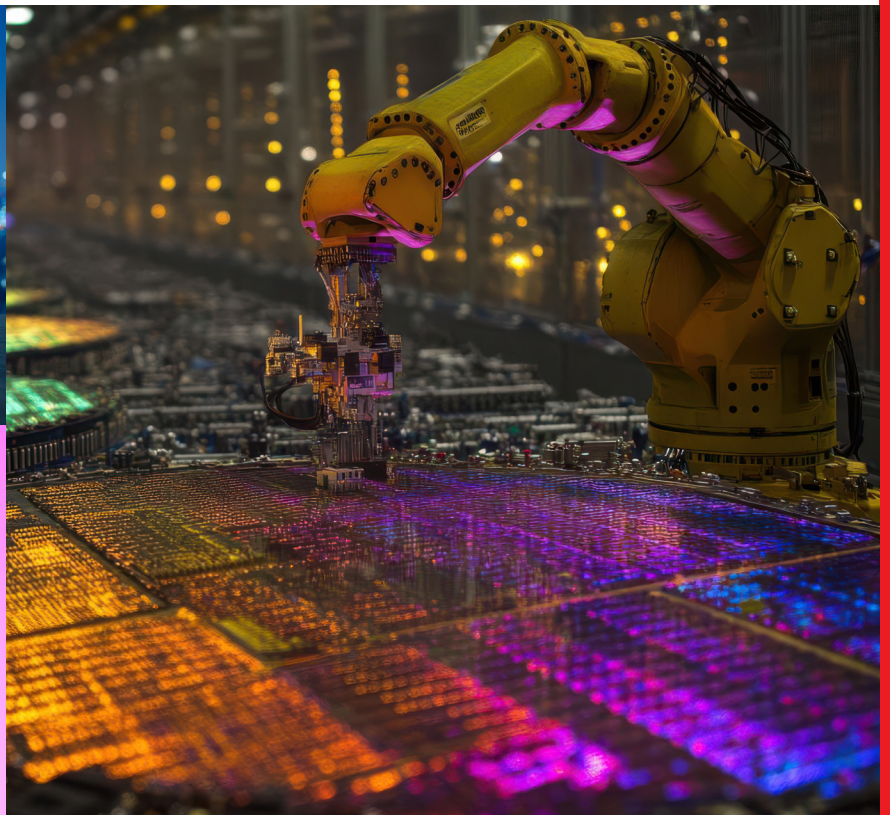# Adobe

State of Customer Experience in Industrial Manufacturing in an AI-Driven World

A strategic guide to transforming value chains with smarter, customer-focused operations

Foreword

Jonathan Burdette

Head of Industry Strategy, Industrial Manufacturing.

In Industrial Manufacturing, transformation is no longer about digitizing processes, it's about redefining value creation. As customer expectations evolve and supply chains become more complex, manufacturers are being challenged to deliver experiences that are not only reliable and efficient but also data-driven, personalized, and insight-led.

The foundation of competitive advantage is shifting from operational scale to digital intelligence. Data integration, customer-centric marketing, and AI-enabled decision-making are now critical to both commercial growth and operational resilience.

This report presents ten strategic insights shaping how Industrial leaders are adapting to these changes. The message is clear: to stay competitive, manufacturers must unify data, modernize marketing, and prepare their operations for a future where AI will be both a driver of efficiency and a differentiator of experience.

At the same time, the industry faces familiar headwinds siloed legacy systems, fragmented customer intelligence, cautious approaches to AI adoption, and pressure to deliver ROI on every investment. Yet the opportunity is just as clear: manufacturers that embrace unified data platforms, embed personalization, and scale AI responsibly will lead the next era of Industrial growth.

Whether you're leading digital transformation, optimizing customer journeys, or shaping AI strategy, I hope this research helps you benchmark your progress and identify where your organization can go next.

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 Industrial Manufacturing 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.
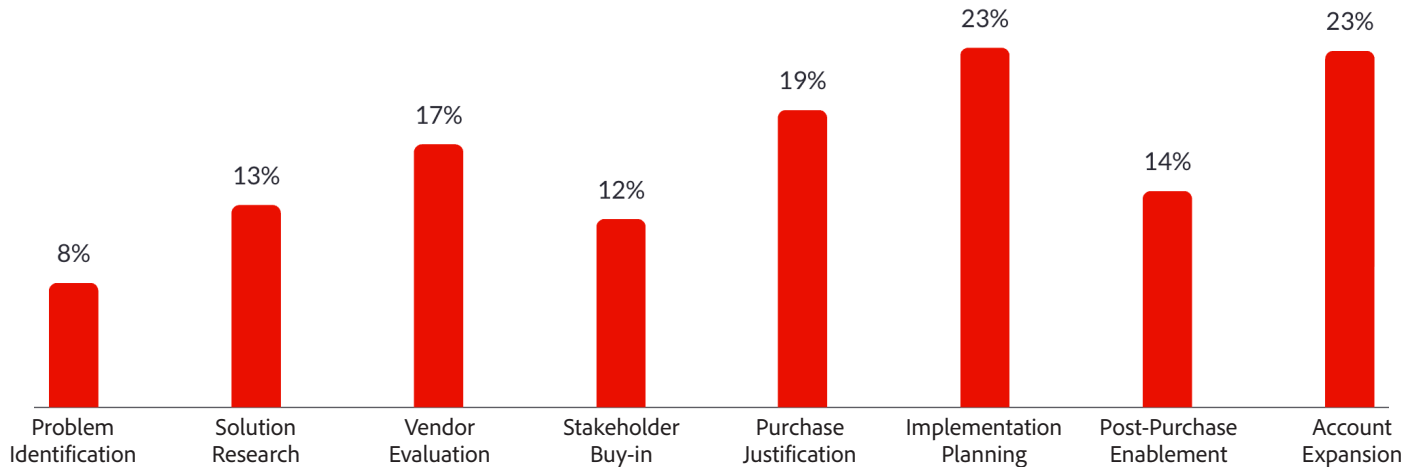
- 559 Industrial Manufacturing leaders participated in the study

