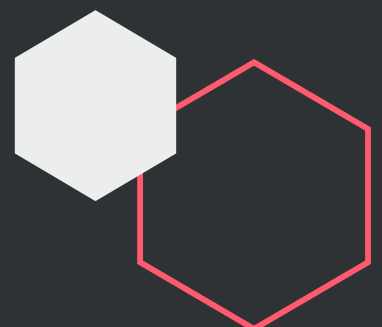


The Digital Reality Check

How pharma measures up in 2025



Welcome from Rob

Now in its third year, Graphite's annual report offers a clear-eyed view of how pharma is evolving in its approach to digital. Through conversations with digital leaders across the industry, we take the temperature on what's really happening behind those big glass doors.

This year, there are signs of real progress in some areas. AI is starting to move from buzzword to business case, with practical applications finally taking shape. And omnichannel? It's still the north star for many teams. Half of our survey respondents now describe their organisations as having "advanced" omnichannel maturity. But the story behind the numbers is more complex. The qualitative insights reveal a familiar picture: fragmentation, slow momentum, and strategies that remain stuck in silos. The ambition is real, but execution continues to lag behind.

Elsewhere, long-standing challenges persist. Compliance still holds disproportionate influence over the digital experience. Measuring impact remains a weak spot. And then there's the big shift everyone's watching the Salesforce-Veeva split. We share early signals from the market and what they might mean for the future of digital infrastructure.

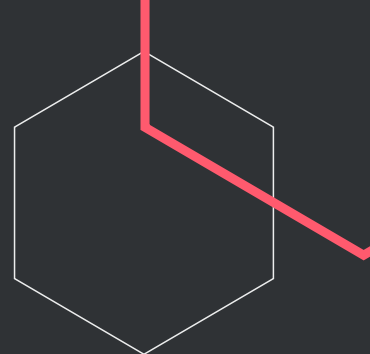
This year's report explores six critical areas shaping pharma's digital maturity, from hype to hard truths, and considers what still needs to shift for the industry to realise its digital potential.

We hope you find it valuable, a chance to reflect, recalibrate, and compare your perspective with the trends we're seeing across the industry. As always, we'd love to hear your thoughts.

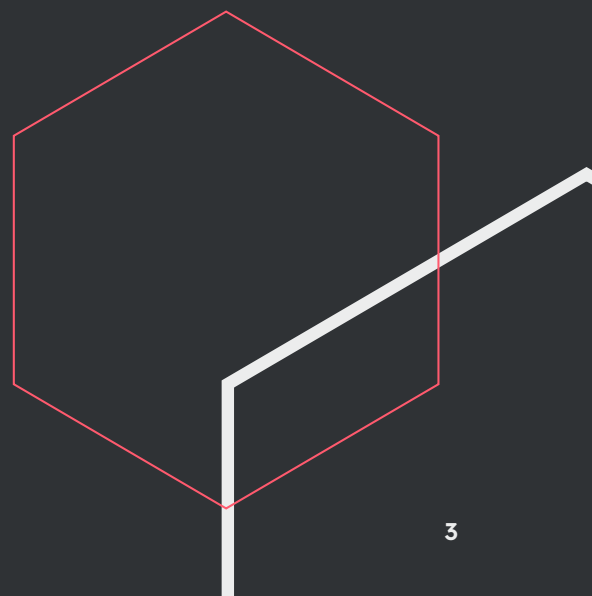


Rob Verheul
CEO, Graphite Digital

In this report



Introduction	04
Section 1: AI in digital pharma: Hype vs. readiness	05
Section 2: Omnichannel maturity: Ambition vs. execution	09
Section 3: CRM choices: Salesforce vs Veeva	12
Section 4: The insight gap: Are we measuring what matters?	14
Section 5: Compliance is calling the shots: But at what cost?	17
Section 6: What's next? Emerging opportunities and future focus	20
Perspectives	22
Conclusion	25
About Graphite	26
Thank you to contributors	27
Methodology	28



Introduction: Taking stock of digital progress in pharma

In 2025, pharma’s digital ambition is unmistakable, but so is the tension between strategy and execution.

The pace of transformation has quickened, driven by AI, data, and omnichannel goals. Yet longstanding challenges remain: fragmented systems, compliance-heavy thinking, and a gap between what companies want to achieve and what they’re truly delivering.

Key findings

13%

AI in digital pharma: Only 13% feel very prepared to implement AI within digital experience citing barriers including data privacy, integration with existing systems, and high cost of adoption

66%

CRM decisions: 66% of respondents revealed their organisation has opted for Salesforce over Veeva, ahead of the upcoming split later this year

70%

Compliance in control: 70% cite compliance as a primary driver of their digital strategies, but what does this mean for experience, usability and innovation?

To understand how digital leaders are navigating this space, we surveyed 100 senior decision-makers across the life sciences sector. The results reveal progress, but also persistent friction.

Open-ended responses speak to a sector energised by the potential to personalise care, simplify journeys, and give patients and professionals more control. But they also highlight familiar blockers, silos, slow momentum, and risk-averse cultures.

This year’s report focuses on five core realities shaping pharma’s digital landscape in 2025:

50%

Omnichannel maturity: 50% report “advanced” maturity but qualitative feedback points to fragmented systems and stalled strategies

29%

The insight gap: Just 29% prioritise first-hand customer research to inform digital decision-making, while 46% rely mainly on internal expertise

Conclusion

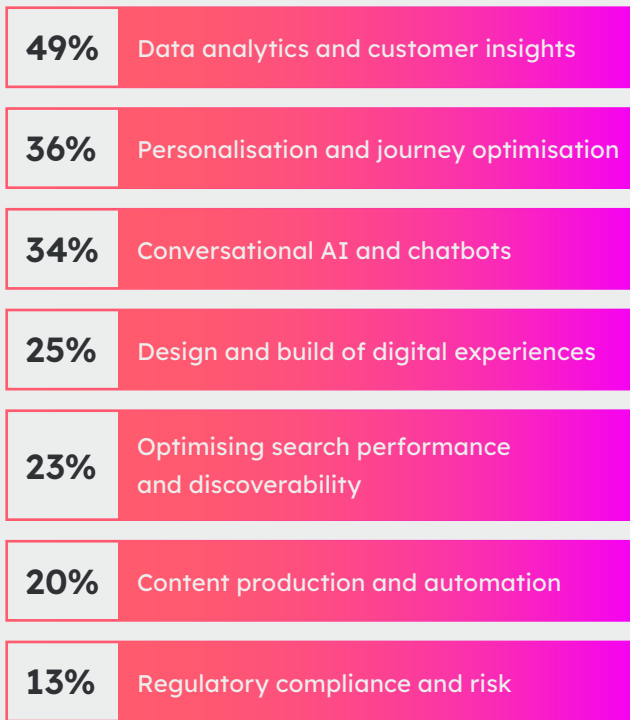
This report hopes to capture the current state of digital progress in pharma. It’s designed to give leaders a grounded view of where their peers are focused, and where the biggest opportunities lie to move from ambition to action in the months and years ahead.

