



State of Customer Experience in Life Sciences in an AI-Driven World

A strategic guide to building trusted, connected ecosystems in Pharma and Medtech



Foreword



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In Life Sciences, trust, personalization, and data precision have become the cornerstones of success. The industry is at a crossroads where scientific excellence alone is no longer enough—companies must deliver experiences that are transparent, connected, and deeply human. Every interaction with healthcare providers, payers, or patients carries heightened expectations for privacy, accuracy, and responsiveness.

This report uncovers 10 critical insights shaping how Life Sciences organizations are evolving to meet these demands. The findings highlight a clear shift: marketing is now expected to drive commercial outcomes, data silos are eroding customer-centricity, and personalization remains more aspiration than reality. At the same time, emerging technologies like AI and automation promise unprecedented efficiencies—but they also raise new challenges for trust and governance.

The opportunity is clear: companies that integrate data, build trust at every touchpoint, and align marketing with measurable commercial impact will define the next era of healthcare innovation.

This is not just a technology transformation; it's an organizational shift toward delivering value with precision and empathy.

About the research

This report is based on global research conducted by Incisiv on behalf of Adobe in Q2 2025 to assess the state of digital transformation in the Life Science Industry.

This report provides Top 10 industry specific insights that focus on strategic priorities and operational readiness across five critical dimensions: AI adoption, data integration, content scalability, organizational structure, and technology implementation.

- 249 Life Sciences leaders participated in the study
- 4 Markets (North America, South America, Western Europe, Central Europe)
- 72% of respondents were from companies with over \$1 billion in annual revenue
- 56% respondents were VP level or above

In Life Sciences, trust drives every interaction and outcome

96%

of Life Science leaders say customers are willing to share data when compliance and security assurances are in place.

82%

of customers are willing to share data for advanced security features.



Note: This chart shows the % that said customers would be willing to share data



The stakes of trust in a regulated, high-stakes sector

In Life Sciences, trust is not just a brand promise, it's a core business requirement. Patients, providers, and payers engage with Life Sciences companies at highly sensitive moments, from evaluating treatment efficacy to sharing personal health information. Privacy, transparent terms, and timely responses are no longer optional, they are expected. In an environment where clinical, commercial, and digital interactions are increasingly intertwined, trust must be embedded across every touchpoint, supported by secure data practices and clear, reliable communication.



More than a mandate, trust is now a market differentiator

Trust expectations have expanded beyond regulatory compliance to become a market differentiator. It's no longer just about safeguarding health data, it's about clearly communicating value, responding swiftly to clinical and commercial inquiries, and maintaining transparency on pricing, access, and outcomes. These capabilities are especially vital in complex buying scenarios involving providers, payers, and procurement teams. Delivering consistent, trusted experiences across digital and human touchpoints is now a defining factor of customer loyalty and leadership.



Operationalizing trust across the lifecycle

To meet these expectations, Life Sciences leaders must treat trust as a cross-functional discipline anchored in security-by-design, audit-ready data flows, and seamless omnichannel experiences. This means building systems that assure customers of privacy and ethical use while enabling actionable insights from shared data. Marketing, IT, compliance, and field teams need to co-own the responsibility of building this trust, because in Life Sciences, trust isn't declared through messaging, it's proven through every interaction and decision.

