



Transforming European Patient
Outcomes and Experience through
Digital Insight and Regulatory Foresight

REIMAGINING THE FUTURE OF CUSTOMER ENGAGEMENT



EXECUTIVE SUMMARY

European healthcare is poised for a pivotal shift to reduce societal burden while striving for outcomes-driven, seamless patient experience in an increasingly hybrid physical-digital world. Beyond the need to achieve sustainable health systems and reduce costs, the acceleration of this shift is driven by three forces: evolving patient expectations shaped by consumer AI and digital experiences; rapid evolution of policies and regulations like the European Health Data Space; and technologies that don't just connect but enrich each other, creating powerful, integrated ecosystems.

In this context Deloitte conducted a European patient research to get a snapshot of patient experience and expectations. Patients are clearly demanding trust and personalised care that blends digital convenience with human empathy. Regulators are raising the bar, rewarding those who navigate complexity with agility. Yet, entrenched orthodoxies persist—treating patient data as proprietary assets, assuming patient centricity means simply following preferences, or viewing patient support as a discrete, post-approval activity. These outdated beliefs risk limiting innovation and patient value.

Organisations that will drive advances and reap the benefits are those willing to challenge orthodoxies by adopting journey-centric over product-centric design, embracing ecosystem partnerships, leveraging data for shared value, and using regulatory expertise as a strategic advantage. Above all, patient experiences must focus on delivering trusted and measurable outcomes by combining clinical rigor with consumer-grade expectations.

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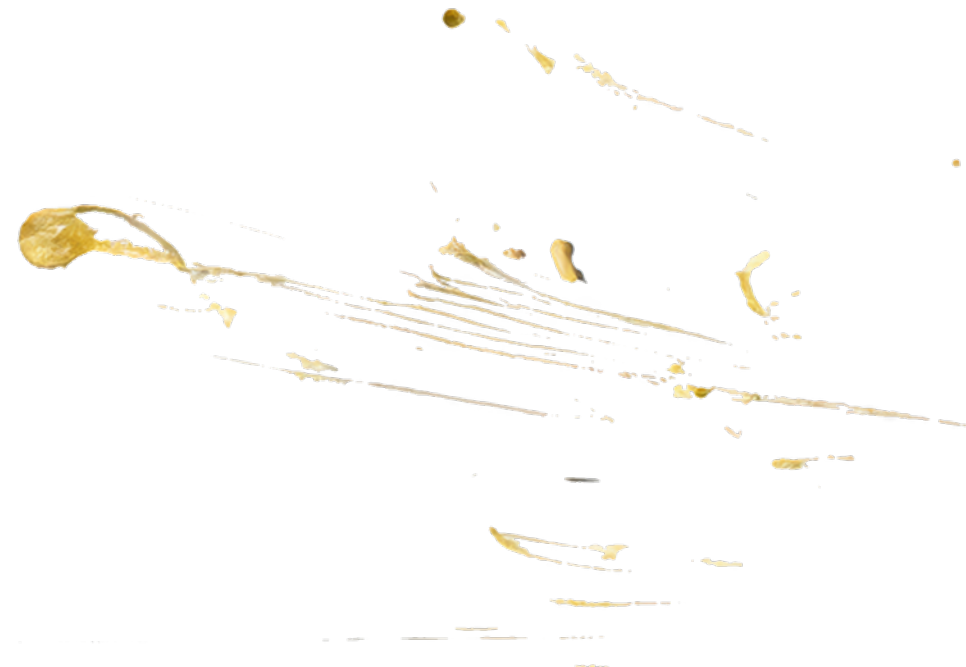
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01

Introduction: Patient perspectives and ecosystem insights

A UNIQUE MOMENT OF CONVERGENCE

European healthcare and life sciences leaders are facing a unique moment. The convergence of evolving patient needs and expectations, data and AI capabilities, and EU regulatory harmonisation and national policy frameworks are rapidly changing the health landscape. There are expanding opportunities for substantial gains in outcomes and value - but it also comes with new risks and costs.

