



Shattering the Patient Support Status Quo:

How a New Patient-Centric Model Increases Engagement and Sustains Adherence



New research shows that more than half of pharmaceutical leaders believe traditional patient support solutions are not keeping up with rising consumer expectations, creating an urgent opportunity for a new approach.



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Executive Summary

Today’s patient support programs (PSPs) are struggling to keep pace with modern consumer experiences. The bar for patient support has been set too low for too long, and the cost of maintaining that status quo is becoming increasingly unsustainable.

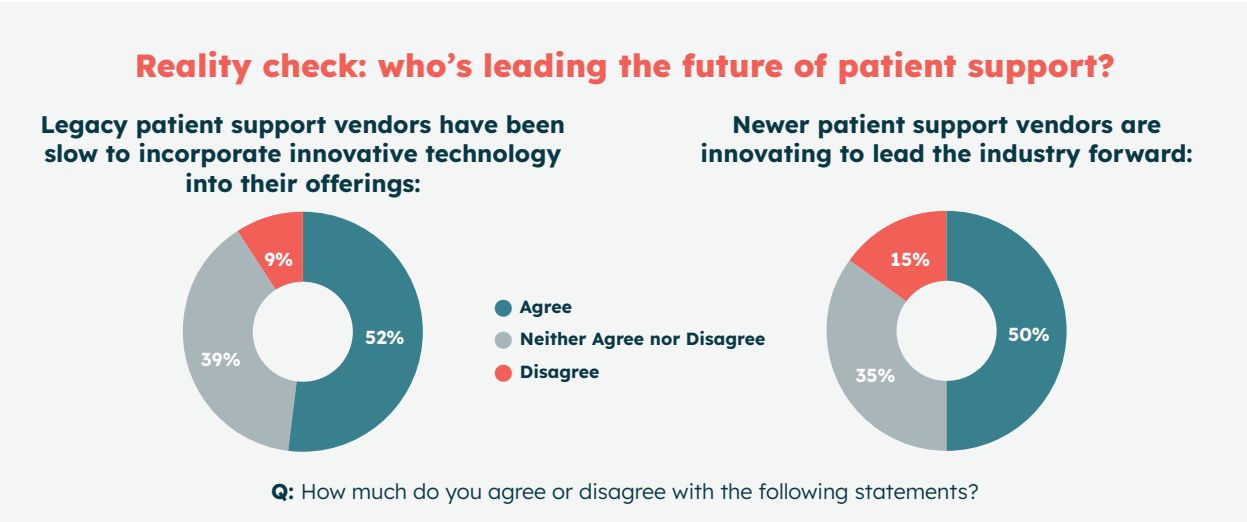


New research shows that pharmaceutical leaders recognize it’s time to transform the PSP model. But leaders view traditional solutions as slow to innovate and PSP leaders are paying a high price: missed opportunities to enroll more patients in support programs that sustain adherence *and* revenue.

The lag in innovation from legacy vendors has created an urgent openness to work with newer companies that specialize in PSP solutions. This research illustrates that pharmaceutical companies are looking for a new approach that delivers real-time engagement, personalized support, connected data, and measurable outcomes across the entire patient journey.

The opportunity is significant, and it’s hiding in plain sight. Low engagement and adherence rates are not inevitable. They are the result of outdated models that have gone unchallenged for too long. A new PSP model is emerging that prioritizes next-generation patient experiences to drive greater enrollment, faster time-to-therapy, and long-term adherence. The question is no longer whether the industry needs to change. The question is who will lead that change, what it will look like, and how quickly can it be implemented?

“
Newer vendors are entering the market focusing on delivering pinpoint, tailored strategies that engage patients effectively across digital layers. They offer a more personalized and modern experience than traditional models.”
 — Category Manager, Commercial Procurement for Patient Services, at a large pharmaceutical company



Research Methodology

To understand the current state of patient support programs and the priorities shaping their evolution, Redi Health commissioned healthcare and technology consultancy Sage Growth Partners to conduct independent primary research with 100 leaders across the pharmaceutical, biopharmaceutical, and life sciences industries in Q1 2026. All respondents were screened to ensure familiarity with patient support programs, all represent organizations that will have at least one commercial pharmaceutical product on the market by the end of 2026, and all operate in the U.S. with many also operating in other countries. Respondents span director through C-suite levels, with the majority holding direct responsibility for evaluating or selecting patient support vendors. Full survey demographics are included at the end of this report.