1. AI in digital pharma: Hype vs. readiness

From personalised care journeys to predictive insights and content automation, artificial intelligence offers tremendous potential for digital engagement in life sciences.

But while pharma companies are already investing in AI, many remain cautious about how ready they are to scale it in a meaningful, responsible way.

Where AI is having the biggest impact in digital engagement

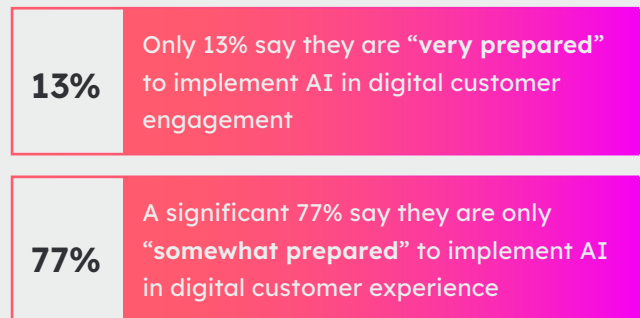


Nearly half of respondents (49%) say AI is having the biggest impact on data analytics and customer insights, suggesting that pharma is leaning on AI to make sense of complex datasets and uncover actionable trends. This aligns with broader investment patterns, where analytics continues to top the list of AI use cases.

Personalisation and journey optimisation (36%) is the next most cited area, reflecting growing confidence in AI's ability to tailor experiences based on behaviour and preferences, a key step in making digital experiences more relevant and engaging. Conversational AI and chatbots are also gaining traction, pointing to early success in automation that supports scalable, 24/7 interaction, without compromising compliance.

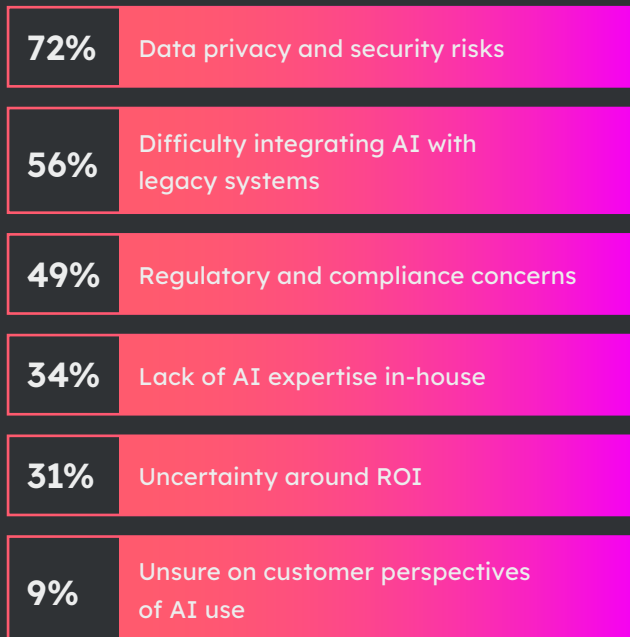
Uncertainty around AI implementation persists

The responses above show that AI is having a positive impact across digital experience in a variety of areas. However, many teams are still finding their footing when it comes to implementation. Only 13% say they are "very prepared" to implement AI in digital customer experiences, but a significant 77% say they are only "somewhat prepared."



Notably, however, no respondents reported feeling unprepared to implement AI. This points to a sector eager to adopt and embrace AI, but still navigating the complexities of doing so responsibly and effectively. As use cases evolve and internal capabilities grow, confidence is likely to follow.

What are the top barriers to AI adoption?



(respondents were asked to choose 3 options)

Data privacy and security concerns are cited as the biggest barrier to AI adoption. AI depends on large, often sensitive datasets, which pharma must handle with extreme care. Combine that with complex regulations and the opaque nature of some AI models, and caution is understandable. Organisations that prioritise transparency, consent, and governance will be best positioned to unlock AI's potential.

Other barriers highlight operational friction. Many legacy systems simply weren't built for AI-level automation, and in a risk-averse environment, fear of getting it wrong may impact the ability to innovate and deliver change at speed.

A talent gap also creates barriers. Without in-house expertise to identify use cases, assess risk, or manage AI systems at scale, adoption stalls, leading to cautious experimentation and missed opportunities.

To move AI beyond the pilot phase, pharma needs smarter integration, stronger cross-functional skills, and regulatory models that support innovation without compromising trust.

“Being “prepared for AI” looks very different from previous digital transformations. It's not about perfection from the outset, but about a mindset for diving in, testing, learning and iterating. This technology is evolving faster than anything we've seen before, and the longer we wait for perfection, the more we miss opportunities to deliver real benefits to customers, patients, and colleagues.”

Michelle Killick
Senior Director, Experience Effectiveness
Lead, Pfizer

Missed AI opportunities: Search, content production, and digital build

While AI is making significant inroads in analytics and personalisation, some areas show surprisingly low impact. When asked where AI is currently driving change in digital experience, only **20%** of respondents cited content production, **23%** mentioned search marketing and SEO, and just **25%** pointed to design and build of digital experiences.

These figures suggest that pharma may be overlooking some of the most scalable and creative applications of AI. To explore this further, we asked three experts to share their perspectives on the opportunities here.

Embrace AI for content creation, or get left behind



Dan Buckland,
Director, Broadcast Health

“Great content drives meaningful engagement, and that’s exactly what pharma needs to influence HCP behaviour. The barrier has always been time and resources, but AI is changing that. With the right tools, strategy, and mindset, marketers can now create trusted, high-impact content at scale, without production agencies or specialist skills. From congress abstracts to visuals and videos, AI lets you focus on quality and relevance. These tools are off-the-shelf and ready to use.

The AI revolution will reward creative, strategic thinkers, so start practicing your content craft now. This world has opened up. If you wait, you’ll be left behind”.

Build visibility and credibility through AI



Tom Vaughton,
CEO, Varn Health

“AI is transforming how people discover, evaluate and trust healthcare content. Yet pharma’s investment in search and SEO often lags behind other digital priorities. As large language models (LLM’s) change our search behaviour, traditional strategies must evolve, towards schema optimisation, entity recognition and answer engine optimisation (AEO). These aren’t future concepts; they’re already changing how healthcare information is found.

The real opportunity lies in building visibility and credibility across AI-powered pathways; structuring content for machine readability, optimising for AI-driven results and tracking performance across non-Google platforms. Search is no longer a channel; it’s a critical driver of reach, relevance and trust”.

How pharma teams can use AI to work smarter, not harder



Alex Jijie,
CEO, Digitalya OPS

“With the rise of GenAI, more and more pharma companies are launching initiatives in this space. A common example is chatbots, which provide a 24/7 experience and allow companies to anonymously monitor what HCPs are asking. This insight can then inform the creation of relevant content.

Another emerging use case is using AI to support the creation of agency briefs. Stakeholders can gather input from colleagues, use GenAI to analyse all the documentation, and generate a single, structured brief to share with agencies.