Offline & trust-driven channels dominate customer acquisition

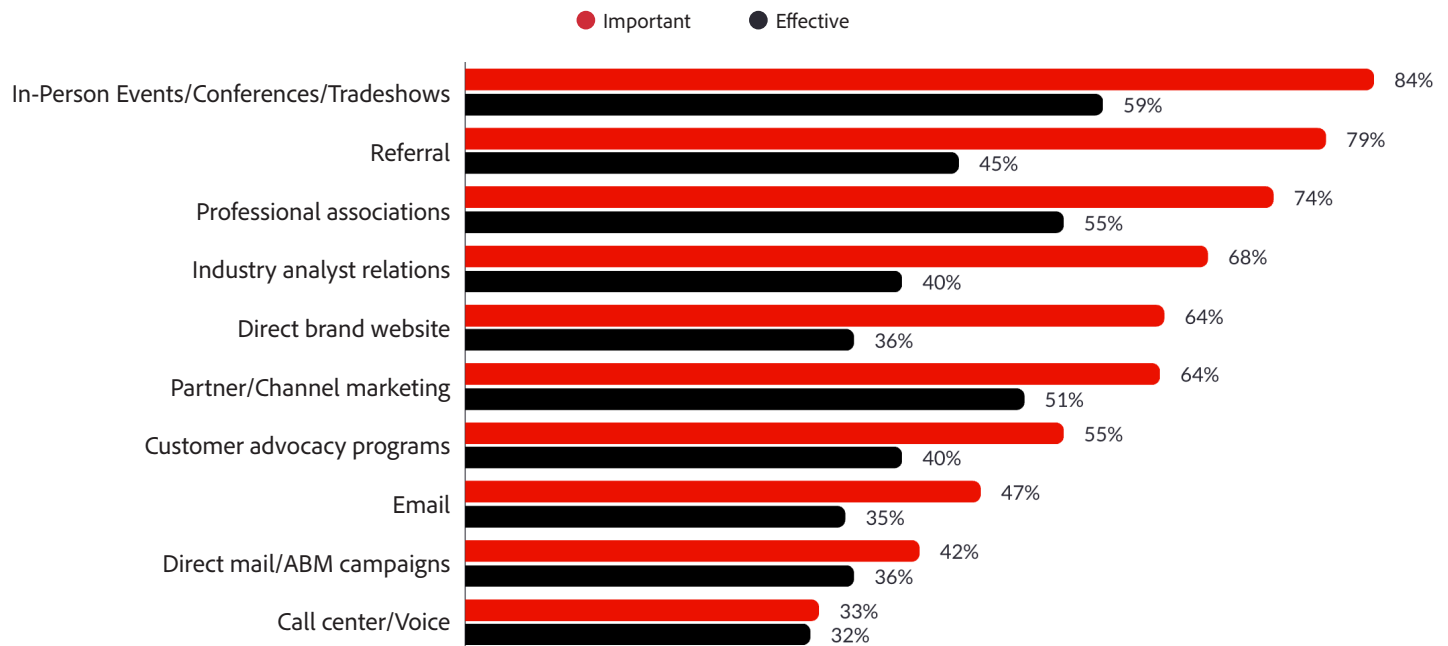
84%

Of Life Sciences executives say In-person events are rated as the most important acquisition channels.

But only,

59%

of the Life Sciences companies are effective in personalizing the in-person events acquisition channel



Note: This chart shows the % for each channel by level of importance and by how effective companies are at personalizing it



Human-centric channels still lead

Life Sciences organizations lean heavily on channels that emphasize personal trust and credibility. In-person events, conferences, and tradeshows remain unmatched for building direct relationships with healthcare providers, payers, and industry partners. These channels allow brands to showcase scientific depth, compliance, and innovation face-to-face—critical factors in high-stakes purchasing decisions where credibility often outweighs cost or convenience.



Digital channels are growing but lag behind

While organic search and email are gaining traction, their influence is secondary to offline interactions. Digital marketing in Life Sciences is often constrained by regulatory oversight, limiting the personalization and flexibility that other industries can leverage. Email campaigns and advocacy programs are most effective when integrated with live touchpoints, reinforcing the importance of omnichannel approaches that merge both digital convenience and real-world validation.



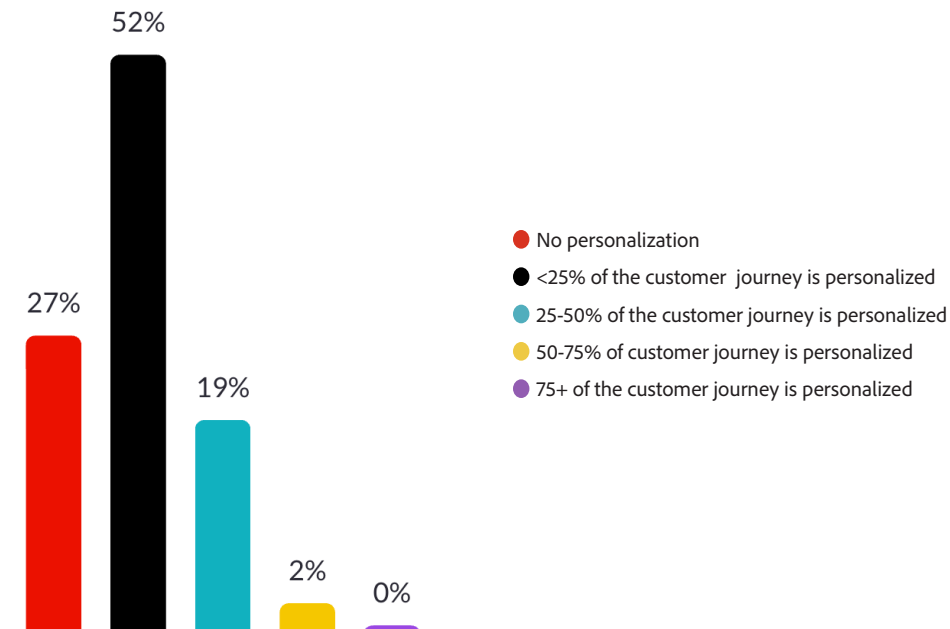
Why trust-driven strategies matter

The dominance of referrals and professional associations highlights that peer credibility and shared expertise drive acquisition far more than mass digital campaigns. For Life Sciences companies, trust is built on verified data, clinical evidence, and long-term relationships, making relationship-centric channels an essential part of customer acquisition strategies. The future lies in blending these traditional channels with AI-enhanced digital strategies to scale trust without losing authenticity.