- 9 Markets (North America, South America, Western Europe, Central Europe, Middle East, India, South East Asia, Australia and New Zealand, Japan)

- 70% of respondents were from companies with over $1 billion in annual revenue

- 54% respondents were VP level or above

Manufacturers face long journeys with low personalization

13.4 average interactions across channels before a service transaction.

However, personalization across these touchpoints is minimal

Note: This chart shows the % of the customer journey phase that is personalized

Chart values:
- Problem Identification: 8%
- Solution Research: 13%
- Vendor Evaluation: 17%
- Stakeholder Buy-in: 12%
- Purchase Justification: 19%
- Implementation Planning: 23%
- Post-Purchase Enablement: 14%
- Account Expansion: 23%

The buying process Is complex, but mostly untracked

For Industrial manufacturers, every deal involves a high-cost, high-risk decision made by multiple stakeholders across engineering, procurement, operations, and finance. Yet despite this complexity, few organizations have full visibility into the touchpoints that drive those decisions. Whether it's a specification download, a virtual demo, or a pricing conversation, most of these interactions happen in silos, unmeasured and disconnected. In an environment where buying cycles are long and nuanced, not knowing what influences a decision is more than a data problem, it's a risk to revenue predictability.

Lack of interaction data undermines precision selling

Without a clear view of customer engagement across functions and channels, manufacturers are left guessing where buyers are in their decision process, or worse, misaligning their messaging and resource allocation. The result is inefficient handoffs between marketing and sales, inconsistent follow-ups, and missed opportunities to influence high-value stakeholders early. In a market where margins are thin and competition is rising, the absence of structured journey data makes it nearly impossible to scale precision-led selling efforts.

Building a data foundation is the first step to journey maturity

To move from reactive outreach to proactive orchestration, manufacturers need to invest in building a foundational layer of interaction intelligence. That means implementing systems and practices that log, connect, and interpret customer-initiated actions across marketing and sales environments. It also requires shared accountability between commercial teams to treat engagement data as a strategic asset. Visibility isn't just about reporting, it's about creating the clarity needed to support smarter investments, faster lead-to-cash cycles, and more predictable revenue outcomes.

Personalization gaps persist across the customer experience

29%
of Industrial Manufacturing's customer journey is not personalization at all.

Only
2%
of customer journey is personalised up to 50–75%, and none exceed that threshold

● No Personalization

● <25% of the customer journey is personalized

● 25-50% of the customer journey is personalized

● 50-75% of customer journey is personalized

● 75+ of the customer journey is personalized
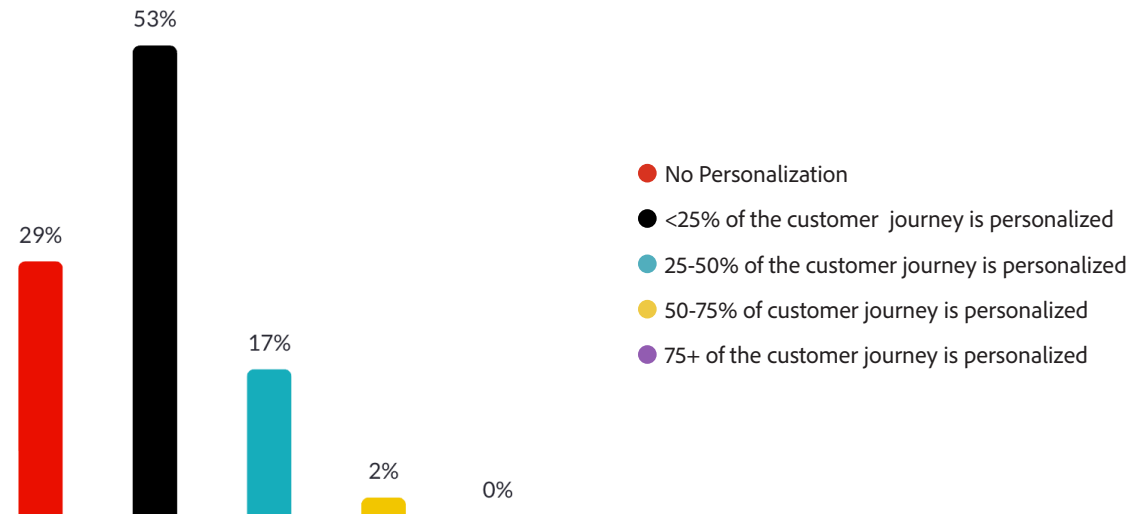
Note: This chart assess the % of current level of personalization across the entire customer journey

