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State of Generative AI in Life Sciences and Healthcare

Generative AI: A Prescription for Innovation

November 2025

Deloitte AI Institute™

Deloitte's State of Generative AI in the Enterprise Quarter four report

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Executive Summary

The Life Sciences and Healthcare industry is at a critical inflection point. After decades of digital transformation in EHR, interoperability, back-office modernization, virtual care and analytics, the industry is now entering an era where data and AI are not just assets, but potentially the key capabilities to address systemic challenges such as high costs, workforce shortages and limited access to care. Generative AI is poised to fundamentally shape how care is provided and how the industry advances toward wellness and protection.

Applications of GenAI are vast – from automating patient charts and discharge summaries, to accelerating drug development, to building learning health systems. Yet, the paradigm shift is not without challenges. Regulatory complexity, ethical considerations and operations readiness present significant hurdles. Like other industries, LSHC must not only adopt and innovate, but to it responsibly and safely within robust trust frameworks. Hence, readiness is not just about technology, but also governance, culture and leadership.

Our survey reveals notable barriers, with many organizations lacking adequate preparedness to fully leverage these transformative technologies. Talent acquisition remains a critical challenge, as readiness in building AI capabilities remains low. Concerns around risk, governance and compliance further complicate adoption, given the industry's complex regulatory environment. Despite this, the Life Sciences and Healthcare industry is leading all others in deploying productivity and industry-specific AI applications, though adoption varies widely across functions.

While organizations prioritize operational performance gains, concerns about regulatory compliance and AI reliability underscore the need for greater transparency and trust. Workforce readiness efforts exist but fall short of meeting upskilling needs and limited engagement with AI tools signals an opportunity to foster a more active usage culture.

Interest in advanced AI capabilities such as agentic AI, multi-agent systems and multimodal solutions is strong. Meanwhile, cross-functional collaboration and standardized practices are improving AI implementation and some organizations are proactively enhancing ethical and compliance frameworks to address AI-specific challenges.

To capitalize on generative AI's potential, organizations must build strategic frameworks emphasizing talent development, risk management, governance and data integrity. Strengthening these foundations and fostering collaboration will enable better integration of AI, ultimately improving healthcare outcomes and operational efficiency.

This report provides senior executives and technology leaders with actionable insights and strategies for navigating generative AI adoption. While challenges remain, organizations that thoughtfully embrace this technology stand to gain substantial rewards in an evolving healthcare landscape.

Foreword

In Life Sciences and Healthcare, we are no strangers to complexity. The stakes are high and the margin for error is slim. Over the past decades, the sector has undergone significant digital transformation—from electronic health records, interoperability and back-office modernization to virtual care and advanced analytics.

Today, the sector stands at a critical moment. After years of building digital infrastructure, we are entering a new phase where data and AI are not just assets, but emerging as key capabilities to solve some of our most pressing challenges: high system costs, limited human resource availability and poor access to care.

In recent conversations with leaders across the industry, one theme has stood out: generative AI is no longer just a concept—it's becoming a central topic of strategic discussion. There's growing recognition that data and AI are not merely assets, but emerging as key capabilities to address some of our most pressing challenges: high system costs, limited human resource availability and poor access to care.

I believe generative AI is prompting organizations to reimagine how they work, how they innovate and how they serve. The applications are already taking shape—from automating patient charts and discharge summaries to accelerating drug development and building learning health systems.

Yet, the path forward is not simple. Regulatory, ethical and operational readiness issues make this paradigm shift particularly challenging. And unlike many other sectors, ours must adopt and innovate within trust frameworks that safeguard patient safety and public confidence. Readiness, therefore, is not just about technology—it's about governance, culture and leadership.

This report offers a snapshot of where we are—and where we might go. The journey ahead will require thoughtful experimentation, responsible adoption and a shared commitment to doing what's right.

Learn more about the series and sign up for updates at

http://deloitte.com/us/state-of-generative-ai

– Victoria Levy, Global Life Sciences & Health Care Industry Leader

Navigating Generative AI Adoption: Barriers and Opportunities

Navigating Generative AI Adoption: Barriers and Opportunities

Organizations in Life Sciences and Healthcare are increasingly drawn to generative AI technologies. The potential for enhanced efficiency, cost reductions and innovation is compelling. However, our survey reveals significant gaps in the industry's preparedness for effective adoption. These challenges stem from unique sector dynamics, including a shortage of professionals who combine domain expertise with AI engineering and data science skills—creating a pronounced AI literacy divide.

