



2026 benchmark report

Patient hub outsourcing and insourcing trends

Two-year comparative insights from
200 biopharmaceutical leaders

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In 2024, Cardinal Health and studioID surveyed biopharmaceutical leaders on the direction of their patient support strategies.

Respondents signaled growing momentum toward hybrid hub models, including the selective insourcing of hub functions historically managed by external vendors.

Our 2026 survey builds on those benchmarks. While manufacturers continue to rely on outsourced support, they now bring sharper expectations and stronger motivations for insourcing select functions. As these models gain momentum, many say their current hub providers are not fully equipped to support those transitions — suggesting a rising demand for more flexible vendor relationships.

Inside this report, we compare 2024 and 2026 results to highlight where hub models are stabilizing, where they're shifting and what manufacturers expect next.



The findings of this research are based on an online survey conducted by BioPharma Dive from December 22, 2025, to January 16, 2026. A total of 200 executives participated in the research. The sample was generated from BioPharma Dive databases. Where referenced, 2024 data come from previous surveys conducted among similar respondent populations.



FINDING

Hybrid hubs remain dominant

Manufacturers are testing new hub models against their internal strengths and opportunities, exploring solutions that best fit their needs. In this reshuffling, some leaders say they're doing more outsourcing. Others say they're bringing more functions in-house.

Between those is a significant middle ground, the hybrid model, where some functions are outsourced and others handled in-house. Once again — as with the previous survey — this is where the market majority is aligned.

In 2026, 63% of survey respondents report having hybrid hubs. Although that's a dip from the 79% in our 2024 survey, it's still a dominant model in the current hub environment. It also tracks with organizational pressure to move hub functions in-house, which increased by 12 percentage points between 2024 and 2026.

"We're seeing our clients place even greater priority on patient services, and taking more ownership of their internal strategy is a natural extension of that focus."



Josh Marsh

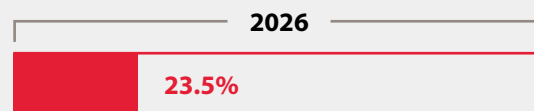
Vice President and General Manager
Sonexus Access and Patient Support
Cardinal Health

The hybrid hub

63%

Most survey respondents (63%) report having a hybrid hub in 2026.

The fully insourced hub



up 12 percentage points



The fully outsourced hub

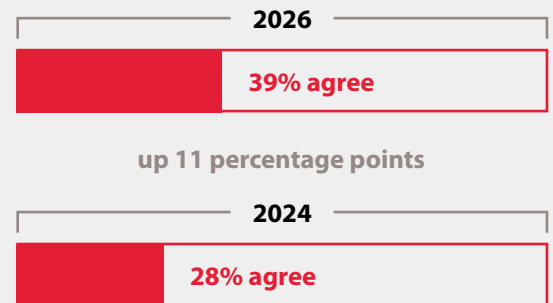


up 5 percentage points





Within the past few years, our leadership has been pressuring the organization to move some or all outsourced hub functions in-house.



“We’re seeing our clients place even greater priority on patient services, and taking more ownership of their internal strategy is a natural extension of that focus,” said Josh Marsh, Vice President and General Manager, Sonexus™ Access and Patient Support at Cardinal Health. “For some organizations, that means collaborating through a fully outsourced model with the right operations, technology and advanced analytical insights to bring their vision to life. Others want to own more of the solution, such as standing up their own CRM, while relying on a hub vendor to deliver the operational and technology backbone.”

Because manufacturers are outsourcing high-demand aspects of their program (such as back-end support), patient services providers should respond accordingly, Marsh added. This is where opportunities like individual hub solutions, which perform standalone functions, become essential. One strong example is our branded eRx intake pharmacy solution. This standalone, bolt-on solution not only simplifies enrollment through our seamless eRx intake channel but also elevates the manufacturer’s brand through our non-commercial, non-dispensing pharmacy.



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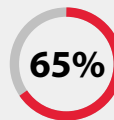
Motivators for insourcing have evolved

In 2024, data control and access control were the primary drivers of insourcing. But in 2026, motivators have changed. As organizations build their bench of talent in a dynamic healthcare environment, they're looking more toward internal expertise and self-sufficiency as their top reasons to insource.

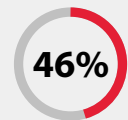
"As manufacturers strategically expand their internal capabilities, new operational and technical complexities naturally emerge," Marsh said. "That's where hub vendors like Sonexus Access and Patient Support play a critical role, offering specialized expertise and purpose-built teams that integrate seamlessly with manufacturer counterparts. Whether a client chooses a fully outsourced model or builds more of their own internal technology and strategy, we deliver the stability, scalability and flexibility needed to support them as their model continues to mature."