Complex operations stall end-to-end experience innovation

In Industrial Manufacturing, personalization remains underdeveloped, limited to isolated use cases or delayed indefinitely. Structural challenges like long sales cycles, high-cost transactions, and multi-tier buyer groups add complexity that makes scale difficult. Fragmented customer data across product lines, geographies, and legacy systems compounds the issue. In this environment, tailoring experiences beyond basic account segmentation feels burdensome. For most manufacturers, customer experience still centers on reliability and technical accuracy, not dynamic, personalized engagement.

Innovation moves cautiously, one validated use case at a time

Manufacturers are pragmatic by design. Change is rarely driven by hype, it requires proof. That's why personalization initiatives often start in narrow areas of the lead-to-cash journey, such as pricing configuration tools, quoting engines, or post-sales support platforms, where the ROI is visible and the risk is manageable. Broader personalization efforts stall without clear internal champions or cross-functional alignment. The lack of momentum isn't apathy; it's risk mitigation. Many organizations have learned the hard way that poorly scoped digital initiatives can create more problems than they solve.

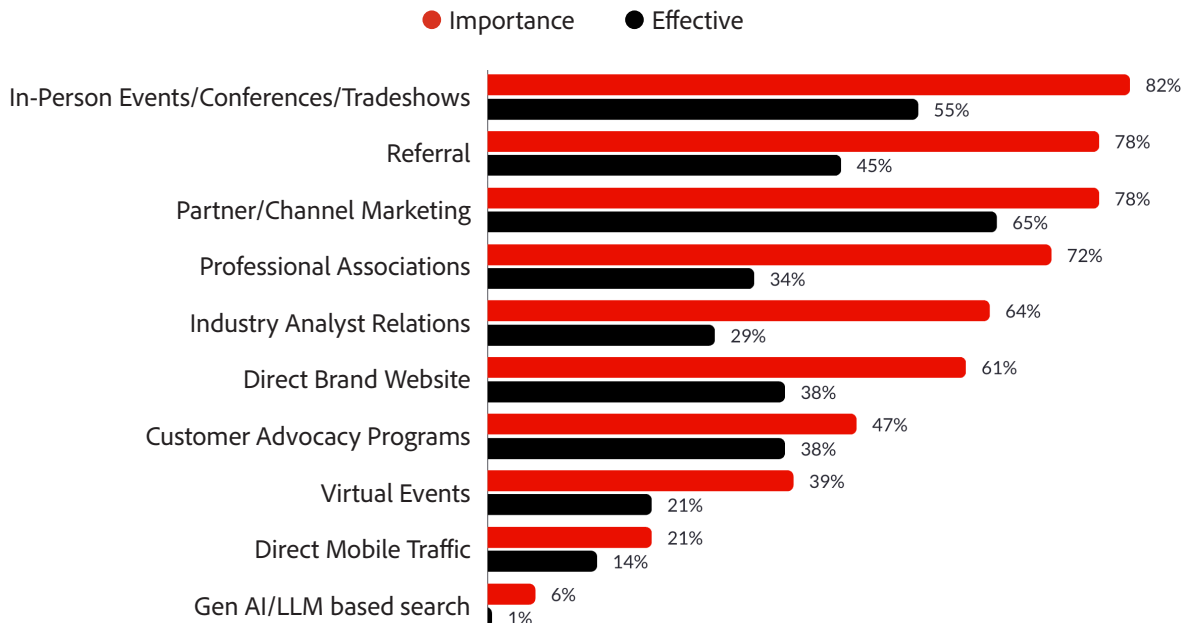### Case-driven proof, not promises, will move the needle

Manufacturers need to see personalization in action, successfully deployed in similarly complex environments, before scaling their own programs. The most effective approach is to present near-peer case studies where personalization improved sales productivity, customer retention, or quoting accuracy. Highlighting ROI in use cases that reflect real workflows creates pull, not push. Just as important is framing personalization as part of broader operational optimization, not merely a marketing effort, which resonates more with Industrial stakeholders focused on precision, process, and performance.

In-person channels anchor Industrial customer acquisition

82% Say in-person events remain the most important channels for Industrial Manufacturing's customer acquisition

● Importance   ● Effective

Channel	Importance	Effective
In-Person Events/Conferences/Tradeshows	82%	55%
Referral	78%	45%
Partner/Channel Marketing	78%	65%
Professional Associations	72%	34%
Industry Analyst Relations	64%	29%
Direct Brand Website	61%	38%
Customer Advocacy Programs	47%	38%
Virtual Events	39%	21%
Direct Mobile Traffic	21%	14%
Gen AI/LLM based search	6%	1%

Note: This chart shows % of the personalization channels based on how important and effective they are globally

Relationships still rule Industrial sales

In Industrial Manufacturing, relationship-building continues to play an outsized role in how business gets done. Whether it's large capital purchases or long-term supply agreements, the sales process hinges on trust, in-person dialogue, and institutional reputation, far more than digital clicks or automated campaigns. Despite increasing investments in digital platforms, Industrial firms still rely heavily on human connections across distributors, partners, and referral networks to influence buying decisions.