Personalization is the missing link in customer experience



Only **2%** of the Life Sciences customer journey is currently personalized more than 75%



Note: This chart shows the % of tcurrent level of personalization across the entire customer journey



Personalization is a known priority, but remains rarely delivered

Personalization is a strategic imperative in Life Sciences, yet few organizations have the capabilities to execute it meaningfully across the customer journey. Whether engaging physicians, patients, payers, or provider networks, most firms still rely on broad, undifferentiated messaging. The gap isn't intent—it's execution. Nearly a third of organizations offer no personalization, and fewer than 3% move beyond account-level targeting. This lack of relevance erodes trust, slows adoption, and limits loyalty, especially in complex B2B or hybrid B2C-B2B models.



Missed moments across the stakeholder lifecycle

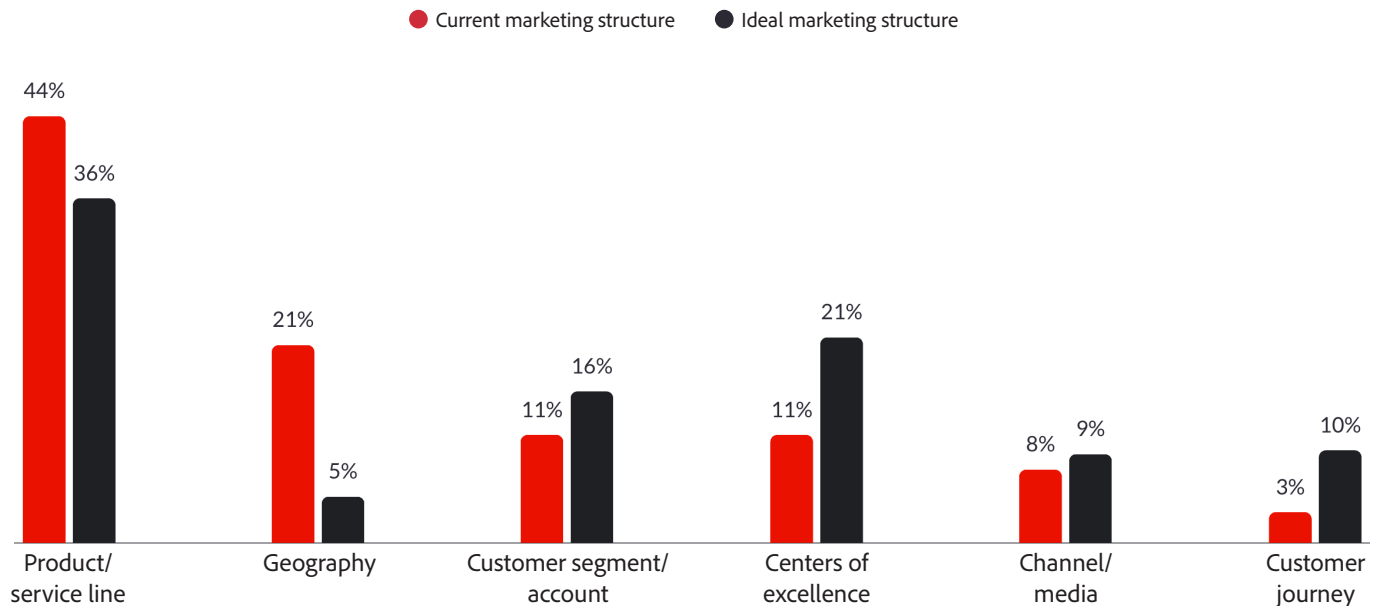
Personalization gaps are most visible in high-impact but underserved lifecycle stages. From early education to solution enablement, Life Sciences brands often fail to address the unique needs of distinct audiences. In medtech, that might mean neglecting cross-functional stakeholders post-installation; in patient-centric models, missing chances to guide therapy adoption or reinforce adherence. Without granular journey mapping and real-time data intelligence, even the most polished content strategies fall short of creating lasting value.