Sage Growth Partners recruited and fielded the research independently, and the survey instrument was designed to capture unbiased responses. All findings and conclusions are drawn from respondent data.

Key Findings

52% of survey participants agree that traditional vendors are slow to innovate patient support technologies—only **9%** disagree

50% say emerging patient support vendors are pushing the industry forward—only **15%** disagree

67% indicate that engaging more than **30%** of eligible patients is an aspirational but realistic engagement rate for lower-complexity cases—and **87%** say the same for more complex cases

68% rank total cost / ROI clarity as the top consideration when choosing a partner, **53%** say proven outcomes, and **52%** say demonstrated impact on time-to-therapy—only **19%** rank vendor maturity or a ‘safe-choice’ risk profile among their top considerations

81% of respondents recognize that consumers expect better consumer-grade experiences from pharmaceutical companies—only **3%** disagree

Top Priorities, Common Challenges, & Governance Considerations

This research makes it clear that pharmaceutical leaders are looking to modernize PSPs. Consider their top priorities: visibility into prior authorization, improving adherence, time-to-therapy, and patient engagement, all while simultaneously reducing operational and administrative burdens on their teams. These are not new aspirations. What is new is the urgency behind them, and the growing recognition that traditional PSP models are structurally unable to deliver on them.

Barriers to next-generation patient experiences are deeply embedded in how PSPs are funded, aligned, and built today. More than half of respondents cite budget constraints (**57%**) and internal stakeholder alignment (**48%**) as the most common blockers to adopting new patient support technologies. Integration complexity follows closely at **45%**.

Top 5 priorities for patient support programs

PSP leaders participating in the survey rank the following as important:

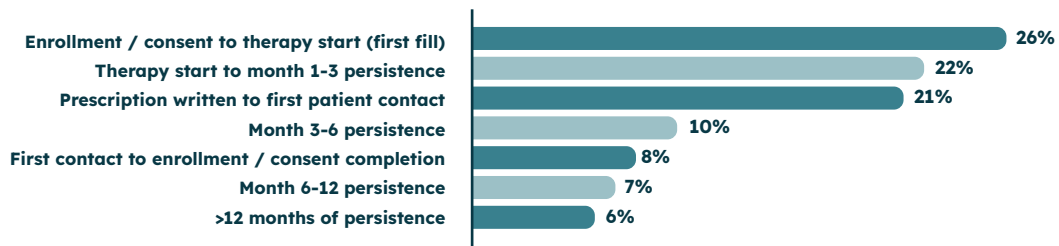
1. Improve prior authorization initiation, completion, or visibility
2. Improve adherence / persistence over time
3. Improve time to therapy (script to start)
4. Improve patient reach / engagement across channels
5. Reduce operational burden on internal teams and partners

Budget constraints are the most common blocker to implementing new patient support technologies



Q: What most commonly blocks adoption of a new patient support/engagement platform?

Nearly 70% of patient leakage happens before month 3



Q: Where in the patient journey do you experience the most 'leakage'?

The common blockers reflect the reality that most pharmaceutical companies have assembled their PSPs from a patchwork of point solutions that were never designed to work together. Vendor immaturity and fear of a non-safe choice rank at the bottom of the barrier list (at **28%** and **23%** respectively) reinforcing the survey findings: pharma leaders are willing to move to newer vendors when the ROI case is compelling and the evidence is there.

Data sharing is the most significant compliance and governance consideration for patient outreach

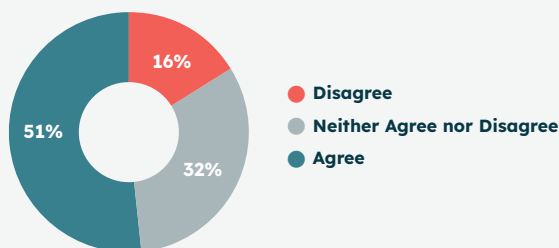


Q: What are the most significant compliance and governance considerations when thinking about patient outreach and engagement?

Script leakage, of course, is another consistent challenge for PSPs. The most common place PSPs encounter leakage occurs between enrollment and first fill (**26%**), followed by therapy start through months one to three (**22%**), and from prescription written to first patient contact (**21%**). Together, these three windows account for nearly **70%** of reported leakage, and they all share a common thread: they are moments where slow, fragmented, or impersonal outreach allows patients to fall through the cracks before they ever establish a therapy routine.