Relationship-driven engagement remains Industrial's strength

While many industries have rapidly digitalized acquisition, Industrial manufacturers have been more deliberate, and for good reason. Complex buying cycles, technical needs, and stakeholder-heavy decisions require consultative selling, peer validation, and contextual conversations that digital-only channels rarely match. Digital touchpoints boost visibility and automate routine tasks but can't replace the influence of industry events, trade networks, or long-standing relationships. Instead, digital investments must augment these strengths, through better targeting, faster follow-up, and richer insights, not replace them.

Build a digitally-augmented relationship model

Industrial leaders must design Lead-to-Cash processes that integrate digital actions with human touchpoints, not automate indiscriminately. Begin by digitizing the discovery journey with content, search, and engagement to surface buying signals. Use digital triggers to prompt timely seller follow-up for high-value accounts, while automating routine steps to free capacity. The future of customer acquisition isn't fully digital, it's digitally assisted, human-led, and insight-driven. Manufacturers who blend technology's precision with relationship nuance will gain operational efficiency and distinct commercial advantage.

Marketing in Manufacturing needs to be efficient and accountable

88%
of Manufacturing leaders say they're being asked to become more efficient.

82%
say they're expected to directly contribute to revenue.

Increasingly asked to become more efficient	88%
Expected to directly contribute to sales/revenue	82%
Budget tied to revenue metrics vs brand metrics	73%
Technology investments prioritized on revenue impact	72%
Measured by direct impact on revenue	69%
Measured by ability to reduce customer churn	64%
Owns more of customer experience	54%
Leaders more involved in strategic decisions	46%
Leaders have strategic influence	37%

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

Operational pressures are reshaping marketing expectations

Marketing has traditionally been viewed as a support function in Industrial Manufacturing, often seen as secondary to product development, engineering, or sales. But that perception is shifting. As leadership pushes for clearer attribution and commercial alignment, marketing's ability to influence pipeline and revenue is becoming a critical path to broader strategic influence. By contributing directly to lead-to-cash velocity and customer acquisition outcomes, marketing is starting to earn a more defined seat at the decision-making table, alongside operations, finance, and supply chain.

Revenue accountability demands a rethink of marketing's role

The data shows that marketing's performance is increasingly judged through the lens of revenue accountability, not just campaign activity. This reflects a broader redefinition of what marketing means in an Industrial context. Instead of measuring success through brand awareness or lead volume alone, Industrial manufacturers are evaluating marketing based on KPIs like cost-to-acquire, sales conversion rates, and contribution to margin. It's a clear sign that leadership is no longer treating marketing as a discretionary cost, it's becoming a commercial input that must earn its place alongside sales and operations.

Industrial CMOs must build a commercially aligned engine

To succeed under this new mandate, Manufacturing CMOs must adopt a revenue-first model that clearly links investments to impact. This demands closer alignment with sales, real-time performance visibility, and agile budgeting focused on outcomes over activity. Investing in martech, analytics, and unified data is key to shifting from intuition-driven to insight-led decisions. At the same time, marketing teams must build commercial fluency and financial accountability into every campaign. Those who adapt won't just weather budget cuts, they'll help lead enterprise transformation.

Siloed data is undermining Industrial growth and execution

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

2% 1%

21%

- ● Fully integrated and accessible
- ● Partially integrated
- ● Siloed but accessible
- ● Inaccessible/unusable

76%
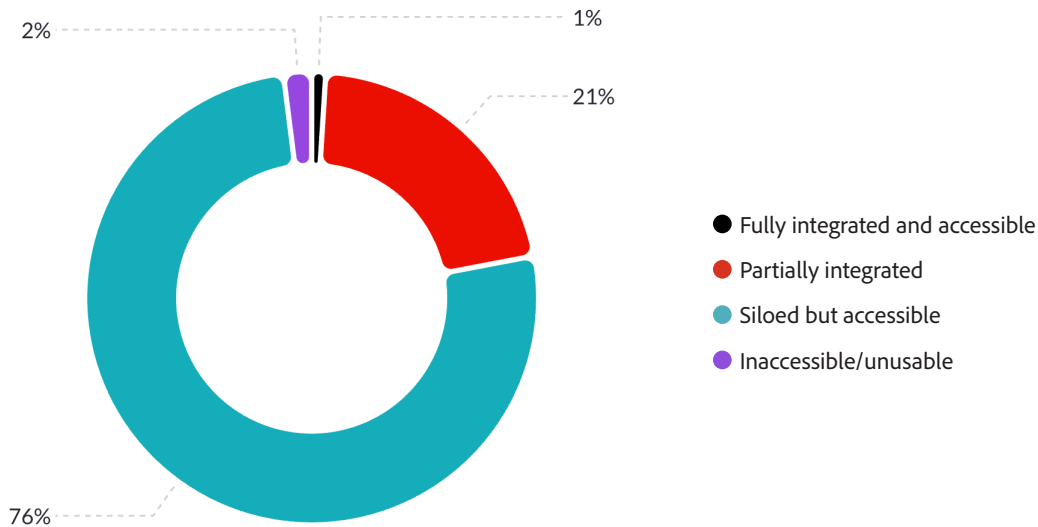
Note: This chart shows the % data that is integrated and accessible