Build the infrastructure for scalable, contextual personalization

To address this gap, Life Sciences organizations must prioritize building the foundations for scalable, multi-audience personalization. That means shifting from static segmentation to dynamic audience models—powered by real-time behavioral data and AI-led content delivery. Teams must also invest in capabilities that span both digital and field-facing channels, ensuring consistent, context-aware messaging across the entire engagement lifecycle. Whether in pharma, medtech, or biotech, the path forward is the same: orchestrate content around the stakeholder's needs, not the brand's structure.

Marketing needs structural alignment for modern engagement



Note: This chart shows the Current vs. ideal marketing organization should be structured



Legacy structures are no longer fit for modern engagement

In Life Sciences, where medical precision and speed are paramount, GenAI is unlocking a new era of agile engagement. Instead of relying on traditional content pipelines, firms can now generate on-demand materials that adapt to the needs of healthcare providers, payers, and patients. Think of regulatory-safe FAQs crafted in minutes, or dynamically updated product guides tailored to specific therapeutic areas. GenAI isn't just about doing more, it's about enabling meaningful, medically compliant conversations at scale.



Customer and journey centric design emerges as the ideal

As AI-powered search redefines how audiences access information, Life Sciences companies must rethink their digital ecosystems. The next wave of discovery will not hinge on static web pages but on conversational content that reflects both deep expertise and real-world applicability. By aligning strategies with AI-driven search patterns, firms can amplify their scientific credibility and become authoritative sources for HCPs and procurement teams seeking trusted insights on complex therapies.



Path to Structural Transformation

To bridge the gap between current and ideal structures, Life Sciences companies must adopt hybrid models that integrate Centers of Excellence (CoEs) which identify as ideal, with journey-focused teams. This means combining strategic capabilities like content orchestration and data analytics with agile, audience-focused squads. By linking cross-functional expertise and unified KPIs, marketing teams can deliver more cohesive experiences, improve campaign agility, and accelerate their move toward customer-centric growth.

Marketing in Life Sciences must now prove its commercial impact

87%

say marketing is being asked to become more efficient

and

72%

say it is expected to directly contribute to sales pipeline



Note: This chart shows the % that said they agreed with this statement



Commercial pressures are reshaping marketing expectations

Marketing in Life Sciences is no longer shielded from the performance expectations traditionally placed on commercial, clinical, or operational teams. As organizations face intensifying cost constraints, product pipeline uncertainty, and accelerating go-to-market timelines, marketing is now expected to operate with the same level of financial discipline and outcome orientation. Efficiency mandates are pushing marketing leaders to rethink their operating models, not just in how they spend, but in how they prove value.



From awareness to accountability

The data reveals a clear shift in how marketing's contribution is measured. While brand equity and awareness remain relevant, they are no longer the sole metrics of success. Marketing is increasingly judged by its ability to generate qualified pipeline, reduce cost-to-acquire, and shorten time-to-convert across therapeutic areas or product portfolios. This expectation is transforming marketing from a storytelling function into a revenue-generating partner especially in medtech and B2B-driven segments, where lead velocity and sales enablement directly impact commercial success.



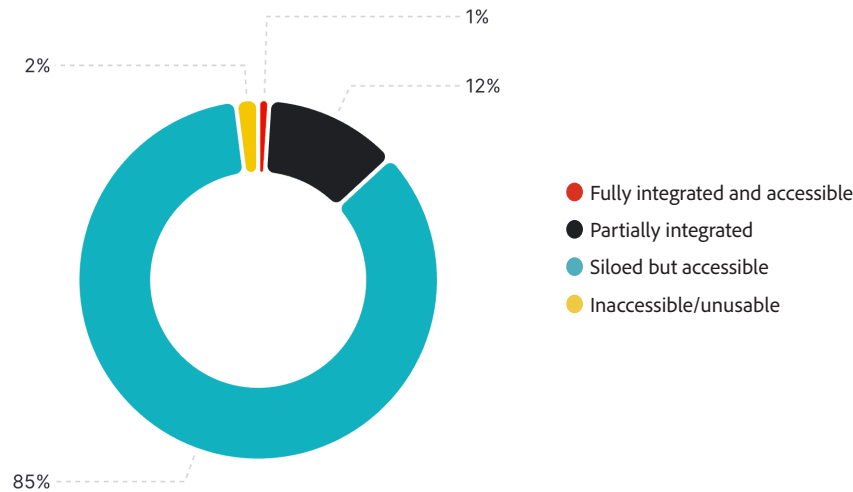
Operationalize a revenue-aligned marketing model

To thrive in this new role, Life Sciences marketers must adopt a performance-led mindset—one that connects every campaign, content asset, and technology investment to business outcomes. That includes aligning more closely with commercial and field teams, implementing attribution frameworks, and leveraging marketing technology to track impact in real time. Leaders must also evolve team structures to support agile experimentation and continuous optimization. When marketing can demonstrate its impact on top-line growth, it earns a stronger voice in enterprise strategy and accelerates its transition from cost center to commercial catalyst.

