



2025 Patient Support Programs Trends

Launching a new therapy involves more than just developing a treatment and obtaining regulatory approval. Due to unprecedented scrutiny and challenges within the healthcare system, drugmakers must provide additional services to ensure their treatments are accessible, affordable, and used as intended.

Patient support programs (PSPs) are crucial for successful therapy launches and sustained adherence. These programs include provider training, patient education, affordability initiatives, adherence promotion, as well as access and reimbursement support, all of which contribute to positive clinical outcomes and patient satisfaction.

Our survey revealed that pharma leaders believe the industry is providing valuable programs that enhance the patient experience. However, leaders say significant technology investments are needed to improve access for at-risk populations, streamline reimbursement, and enable an improved, digital-first experience for both patients and providers.

Guidehouse Patient Support Programs Survey

In Q1 2025, Guidehouse conducted a survey of 35 executives across PSP and market access roles at pharmaceutical firms. The results provide insight into the challenges PSPs face, opportunities for performance improvement, and programs that could benefit from additional investment.

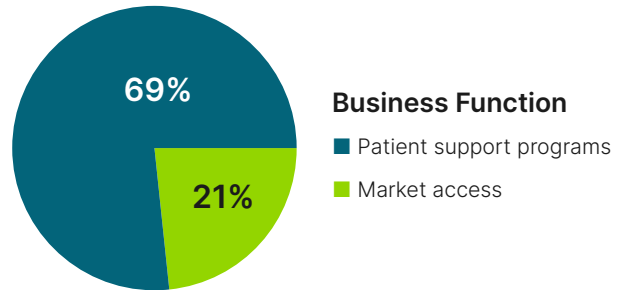
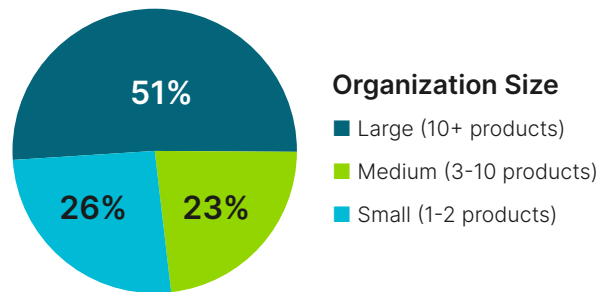
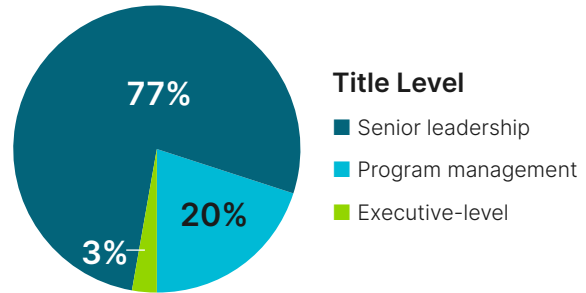
Insights snapshot

Trends and priorities: Responding to unprecedented demand, pharmaceutical manufacturers continue to focus on strong execution of foundational programs addressing affordability challenges. Leaders are also investing in digital solutions that improve the patient experience and bolster adherence.

Pain points: Executives identified significant opportunities to improve the implementation and execution of programs that serve at-risk populations and streamline provider reimbursement.

Opportunities for growth and innovations: Leaders highlighted the need for technology investments that expedite provider reimbursement and provide patients with easier access to care and support.

Pharmaceutical Executive Survey Respondents



Glossary of program types highlighted in this report:

Copayment assistance programs:

Manufacturer-sponsored copay assistance programs and independent charitable copay foundations (ICCF)

Dedicated account support:

Reimbursement case management, field reimbursement manager support

Patient adherence programs:

Apps, text message reminders, patient advocacy, wearables

Patient access and affordability programs:

Patient assistance programs (PAPs), quick-start and bridge programs, temporary patient assistance programs (TPAPs)

Product support and patient education:

Trainings, educational materials, nurse navigator support

Reimbursement support:

Benefits investigation and verification, prior authorization, denials support

Technical capabilities:

Text messaging, email, patient portals, HUB-based services, and additional HUB-related reporting tools

Solutions for at-risk populations:

Transportation/accommodation assistance, multilingual support, culturally adapted materials

Trends and priorities

Survey respondents clearly indicated that patient support programs are in demand. Nearly 60% of respondents said their organization's HUB services are used by at least half of the patients utilizing these programs.