When it comes to regulatory compliance, the responses reveal that pharmaceutical leaders are divided as to whether today’s regulations pose a significant barrier to investing in innovative patient support solutions. Data sharing with vendors and third parties (**54%**), PHI handling and data security (**52%**), and consent validity (**40%**) are the leading compliance concerns among respondents. This further highlights the need for innovations in the space to be architected specifically for pharma compliance in order to be viable.

Compliance is viewed as a barrier to investing in innovative patient support solutions.



Q: How much do you agree/disagree with the following statement: Compliance is a significant barrier to investing in innovative patient support/engagement solutions.

“One thing is loud and clear: pharmaceutical companies are going to take a more active role in the patient relationship than ever before. They are piling money into patient services, asking how they can improve, and faster. This will become standard practice.”

— Former Associate Vice President, Market Access, at a large pharmaceutical company

The Opportunity to Advance PSPs: Adherence Rates vs. Realistic Aspirations

Of all the findings in this research, perhaps none is more striking than the gap between where patient engagement stands today and where pharmaceutical leaders believe it realistically could be. For relatively simple patients on low-complexity therapies, the current reach is modest and improvement expectations are measured. Only **22%** engage more than **41%** of patients early in the journey, while an additional **48%** consider engaging more than **40%** of patients to be aspirational. More complex cases are a different story: **64%** engage **41%** of patients or more early in the journey, while **76%** say engaging more than **40%** is aspirational but realistic.

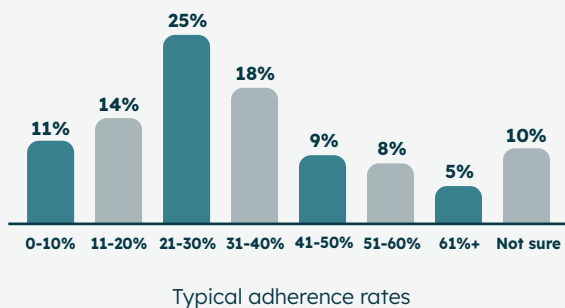
The substantive opportunity for PSP leaders is to reset the perception that low engagement and medication adherence rates are acceptable. They are not. Instead, now is the time to change that mindset and build next-generation patient experiences that improve first-fill establishment and long-term adherence rates in ways not being done today.

The research shows that leaders already know this and the aspiration is there. What has been missing is the model, the technology, and the partner with material patient reach capable of closing the gap between where programs perform today and where leaders know they should be.

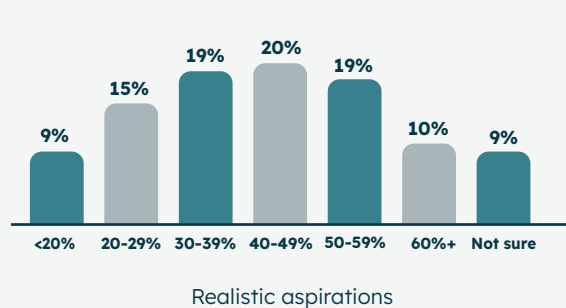
In a typical retail setting, pharma leaders report that only 21–30% of patients are currently reached, while most aim to increase that reach to 50–60%

Scenario 1: Cardiac Care, High Volume, Lower Complexity

In this scenario, what percent of eligible patients does a typical support program reach or engage early in the journey today?



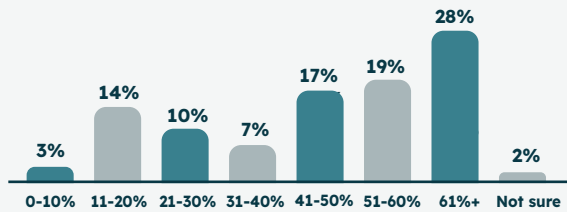
In this scenario, what should an aspirational but realistic reach / engagement rate be for eligible patients?