Siloed data is stalling customer-centric marketing



Only **1%** have fully integrated and accessible customer data, while the majority operate with only partial data integration.



Note: This chart shows the Current vs. ideal marketing organization should be structured



Fragmented data limits market responsiveness

Despite being among the most data-intensive sectors, Life Sciences organizations remain hamstrung by fragmented customer data ecosystems. Scientific, regulatory, and commercial data often reside in distinct systems each optimized for its own compliance or operational use case, but rarely connected across the end-to-end customer lifecycle. As omnichannel engagement becomes critical across both provider and patient-facing initiatives, this fragmentation undermines visibility, agility, and relevance, forcing marketers to rely on incomplete or outdated views of their audience.



Siloed access isn't the same as actionable integration

While data may be technically accessible, accessibility without true interoperability creates a false sense of readiness. Many marketing teams lack the governance, architecture, and real-time pipelines needed to unify data into a single, actionable source of truth. This disconnect leads to inefficient campaigns, poor personalization, and limited measurement of marketing effectiveness. Without integrated intelligence, marketing teams struggle to meet the expectations of healthcare providers, health systems, and increasingly, informed patients.



Life Sciences needs an interoperability mandate

To unlock the full value of customer data, Life Sciences companies must prioritize data interoperability as a strategic enabler not just a technical upgrade. This means investing in platforms that can harmonize data across CRM, medical affairs, field force, and digital touchpoints, while maintaining compliance and auditability. Stakeholders across IT, compliance, and commercial teams should align on a shared data model and define the operational use cases that demand integration most urgently (e.g., KOL engagement, account-based orchestration, patient journey mapping). When data flows freely and securely across silos, marketing can finally move from reactive execution to strategic impact.

Cross-functional silos are holding back customer-centric marketing in Life Sciences



47%

of organizations say breaking down organizational silos is their biggest challenge, followed by integrating legacy and new technology systems

Global Rank	Challenge	Life Sciences
1	Breaking down organizational silos	47%
2	Integrating legacy and new technology systems	46%
3	Data integration and accessibility	41%
4	Finding and retaining talent with right skills	26%
5	Driving organizational culture change	25%
6	Measuring ROI/impact of marketing initiatives	24%
7	Securing budget/investment for transformation	22%
8	Scaling personalization capabilities	20%



Legacy silos are incompatible with modern engagement models

In Life Sciences, silos arise from scientific specialization, risk controls, and regulations. While necessary for compliance, these structures often isolate marketing from clinical and medical teams—limiting its ability to craft messaging that meets evolving stakeholder needs. As demand for personalized, connected experiences grows, these rigid structures are becoming a barrier. Customers, whether Healthcare Professionals (HCPs), providers, or procurement teams, expect seamless continuity, yet siloed teams frequently deliver fragmented experiences.



Technology investment alone won't solve fragmentation

The real obstacle lies in culture and structure, not just technology. Without clear governance to unify data ownership, content workflows, and omnichannel activation across commercial and medical teams, even modern platforms fall short. Disparate teams often operate with conflicting definitions of customer engagement, varied timelines, and disconnected KPIs, leading to duplicated efforts, regulatory bottlenecks, and misaligned field interactions.



