



# Next-Generation Patient Support and Services

ANNUAL TRENDS REPORT EXCERPT

2025

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# What's inside?

ZS's 'Pulse of the Market' findings for 2025

## **Smarter tech, smoother care: Connecting patient services across life sciences**

Explore how technology integration is breaking barriers to access and adherence, enhancing healthcare provider (HCP) experiences and improving health outcomes.

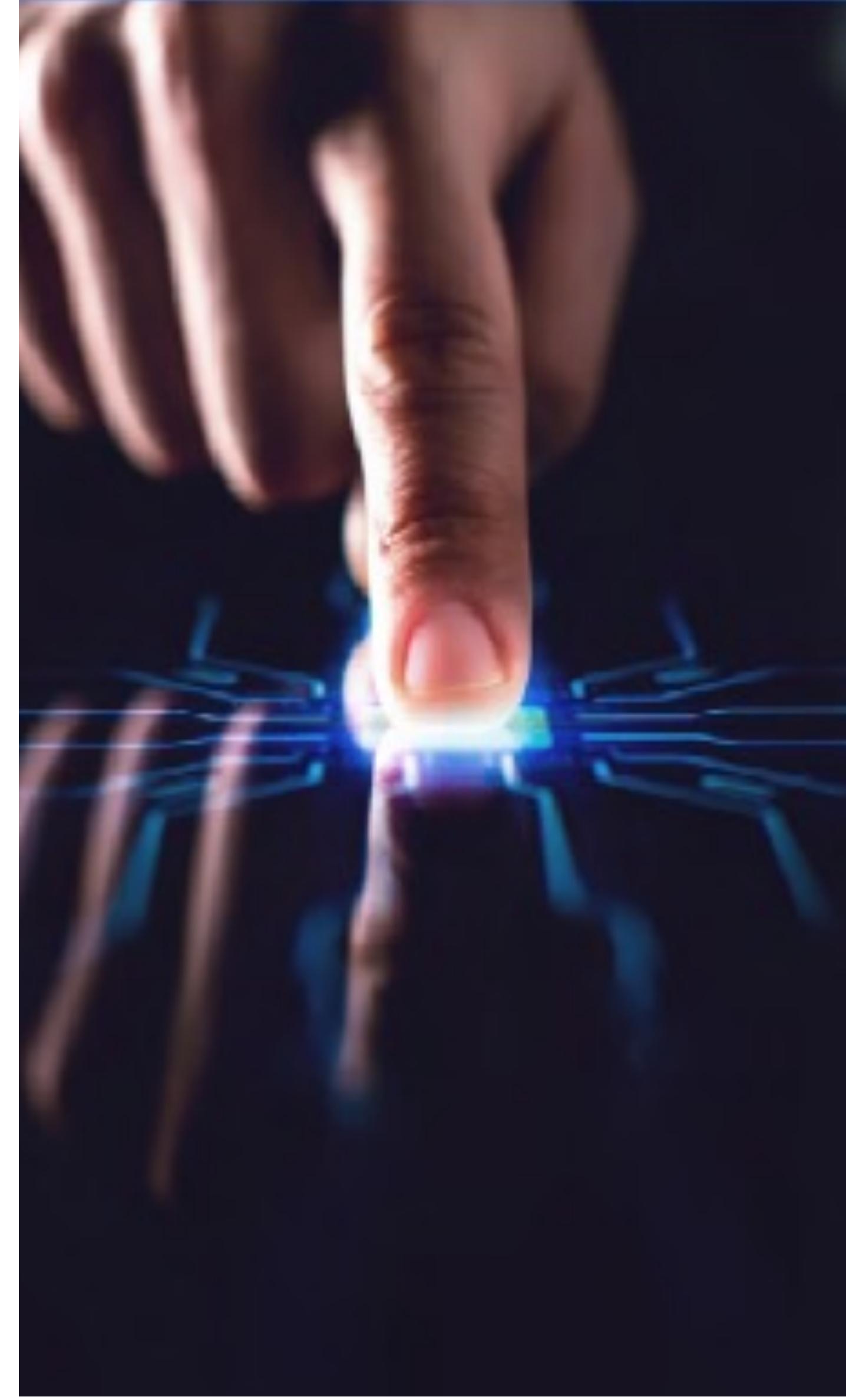
## **AI finds its moment in patient support— and patients are ready**

Uncover how patient support programs (PSP) are evolving into data-driven resources, driving smarter decision-making across healthcare.