DELOITTE EUROPEAN PATIENT ENGAGEMENT PULSE SURVEY AND ECOSYSTEM INSIGHTS

To explore current European patient perspectives Deloitte conducted a pulse survey of patients with oncologic, neurologic, or cardiovascular-metabolic conditions in five

European countries – UK, Germany, France, Spain, and Italy. The results highlight that patients across all ages, geographies, and disease areas are actively engaging digitally, proving there's not just readiness but widespread demand for digitally enabled care support. (Note that all survey respondents had at least a weekly engagement with digital channels).

European patients are sending a clear message: while the future of healthcare is enabled by digital, trust remains paramount.

We're entering an era where technologies don't just connect—they enrich each other, forming intelligent ecosystems that unlock clinical-grade AI for organisations of all sizes.

Select highlights of Deloitte's survey results:

87% of patients surveyed prefer digital channels over non-digital ones.

Currently the most used digital sources are Websites (**66%**) and Mobile apps / Patient support apps (**61%**)

Respondents reported the most trusted digital sources are "Healthcare provider apps" (**32%**); followed by "Patient support apps" (**28%**)

45% of diagnosis-stage patients engage daily via apps, while patients in chronic treatment stage prefer weekly website use, indicating engagement preference varies by treatment stage.

42% of patients are very likely to use medication reminders, but only 27% trust AI chat support which implies that digital readiness varies by functionality.

Patients want their digital engagement experience improved by having easier access to healthcare professionals, followed by more frequent updates and interactive tools

Over **48%** of patients seek disease awareness, treatment options and adherence support information from pharmaceutical companies

Only **50%** of the patients expressing interest in using health apps and virtual care currently do so, illustrating a gap in fulfilling existing patient needs in Europe



*Success demands more than tech deployment, it requires **robust governance, trusted partnerships,** and a redefined patient relationship model.*

REGULATORY MOMENTUM ON THE POLICY FRONT

On the policy front, accelerating changes such as the implementation of the European Health Data Space (EHDS), EU AI Act, and national-level data protection, digital health and AI laws, are driving a significant shift in the regulatory environment, creating first-mover advantages for companies that are prepared to adapt swiftly.^{1,2}

Early adopters who work with policy makers and align data governance, compliance frameworks, and operational models to address and capitalise on future requirements (e.g. EHDS) are better positioned to leverage health data sharing to unlock new insights and accelerate innovation. While EHDS

and other EU legislation pushes toward harmonisation, local regulations—such as Germany's Digital Act (DigiG), UK's Data Protection Act and Data Use and Access Bill, Italy's Health Data Ecosystem Decree—continue to emerge, reinforcing Europe's hybrid centralised-national approach. This requires companies to execute agile, market-shaping strategies.^{3,4,5}

This regulatory momentum is fostering greater interoperability while also focusing on safety, privacy, transparency and patient empowerment, which are critical to building trust in digital health solutions. Organisations that proactively engage with these evolving regulations will gain competitive advantage and can help shape policy development.