AI is set to reduce redundant, low-value tasks, enabling people to focus on strategic work and develop higher-level thinking skills”.

Insight to action: 3 takeaways

Pharma is optimistic about the potential of AI and investing in this area, but lacking confidence in its ability to implement it successfully within digital. Privacy, integration challenges, and cost concerns are holding teams back, even as use cases for content, personalisation and analytics expand.

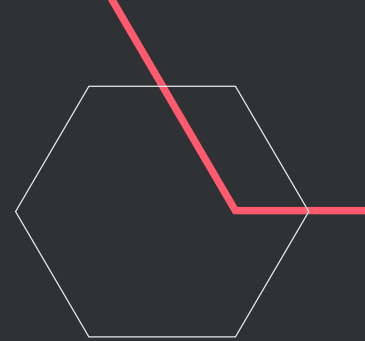
To close the gap between ambition and readiness, and make AI investments count, organisations should consider:

1. Building governance and compliance frameworks that enable speed without compromising trust
2. Focusing on AI integration into everyday tools, journeys and decision-making, not just standalone pilots
3. Upskilling teams, bringing in expert talent, and learning from other sectors

“To ensure the right levels of safety, companies have so far relied on expert reviews and established testing protocols. But when it comes to AI, using old protocols and approaches will either block projects or fail to deliver the required level of safety. New protocols and approaches will have to be crafted, tested, and refined. And, most importantly, they will have to be developed not just by legal, privacy, regulatory, and compliance experts, but by a broader group that also includes AI and IT specialists.”

Manuel Mitola

Co-founder and Managing Director, ctcHealth



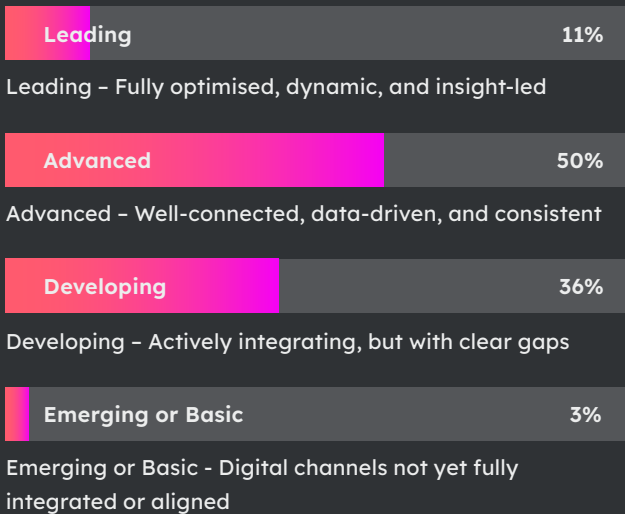
2. Omnichannel maturity: Ambition vs. execution

Pharma has spent the past decade talking about omnichannel transformation.

And according to our survey, many now believe they're getting there: 50% of respondents describe their organisations as having an "advanced" omnichannel maturity level.

But the qualitative data tells a different story, one of fragmentation, slow progress, and strategies stuck in silos. The ambition is there, but the execution still seems to be catching up.

Omnichannel maturity self-assessment



Real-world blockers to omnichannel maturity



Different teams operating in isolation.

We still treat digital and physical channels as separate entities.

No clear roadmap for omnichannel evolution.

The absence of an omnichannel culture.

Insights from one channel are not applied to improve the others.

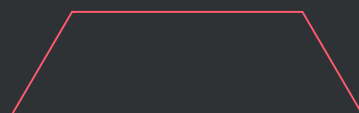
The barriers to omnichannel maturity aren't just technical, they're strategic. Many organisations still appear to treat digital and physical channels as separate entities, with no clear roadmap to unify them.

A key issue is that insights from one channel aren't used to inform others, limiting integration and consistency. Without a joined-up vision that aligns user journeys with business goals, efforts remain siloed and fragmented. Driving real progress will require research-led strategy, shared ownership, and a shift from channel-based thinking to connected customer experiences.

"The biggest barrier to omnichannel adoption and success is teams, including senior leaders', continued obsession with traditional face-to-face channels. Digital channels are still seen as a "nice to have" add-on to what we are doing and there is still the belief in some markets that "my customers don't use digital". In reality, digital channels do not perform well because the content and execution is not good enough.

Steve Rye

Senior Manager, Omnichannel Engagement, Mundipharma



Many respondents also talked about challenges with internal fragmentation, including:

- Lack of cross-functional ownership
- Poor data governance across platforms
- Lack of a unified vision and clear objectives
- Disjointed regional execution models
- Slow adoption of new tools and processes

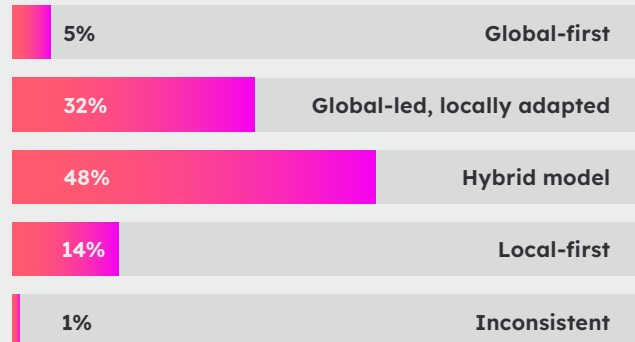
“In my experience, a globally led model is always more efficient and allows for more scalable solution. Ideally you want globally managed platforms and operating models, while allowing locally driven customer experiences and insights.”

Susana Bento
Global Omnichannel Operations Lead,
Grünenthal Group

Global consistency vs. local market adaptation in digital: Hybrid dominates

When asked how their organisation approaches the balance between global consistency with local market flexibility when devising their digital strategies, nearly half (48%) of respondents say they operate a hybrid model, with 32% opting for a globally-led, but locally adapted approach.

How does your organisation approach the balance between global consistency and local market flexibility?



While there's no one-size-fits-all model, and each approach comes with its own strengths and challenges, there are a few key principles that can help ensure success, regardless of whether you lean global, local, or somewhere in between:

- **Clear ownership and accountability** are essential. Without them, delivery becomes fragmented and inefficient.
- **The customer experience should always lead decision-making.** Prioritise intuitive interactions, engaging content, and seamless access to information across markets.
- **Strong documentation, guidelines, and governance** are vital to ensure consistency, especially when multiple teams or regions are involved.
- **Balance is everything.** Aim to maintain a consistent global identity while still giving local teams the flexibility to adapt and innovate.
- **Development and implementation come with a cost.** Factor in the technical complexity and resource implications of your chosen approach early on.

Insight to action: 3 takeaways

Omnichannel maturity isn't a label, it's a capability. The difference between being active on multiple channels and delivering omnichannel excellence is strategy, structure, and ownership. And your customers can tell the difference.