Most-used services

Persistently high drug costs, coupled with recent economic inflation, have significantly impacted patients' ability to afford their prescription medications. Consequently, survey respondents indicated that the most-utilized services within their PSPs are those aimed at reducing medication costs, such as copay assistance and patient affordability programs. As costs continue to rise and more patients are included in value-based care arrangements, pharma firms will need to consider how they can improve and expand these types of programs to facilitate adherence. Moreover, as more complex therapies continue to come to market—such as cell and gene therapies, drug-device combinations, and psychedelic treatments—manufacturers should continue to identify ancillary out-of-pocket costs that may be barriers to access. Leaders can support patients by covering costs related to pre-treatment requirements such as genetic testing and Risk Evaluation and Mitigation Strategy (REMS) required procedures, travel to treatment sites, and drug administration costs where applicable and compliant with relevant regulations.

The survey also revealed that patient utilization of product and patient education programs is highest in therapeutic areas treating chronic diseases, including autoimmune and immunology. These areas reported lower utilization of medication adherence programs. Conversely, respondents with portfolios that include therapies for respiratory conditions reported high utilization of services designed to enhance technical capabilities.

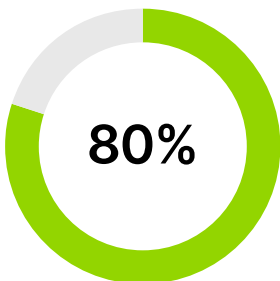


EXECUTIVE PERSPECTIVE

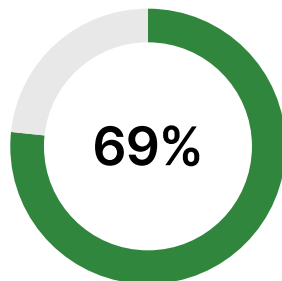
“ In my experience, copay assistance programs are underutilized across most therapeutic areas. Every product has a copay, but many patients still don't know about them. Educating patients on these programs needs to be a joint effort between the manufacturer, the physicians, and the pharmacist.”

—Senior market access leader at a medium-sized organization

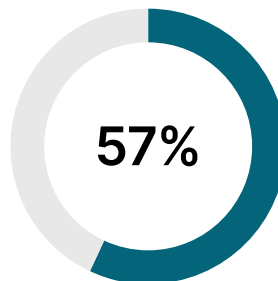
Most-Used PSP Services



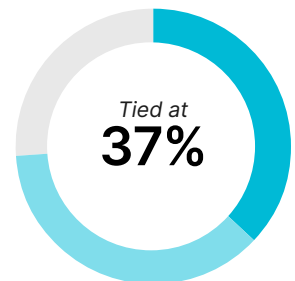
Copayment assistance programs



Patient access and affordability programs



Reimbursement support



■ Product and patient education
■ Technical capabilities

Investment priorities

In 2025, providers, payers, and life science firms are all prioritizing efficiency and consumer engagement. When evaluating an external HUB service provider, respondents to our survey said they're currently focused on solutions that streamline the user experience and facilitate partnerships for key services.

Pharmaceutical firms are undergoing a patient-centric revolution. To earn trust, leaders must engage patients directly, make them feel supported, and demonstrate the value and efficacy of therapies.

Our survey found that while larger firms are more comfortable bringing PSP in house to reduce costs, medium-sized firms are focused on finding strategic partnerships that help them achieve their goals. Small firms are overwhelmingly focused on investing in solutions that solve for the needs for their unique, disease-specific patient populations. Leaders from organizations of all sizes noted a need to implement better digital tools and AI solutions to onboard and keep patients on therapy.

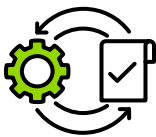
Must-Haves in a HUB Vendor



71%
Innovative tech solutions/
capabilities



Tied at
70%
• Strategic partnerships
• Tech solutions/capabilities



53%
Quality monitoring



Affordability and access programs

Price transparency regulations, consumer sentiment, and payer scrutiny have increased pressure on life sciences companies to facilitate access to their therapies. Payers are more aggressively managing therapy reimbursement through tools like step therapy, prior authorization, and formulary exclusion—and that's creating challenges for providers too. Respondents indicated that services related to affordability and access continue to be most important to enabling a positive patient experience.