Rethinking collaboration around the customer journey

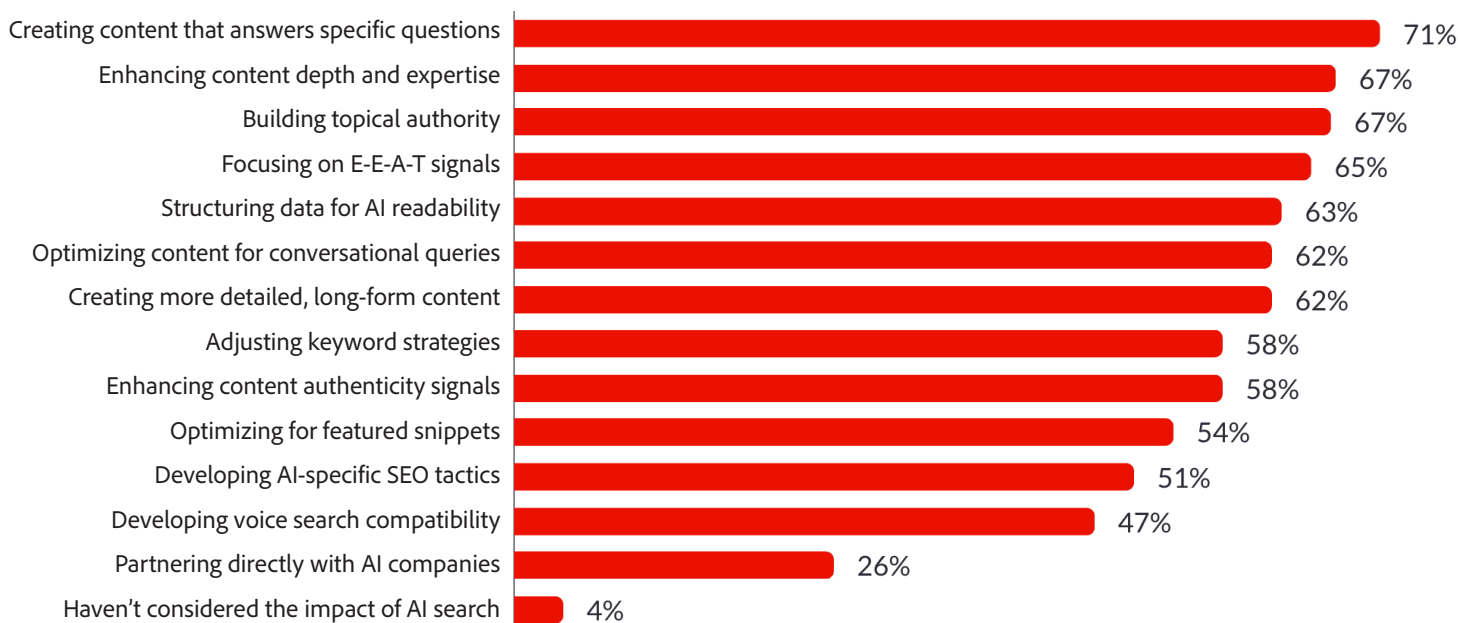
To break these silos, Life Sciences leaders must align collaboration with the full customer journey. Cross-functional teams should be structured around shared customer segments (e.g., oncology specialists, health system buyers) and supported by unified data models and content frameworks. Joint planning cycles, shared accountability metrics, and regulatory-aligned review workflows can bring marketing, sales, and medical affairs into sync. Progress requires redefining value delivery across the organization rather than relying on top-down mandates.

GenAI is reshaping marketing and discovery in Life Sciences



10% of Life Sciences leaders expect their current organic search traffic to shift to AI-powered platforms over the next 24 months

AI-driven discovery is redefining how Life Sciences brands approach search strategy



Note: This chart shows the % brands adjusting their search strategy for AI-powered discovery



From static content to intelligent engagement

In Life Sciences, where medical precision and speed are paramount, GenAI is unlocking a new era of agile engagement. Instead of relying on traditional content pipelines, firms can now generate on-demand materials that adapt to the needs of healthcare providers, payers, and patients. Think of regulatory-safe FAQs crafted in minutes, or dynamically updated product guides tailored to specific therapeutic areas. GenAI isn't just about doing more—it's about enabling meaningful, medically compliant conversations at scale.



Search and discovery are evolving

As AI-powered search redefines how audiences access information, Life Sciences companies must rethink their digital ecosystems. The next wave of discovery will not hinge on static web pages but on conversational content that reflects both deep expertise and real-world applicability. By aligning strategies with AI-driven search patterns, firms can amplify their scientific credibility and become authoritative sources for HCPs and procurement teams seeking trusted insights on complex therapies.



Reengineering marketing operations

Adopting GenAI requires more than just technology, it calls for operational reinvention. Life sciences leaders are reimagining content workflows, building hybrid teams of medical writers and AI specialists, and refining review frameworks to keep AI outputs compliant with stringent regulatory standards. The goal is to merge scientific accuracy with speed, ensuring every AI-generated asset meets the rigorous demands of both regulators and stakeholders.