To build a truly connected, customer-centric model, pharma teams should focus on three priorities:

1. Design omnichannel strategies around real customer journeys, rather than siloed internal processes
2. Establish shared goals and ownership across field, content, medical, and tech teams
3. Measure experience quality across touchpoints—not just campaign performance

“Our annual planning cycles (often in siloed teams) and unreliable tactical execution timelines really hamper our industry from delivering timely omnichannel experiences for HCPs and patients. In addition, omnichannel relies on being able to make agile decisions based on what the data is telling us, but we don't typically build the space into our calendars, and the budget in our plans, to effectively evaluate and evolve our content and campaigns throughout the year.”

Steven Hunt

Digital and Omnichannel (Rx) Director, Norgine

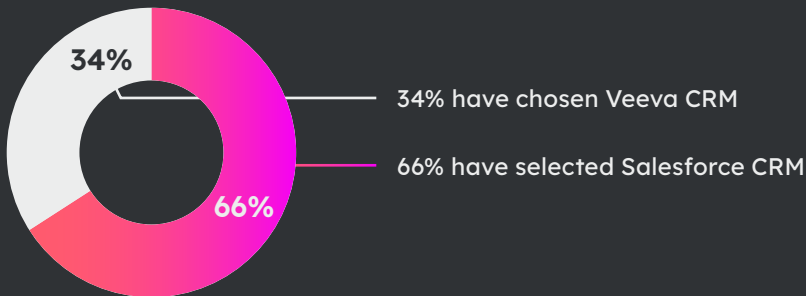
3. CRM choices: Salesforce vs Veeva

CRM platforms are central to pharma’s digital infrastructure, enabling data management, omnichannel engagement, and personalised experiences, all within a regulated environment.

The upcoming Salesforce-Veeva split in September 2025 seems to have triggered a pivotal moment in pharma digital strategy, prompting many organisations to re-evaluate how effectively their tools, channels, and data are working together to serve customers.

As part of our survey, we asked, “*With the upcoming Veeva and Salesforce split in mind, which CRM vendor has your business decided to move forward with?*”. The response shows a clear lean toward one platform:

CRM adoption snapshot: 66% choose Salesforce over Veeva



Notably, no respondents selected our third option “*Another CRM solution (please specify)*”. This shows the dominance of Salesforce and Veeva within the sector, despite a number of specialist CRM providers emerging in recent years.

“Whilst the CRM is very important, it needs to go hand in hand with other channels and sources of information. For me, good data and a place to house and analyse that data (like a CDP) is the most important enabler of omnichannel.”

Steve Rye
Senior Manager, Omnichannel Engagement, Mundipharma

What were the top decision-making factors?

While both platforms remain trusted within life sciences, the rationale behind these choices provides a window into digital priorities.

Salesforce was recognised for its advanced features and ability to scale and support growth, whilst Veeva comes out on top for usability and built-in compliance features.

Salesforce

Main drivers:

1. **Flexibility, customisation and adaptability** to organisational needs
2. **Speed and ease of implementation**, with minimal disruption and rapid deployment
3. **Advanced features**, such as AI-driven recommendations, predictive analytics, and real-time reporting
4. **Seamless integration** with third-party apps and existing systems, and ecosystem support
5. **Scalability** and ability to support long-term growth “The flexibility of customization to meet our needs.”



The ease and speed of implementation is something that influenced my decision making.

The CRM tool's scalability was in line with our growth plans and this one factor influenced our decision.

Veeva

Main drivers:

1. **Compliance and governance** features built-in
2. **Simplicity and integration**, including easy adaptation and compatibility with legacy systems
3. **Communication and engagement** tools and customer interaction tracking
4. **Support and user interface** noted for intuitive design, helpful resources, and strong user community



Its built-in compliance features was a major factor in our decision-making.

A significant factor in our decision was the ability to keep track of all customer interactions in one place.

The CRM's user interface played a significant role.

“After trying out an alternative platform, we pivoted back to Veeva 3 years ago for our biggest, most advanced affiliate and put all ex-US moves on hold until Salesforce matures. Right now, we’re staying with Veeva CRM: its tight link to PromoMats, Vault, and the soon-to-launch Campaign Manager aligns with our DAM and modular-content rollout.”

Gary Holifield

Head of Digital Engagement, Global Rare Diseases, Chiesi



4. The insight gap: Are we measuring what matters?

In many cases, pharma still appears to be still designing digital experiences based on internal assumptions and surface-level metrics.

While companies are pouring resources into analytics, AI, and digital tools, they often lack the insight needed to design truly meaningful experiences, or to demonstrate their impact.

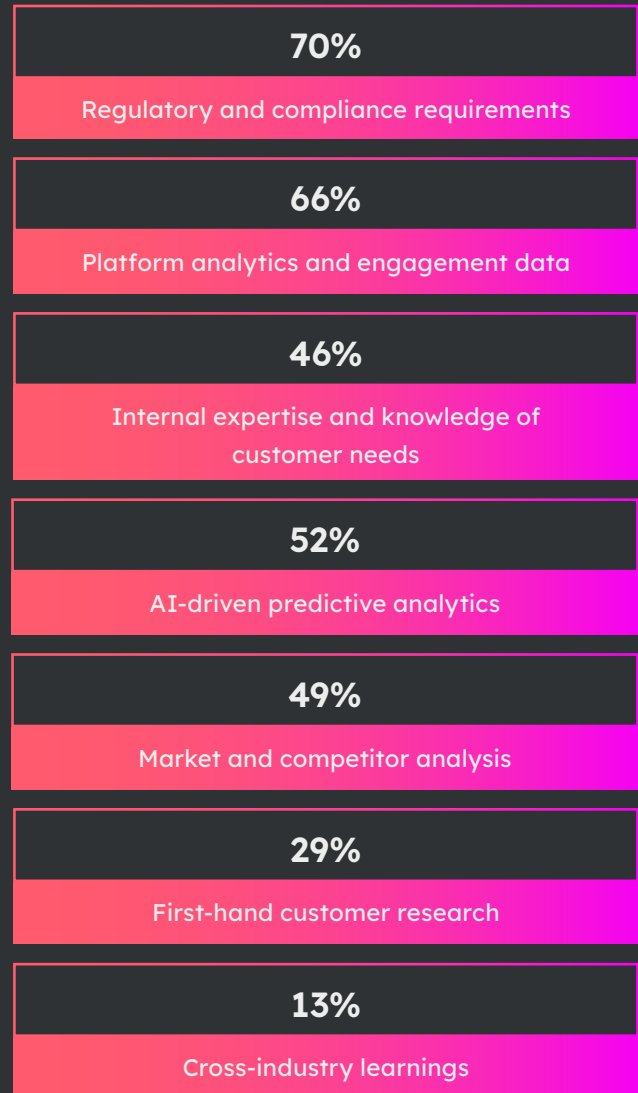
Sources of insight shaping digital decision-making

Despite years of talking about patient- and HCP-centricity, nearly half of organisations admit they're relying heavily on internal assumptions to shape their digital strategies.