This trend was consistent when respondents were asked about what capabilities stand out as key to facilitating providers' efforts to support patients in starting and staying on therapy, with temporary assistance and bridge programs as well as provider access and reimbursement support ranking highest in those efforts.

Services That Improve the Patient Experience

78% Patient access and affordability programs

70% Copayment assistance programs

71% Reimbursement support

53% Dedicated account support

44% Product and patient education

Services That Improve the Provider Experience

Tied at
77% • Patient access and affordability programs
• Reimbursement support

72% Copayment assistance programs

62% Dedicated account support

35% Product and patient education

EXECUTIVE PERSPECTIVE

“Using copay assistance to identify and support patients with accumulator or maximizer programs is a value-add for both manufacturers and patients.”

—Program manager at a small organization



Pain points

Patient support programs are essential for a therapy’s success, enabling timely access, appropriate use, and monitoring of patient outcomes. However, these programs are influenced by market conditions, patient behavior, cultural and geographic barriers, and logistical constraints, which can challenge a therapy’s long-term success, especially in a competitive market.

Reimbursement bottlenecks

Inefficient PSPs can cause frustration for patients, despite their intended purpose to make things easier. Survey respondents noted that when reimbursement support programs are not run effectively, they create the most significant bottlenecks and disruption to the patient journey. This echoes a common theme in responses to our survey—that a complicated patient journey and problematic case management workflow can impact access by lengthening time to therapy.

As providers are facing declining reimbursement rates and rising costs, they’re also facing increased difficulty in obtaining reimbursement for treatments provided. Between 2022 and 2023, denials increased by 20% for commercial payers and 56% for Medicare Advantage plans, according to the American Hospital Association. Denials often cause delays, which can be frustrating for patients and ultimately impact medication adherence. It is therefore even more important that PSPs offer effective temporary support and bridge capabilities to circumvent such access obstacles.

Pharma firms launching therapies—especially those that require significant provider services to administer—face the realities of an imperfect, often inefficient healthcare system. Close coordination with payers and providers is needed to overcome obstacles to reimbursement and access.

PSP challenges

Solutions for at-risk populations topped our list of areas where PSP leaders report challenges. Access challenges, provider shortages, and transportation issues are just a few of the obstacles that PSPs can face in supporting these types of patients. Bias in AI-driven solutions can also lead to disparities in medical decision-making, and low adoption of digital health tools can hinder services like AI health assistants or prescription discount programs that require online enrollment.

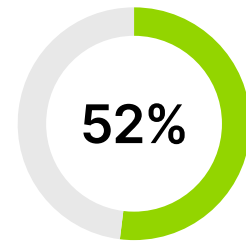
From a provider perspective, reimbursement support was once again cited as a major concern. Survey respondents identified a significant need for improved services for providers, including benefit verification and investigation, prior authorization support, and assistance in responding to denials.

PSP leaders need to work closely with both external vendors and internal teams to facilitate the success of these programs. Clearly defined governance structures, frequent and open communication, and analytics dashboards are critical foundational elements to facilitate successful partnerships and effective programs that achieve strategic objectives.

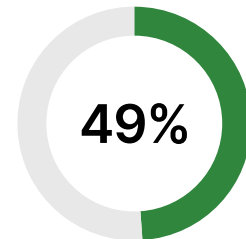
Top Bottlenecks When Underperforming

1. Reimbursement support
2. Patient access and affordability programs
3. Dedicated account support
4. Tied:
 - Patient adherence programs
 - Solutions for at-risk populations