But requires governance and real-world readiness

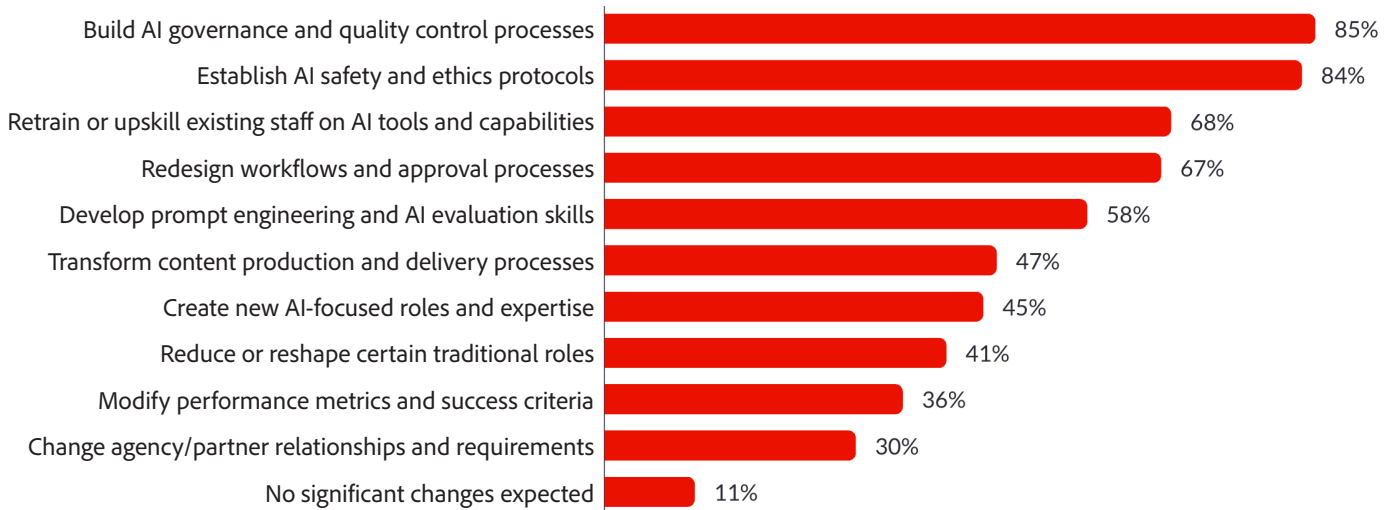
85%

of organizations plan to build AI governance and quality control processes over the next 24 months

84%

of organizations plan to establish AI safety and ethics protocols over the next 24 months

While organizations are planning to build AI governance and quality control processes, the chart reveals broader priorities



Note: This chart shows % of marketers anticipating GenAI-driven change within the next 24 month



Speed vs. scrutiny in regulated content

AI governance is fast becoming a non-negotiable foundation, with companies prioritizing ethical frameworks, data transparency, and quality controls. These safeguards are critical in a field where AI must operate within the boundaries of scientific rigor, regulatory oversight, and patient safety. However, guardrails alone do not generate business value. Without seamless alignment between governance protocols and operational workflows, AI risks becoming a checkbox rather than a competitive advantage.



The operational cost of oversight

AI adoption is slowed by a lack of operational readiness, from workforce training to process integration. Most teams still lack the fluency and practical experience to apply AI to high-stakes scenarios like regulatory content generation, medical affairs communication, or clinical documentation. This disconnect between strategic intent and real-world enablement means AI remains siloed in pilots rather than driving cross-functional innovation. Unless organizations close this gap, AI investments will continue to deliver limited returns.



Building AI governance and content accountability

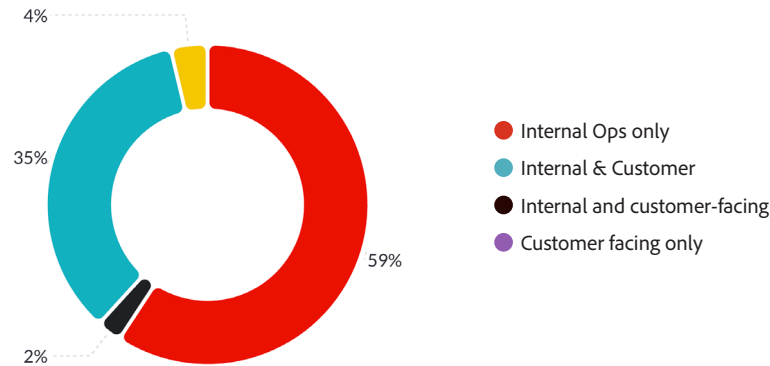
To balance speed with accuracy, Life Sciences leaders must invest in robust AI governance frameworks. This includes pre-approved AI content libraries, audit trails for all generated content, and AI-powered validation tools that cross-check outputs against clinical and regulatory databases. For example, when automating medical labeling or promotional content, AI must align with Medical Legal Review (MLR) processes to ensure compliance. When combined with agile MLR processes, AI becomes a strategic enabler, delivering compliant, personalized content faster to healthcare professionals and patients without compromising trust or regulatory integrity.