When asked how digital strategy is currently informed, only 29% prioritise first-hand insight gathered directly from HCPs or patients in comparison to 46% who utilise internal expertise and knowledge, and 70% who look to regulatory and compliance requirements.

There appears to be a strong reliance on internal quantitative data showing 'what' is happening, while the 'why' behind customer needs and behaviours is often overlooked. That deeper qualitative insight is key to creating experiences that truly resonate.

When creating digital engagement strategies, what insights are used to inform decision-making?



“This data highlights a common practice of relying primarily on digital behavior and operational data in decision-making, alongside a strong self-perception of how well we understand our customers’ needs and motivations. We should explore broader methods for gathering more qualitative customer insights at a lower cost or faster than classical market research, and better leverage other sources such as solicited and unsolicited customer feedback, and frontline employee insights.”

Ksenia Levina
Global Customer Experience Lead, Grünenthal Group

Why it matters: Insight drives relevance and results

Success in digital engagement isn't just about having the right tools, it's about understanding your audience well enough to design experiences that truly resonate and keep them coming back. Without direct customer insight, pharma risks misjudging priorities, tone, and timing, leading to low engagement, lost trust, and wasted investment.

To avoid this, first-hand research must become a strategic priority. This means:

- Conducting regular qualitative research with HCP and patients
- Embracing co-creation processes to explore needs and pain points
- Testing and iterating experiences with real users to inform digital product launches and drive continuous improvement
- Listening to emotional as well as functional feedback

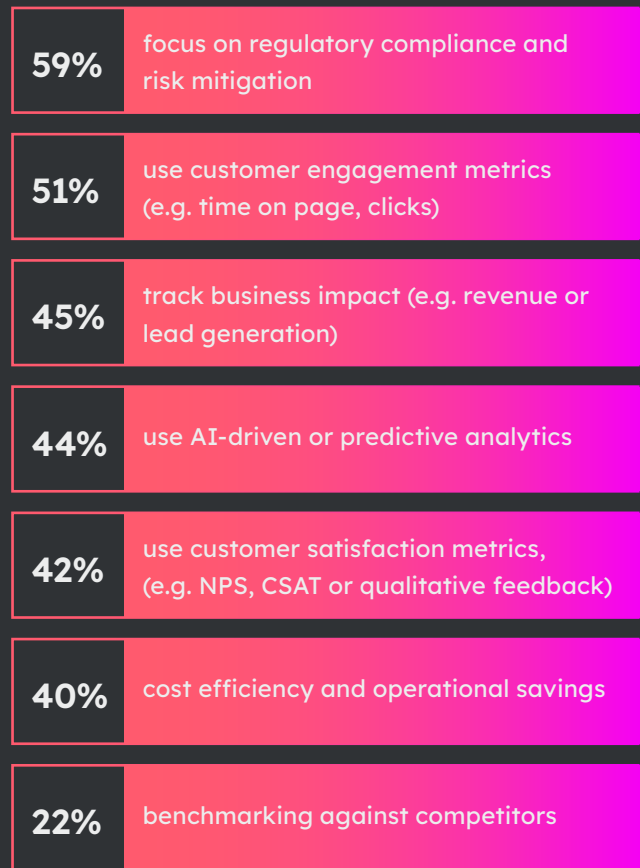
“In the digital era, pharma handles vast amounts of data from multiple sources, but struggles to convert it into actionable insights. Many lack the data architecture to integrate channels into a data lake and enable martech platforms, while marketing teams are often unprepared to process this data effectively and use it to calibrate digital campaigns. Most companies also lack processes to combine first-hand insights from REPs/MSLs with digitally collected data to build customer profiles. A technical evolution and strategic mindset shift are needed to fully unlock the value of this data.”

Susana Bento
Global Omnichannel Operations Lead,
Grünenthal Group

How digital ROI is currently measured

When determining the value or ROI of digital engagement strategies, our data shows that many companies default to familiar KPIs, such as engagement metrics and compliance with regulatory requirements.

Customer satisfaction metrics were a less selected response, highlighting a gap in prioritising the user perspective, which is critical for driving long-term impact and engagement.



(respondents were asked to select all that apply)

Measurement that drives meaning: Beyond surface-level metrics

Our qualitative feedback, in response to being asked about what's holding back omnichannel success, reveals challenges with gaining in-depth and actionable insights around customer needs.



We're not able to measure how customers truly feel.

The inability to measure and act according to customer needs.

We want to measure how much value our tools actually deliver—not just how many people use them.

To move beyond surface-level metrics, pharma organisations should consider implementing a clearer, more intentional measurement framework, one that defines what success looks like and why it matters. Organisations still rarely measure:

- The trust it's building, or losing, across digital journeys
- The emotional tone of customer interactions
- Whether digital tools are reducing effort, confusion, or time to value
- How aligned teams are around shared experience KPIs

This is a missed opportunity. Because when teams fail to capture what matters most to customers, they also miss the chance to demonstrate real business impact, retention, loyalty, efficiency, and growth.

Insight to action: 3 takeaways

Digital success won't be driven by assumptions or vanity metrics. It requires a shift towards insight-led strategy and value-based measurement, rooted in what matters to customers and long-term business objectives, not just what's easiest to track.

If organisations fail to close the insight gap, they risk designing in the dark and missing chances to build trust, deliver value, and demonstrate impact.

Three things to focus on include:

1. Draw on qualitative and quantitative insight sources to reveal the full picture
2. Design digital solutions that are built around real user needs, not assumptions
3. Align digital KPIs with real customer outcomes, rather than just operational outputs



5. Compliance is calling the shots: But at what cost?

One of the clearest signals from this research, stronger than in similar industry surveys we've run in the last three years, is just how much compliance and regulation are shaping digital decision-making.

Far from being a background concern, compliance seems to have moved to the top of the agenda, influencing everything from platform selection and design strategy to the adoption of AI tools.

It's not just that compliance matters. The shift is in how often it's now being cited as the primary driver of digital decisions, perhaps at the expense of experience, usability, and innovation.

70%

say regulatory requirements shape their digital engagement strategies

72%

cite data privacy and security as the top barrier to AI implementation

59%

say regulatory compliance and risk mitigation is a key way of determining digital value

“If we keep measuring omnichannel success only by clicks and approvals, we'll keep producing campaigns that tick boxes instead of changing lives. Regulation shouldn't be the brake pedal—it's the guard-rail that lets us drive faster when compliance teams are embedded as product owners from day one. That frees us to track what really matters: Customer Performance Indicators, clinical outcomes and speed-of-learning moving in the same direction, proving digital ROI without raising risk.”

Gary Holifield

Head of Global Digital Engagement, Global Rare Disease, Chiesi

Is risk aversion rising?

Our research implies that risk aversion within digital pharma may be increasing. Teams are being cautious with AI adoption. CRM choices are heavily weighted toward platforms with pre-built compliance features. And innovative digital ideas can get stalled in complex approval cycles.