Level of preparedness

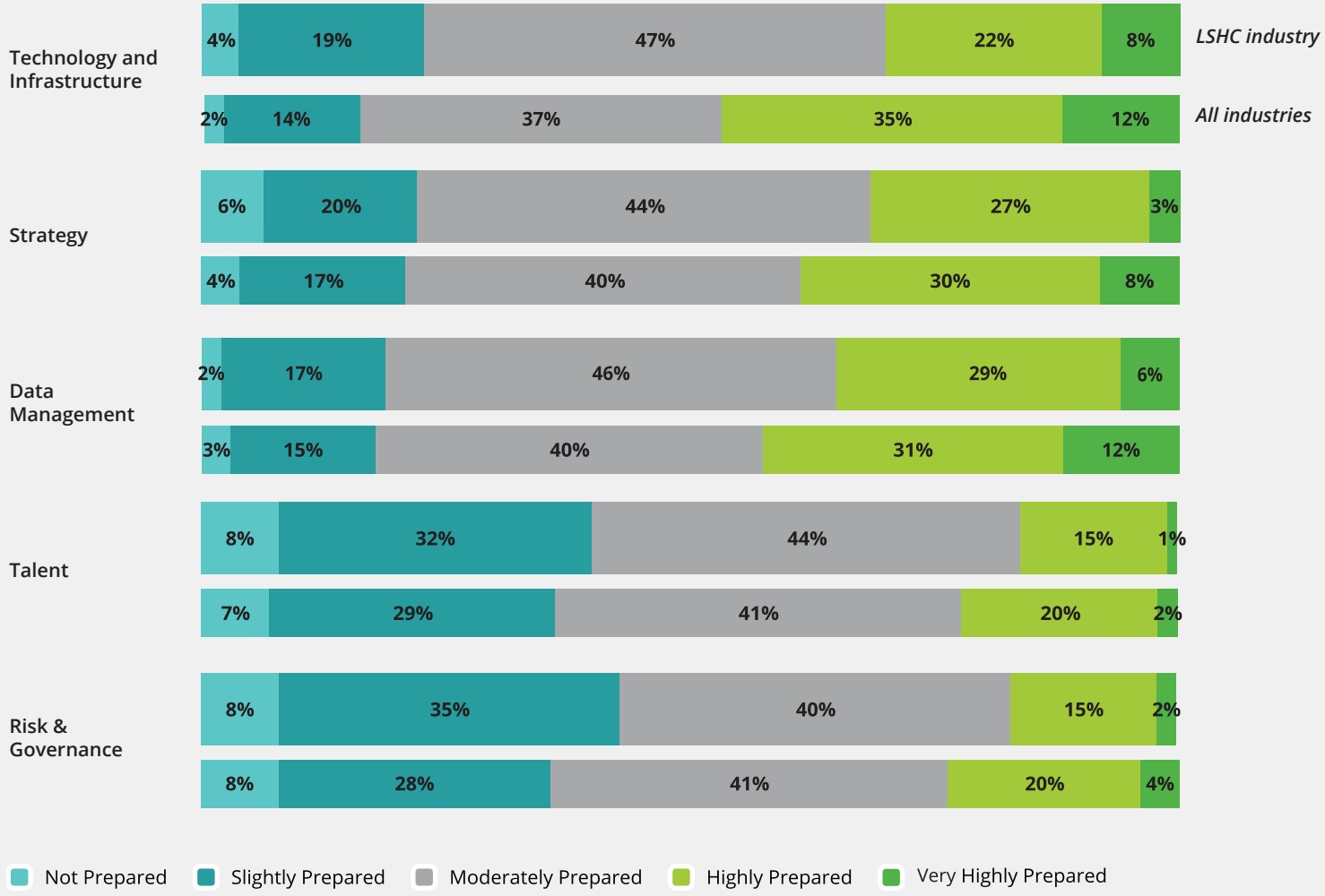


Figure 1

Q: Consider the following areas. For each, rate your organization's level of preparedness with respect to broadly adopting generative AI tools/applications.

Preparedness to adopt generative AI is critical. The survey reveals a concerning trend: across the five foundational dimensions—Talent, Technology Infrastructure, Strategy, Risk & Governance and Data Management—Life Sciences and Healthcare organizations lag the cross-industry average in every category. Only 35% feel highly or very highly prepared in data management, well below the 43% average, underscoring the industry's position at the bottom of the readiness scale. Technology infrastructure reveals an even starker contrast, with just 31% reporting they are highly or very highly prepared, compared to a 47% cross-industry average. This reflects the reality that core systems such as Laboratory Information Systems (LIS) and Electronic Health Records (EHR) are not AI-ready, APIs lack AI compatibility and data remains siloed. Additionally, the sector's fragmented systems—driven by frequent mergers and distributed environments—lack interoperability, while low cloud and compute maturity further limits scalability for generative AI workloads. Talent emerges as the weakest point, with only 16% of respondents reporting strong capabilities, while Risk & Governance follows at 17%, highlighting the lack of robust systems to manage AI-related risks.

