



EXECUTIVE INSIGHTS

The Emergence of Direct-to-Consumer Pharmaceutical Platforms: Strategic Implications for Biopharma

When a growing share of new-to-brand prescriptions in select therapeutic classes originates outside traditional channels, brand strategy itself must evolve. Obesity illustrates this shift. Anti-obesity medicines have demonstrated both the viability of novel commercial channels and the scale of self-directed care: Patients know the therapy they want, actively direct treatment decisions and engage outside traditional pharmaceutical pathways.

This dynamic warrants a reevaluation of pricing, access and channel strategy. In this emerging model, direct-to-consumer (DTC) and cash-pay pathways are not peripheral tactics; they shape affordability anchors and demand generation. Companies that fail to adapt risk ceding influence over both the patient experience and the economic logic of their most important assets.

A changing demand landscape and the rise of DTC and self-pay pathways





The DTC model for prescription pharmaceuticals has moved rapidly from experimentation to mainstream adoption. Digitally enabled, patient-initiated pathways reduce friction, compress time to therapy, and offer flexibility between reimbursement and cash-pay access.


In high-demand categories such as obesity, migraine and metabolic disease, coverage gaps and prior authorization barriers have created meaningful access friction. At the same time, patient comfort with virtual care and consumer-grade digital platforms has raised expectations for speed, transparency and convenience. Together, these forces make DTC a credible channel for conditions characterized by high patient activation and relatively standardized clinical decision-making.

Biopharma leaders are increasingly treating DTC as a durable commercialization component rather than a tactical add-on. Platforms such as LillyDirect, NovoCare and PfizerForAll reflect this shift toward more direct, digitally coordinated engagement (see Figure 1).

Figure 1

Pharma DTC platform trend

 DTC platform	 Key products	 Focused indications	 Workflow			
			Telehealth HCP finder	Cash	Insurance pay	Partner pharmacy delivery
LillyDirect	Zepbound; mounjaro; Emgality	Obesity, T2D, migraine	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NovoCare Pharmacy	wegovy	Obesity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
PfizerForAll	Paxlovid; Nurtec ODT	COVID-19, migraine, vaccines	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Eliquis 360 Support	Eliquis	AFib stroke prevention		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AmgenNow	Repatha	Hypercholesterolemia		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
AstraZeneca Direct	farxiga; AIRSUPRA; FluMist Quadrivalent	T2D, CKD, HF, asthma, flu		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Novartis (no public platform name)	Cosentyx	Plaque psoriasis		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bristol Myers Squibb Patient Connect	SOTYKTU	Plaque psoriasis		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Synthroid Delivers	Synthroid	Hypothyroidism		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Boehringer Ingelheim Access	Spiriva	COPD		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Genentech (no public platform name)	xofluza	Influenza		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>








 End-to-end platform

Note: DTC=direct-to-consumer; HCP=healthcare provider; T2D=type 2 diabetes; AFib=atrial fibrillation; CKD=chronic kidney disease; HF=heart failure; COPD=chronic obstructive pulmonary disease
Source: Company websites; GoodRx; SingleCare; Fierce Pharma; Reuters; GlobalNewswire; PR Newswire; AP News

Obesity has been the clearest catalyst. Strong demand combined with uneven coverage has produced a sizable self-pay segment, large enough to sustain manufacturer-led pathways outside traditional benefit structures. A growing share of new-to-brand Zepbound prescriptions now originates through LillyDirect, underscoring DTC's role in therapy initiation. What began as a niche workaround is evolving into a broader model for engaging, initiating and retaining patients in chronic care (see Figure 2).