This increase in caution could be driven by several converging pressures: heightened scrutiny from regulators, growing complexity in digital channels, and the emergence of AI, an area that still lacks clear, pharma-specific guidance.



Too much focus on compliance rather than innovation.

Delays due to regulation in the industry.

Constantly changing regulations in the sector.

Slow internal approval processes.

Being cautious has its place, it helps avoid rash decisions and keeps things grounded. But when risk aversion goes too far, it can hold things back. Opportunities get missed, progress slows, decision-making is difficult, and the end user experience can suffer.

Experience as an afterthought

59%

say they determine digital value and ROI through regulatory compliance and risk mitigation

Within pharma, digital engagement tools may be built to satisfy regulatory requirements first, and user needs second. Products go live, but not necessarily in a way that's intuitive or effective for the people they're supposed to serve. Content is approved, but not optimised.

This pattern may persist because for many organisations, meeting compliance goals is seen as a measure of success in itself. With one in two saying compliance and risk mitigation is their primary way of measuring ROI, if the rules are met, the job may be considered 'done'.

Yet designing with the user in mind doesn't just enhance experience, it also reduces risk by ensuring investment goes into digital tools that are more likely to succeed, avoiding wasted spend on solutions that fail due to poor usability or lack of engagement.

"Pharmaceutical companies want the same as healthcare professionals; well informed patients and good clinical outcomes. AI has presented us with both a huge challenge and a huge opportunity, but we need to work with our industry associations to reform our codes of practice to accommodate this new technology and who, in turn, can represent us and lobby on our behalf for regulatory reform, whilst keeping patient safety as the utmost priority."

Alan McDougall

Former Medical Affairs Head of Europe and Canada, Astellas

Time for regulatory reform?

Compliance shouldn't be seen as a barrier to innovation. With the right changes, it can enable trusted, user-friendly digital tools. These changes could include:

- **Updating outdated frameworks:** many current MLR rules were built for print, not digital, and don't reflect how modern pharma communications work.
- **Clarifying digital guidance** across markets to reduce ambiguity and subjectivity in approvals. Consistent rules would help teams move faster and with more confidence.
- **Supporting and educating regulatory teams** in usability and digital best practices so they can assess content with a user-first lens.
- **Exploring smarter approval models:** demand for digital is outpacing MLR capacity. There's interest in using AI to help, but progress is slow due to the complexity of pharma communications.

Without regulatory involvement, pharma risks building compliant but unusable experiences, missing a major opportunity to modernise patient and HCP engagement.

Insight to action: 3 takeaways

To build trust through digital, pharma should aim to build systems where both innovation and compliance can co-exist successfully. The organisations that will lead in the next wave of pharma innovation will be those that:

1. Balance regulatory requirements with usability and experience, and involve regulatory teams earlier in the design process
2. Push for modernisation in approval processes, especially around AI
3. Treat good UX as a form of risk mitigation, not a trade-off

“AI is here to stay and its power will likely increase exponentially. As an industry, we need to embrace it, understand the limitations to improve it and, most importantly, work with regulators so that we can more fully utilise the enormous potential of this technology.”

Alan McDougall

Former Medical Affairs Head of Europe and Canada, Astellas

6. What's next? Emerging opportunities and future focus

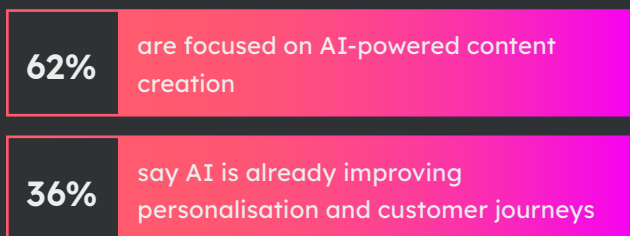
Despite some of the challenges outlined in this report, the outlook from digital leaders in pharma is anything but pessimistic.

If anything, it's ambitious. Survey respondents consistently pointed to exciting opportunities for digital experiences to become more intelligent, more connected, and more human. A stronger focus on patient experience suggests many organisations are paving the way for more direct relationships with consumers.

The overall message? Pharma may still be catching up in some areas, but it knows where it's heading. Three future-focused themes stand out:

1. More adaptive, personalised experiences

Digital engagement is evolving toward real-time, behaviour-led personalisation, where experiences adapt to each individual, not just broad segments or personas. AI and data-driven insights are laying the foundation for this shift, allowing pharma to meet patients and HCPs where they are, with what they need, at the right moment.



Respondents highlighted personalisation as one of the most exciting developments on the horizon:

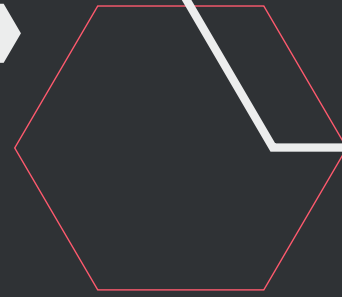


Making healthcare feel more personalised.

Instant, personalised insights for more precise healthcare interventions.

Digital experiences are becoming more relevant to individual needs.

The ambition is clear: build experiences that flex in real time, not only delivering relevant information, but anticipating what users need next. A thorough understanding of user behaviours and preferences is crucial for this.



2. More connected healthcare ecosystems

Pharma leaders aren't just aiming to improve digital engagement, they're looking to create interconnected healthcare ecosystems that span platforms, geographies, and partners. The focus is shifting from isolated campaigns or tools to coordinated systems that enable continuity, context-awareness, and collaboration at scale.

Respondents highlighted this need for smarter, more joined-up systems:



Increased collaboration and to ensure continuity of care for patients regardless of location.

The responsiveness of the healthcare ecosystem in real-time is an exciting thing, especially with the digital experience.

Better coordination between different areas of healthcare.

These comments point toward a future where digital isn't a support function, it's the connective tissue of modern healthcare.

3. Humanised, emotionally intelligent design

As digital becomes more embedded in healthcare, there's a clear expectation for it to also become more human. Respondents emphasised the importance of designing with empathy, creating tools that support emotional wellbeing, reduce cognitive load, and empower patients to take control of their own health.

Many comments reflected a need for healthcare to feel simpler, more compassionate, and more inclusive. Respondents shared a deep interest in experiences that empower and support patients:



Helping people feel more supported in their healthcare journey.

Allowing patients to understand and participate in their care decisions.

Giving patients a more active role in managing their health.

Making healthcare more inclusive and accessible to diverse populations.

Putting patients in control.

This is about more than UX, it's about designing digital experiences that build confidence, clarity, and emotional connection.

Graphite perspectives

Service under pressure: Designing seamless experiences from behind the scenes

In many organisations, especially in pharma, delivering a consistent omnichannel experience can feel like managing a chaotic kitchen during service.

Behind the scenes, teams are dealing with complex systems, disconnected data, and overlapping responsibilities, all while trying to maintain momentum.

But customers don't see the chaos. They're sitting at the table, and their expectations are simple: a joined-up, intuitive experience that just works. They don't care how it got there, they care how it feels to use.