A NEW ERA: AI FOR PATIENT-CENTRICITY

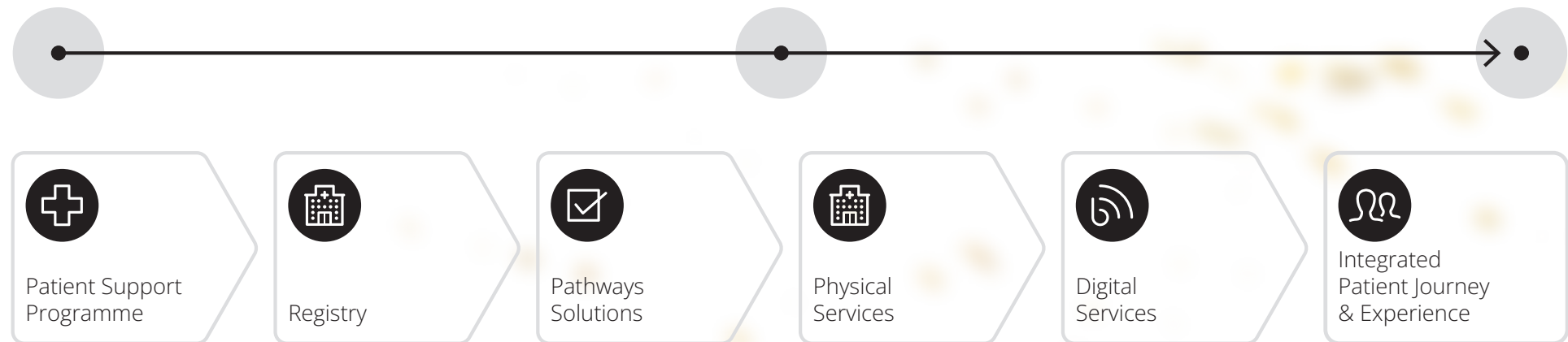
We're entering an era where technologies don't just connect—they enrich each other, forming intelligent ecosystems that unlock clinical-grade AI for organisations of all sizes. AI-driven tools now offer scalable solutions that enable personalised care pathways, predictive analytics, and real-time decision support at scale. This maturation of technology is transforming how healthcare providers and life sciences companies approach patient engagement, and operational efficiency. Importantly, these AI capabilities are becoming more accessible through cloud platforms and modular applications, allowing organisations to tailor solutions to their specific needs without prohibitive investment. The result is a new era of healthcare delivery that combines precision, scalability, and patient-centricity.

Despite the patient reported benefit of support programs and the clear opportunity to impact outcomes and unlock value through health data and digital innovation, organisations and regulators face ongoing challenges to consistently demonstrate impact on patient outcomes and health economic benefit. Success in this landscape requires more than deploying the latest solution or technology—it demands a fundamental shift in how healthcare, life sciences, and regulators think about patient relationships.

PATIENT SUPPORT

PATIENT SERVICES

PATIENT OUTCOMES





02

Challenging orthodoxies in Europe

The Deloitte study on The Future of Health in Europe reveals the health system's unsustainability and urgent need for change.⁶ Ageing populations, cultural shifts, complex financing, and rising innovation costs demand a move from reactive treatment to proactive, prevention-focused care. By 2040, patient-centred, AI-driven autonomous healthcare will reshape operating models and workforces.

There's no single solution for unlocking interoperable data and digital health's potential, but organisations embracing hybrid patient experiences, workforce readiness, and ecosystem partnerships see real gains—earlier diagnoses, better care, higher satisfaction, and improved outcomes. We identify seven key beliefs to challenge in shaping digital health's future.

BELIEF 01

“Patient data is an owned asset”

THE CHALLENGE:

Companies traditionally view patient data as proprietary competitive assets to be collected and leveraged internally. European patients express significant concerns about data misuse and hacking, with patient data being the most targeted asset in 30% of cyber incidents in the health sector.⁷ While proprietary development and differentiation is critical to investment cases, the greatest societal value comes from data ecosystems that benefit patients, providers, researchers and innovators collectively.

WAY FORWARD:

Establish a clear stance on what is owned internally and where and how your data creates greater shared value. Build a capability to establish trusted data ecosystems rather than data silos. Leverage interoperable, open standards (e.g., HL7 FHIR, EHDS participation) and collaborative data-sharing among health systems, pharma, patients, and regulators—always under GDPR and ethical guidelines.⁸

BELIEF 02

“Patient-centricity means following patient preferences”

THE CHALLENGE:

European healthcare systems and life sciences companies have long treated patients as passive recipients rather than active participants in care. While many now aim to centre patient preferences in design and delivery, true patient centricity remains complex. Not all patients seek deep involvement, and their stated preferences may not align with optimal clinical outcomes. Research shows that patients often prioritise different goals—such as upper-limb function in rare disease—than those valued by regulators or clinicians. Universal engagement isn't always scalable or beneficial, and what patients initially express may not reflect what they truly need to achieve better health.