Top motivators to insource

2026:

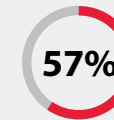


**Internal
expertise**

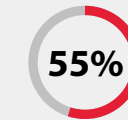


**Ability to be
self-sufficient**

2024:



**Data
control**



**Access
control**





"Your patient services provider should be driving education and recommendations on how these policy and regulatory changes will impact your programs in the future."



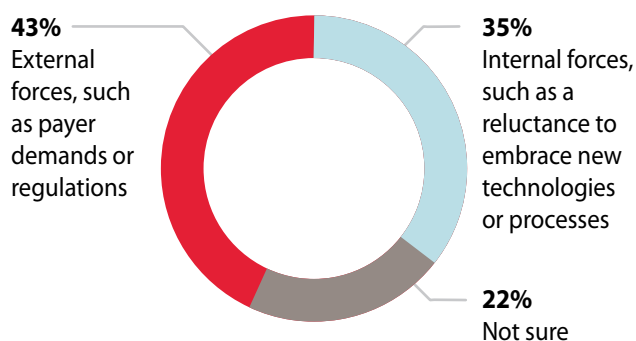
Josh Marsh

Vice President and General Manager
Sonexus Access and Patient Support
Cardinal Health

Importantly, respondents cited external factors such as payer demands and regulations as their biggest threat. In a healthcare climate reshaped by evolving policy, pricing pressure and access frameworks, this further underscores the value in the stability and expertise that a patient services provider can bring, Marsh added.

"External forces will be the biggest challenge to patient services because innovation will always be a step ahead of regulation. New legislation is creating additional guardrails, and the demands of the market require everyone to explore new methods for improving services and patient experiences. Your patient services provider should be driving education and recommendations on how these policy and regulatory changes will impact your programs in the future," said Marsh.

Over the next 1 to 2 years, which of the following forces do you expect will pose the biggest threat to patient services innovation? (2026)





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Confidence levels reveal a competitive edge

From 2024 to 2026, leaders remain confident with the hub models they've chosen — whether insourced, outsourced or hybrid. But although confidence in their in-house capabilities has jumped substantially, confidence in outsourcing has only marginally improved.

Marsh attributes those modest gains to a mixed market of patient services vendors that may be approaching hybridization differently. For example, the Sonexus Access and Patient Support team has fully leaned into the trends — building flexible offerings that include single-service solutions to support manufacturers no matter the model. But if hub providers resist those industry headwinds instead, it can complicate manufacturers' efforts to find the best model.

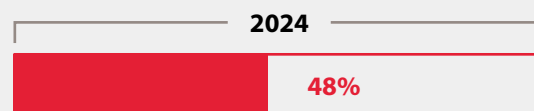
That dynamic might explain why manufacturers are now more confident in what they insource than what they outsource. In addition to the internal skills they've built, brands may be elevating their expectations of vendors as they explore new models. Hub providers that meet those needs will have the edge now and moving forward.

"As more brands consider transitioning their [patient support] programs to models that better support their long-term vision, ensuring a smooth, patient-centered experience becomes extra critical. The focus must always remain on continuity and quality of support, and that's where flexible, collaborative partners can make a meaningful difference."

How confident are you that the hub functions your organization insources are the best they can be?



up 17 percentage points



How confident are you that the hub functions your organization outsources are the best they can be?



up 4 percentage points





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Widening gaps in support for hub transitions

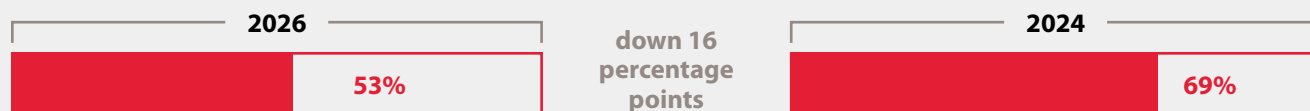
As brands reassess their hub structures, many are consolidating programs or preparing transitions to align with longer-term strategic goals. In 2026, 57% of survey respondents say they have either undergone or are considering a consolidation. In a tightening market, flexibility becomes a defining differentiator among patient services providers.