Fragmented data is a hidden drag on commercial performance

In Industrial Manufacturing, customer data often mirrors the complexity of the business itself, fragmented across systems tied to regions, product lines, channel partners, and service workflows. While teams may be able to extract data from individual sources, very few have a unified, structured view of the customer lifecycle. The result is a reactive approach to engagement, where strategic planning is constrained by technical limitations. In an industry built on efficiency and predictability, this lack of integration quietly undermines both.

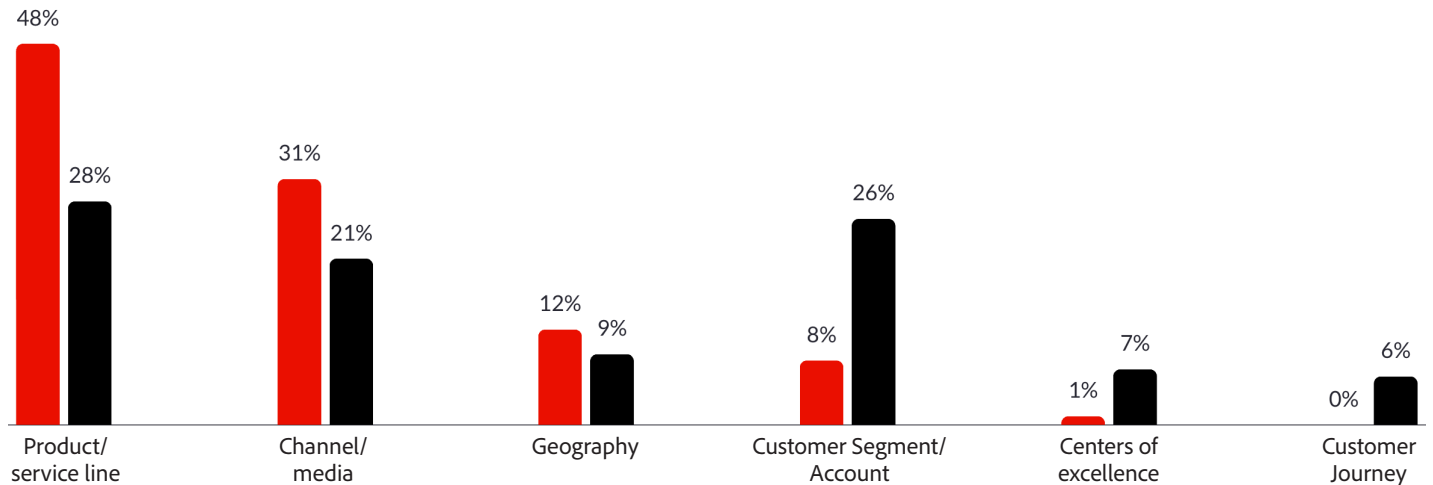### Without data integrity, strategy becomes speculative

The consequences of poor integration stretch far beyond personalization. From pipeline forecasting to account targeting, disconnected data inhibits every aspect of commercial execution. Marketing campaigns are based on assumptions, not signals. Sales prioritization happens by instinct, not insight. And performance metrics, at best, reflect isolated activity rather than holistic impact. For Manufacturing leaders who demand ROI on every operational investment, continuing with fragmented data environments is a growing liability, one that will only deepen as AI and automation become more reliant on clean inputs.

The first investment must be unification, not activation

Before manufacturers can accelerate advanced digital strategies, they must start with an intentional effort to unify and standardize customer data. That means aligning taxonomies across teams, eliminating duplicative records, and ensuring that systems can talk to each other in real time. Data governance shouldn't be a backend IT function, it should be a commercial priority. With greater integration, manufacturers can shift from campaign-led activity to insights-led planning, fueling more consistent customer experiences and more precise go-to-market execution.

Rethinking the marketing org chart to align with buying realities

48%
Say the marketing is structured by product/service

But only,
28%
say this should be the ideal

None
are organized by customer journey, when 6% say it is ideal

	Current	Ideal
Product/service line	48%	28%
Channel/media	31%	21%
Geography	12%	9%
Customer Segment/Account	8%	26%
Centers of excellence	1%	7%
Customer Journey	0%	6%

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

Product-centric structures limit customer relevance at scale

Many Industrial manufacturers still organize marketing around what they make, product categories, SKUs, and business units,rather than who they serve. This product-centric model may support internal efficiency, but it often disconnects fromincreasingly complex buyer groups who expect relevance, continuity, and tailored messaging at every touchpoint. As customerexpectations shift, product-line structures struggle to keep pace. Without alignment to customer needs and lifecycle stages,marketing risks becoming reactive and siloed, focused more on output than strategic engagement.