## **Think global, support local: Scaling life sciences with smart and flexible models**

Discover how life sciences companies are balancing patient engagement with cost efficiency, agility and scalability through hybrid sourcing models.

Excerpt





## Consumers expect PSPs to offer accessible and personalized care that will empower them to manage their condition and treatment

Evolving patient expectations are redefining the landscape of patient services. Consumers now demand more personalized support, coordinated care and experiences tailored to their specific life contexts. At the same time, structural barriers—including fragmented systems, inequitable access and low health literacy—continue to hinder progress.

These insights, drawn from ZS's Patient as People Co-Lab, highlight the critical shifts underway.

### Barriers in accessing patient support services<sup>1</sup>

Consumers ranked patient support services "very important" when first diagnosed with their condition (95%), after receiving a prescription (86%) and during the approval and payment stage of their medication (64%). However, key barriers continue to limit access.

### Key areas ranked as barriers by patients include:

Survey findings from the interviewed pool of Co-Lab patients revealed the top three barriers preventing them from accessing patient services were lack of awareness about available services, limited or no accessibility to services in the region and confusion about eligibility criteria for support services.

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**I have not really been aware of services available to me. I'm just now about to utilize more services that I've become aware of and am now researching.**

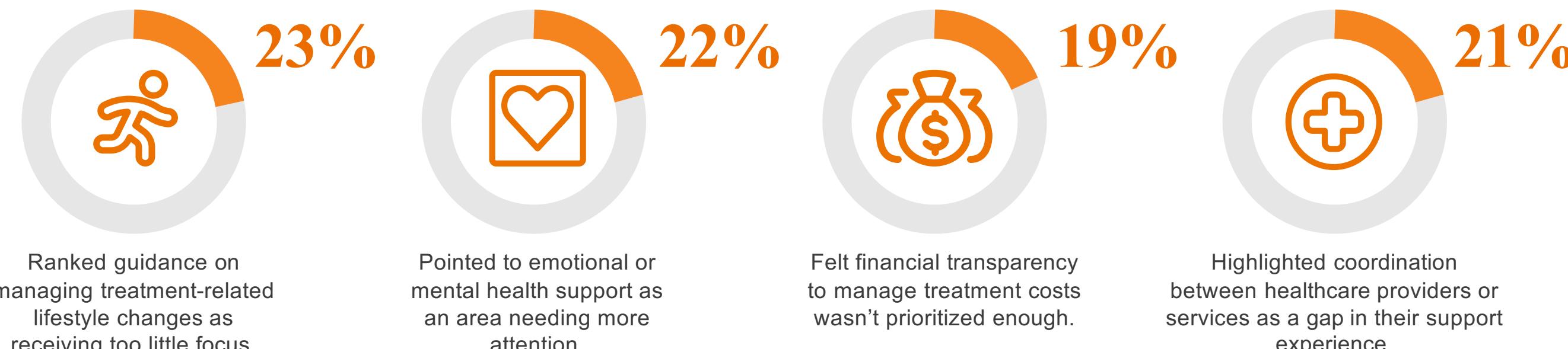
—A person living with obesity

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## Underemphasized areas of patient support<sup>1</sup>

Financial assistance programs (75%) and mental health support (46%) emerged as the most valued services in meeting patient healthcare needs. However, patient survey insights reveal a critical gap. Despite their importance, these services remain underemphasized in many PSP offerings.