To better understand the specific barriers to generative AI adoption, our survey identified several prevalent concerns. Compliance with regulations emerged as the top barrier, with 40% of respondents citing it as a significant issue. The highly regulated nature of the Life Sciences and Healthcare industry amplifies these concerns, as non-compliance can lead to severe consequences. Notably, 31% of respondents highlighted challenges with managing risks, which correlates with the low preparedness in Risk & Governance.

Interestingly, these concerns—alongside the lack of technical talent and implementation challenges (both cited by 28% of respondents)—mirror challenges reported in other industries. Two notable deviations include cultural resistance from employees, cited by 21% in Life Sciences and Healthcare versus 17% cross-industry and lack of a governance model, mentioned by 20% compared to 24% overall. Despite these differences and the industry's distinct regulatory environment, the overall distribution of barriers remains broadly aligned with the cross-industry picture.

Despite these challenges, organizations maintain high aspirations for the benefits that generative AI can deliver. Driving efficiency and productivity is the top goal, cited by 58% of respondents, with cost reduction following at 38%—both of which are the highest figures across all industries. Compared to cross-industry averages of 54% for efficiency and 29% for cost reduction, these priorities reflect a particularly strong focus on performance and operational value.

Other benefits sought are largely consistent with those in other industries, though Life Sciences and Healthcare respondents show less interest in using AI to improve client relationships or manage fraud and risk.

Effectively addressing risk perceptions is essential for advancing generative AI adoption. According to responses on the top risks related to generative AI tools, regulatory compliance was cited by 45% of respondents—the highest proportion across all industries and notably 6 percentage points above the cross-industry average, highlighting the complexities facing the industry. Confidence in AI-generated results was the next most cited issue, with 32% expressing doubts, also leading all other industries. These priorities point to a critical need for AI solutions that emphasize transparency, reliability and user trust.