Figure 2

Consumer digital experience journey: Pain points and opportunities

Consumer digital experience journey							
	Discovery	Onboarding	Telehealth	Routing	Payment	Delivery	Follow-up
Pain points	Minimal consumer awareness, no clear digital entry point	Multi-click navigation to telehealth, disease-first framing	Limited partners, lack of integration with lifestyle support	Limited routing to self-pay vs. insurance	No up-front transparency, complex billing	Limited visibility, no proactive tracking or updates	Few tools/resources for side effects and adherence
Opportunities	 <p>Paid media, social- and influencer-led funnels with conversion</p>	 <p>Consumer-first onboarding: "What are your goals?"</p>	 <p>Telehealth integrated, coaching/ medication combined</p>	 <p>Channel into pharmacy flows with transparent self-pay models</p>	 <p>Subscription and self-pay pricing calculators, cost clarity up front</p>	 <p>Amazon-style UX: shipment notifications, easy refills</p>	 <p>Digital dashboards, nudges and support modules</p>

Note: UX=user experience
Source: L.E.K. research and analysis

The evolving DTC value chain: A new commercial architecture

Early DTC efforts were largely promotional or transactional. Today's models more closely resemble coordinated access architectures that integrate capabilities across the patient experience. Manufacturers increasingly rely on ecosystems of specialized partners spanning telehealth, payments, pharmacy and logistics. No single organization can deliver all capabilities at scale, making thoughtful ecosystem design essential.

Across leading platforms, the DTC journey can be distilled into several core modules:

- **Digital intake and triage:** Consumer-facing onboarding portals, eligibility screening and telehealth scheduling

- **Clinical evaluation and prescribing:** Independent virtual medical groups and e-prescribing systems
- **Coverage navigation and payment:** Benefits verification, cash-pay calculators, affordability programs and payment processing
- **Pharmacy routing and fulfillment:** Specialized mail-order or hybrid pharmacies supporting insured and self-pay flows
- **Delivery, refills and support:** Home delivery or retail pickup, refill automation, and adherence support

By bypassing pharmacy benefit managers (PBMs) and wholesalers in self-pay scenarios, these models reduce administrative complexity while enabling multiple engagement pathways. Increasingly, they support both insured and cash-pay patients through a unified experience, expanding choice without adding friction.

Learning from digital health: User experience (UX) lessons from non-biopharma entrants

Consumer-focused digital health companies such as Hims & Hers, Ro and Noom have set clear expectations for frictionless user experience. Their success reflects a focus on intuitive design, up-front pricing clarity and tightly integrated care models that resonate with patients and increasingly compete with manufacturer-led approaches (see Figure 3).

Figure 3

Best-in-class digital customer experience pillars for obesity care



Source: L.E.K. research and analysis

Key non-biopharma UX learnings:

- Consumer-first onboarding framed around goals rather than diagnoses
- Streamlined, linear journeys with minimal handoffs
- Clear self-pay pricing and subscription options
- Integrated telehealth, pharmacy and support
- Retail-grade fulfillment and proactive refill flows
- Ongoing behavioral engagement to reinforce adherence

As biopharma scales DTC platforms, matching or exceeding these experience standards will be essential to sustaining patient engagement and trust.

Imperative for biopharma leaders

As DTC and digitally coordinated models mature, the question for commercial executives is no longer whether to participate, but whether they are actively shaping patient engagement for the right assets. These models are not universally applicable. Highly complex, provider-anchored therapies, such as oncology, will remain rooted in traditional care settings. In contrast, medicines characterized by high patient activation, standardized clinical decision-making and meaningful access friction are being increasingly influenced by digital pathways.

For those assets, DTC cannot remain a pilot or side initiative. It requires deliberate executive action across three imperatives:

- **View DTC as a catalyst for brand strategy, not an add-on**

Be explicit about what DTC is meant to unlock. It may require breaking from legacy pricing logic and elevating accessibility and affordability over price maximization. DTC should not sit adjacent to the brand strategy. It may redefine it.

- **Commit to an operating model, not just a platform**

Decide where control is essential and where partnerships are sufficient. Clarify which parts of the patient experience must be closely governed to ensure clinical integrity and compliance, and which can scale through external partners.

- **Activate demand with intent**

Be deliberate about how patients are discovered, guided and supported. Focus digital activation on points in the engagement journey where early intervention changes outcomes, and prioritize assets where shaping engagement creates lasting advantage.

Competitive advantage will not come from launching a DTC presence alone. It will accrue to organizations that make intentional choices about how they engage patients digitally, where DTC fits within the portfolio and which brands are allowed to meaningfully shape the patient experience.

For more information, please [contact us](#).

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