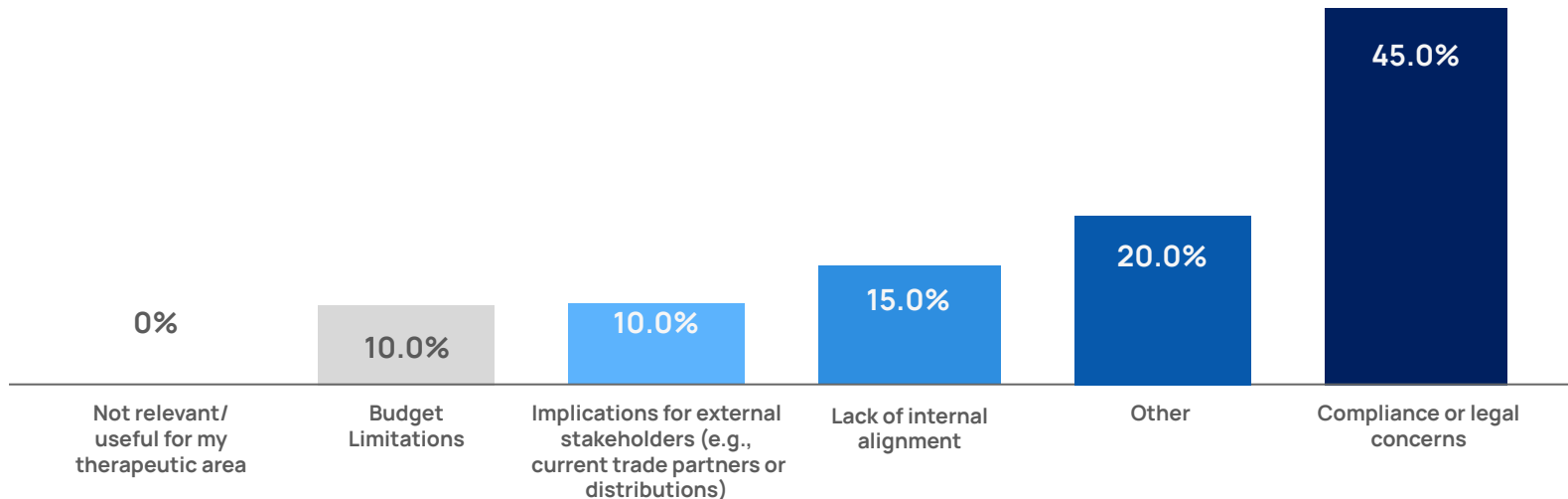
What Defines Success?

Which of the following outcomes would define success for a DTP program at your organization?
(Select up to 3)



Compliance is the Biggest Barrier

What is (or was) the biggest barrier to launching a DTP program at your organization?





How do you believe the current political climate and healthcare policy discussions (e.g., pricing reform, MFN) affect your appetite for DTP initiatives?

44%

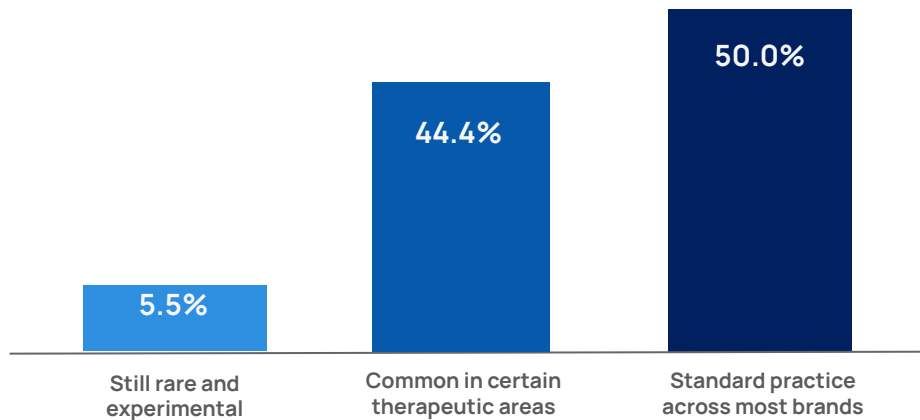
Increases scrutiny,
making DTP
programs riskier

39%

Encourages
innovation to
improve access

DTP in Five Years

In five years, how common do you expect pharma-supported DTP programs to be across the industry?





ixlayer

one platform,
built for biopharma

Our Methodology

RESPONDENTS

Sample – 37 pharma respondents, 20 completes

The respondents represented a broad cross section of areas including rheumatology, dermatology, oncology, diabetes, respiratory, HRT, immunology, cardiovascular, rare disease, and neurological disorders.

Pharma Profile: 2/3 work in Top 20 Pharma, 1/3 Medium/Boutique Pharma



FIELD

8/1/2025 – 9/18/2025

Direct-to-patient (DTP) programs are a fast-growing tool in the pharmaceutical marketing arsenal, aimed at improving access, experience, and engagement throughout the patient journey.

Traditionally, patients have engaged with pharmaceutical brands, healthcare providers, pharmacies, and support services distributed across fragmented systems. Today, DTP programs are reshaping that dynamic. By integrating digital tools, secure infrastructure, and clinical partnerships, these programs allow pharmaceutical brands to help patients ease the friction in the healthcare journey. Patients can enjoy a more seamless healthcare experience with fewer barriers and more direct pathways to healthcare providers.

DTP models may include services such as telehealth consultations, at-home diagnostic testing, digital pharmacy fulfillment, and online care navigation. Please respond to the following questions based on your current experience, perceptions, and level of involvement with DTP initiatives.