Desired benefits from generative AI

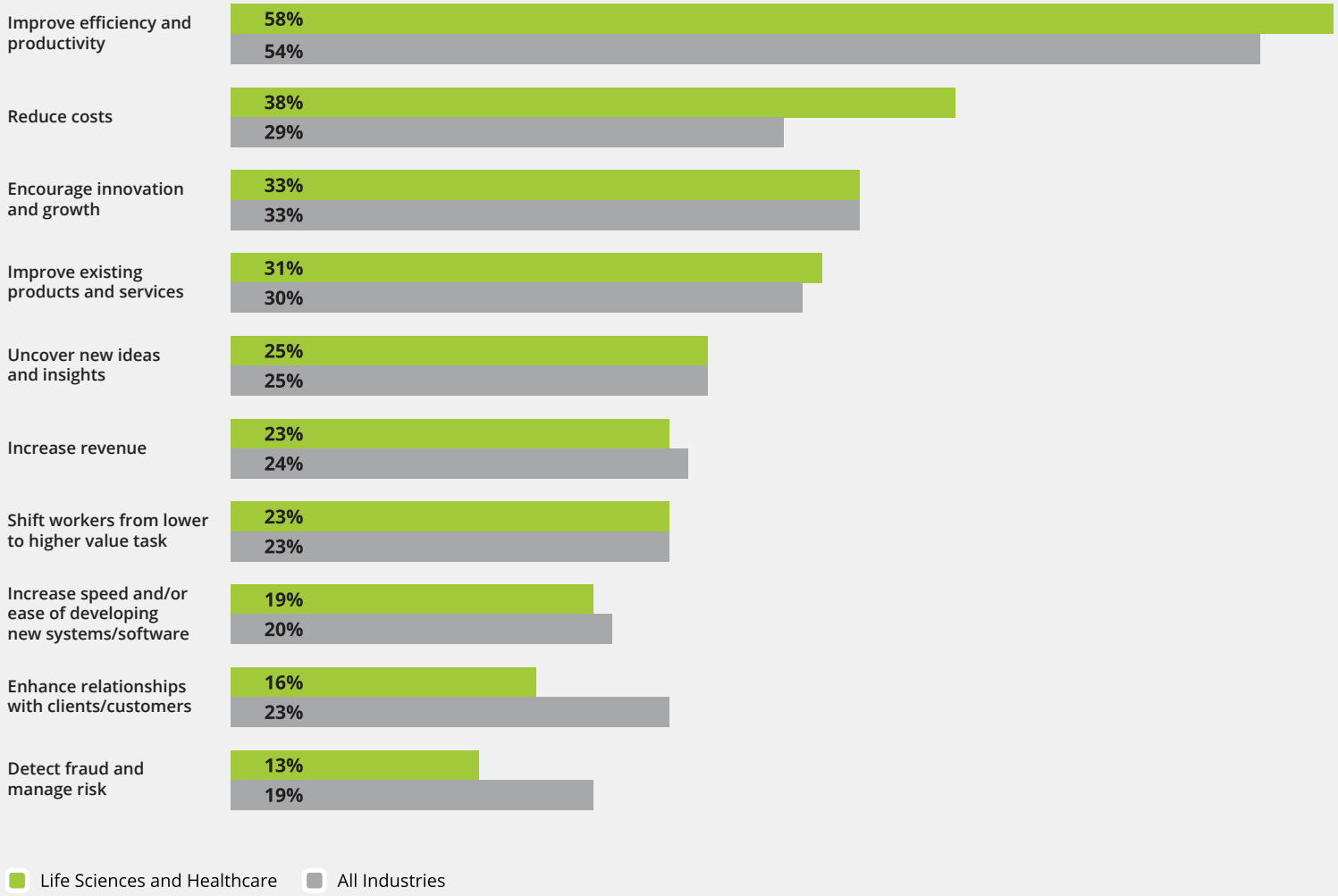
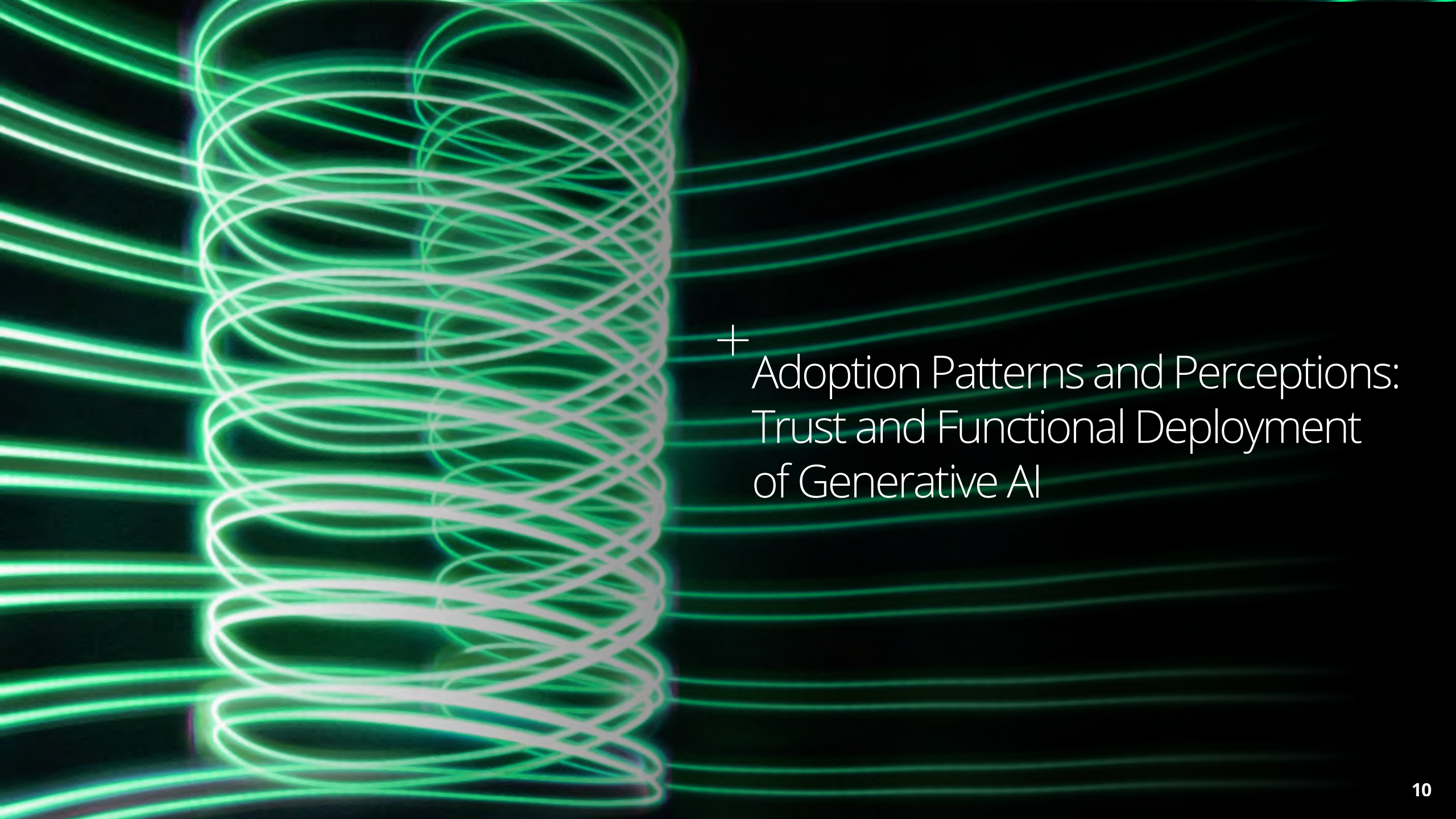