Industrial marketing is ready to shift but lacks the blueprint

Marketing leaders recognize that customer segment-based structures are better suited to modern B2B journeys, which involve diverse roles, longer timelines, and higher stakes. But evolving to this model requires more than reorganization, it demands rethinking incentives, talent deployment, and data sharing across business units. Many manufacturers hesitate to disrupt legacy models without a clear roadmap. And with interdependencies across marketing, sales, product, and operations, change often stalls without cross-functional sponsorship and demonstrated impact.

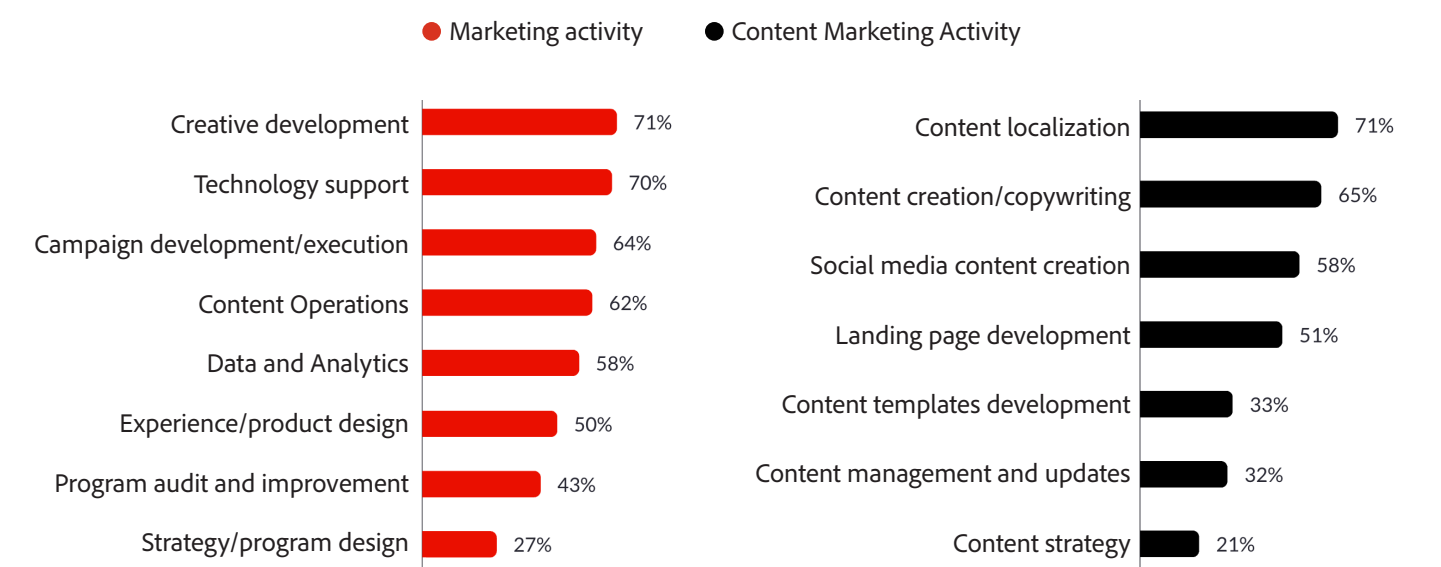### Structure drives strategy but must be grounded in use cases

The path forward lies in incremental, evidence-backed transformation. Rather than overhauling the organization in one sweep, leading manufacturers are piloting targeted changes, such as establishing account-focused marketing pods or aligning go-to-market efforts around strategic customer segments. These pragmatic steps allow organizations to validate results in real-world settings before scaling. In an industry where operational stability is paramount, organizational change must be rooted in performance-driven experimentation, one use case, one business outcome at a time.

Manufacturers rely on external partners for core marketing functions

71% outsource content localization, underscoring the need for specialized expertise to deliver market-relevant messaging

● Marketing activity   ● Content Marketing Activity

Marketing activity	%
Creative development	71%
Technology support	70%
Campaign development/execution	64%
Content Operations	62%
Data and Analytics	58%
Experience/product design	50%
Program audit and improvement	43%
Strategy/program design	27%

Content Marketing Activity	%
Content localization	71%
Content creation/copywriting	65%
Social media content creation	58%
Landing page development	51%
Content templates development	33%
Content management and updates	32%
Content strategy	21%

Note: This chart shows the % of marketing and content activities that rely on external partners

Manufacturers marketing functions are externally driven

Many Industrial Manufacturers continue to depend on agencies and external partners for marketing execution, from campaign development to content production. While this helped bridge skill gaps in the past, it now limits manufacturers' ability to act quickly in fast-changing markets. With buyer demands shifting toward digital self-education, customized solutions, and faster response cycles, marketing needs to be closer to the factory floor, product teams, and customer feedback loops to influence engagement in real time.

Content workflows lack control and consistency

Outsourcing key marketing activities like content creation, localization, and campaign design often leads to misalignment with product complexity, regulatory nuances, and technical value propositions. When marketing is not embedded within engineering or sales workflows, content tends to generalize or oversimplify. This is a missed opportunity, especially in long-cycle, high-consideration sales where tailored, technical content can differentiate a solution and build buyer confidence across the spec-to-procure journey.