Top areas patients ranked as underemphasized in patient services include:



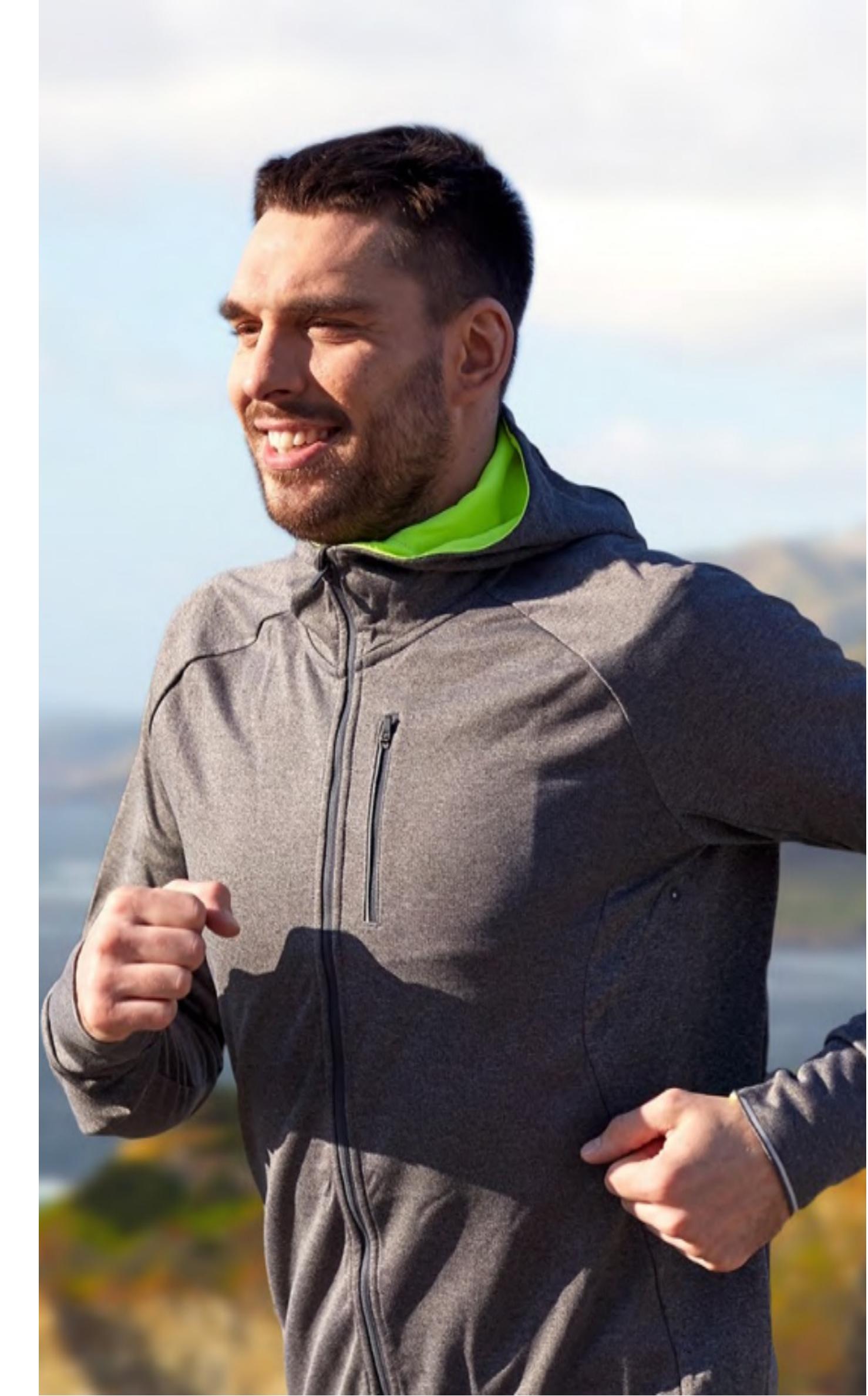
<sup>1</sup>ZS Patient Co-Lab Survey 2025

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**Prior to choosing or beginning any medication, educational resources are the most important. After choosing or beginning a medication, emotional support would be first. I believe that is the key to people staying on their medications.**

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—A person living with multiple sclerosis



## Patient perception and expectations of PSPs<sup>1</sup>

Despite accessibility challenges, patients continue to perceive PSPs as essential to their treatment management.