In a typical specialty care setting, only 28% of pharma leaders report that most patients (61%+) are currently reached by support, while over half (50%+) say this is the level of reach they aim to achieve

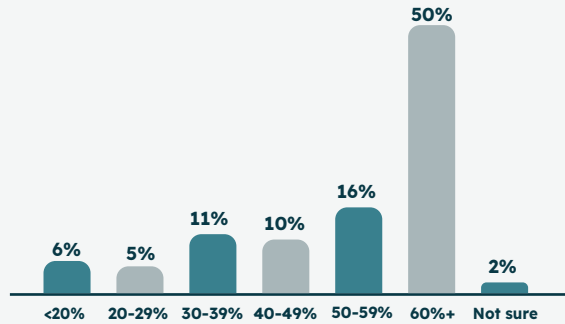
Scenario 2: Rare Disease, High WAC, Complex Access

In this scenario, what percent of eligible patients does a typical support program reach or engage early in the journey today?



Typical adherence rates

In this scenario, what should an aspirational but realistic reach / engagement rate be for eligible patients?



Realistic aspirations



“

If I could wave a magic wand, a patient would receive their medication the day after the prescription is written. Turnaround time is a very critical metric for patients, especially when it comes to rare diseases, and it also has an impact from a revenue perspective. I’m always trying to balance patient needs with business outcomes.”

— Vice President of Market Access and Patient Services, at a small specialty pharmaceutical company

Elements of Next-Generation Patient Experiences

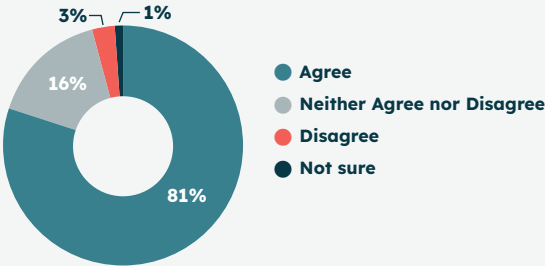
The data in this research is unambiguous: **81%** of pharmaceutical leaders surveyed agree that patients increasingly expect consumer-grade experiences from their support programs—the kind of seamless, responsive, personalized interactions they have come to expect from every other part of their digital lives.

Next-generation patient experiences require more than simply increasing the number of communications with patients. To that extent, PSPs can drive more effective enrollment, engagement, and sustained adherence with outreach that is strategic, proactive, targeted, and timely across the therapy journey.

PSP leaders indicate that the following elements are necessary for delivering consumer-grade patient support programs:

- Two-way interactions in which patients can respond and receive help
- Fast resolution of access and affordability hurdles
- Frictionless enrollment and consent
- Next-best-action guidance that is more personalized than basic reminders
- Multichannel orchestration with consistent context
- The capability to seamlessly hand off issues to a human for support when it's needed

Patients increasingly expect consumer-grade experiences in support programs



Q: How much do you agree or disagree with the following statement: Patients increasingly expect consumer-grade experiences in patient support programs.

Survey results may not add up to 100% due to rounding

“

Patient support must be strategic, concise, and at an inflection point. At month three, you must proactively communicate that nine out of 10 people achieve significant results but don't see improvements for five or six months. Reinforcing that is crucial to prevent patients from dropping off prematurely.”

— Former Director, Patient Support Design and Execution, at a large pharmaceutical company

The Evolving Role of Technology in PSPs

The survey findings show that current PSPs consist of a patchwork of internal resources and point solutions from third-party vendors. Pharmaceutical companies currently rely predominantly on external partners for execution-heavy workflows, while PSPs handle field reimbursement, patient education, and health literacy in-house.

When asked where pharmaceutical leaders are looking to patient support partners to improve, responses include workflow automation, proactive and personalized adherence support, better-connected data, integrated systems, faster access, and less administrative burden. Those suggest that a single platform can be even more valuable than the sum of its parts, particularly for pharmaceutical companies that have been piecing their PSPs together.

As they evaluate patient support partners, PSP leaders anchor investment decisions in ROI, proven patient experience outcomes, and evidence that demonstrates a partner can deploy the technology on time and within budget by addressing any implementation risks. **Six out of 10** respondents say they need to see “significant improvement” in order to justify switching partners or adding a new technology to their PSP.