Strengthen orchestration between internal strategy and external execution

While external partners handle localized creative development, technical formatting, and regional deployment, manufacturers must retain centralized control over product messaging, compliance standards, and customer engagement strategy. This hybrid execution model ensures agility without compromising brand integrity. With the growing complexity of industrial buying journeys and regulatory standards, tighter orchestration helps teams align on product positioning, meet engineering and legal requirements, and maintain consistency across partner-led campaigns. Done right, it empowers manufacturers to accelerate go-to-market timelines while maintaining control over critical messaging outcomes.

Digital transformation falters without sustained enablement

Homegrown
systems deliver better returns, tailored functionality, and cost advantages

Third-party
solutions provide faster deployment and are more future-ready

This split highlights a strategic trade-off between control and speed

% Satisfaction With Core MarTech Performance	Home-Grown	Third-Party
Implementation Speed	17%	28%
ROI	53%	44%
Functionality	68%	63%
Future Readiness	57%	71%
Cost Effectiveness	68%	51%

Note: This table shows the % of satisfaction with homegrown vs. third-party solutions

Implementation isn't the finish line

In Industrial Manufacturing, technology success isn't just about selecting the right tools, it's about aligning implementation with the way production environments, supply chains, and commercial teams actually operate. Yet, many manufacturers still treat implementation as a one-time rollout rather than an evolving, adaptive capability. Without sustained attention to training, process alignment, and operational handoffs, even the best systems often go underutilized, leading to missed business outcomes and diminished ROI.

Adoption gaps stem from operational misalignment

Across both homegrown and third-party platforms, satisfaction gaps are especially pronounced in areas like implementation speed and future readiness. These challenges aren't just technical delays, they reflect deeper, systemic frictions in integrating technology into legacy Industrial workflows. Disconnected engineering and sales functions, limited cross-functional coordination, and low digital fluency on the factory floor all contribute to adoption barriers that are more organizational than technological in nature.

Execution requires continuous enablement and ownership

Digital maturity in B2B Manufacturing requires more than IT execution, it requires operational enablement. Leaders should build cross-functional ownership for new systems, with KPIs that track not just deployment but usage and impact. Establishing adoption benchmarks, embedding training into frontline workflows, and continuously revisiting use cases should be baked into every tech initiative. The most successful manufacturers treat enablement as an ongoing operational priority, not a post-launch afterthought.

Manufacturers are gearing up for GenAI, but lag on governance

16%
of manufacturers are prioritizing AI governance and quality control

Only
2%
are conducting GenAI proofs of concept and fewer are scaling.

42%
say they have no plans for using GenAI in content operations

Establish AI safety and ethics protocols	88%
Build AI governance and quality control processes	84%
Retrain or upskill existing staff on AI tools and capabilities	54%
Redesign workflows and approval processes	47%
Develop prompt engineering and AI evaluation skills	33%
Transform content production and delivery processes	28%
Reduce or reshape certain traditional roles	26%
No significant changes expected	26%
Create new AI-focused roles and expertise	22%
Change agency/partner relationships and requirements	16%
Modify performance metrics and success criteria	12%

Note: This chart shows the % of respondents expecting GenAI to impact their marketing strategy in the next 24 months

Operational risk culture shapes the AI adoption curve

In the Industrial Manufacturing sector, caution isn't a sign of stagnation, it's part of a deeply embedded operating model designed to minimize disruption, ensure compliance, and maintain product quality. That same mindset governs the approach to Generative AI. Leaders recognize its potential, but its integration into engineering-heavy, documentation-sensitive workflows raises immediate questions: Will it meet regulatory standards? Can it handle technical depth? Without clear answers, most organizations are deferring action to avoid introducing unintended variability into critical processes.

Manufacturers are studying, not yet investing

This data signals a clear divide between awareness and action. Most marketing and content leaders are still trying to define where GenAI could fit, how it would be governed, and whether it's worth the risk. The Industrial landscape requires tools that can adapt to long sales cycles, complex customer hierarchies, and high-cost engagement. Until GenAI demonstrates measurable value in these contexts, with traceability and control, it will remain a topic of research, not resourcing. The hesitancy isn't resistance, it's a call for relevance and rigor.

Laying the foundation through governance and education

For GenAI to move from exploration to execution, manufacturers must first establish the internal infrastructure for responsible experimentation. That includes clear content governance protocols, well-defined training boundaries, and a safe testing environment where business units can assess value without exposure. Equally important is cross-functional education, ensuring legal, compliance, and operations teams understand both the promise and the parameters. In Industrial environments, trust is not assumed, it's earned. GenAI's path forward will depend on structure, not speed.