This is where design plays a critical role. Thoughtful, user-centred design bridges the gap between internal complexity and external simplicity. It helps translate business goals and technical constraints into experiences that are clear, consistent, and human.

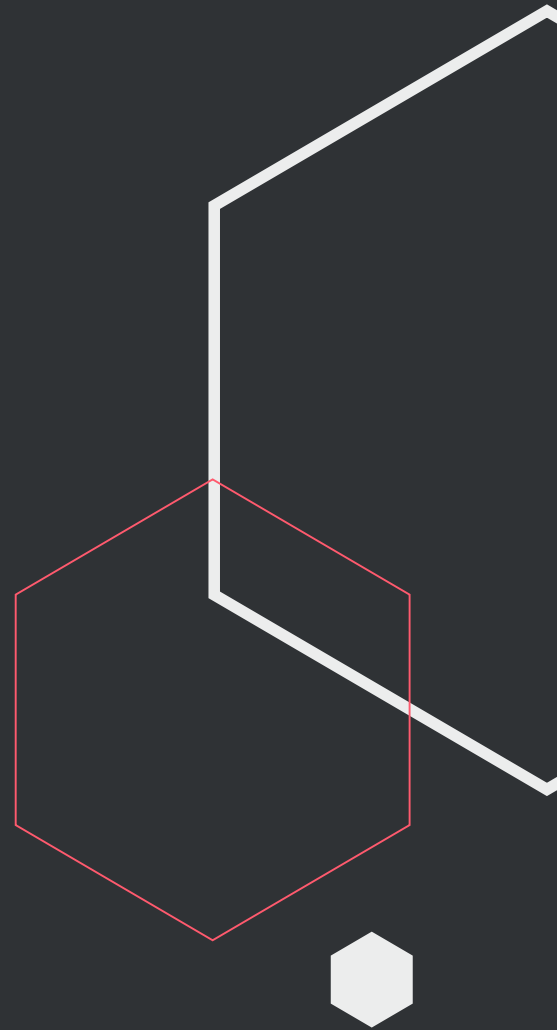
Our recent survey shows many pharma organisations are maturing in their omnichannel capabilities. But the reality for many teams is that orchestration remains difficult. Channels are often siloed, content isn't always joined up, and the internal focus can drift toward operations rather than outcomes.

That's why it's essential to keep coming back to the customer perspective. Design has to reflect what users need and how they behave, not just what the business wants to deliver. When we anchor our work in real user needs, we can shape experiences that feel seamless, even when the delivery behind them is anything but.

Success isn't measured by how smooth things look internally. It's measured by how effortlessly things feel to the customer.



Edward Hart
Head of Design, Graphite Digital



How to mitigate risk and driving ROI with user-centric design processes

The results of this survey have shown that risk mitigation and compliance frameworks are holding digital progress back within pharma.

While there is a growing drive to be more user-centric, many organisations are still struggling to find the right balance between regulatory requirements and shaping digital solutions around real user needs.

The risks tied to digital initiatives such as poor engagement, fragmented experiences, and low return on investment, often stem from a lack of user insight. Without a deep understanding of what patients, HCPs or internal teams truly need, even well-intentioned digital solutions can miss the mark.

User-centric design helps mitigate this by grounding decisions in evidence. It reveals user needs behaviours, motivations, and challenges, supporting smarter, more focused investment and reducing the chance of costly rework. This understanding is key to shaping impactful omnichannel strategies, aligning every interaction with what truly matters to users and driving meaningful value.

By embedding UX strategy and research early, organisations can better align stakeholders, prioritise with purpose, and define success around real outcomes. It's not just about creating better experiences, it's about reducing uncertainty, meeting compliance requirements, and driving measurable returns.

In a sector where the cost of getting it wrong is high, user-centricity isn't a nice-to-have. It's a strategic tool for de-risking and delivering real value.



Anna Brooke
UX Strategist, Graphite Digital

Global vs Local vs Hybrid: Balancing consistency and creativity in digital delivery

Striking the right balance between global consistency and local flexibility is one of the most complex challenges in delivering digital experiences across markets.

A global-first approach offers efficiency and control. It reduces the risk of inconsistency, maintains the integrity of design systems, and ensures a seamless, intuitive user experience across touchpoints and brands.

From a delivery standpoint, it simplifies governance, accelerates implementation and drastically reduces agency and development costs. But the 'one size fits all' model has its pitfalls. Over-standardisation can limit creative expression, resulting in unengaging experiences and frustration among local teams who feel creatively constrained or disconnected from strategy.

A hybrid model introduces greater flexibility. It empowers local teams to tailor content and presentation to their market needs, improving cultural relevance and audience engagement. Yet this freedom comes with risk. Without clear guardrails, hybrid approaches can lead to technical inefficiencies, content sprawl, and diluted brand identity.

Crucially, this isn't just a design or delivery challenge, it's a people one. Teams need to feel like their needs are being listened to, providing a sense of ownership and agency. Successful models strike a balance: offering a strong global framework while enabling local adaptability within defined parameters. The most effective strategies embed collaboration, not just coordination, across regions, so teams feel empowered, not restricted, in delivering great digital experiences.



Leslie Rois-Burrows
Head of Delivery, Graphite Digital

Pharma knows where it needs to go. Now it needs to get there.

This report has surfaced both familiar tensions and fresh urgency. Pharma's digital progress is real, but uneven.

There's greater clarity around what good looks like, more investment in AI and engagement platforms, and a stronger appetite for personalisation, automation, and insight. But the sector is still grappling with entrenched challenges: fragmented systems, reactive measurement, risk-averse culture, and compliance models that haven't caught up with digital reality.

What's different now is the tone. The industry's ambition has matured. Leaders aren't just looking to optimise channels, they want to transform how they engage. There's clear momentum behind building more connected ecosystems, improving experience quality, and giving patients and HCPs tools that are genuinely empowering.

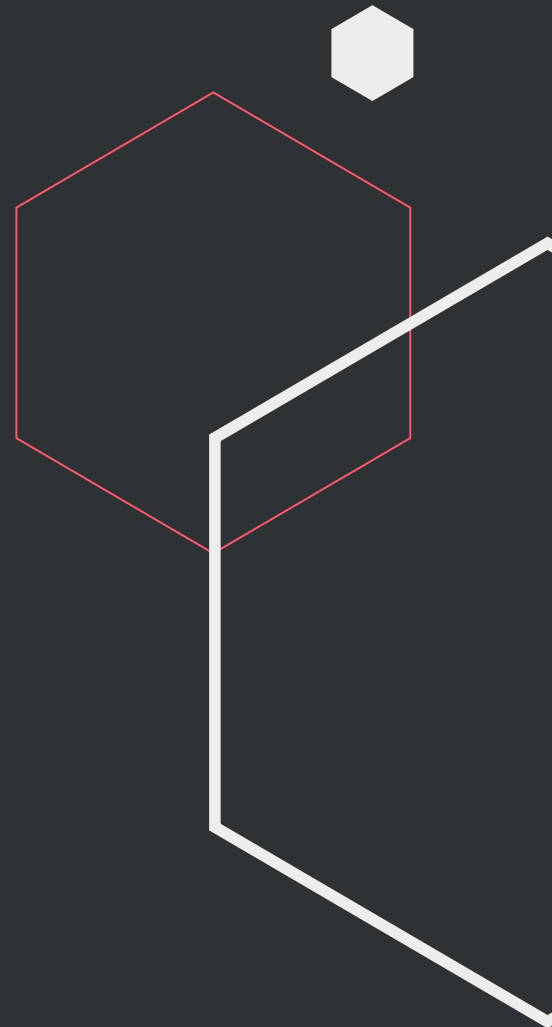
But progress won't come from investment alone. The data shows that too many teams are still designing around internal structures instead of real-world journeys. Organisations are still relying on internal assumptions instead of listening to users. And many are treating compliance as a blocker, not something to evolve in step with innovation.