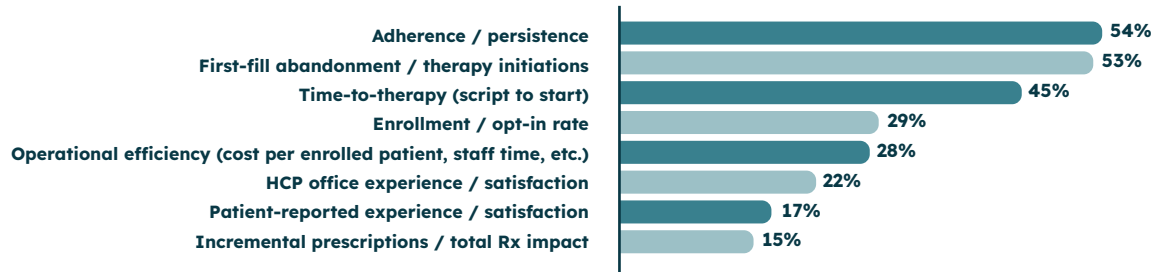
PSP patchwork leaves room for improvement

PSPs are using multiple point solutions and internal resources but lack effective ways to leverage those tools to deliver a consistent experience for patients.

	Internal resources	3rd party vendor	No solution today	Not sure
Hub services / care coordinators / case management	19%	72%	4%	3%
Field reimbursement / access support services	64%	29%	4%	3%
Affordability support (copay patient assistance program)	28%	62%	2%	6%
Patient outreach / messaging	27%	54%	11%	5%
Enrollment / consent workflows	33%	56%	5%	4%
Prior authorization support or visibility	31%	59%	2%	6%
Refill reminders / adherence workflows	11%	67%	11%	6%
Patient education / health literacy enablement	56%	32%	6%	1%
Outcomes measurement / analytics / attribution	51%	41%	4%	3%
Data integration / orchestration across partners	39%	42%	15%	4%

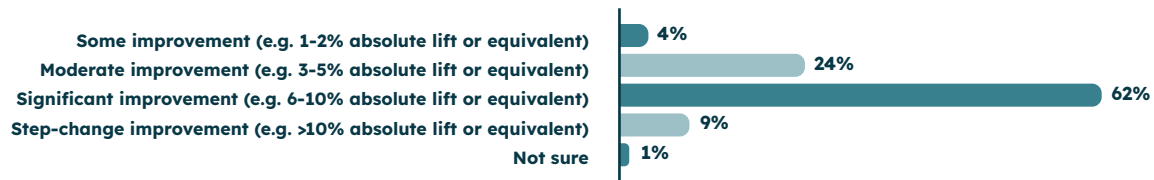
Q: Please select if your organization primarily uses internal resources or a vendor solution.

Adherence and first-fill abandonment is the most common KPI leaders consider when investing in patient support



Q: Which of the following KPIs most significantly influence patient support investment decisions for your priority brands?

PSP leaders expect a significant level of improvement to justify new investments



Q: What level of improvement would be needed to justify switching or adding a new vendor for your selected KPIs?

“

As it stands, data is fragmented across the hub, pharmacies, copay programs, and other vendors. In the next three to five years, I see patient support evolving from a reactive to a more proactive model. Pharma companies should be able to accurately connect their patient’s journey data from the first interaction until the patient is on therapy and receiving care.”

— Category Manager, Commercial Procurement for Patient Services, at a large pharmaceutical company

Top 5 considerations: selecting a tech partner for PSP transformation

To inform PSP leaders about what their competitors and peers look for in PSP partners, the research findings show that respondents rank the following as impactful factors when evaluating newer technology companies in this space:

1. Predictable pricing / clear ROI model
2. Demonstrated lift vs. a credible comparison group
3. Patient experience outcomes (not just outreach volume)
4. Transparent methodology for measuring impact
5. Speed-to-launch evidence (time, resourcing)

How Redi Health is Leading the Next-Generation Patient Experience

The research in this report defines what pharmaceutical leaders need from a next-generation patient support partner. Redi was built to deliver exactly that and the outcomes we achieve speak for themselves. For the pharmaceutical brands Redi partners with and their patients:

27% increase in fills compared to patients not utilizing the Redi platform

61% of patients sustaining therapy at six months

33% additional enrollment into patient support programs including hub, copay, and nursing support

7/10 Seven out of the top 10 pharmaceutical manufacturers in the world have implemented Redi Health's solution to increase PSP enrollment, improve access to affordability resources, enable more first fills, and sustain therapy across the entire health journey.

10% As much as **10%** decrease in first-fill abandonment

2 minutes or less to enroll in a PSP

The result? More patients start therapy sooner and stay on it longer with Redi.