WAY FORWARD:

Genuine patient centricity requires balancing patient voice with clinical evidence, tailored support, and flexible engagement. Empower patients through transparent information, responsive tools, and hybrid care options, while guiding them toward informed decisions rather than placing the full burden of choice on them.⁹ Co-design with patients and providers to shape services that reflect real needs and expectations. As patients increasingly compare healthcare to consumer experiences, organisations must learn when to lead, when to support, and how to personalise—focusing on trust and outcomes over preference fulfilment or volume of engagement.¹⁰

BELIEF 03

“Patient support is a post-launch program”

THE CHALLENGE:

Patient support is often viewed as an add-on for use after drug or device approval, rather than a strategic component starting early in development. Programs often equate patient support with deploying apps, websites, and platforms to connect with other patients. Patients ultimately want seamless experiences across their entire treatment journey, connecting physical and digital engagement, with different needs and preferences by treatment stage, not just point solutions that support one element of their holistic health condition.

WAY FORWARD:

Integrate digital health, patient engagement, and outcomes data from clinical trial design through to commercialisation, building support tools and adherence programs as part of the therapy—not as a bolt-on. Design journey-stage personalisation strategies rather than channel-first approaches. Focus on patient needs at each phase rather than technology capabilities. Recognise that the most powerful “digital” intervention might be AI-enabled human interactions.

BELIEF 04

“Digital health benefits all patients”

THE CHALLENGE:

Digital strategies often assume “if we build it, all patients will come”—but research shows usage, comfort, and preferences vary significantly by factors like age, socio-economic status, education, disease state, and location. Digital can increase inequities in access, use and engagement and vulnerable groups such as the elderly, socioeconomically disadvantaged, ethnic minorities and those with limited digital literacy are often excluded or underserved.

WAY FORWARD:

Design digital health initiatives with equity at the core by embedding accessibility, cultural adaptation, and digital literacy support. Use patient journey mapping, behavioural segmentation, ‘human-centred’ design methodology and health literacy analytics to develop differentiated, personalised engagement and support. Focus efforts and resources on bridging digital divides—e.g., hybrid digital/offline support, multi-language AI assistants, and provider-mediated tools and continuously monitor disparities and target interventions, ensuring no patient group is left behind. As demonstrated by the UK NHS Digital Inclusion Framework, inclusive design paired with non-digital alternatives can effectively reduce inequalities and improve population health.¹¹

BELIEF 05

“We should own digital patient channels and support tools”

THE CHALLENGE:

Belief that building proprietary life science branded apps yields patient loyalty overlooks the patient trust issues and the crucial role of trusted health provider platforms. Our pulse survey data shows healthcare provider endorsement drives adoption more than technology features. Success in patient support programs comes from combining your owned investments with trusted healthcare intermediary partnerships—working together to deploy solutions that support disease management, rather than launching competing tools or product-cantered support.

WAY FORWARD:

Embrace partnership-based engagement—collaborate with provider-led apps, patient organisations, and digital health start-ups to create integrated, trusted patient journeys and shared-value solutions. Invest in white-label solutions or contributing capabilities that are deployed through healthcare partners to build value through HCPs and the ecosystem rather than platform ownership.



BELIEF 06

“Compliance limits innovation”

THE CHALLENGE:

Many executives view Europe's complex regulatory landscape—GDPR variations, direct marketing restrictions, data governance requirements—as barriers to digital innovation. Regulatory complexity can create competitive advantage for companies that master it. The upcoming European Health Data Space (EHDS) presents first-mover advantages for data-ready companies but also poses a challenge to the proprietary nature of drug development and resource implications.¹²

WAY FORWARD:

Treat regulatory expertise as a core competitive capability. Build compliance into the product development process from day one. Use regulatory mastery to enter markets that competitors find too complex to navigate effectively.