Pharma now has the opportunity to close the gap between ambition and execution:

- By designing with users, not just regulators in mind, building trust through clarity, usability, and relevance.
- By connecting journeys, not just optimising channels, creating experiences that feel seamless, not fragmented.
- By measuring what truly matters, aligning success to impact, not just outputs.

The direction of travel is clear. The opportunity is there. What's needed now is focus, urgency, and a willingness to challenge how things have always been done.

How will your organisation turn ambition into action?



About Graphite

Digital experience. Human impact.

Graphite Digital is a dedicated Health and Pharma digital experience agency, creating solutions that result in a positive, measurable impact on people's health and wellbeing.

Whether Patients, Healthcare Professionals, or Consumers, we deep dive into peoples' emotional needs and behaviours to deliver innovative digital solutions that will keep them coming back.

Our unique approach blends strategy, research and human-centered design to create digital experiences with purpose.

Working across omnichannel experience and digital health, we bring the voice of the customer into the design process to ensure your products meet their needs whilst driving positive results for your business.

Our services:

Digital Product Design

Design Systems

Design Thinking and Innovation

Get in touch:

If you have the ambition to do exceptional things, we're here. Get in touch to tell us more about your plans, goals, or challenges to see how we can work together.

contact@graphitedigital.com

graphitedigital.com



graphite-digital



wearegraphite

Thank you to our contributors

Thank you to our contributors

We would like to thank the following contributors for sharing their time and insights for this report.

All views are those of the individual, not the organisation.

Alan McDougall

Former Medical Affairs Head of Europe and Canada, Astellas

Gary Holifield

Head of Global Digital Engagement, Global Rare Disease, Chiesi

Ksenia Levina

Global Customer Experience Lead, Grünenthal Group

Manuel Mitola

Co-Founder & Managing Director, ctcHealth

Michelle Killick

Senior Director, Experience Effectiveness Lead, Pfizer

Steven Hunt

Digital and Omnichannel (Rx) Director, Norgine

Steve Rye

Global Senior Manager Omnichannel Engagement, Mundipharma

Susana Bento

Global Omnichannel Operations Lead, Grünenthal Group

Disclaimer

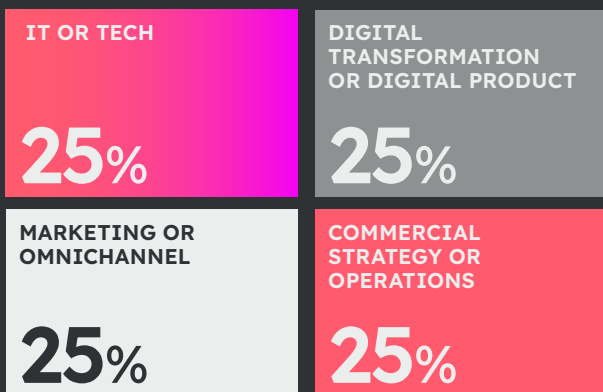
The survey data referenced in this paper was sourced by [WBR Insights](#) on behalf of Graphite Digital. The final report was compiled and written solely by Graphite, and the information and opinions within reflect that. Graphite would like to thank WBR Insights for their primary research efforts that went into gathering the data to make this report possible.

Methodology

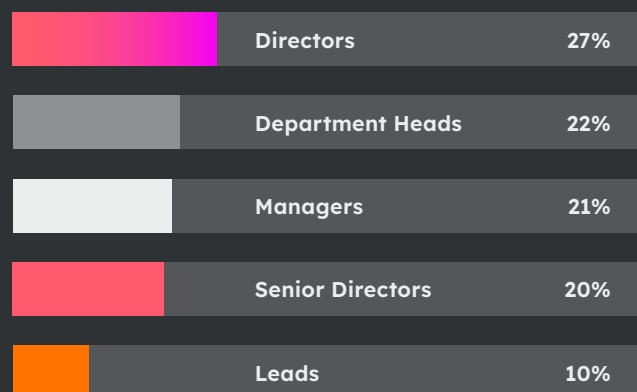
This report is based on a custom survey conducted by Graphite Digital in partnership with WBR Insights in Q1 2025.

The survey gathered input from 100 digital decision-makers working in pharmaceutical organisations across North America and Europe. All respondents hold strategic responsibility for digital customer experience, product strategy, or engagement.

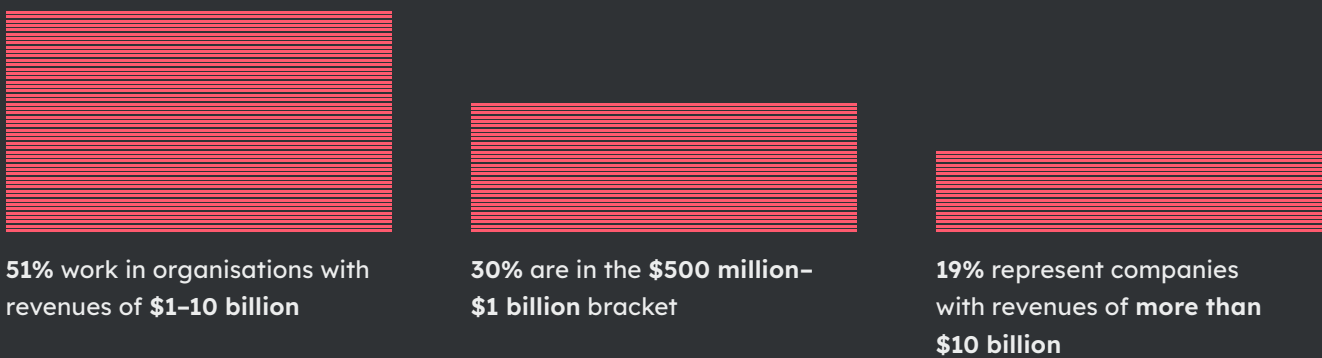
Roles:



Seniority:



Organisation size:



Geographic remit:

- 47% have a European focus
- 43% are focused on North America
- 11% operate with a broader or global remit