Looking Ahead

Today's pharmaceutical leaders widely recognize the need to transform traditional PSPs into modern consumer-grade experiences that match changing patient expectations. But traditional solutions have been slow to innovate, so PSP leaders are looking for alternatives to move the industry forward.

The research data points to a future that is already within reach. Next-generation patient support programs will look fundamentally different from the models that have defined the industry for the past two decades. They will enroll and serve patients in minutes, not days. They will be built on two-way communication rather than one-directional outreach. They will resolve access and affordability barriers quickly rather than leaving patients to navigate them alone. They will deliver personalized, proactive guidance at specific inflection points—prescription to first contact, first fill, month three—where patients are most at risk of disengaging. And they will connect data seamlessly across the full therapy journey, giving both patients and their support teams a complete, real-time picture of where things stand.

The research is clear: it's time to raise the bar on patient support. The technology exists, consumer expectations are already there, and pharmaceutical leaders that fail to modernize their PSPs risk falling behind competitors that deliver experiences patients actually want and use consistently.

Survey Demographics

Sage Growth Partners independently surveyed 100 leaders in the pharmaceuticals, biopharmaceuticals, and life sciences industries. Survey results do not all add up to 100% due to rounding.

Which best describes your current title?

- Executive director / senior director: **38%**
- Director: **37%**
- C-suite / EVP / SVP: **15%**
- Manager: **10%**

Which of the following best describes your organization?

- Pharmaceutical manufacturer: **54%**
- Biotechnology company: **36%**
- Specialty pharmaceutical company: **10%**

What is your company's annual revenue?

- Less than \$10 million: **4%**
- \$10 million – \$50 million: **2%**
- \$51 million – \$100 million: **4%**
- \$101 million – \$500 million: **11%**
- \$501 million – \$999 million: **13%**
- \$1 billion – \$9 billion: **39%**
- \$10 billion or more: **27%**

Which therapy areas do you support?

- Oncology: **52%**
- Immunology: **51%**
- Rare / orphan: **40%**
- Neurology: **36%**
- Primary care: **26%**
- Cardiometabolic: **24%**
- Specialty (non-rare): **4%**
- Other: **11%**

How involved are you in evaluating, selecting, or managing patient support / patient engagement vendors?

- Key evaluator / recommender: **57%**
- Primary decision-maker / final approver: **23%**
- Influencer / stakeholder input (e.g. compliance, analytics, operations): **20%**
- Not involved in vendor decisions: **0%**

Which best describes your primary function?

- Brand commercialization / Brand operations / Marketing: **50%**
- Commercial operations / Analytics / Insights: **22%**
- Market access / Patient access services / Field reimbursement / PAP / Copay strategy: **17%**
- Patient services / Patient support programs / Hub strategy & operations: **8%**
- Other: **2%**
- Digital / Omnichannel / CRM: **1%**

Which of the following have you been involved in within the last 18 months?

- Supporting marketing or brand commercialization: **85%**
- Evaluating vendors related to patient support programs: **70%**
- Defining KPIs for patient support performance: **64%**
- Designing a patient support program: **63%**
- Managing implementation of patient support solutions: **53%**
- Overseeing hub services operations: **45%**

Which product distribution channels do you support?

- Specialty pharmacy (including LDD / LDN): **70%**
- Outpatient provider-administered products (buy-and-bill): **54%**
- Traditional retail pharmacy: **52%**
- Inpatient / institutional products (i.e. infusion): **46%**
- Innovative pharmacy channels (i.e. D2C Mail Order): **32%**
- Other: **4%**



About Redi Health

Redi creates novel connections between pharmaceutical manufacturers and patients. Our highly targeted approach drives new patient acquisition and medication sustainment by accelerating enrollment, navigating financial support, and reducing abandonment across the therapy journey — all to maximize your investment.

More patients, better outcomes. redi.health



About Sage Growth Partners

Sage Growth Partners is a healthcare growth strategy and marketing firm with deep expertise in market research, go-to market strategy, and marketing communications. Founded in 2005, the company's extensive domain experience ensures that healthcare organizations thrive amid the complexities of a rapidly changing marketplace. Sage Growth Partners serves clients across the full healthcare spectrum, including Press Ganey, GE Healthcare, LexisNexis, GoodRx, Xealth, VytOne, Progeny Health, Kyruus Health, Best Buy Health, New Jersey Brain and Spine, and Philips Healthcare. For more information, visit sage-growth.com.