Stated value for support services that help patients go beyond just helping pay for medication.



Agree PSPs enhance treatment outcomes and patient experience.



Agree on actively seeking out patient services that apply to their treatment needs.



Patients rank transparency and seamless access as their top expectations for life sciences companies in patient services.



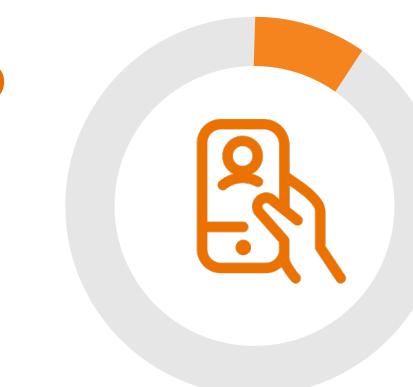
Stated need for a centralized platform for reliable treatment and condition information.



Chose increased transparency as an important need.



Desire simplified access to patient services from life sciences companies.



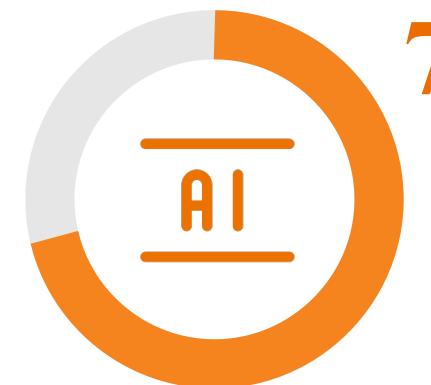
Desire personalized services along with frequent communication on treatment management tips.

**When I start a new treatment, I want direct contact with life sciences companies to understand what support is available. There needs to be more transparency in areas that directly affect patients' needs.**

—A person living with multiple myeloma

## AI for personalized engagement<sup>1</sup>

Patients prefer personalized engagement with a healthcare provider over AI tools but are comfortable using AI for tasks, such as medication reminders and appointment scheduling.



Prefer their engagement to be personalized through a human healthcare provider when accessing patient support services as opposed to AI-driven tools.<sup>1</sup>



Are comfortable interacting with AI tools for daily healthcare tasks such as reminders and appointment scheduling.<sup>1</sup>

Patients are willing to share their health data if it benefits them. Across countries<sup>2</sup>:



Would share their data if it improves their health.<sup>2</sup>



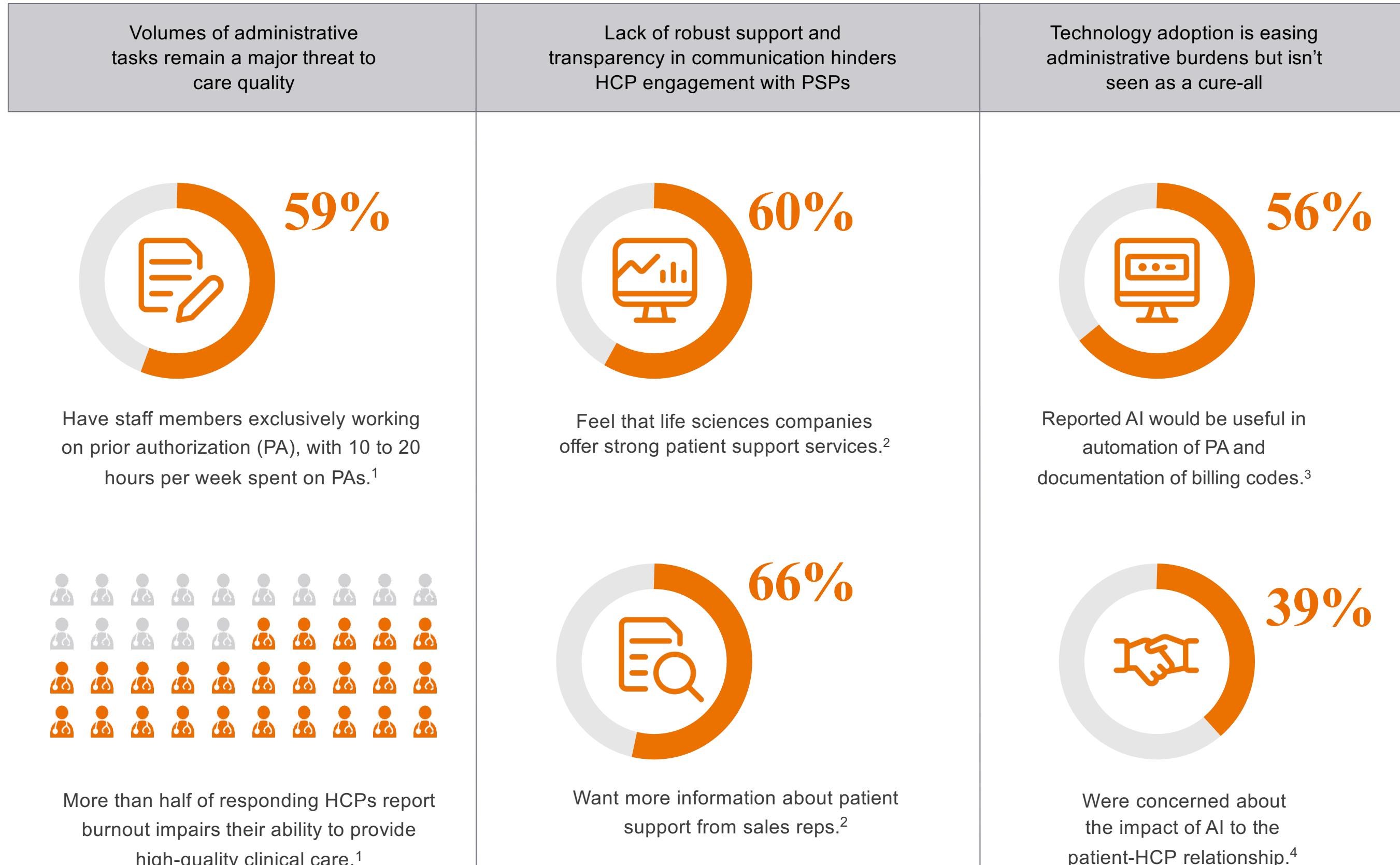
Would share their data to receive tailored health services.<sup>2</sup>