BELIEF 07

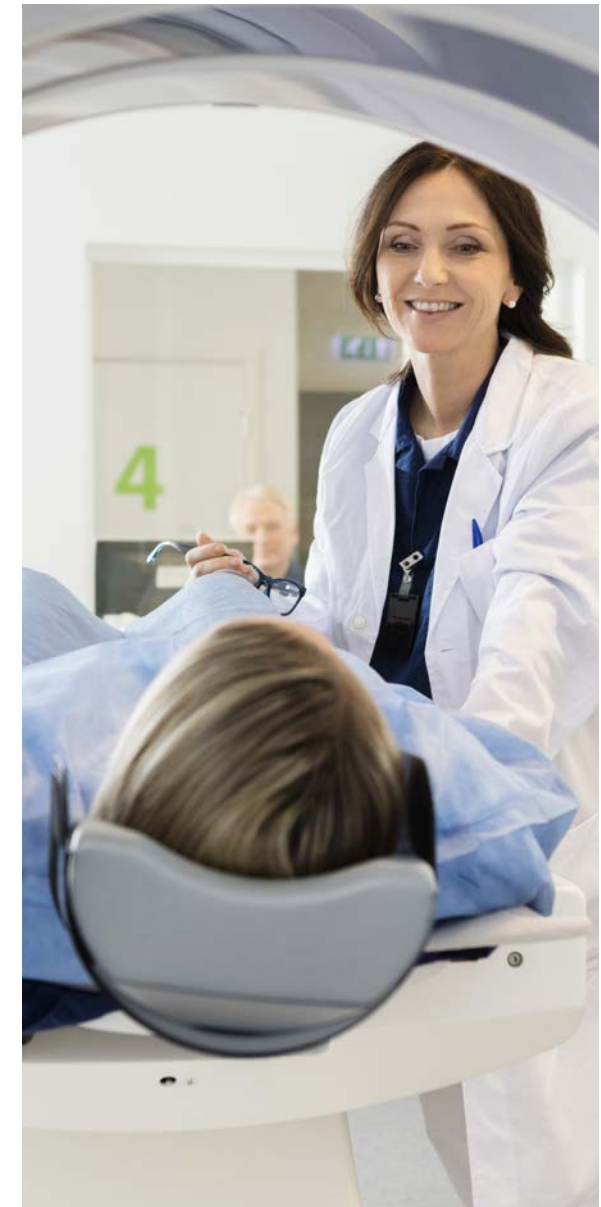
“Technology is the key to transformation”

THE CHALLENGE:

Many organisations still equate the implementation of the latest digital or AI tools with digital transformation success. This mindset risks making technology the destination rather than a means to achieve better patient support, experiences, and outcomes. At the same time, traditional siloed operating models and fragmented structures slow down progress and limit the value that technology could unlock.

WAY FORWARD:

True transformation in life sciences means shifting from silos to agile, data-driven ecosystems focused on patient outcomes. It will drive a need for different roles, skills, and governance. Success will result in personalised experiences, workforce productivity, and outcome-driven policies that track real improvements. Technology must be a clear enabler of value beyond cost efficiency, accelerating digital health as a trusted part of care delivery.



03

The implications

Addressing these orthodoxies highlight the shifts organisations must embrace to realise the full promise of interoperable data and digital health for patients and society. Challenging historic ways of working and industry boundaries opens new strategic possibilities for a digitally enabled healthcare future where outcomes, trust, and ecosystem value determine competitive success.

Healthcare and life science executives should build patient strategies on key principles:

- Journey-Centric Design: Organise around holistic patient treatment experience and outcomes integrating physical-to-virtual touch points while diminishing organisational silos and data islands
- Partnership Focused: Instead of build vs. buy decisions, focus on building the capability to drive ecosystem orchestration and value creation through trusted intermediaries and shared digital and data initiatives
- Approach to Data and Platforms: To steer your digital platform, AI and tech capability investment decisions, identify where to create shared value through data ecosystems and where to keep proprietary advantages

- Regulatory as a Differentiator: Transform compliance complexity into competitive and market entry strategies as an early mover
- Trust-Led Digital Transformation: Focus first on how tech investments enable relationship-building, demonstration of outcomes and supporting healthcare workforce over specific use cases or features and functionality

The question isn't whether orthodoxies will be challenged—patient expectations and market forces are already doing that. The question is whether health care companies will lead the transformation in Europe or be forced to follow it.