Agentic AI finds a niche in control-centric Industrial tasks

52%
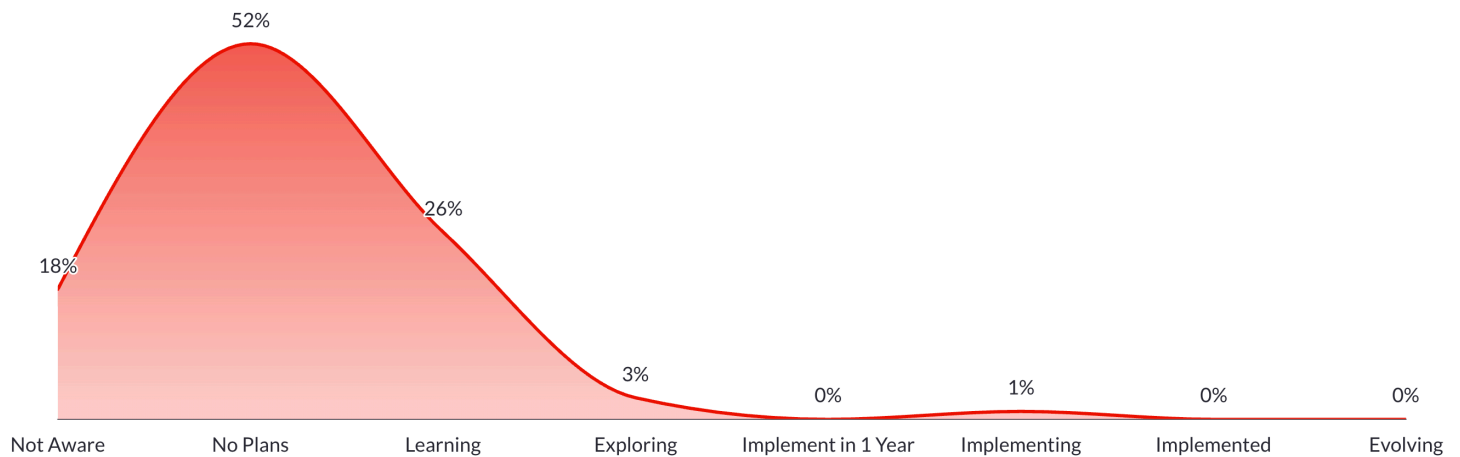of manufacturers have no plans to adopt agentic AI

96%
require security audits & regulatory compliance before expanding Agentic AI initiatives

91%
conduct risk assessments as a key prerequisite for scaling AI adoption

Nearly all manufacturers demand security, compliance, and risk validation before moving forward with Agentic AI

Note: This chart captures where organizations currently stand in their awareness and planning for Agentic AI

Manufacturers will only adopt what they can secure and supervise

When it comes to AI, Industrial manufacturers don't chase disruption; they manage risk. That's why agentic AI, autonomous systems capable of taking independent actions, faces steep scrutiny. In a sector defined by precision, traceability, and regulatory obligations, the idea of AI acting without oversight can trigger more concern than curiosity. Manufacturers see value in AI that supports operational performance, but only if it can operate within strict guardrails. The focus is less on "what it can do" and more on "how it will behave under pressure."

Exploration is rooted in efficiency, not reinvention

Agentic AI is not being explored as a path to experience transformation or customer-facing automation. Instead, its perceived value lies in optimizing areas that already rely on real-time data and predictive triggers, like monitoring supply chain disruptions or identifying early-stage equipment failures. These priorities reinforce a familiar theme: Industrial innovation succeeds when it enhances system reliability, reduces downtime, or supports compliance. Agentic AI, to gain traction, must prove itself as a back-end intelligence engine, not a front-end revolution.

Organizations must build technical and ethical readiness together

Progress will depend not just on technological feasibility but on establishing frameworks for accountability. Before deployment can even be considered, manufacturers must address key questions: Who governs autonomous decision-making? How are escalation protocols defined? What happens in edge cases or system overrides? Building readiness means establishing shared language across operations, compliance, and IT, so AI actions don't outpace organizational control. Agentic AI may hold promise, but in Manufacturing, autonomy will always be earned, never assumed.

Conclusion

The future of Industrial Manufacturing will not be defined by production capacity alone, it will be defined by how intelligently and efficiently companies connect with their customers and partners.

This research reveals a directional shift:

- Data unification must precede digital acceleration. Without integrated, structured customer data, marketing, sales, and operations cannot achieve precision or scale.

- Personalization must move beyond pilots. Manufacturers need to embed contextual relevance across the full customer lifecycle, from pre-sales discovery to post-sales support.

- Marketing must evolve into a commercial growth engine. Alignment with sales, pipeline impact, and revenue contribution are now the benchmarks of success.

- AI adoption must be intentional and governed. GenAI and agentic AI will create value only if they are scaled with oversight, domain specificity, and operational alignment.

- Operating models must adapt to a hybrid future. The strongest organizations will blend digital engagement with human relationships powered by unified data and flexible infrastructure.

Strategic priorities for Manufacturing Leaders

1. Unify customer data to drive precision selling. Create a single source of truth across regions, product lines, and partner channels.

2. Measure and orchestrate the customer journey. Capture interaction data across marketing and sales to improve lead-to-cash velocity.

3. Scale personalization with operational rigor. Use modular content, AI-driven insights, and account-based strategies to drive relevance.

4. Rewire marketing for revenue accountability. Align teams, budgets, and KPIs to direct pipeline and margin impact.

5. Adopt AI responsibly and strategically. Build governance frameworks for GenAI and pilot use cases that enhance operational efficiency and customer trust.

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