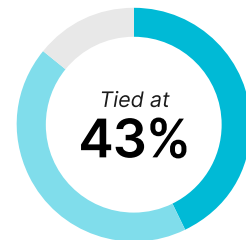
Top Programs in Need of Improvement



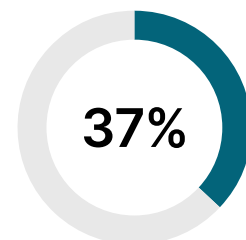
Solutions for at-risk populations



Reimbursement support



■ Patient adherence programs
■ Technical capabilities



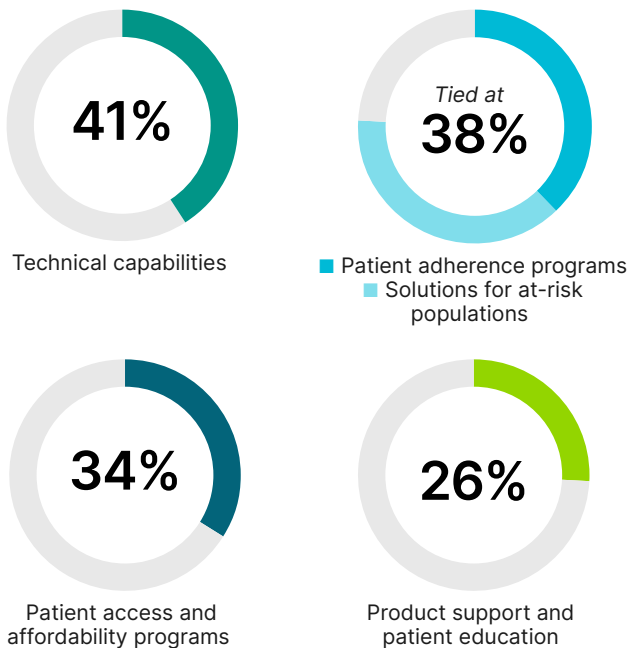
Dedicated account support

Leaders face challenges implementing complex PSPs

Respondents reported that technology initiatives are among the most difficult to implement, followed closely by patient adherence programs solutions for at-risk populations. A lack of interoperability, IT staffing shortages, and low adoption of digital health tools have made it difficult for the healthcare industry to develop effective technology solutions at scale. Medication adherence programs are complicated by a wide variety of challenges, including pharmacy availability, a lack of motivation among patients, and difficulties in communicating with patients.

When it comes to solutions for at-risk populations, cultural competency is key. PSP leaders must consider cultural differences, health literacy, and reading levels when developing solutions, as complex applications can deter patients from completing the process. While this is important, it can be difficult—many respondents to our survey noted that accommodating non-English speaking patients has been particularly challenging.

Most Challenging Programs to Implement



EXECUTIVE PERSPECTIVES

“ There are significant opportunities to innovate in the reimbursement support space, and there is significant dissatisfaction with the current market. There are some huge vendors here that don’t do business well, and these types of solutions can significantly impact brand performance.”

—Senior PSP leader at a large organization



“ There is always room for optimization in technical capabilities. Both internally and externally, user interfaces and technology capabilities are lagging behind the industry and the broader technology space.”

—Senior leader focused on patient journey strategy

Opportunities for growth and innovation

Looking toward the future, respondents shared their wish list of next-generation services that they believe will significantly impact the patient and provider experience. Once again, reimbursement was a major focus, topping both lists but a high priority for providers especially, leading other responses by at least 20 percentage points. Leaders also expressed interest in enabling more robust digital health modalities and using AI and other technologies to engage patients and expedite support.

Next-Gen Services That Will Elevate the Patient Experience

60%	Automated prior authorization and billing support options
57%	Dynamic patient journey mapping/personalized pathways
46%	Direct-to-consumer product therapy/delivery
43%	AI-supported health assistants
40%	Omnichannel patient engagement

Next-Gen Services That Will Elevate the Provider Experience

54%	Automated prior authorization and billing support options
34%	AI-supported health assistants
26%	Direct-to-consumer product therapy/delivery, next-gen telehealth and AI-powered disease management applications

Conclusion

PSPs play a crucial role in helping pharmaceutical firms optimize the potential of therapies to improve health outcomes and enhance patients' quality of life. As the industry continues to face increasing complexity, payer constraints, and regulatory shifts, it is likely that firms will increasingly invest in these programs to facilitate proper use of therapies, enable positive health outcomes, and mitigate risk in performance-based agreements. Our survey findings underscore the importance of these programs to patient care, the need for continuous improvement of service delivery, and the promise of technology in enabling more efficient and effective services for both patients and providers.



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