For organizations moving toward hybrid or insourced hub models, consolidation is often a critical first step. When a company shifts to a hybrid approach, they frequently look to reduce the number of third-party vendors — recognizing that it is far easier to stand up a CRM and integrate with one vendor or select outsourced services than to manage integrations across four or five different vendors.

Yet despite this trend, the flexibility gap appears to be widening. In 2026, leaders were much less confident that their vendors were equipped to support an in-house model should they choose to pursue such a transition.



How confident are you that your current patient support services or hub vendor is equipped to help you move some functions to an in-house model, should you ever choose to make that transition?

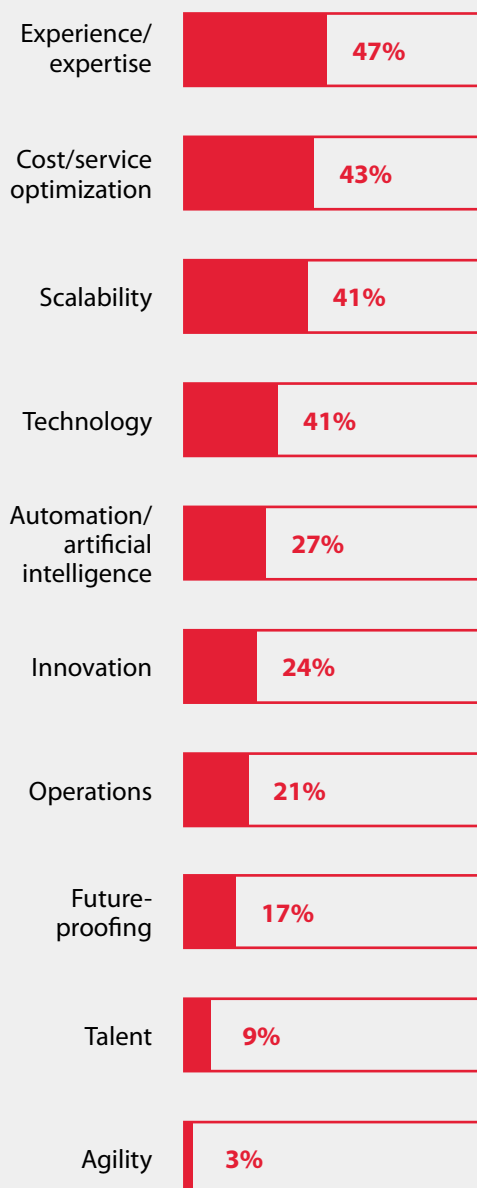


“The fact that 86.5% of manufacturers are embracing hybrid or in-house setups, but only 53% feel their vendors can facilitate that evolution, highlights a pivotal moment for our industry,” Marsh said. “Manufacturers are clearly signaling what they need, and vendors who can operationalize, support and add differentiating value within those models will set the pace for the next era of patient services.”

Additional priorities emerged when respondents identified the attributes they value most in a hub vendor. Experience, cost- and service-optimization and the ability to scale stood out as the top requirements. These preferences reflect today’s environment, where manufacturers increasingly rely on flexible, standalone technologies that can integrate seamlessly into hybrid models and strengthen program performance without adding operational complexity.

“Several of our clients are on a planned path toward hybrid over the next three to five years, and they’ve asked us to help lead that evolution,” said Marsh. “Their confidence in us comes from the work we’re already doing to guide programs through complex transitions without disrupting patient experience.”

What are the top attributes you look for in a hub vendor? (2026)



Your hub strategy is our strategy

Our 2026 insights make one thing clear: manufacturers are no longer bound by traditional hub constructs. They're designing models that reflect their internal strengths, selecting the right mix of in-house and outsourced capabilities, and adjusting those configurations as their needs evolve. This flexibility is shaping a more modern, adaptable era of patient services.

Hub providers that can evolve alongside a manufacturer's strategy are becoming essential to both operational success and patient care. Yet this survey shows that many of the market's most fundamental needs still go unmet. As external pressures persist and models continue to shift, the right hub vendor can position your organization and patients for long-term success.

The next step is choosing a vendor built to support that future.



Email **biopharmasolutions@cardinalhealth.com** to schedule a meeting with the Cardinal Health Sonexus Access and Patient Support team



Your hub strategy is our strategy

Cardinal Health Sonexus™ Access and Patient Support delivers the expertise, capacity and adaptability needed to evolve with your program and drive meaningful impact.

We seamlessly integrate with biopharmaceutical companies through a range of program models designed to meet diverse operational needs.



To transform your program from the inside out, **scan QR code** or email **biopharmasolutions@cardinalhealth.com**



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