Instead of asking “What do patients want?” the more powerful question may be “What outcomes do patients need? This doesn't mean returning to paternalistic healthcare—it means evolving beyond “patient centricity” toward sophisticated outcomes optimisation that balances patient preference, clinical evidence, and measurable health improvements at individual and system levels. Companies that can align incentives and quantifiable benefits across multi-stakeholder collaborations will position themselves as preferred partners in Europe's evolving digital healthcare landscape.

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“What do patients
want?” the more
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04

The urgency to act

Three forces are creating immediate pressure for patient support, digital and data transformation:

1. Patient expectation evolution: Digital adoption has permanently shifted and evolved with the everyday use of GenAI and agentic AI, driving consumer-like expectations and engagement preferences among patients.
2. Regulatory acceleration: EHDS implementation is creating first-mover advantages for companies that are ready.
3. Technology maturation: AI capabilities are reaching clinical-grade reliability while remaining accessible to mid-size organisations, enabling scalability and personalisation at scale for more efficient, tailored healthcare delivery.

While the importance of digital health is generally recognised, patients remain sceptical of company motives and continue to express concerns. A recent Deloitte survey in Switzerland indicated 60% of citizens believe digitalisation is essential for the future of healthcare but 70% have concerns about data security and privacy.¹³ Patient-centric rhetoric without genuine transformation may increase patient cynicism. Companies that delay making a shift risk being locked out of partnerships with leading health systems and losing patients to competitors that are embracing change and collaboratively addressing concerns.



05

Your next steps

As European digital health markets mature and regulatory frameworks evolve, healthcare organisations and life science companies face unprecedented opportunities to transform patient experience. European patient support is entering a new era where data integration, AI and ecosystem collaborations will influence competitive success. Impacting patient outcomes requires more than technology investment—it demands strategic expertise in navigating regulatory complexity, building trusted partnerships, and designing patient experiences that meet consumer-grade expectations while maintaining clinical rigor.

At Deloitte, our Life Sciences and Healthcare team has developed proven methodologies to help organisations navigate this complex landscape. For example, our HEAL framework combines Deloitte's deep European healthcare expertise with systematic investment approaches, enabling companies to make confident decisions about where, when, and how to deploy digital patient support capabilities.

Ready to transform your patient strategy for the AI age? Contact our team to discover how strategic digital transformation can drive both patient outcomes and business growth across Europe's rapidly evolving healthcare landscape.

STRATEGIC INVESTMENT FRAMEWORK: OUR HEAL APPROACH

Based on our research and experience implementing patient support, digital and data programs across Europe, we developed a distinctive data-driven methodology to prioritise opportunities and investments in digital health:

- **H**ealthcare Digital Readiness Assessment: Evaluate the regulatory landscapes, existing digital capabilities, and partnership ecosystems across geographies and regions, assessing the preparedness of an organisation, the regulatory environment, market players and patients for adopting digital health and patient support.
- **E**ngagement Opportunity Prioritisation: Identify and prioritise the highest-impact patient interventions, outcomes and engagement opportunities across treatment journeys and markets.
- **A**ccess to Data, AI & Digital Integration: Evaluate the requirements and capabilities needed to leverage interoperable data, AI and digital innovation for predictive and personalised patient support.
- **L**aunch Strategy & ROI Framework: Planning and readiness to execute patient support programs and digital health solutions with phased investments and rigorous value measurement.

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Endnotes

This analysis is based on Deloitte's European 2025 patient engagement pulse survey (n<100), Deloitte's Future of Health in Europe research, and comprehensive review of academic literature from leading journals including the European Journal of Public Health, JMIR, BMC Health Services Research, and policy documents from European regulatory authorities.

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