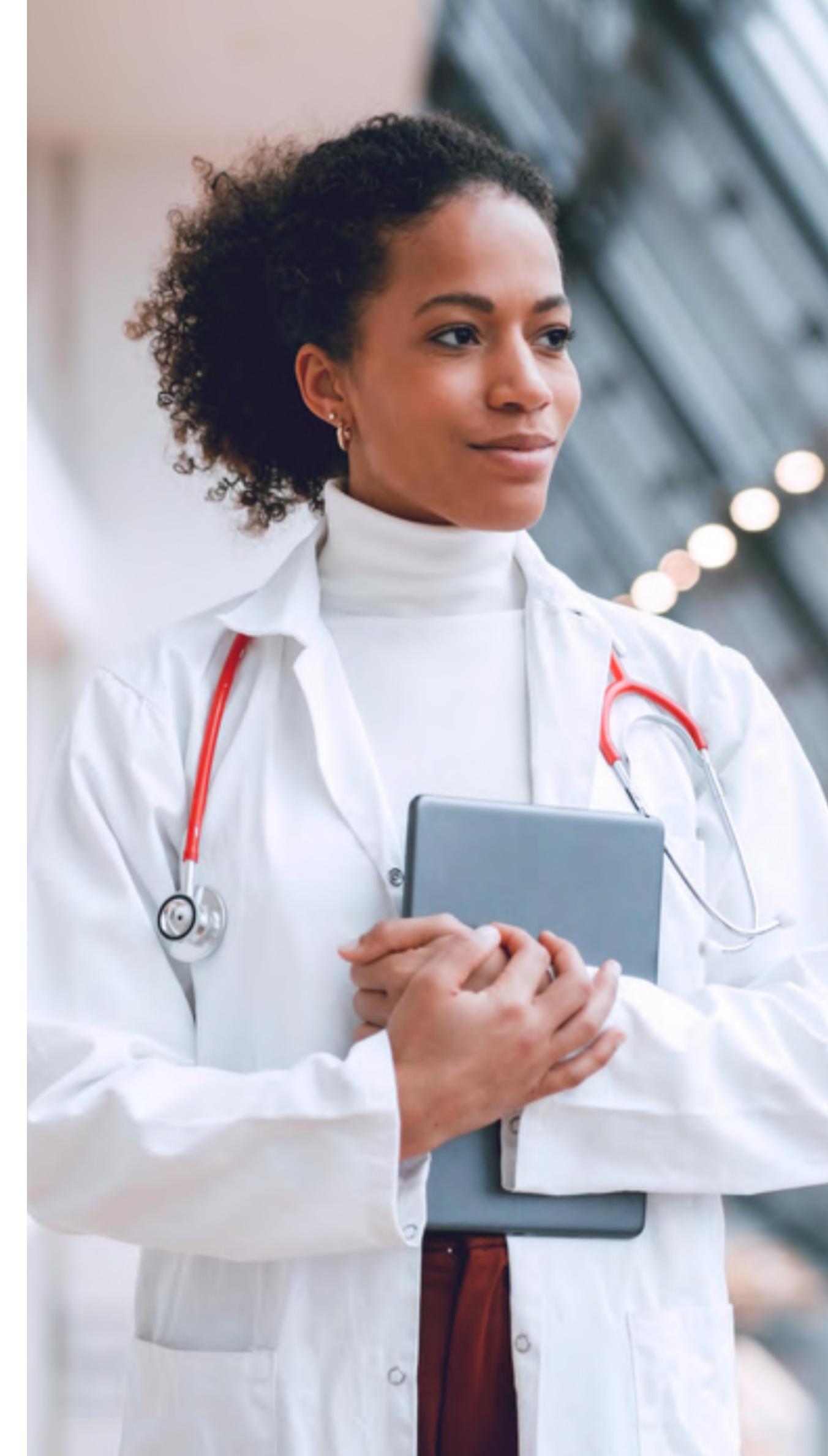
**I would like to meet with a human health professional to discuss personal detail questions that AI-driven tools may not be able to answer and then use AI-driven tools for general questions for quicker convenience.**

— A person living with FSGS

## HCPs want support from life sciences companies to streamline workflows, reduce administrative burden and improve patient engagement



<sup>1</sup>Burden on physicians and staff; <sup>2</sup>HCP expectation; <sup>3</sup>Prior auth automation; <sup>4</sup>Impact on clinical care



# The shift toward patient-centric care, driven by greater access to information and technological advancements, is transforming patient services into more personalized and empowering experiences

The following key trends identified by ZS are shaping the patient services industry, driving innovation in patient engagement, technology integration and data-driven decision-making to enhance healthcare experiences and outcomes.

- 1. PSP models adapting to market complexities**

Evolving patient service models are enabling organizations to navigate market complexities more effectively while addressing diverse patient needs with greater precision.
- 2. Hybrid sourcing model for PSPs**

Life sciences companies are optimizing PSP operations through hybrid sourcing models that combine in-house expertise with external flexibility to drive efficiency and scale.
- 3. Tech-driven access and adherence**

Technology integration in patient support is helping address persistent challenges in access, experience and outcomes across the care journey.
- 4. PSP data-driven decisions**

PSPs are emerging as a valuable source of evidence and insights, enabling data-driven decisions across healthcare strategies.



# To see the full Next-Generation Patient Support and Services Annual Trends Report, contact us at Opportunity ZS.

ZS helps life sciences organizations focus on the human side of healthcare and optimize impact.

**Explore how ZS can help accelerate your PSP.**

## **Patient-centric trials**

Accelerate clinical trials by optimizing the patient and site experience while improving inclusion and belonging.

## **Commercial activation, engagement and measurement**

Enhance outcomes by finding, onboarding, supporting and retaining patients.

## **Patient-centric organizational strategy**

Align your organization, operations and culture around patients.



***Intelligence to drive scale***