Life Sciences leaders approach agentic AI with cautious optimism

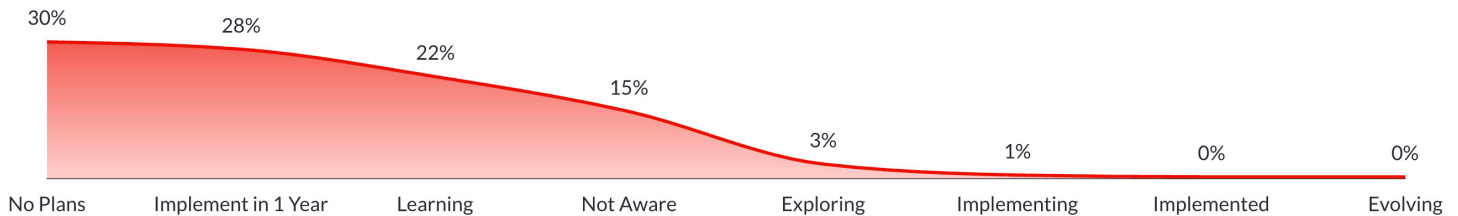


54%

of Life Sciences organisations are actively exploring, learning, or implementing Agentic AI capabilities.



Note: This chart highlights key areas where organizations are prioritizing the implementation of Agentic AI



Note: This chart shows the % of an organization's awareness and plans for Agentic AI and adoption



Agentic AI adoption is still nascent

Agentic AI, which enables autonomous decision-making and customer journey orchestration, is still at an early adoption stage in Life Sciences. Only 1% of firms have deployed it, mostly for internal operations. The low adoption reflects the high complexity of AI integration within regulated healthcare environments, where precision, auditability, and patient safety remain critical. Despite this, awareness is growing as companies evaluate Agentic AI for areas such as medical content automation, real-time customer support, and operational efficiency.



Awareness and planning are accelerating

The data shows that 28% of organizations plan to adopt Agentic AI within 24 months, signaling a shift from experimental pilots to more strategic planning. Most firms are still in the "learning" or "exploring" phases, aiming to understand how Agentic AI can augment functions like regulatory communication, field enablement, and marketing orchestration. Early movers are using controlled environments to test how autonomous systems can handle repetitive tasks, while ensuring all decisions comply with strict industry regulations.



Challenges to scaling Agentic AI

Despite rising interest, scaling Agentic AI in Life Sciences is hindered by operational and cultural challenges. Many organizations lack cross-functional readiness, integrated data systems, or the governance frameworks required to deploy autonomous AI confidently. Misalignment between IT, compliance, and commercial teams often slows adoption, while the need for explainability and human oversight adds complexity. To fully realize Agentic AI's potential, companies must invest in robust pilot programs, structured AI testing, and clear accountability models.

Conclusion

The future of life sciences will not be defined by traditional promotions or product pricing alone. It will be shaped by how effectively brands can deliver personalized, seamless, and consistent experiences across every channel, digital or physical, while leveraging data and technology to anticipate customer intent.

This research highlights a pivotal shift:

- Customer expectations set the bar for experience; demand faster / automated ordering, responsive mobile journeys, and frictionless omnichannel interactions as a baseline for loyalty.
- Personalization gaps dilute customer value. Without a unified data foundation, life sciences organizations struggle to deliver meaningful, timely engagements, especially in early stages like awareness and discovery.
- AI is redefining efficiency and content economics. Generative and agentic AI are enabling scalable content creation, faster time-to-market, and intelligent customer assistance, but require robust governance to maintain accuracy and trust.
- Third-party content shapes buying decisions. With customers trusting peer reviews, influencer content, and user-generated content, life sciences organizations must actively manage and amplify credible third-party narratives.
- Martech maturity is becoming a competitive advantage. Advanced platforms for journey orchestration and decisioning are critical to meeting evolving consumer demands.

Strategic priorities for Life Sciences Leaders

1. **Deliver frictionless customer journeys.** Simplify orders, optimize mobile experiences, and ensure fast delivery to reduce churn and increase customer satisfaction.
2. **Unify and activate customer data.** Break down silos with modern data platforms to enable real-time personalization and actionable insights across every channel.
3. **Scale AI responsibly.** Deploy generative and agentic AI to accelerate content production and customer engagement while embedding governance and quality control.
4. **Enhance personalization across the entire journey.** Extend personalization to early discovery phases and integrate predictive recommendations to increase conversions and loyalty.
5. **Strengthen influence over third-party narratives.** Partner with trusted content creators and monitor social sentiment to amplify authentic endorsements.
6. **Modernize martech stacks.** Invest in journey orchestration, next-best-action engines, and privacy-compliant data clean rooms to deliver connected, intelligent experiences.
7. **Adopt conversational search strategies.** Prepare content for AI-powered search by focusing on structured data, conversational queries, and Experience-Expertise-Authoritativeness-Trustworthiness (E-E-A-T) principles.



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