Figure 2 *Q: What are the key benefits you hope to achieve through your generative AI efforts?*

Workforce readiness is also a key factor in successful generative AI adoption. In the Life Sciences and Healthcare industry, just 35% of organizations report significant workforce education efforts—8 percentage points below the cross-industry average of 43%—placing the industry among the least proactive in this area. Only 32% are actively reskilling staff in response to AI-driven role changes and 28% are focused on recruiting technical talent—both figures trailing the cross-industry averages of 40% and 33%, respectively. While there is clear recognition of the talent challenge, the industry's current investment in reskilling and hiring reveals that efforts remain insufficient to build the talent pool necessary for effective integration.

Regarding anticipated timelines for overcoming challenges, respondents exhibit caution. Only 12% expect training issues to be resolved within the next six months, compared to a 16% cross-industry average. Just 5% anticipate overcoming barriers to realizing returns on investment within that time, versus 11% across industries. Only 8% foresee addressing data-related challenges in under six months, well below the 14% cross-industry benchmark. These consistently lower expectations across all dimensions point to a need for more coordinated efforts in building readiness across knowledge, governance and infrastructure.

In examining this landscape of barriers and opportunities, the insights from our survey illustrate a critical need for organizations to build a strong strategic foundation in areas such as talent acquisition, governance and risk management. The opportunity lies in using generative AI readiness as a catalyst to build data fabrics and accelerate adoption of standardized data ontologies such as OMOP and FHIR. Establishing AI Centers of Excellence can help prioritize opportunities across patient services, R&D and operations. Organizations should focus on selecting AI use cases that align with value chains requiring modernization, introducing governance frameworks aligned with emerging standards such as the EU AI Act and adopting GPU/cloud providers capable of supporting scalable AI workloads. By fostering an environment that embraces generative AI, organizations can unlock transformative value and improve healthcare outcomes.



Adoption Patterns and Perceptions: Trust and Functional Deployment of Generative AI

Adoption Patterns and Perceptions: Trust and Functional Deployment of Generative AI

The Life Sciences and Healthcare industry presents an intriguing paradox. While 20% of survey respondents perceive significant or extreme threats from generative AI, slightly above the average across industries of 16%, adoption rates tell a different story. Only 32% of respondents feel minimal threat, ranking it among the lowest in that sentiment. These numbers suggest widespread concern over generative AI's potential disruption of existing models.

Yet, 67% report their organizations are leveraging productivity applications integrated with generative AI, leading all industries, while 63% indicate broader application usage. Notably, 50% are using industry-specific software applications, the highest rate across all industries and well above the 28% cross-industry average, showing a strategic approach tailored to the industry's unique challenges. This juxtaposition reveals an eagerness to harness the technology's capabilities to improve efficiency despite underlying fears.

Trust levels in generative AI remain a major concern. Only 24% of respondents report "high" or "very high trust" in these tools, the second lowest among all industries and substantially lower than the cross-industry average of 33%. At the same time, 17% of organizations report "low" or "very low" trust—also the second highest across industries—highlighting widespread doubts about generative AI's reliability. This skepticism may prevent deeper integration. Organizations appear cautious, deploying tools selectively rather than fully embracing their potential. Emphasis on transparent methodologies and robust governance is essential in building organizational trust.

Adoption Patterns and Perceptions: Trust and Functional Deployment of Generative AI

Unsurprisingly, limited trust appears to shape adoption patterns, leading to significant disparities across functions. IT/Cybersecurity shows the highest adoption within the industry, with 22% reporting AI deployed at scale—though this still trails the cross-industry average of 26%. Product Development follows closely at 17%, exceeding the cross-industry average of 11%. This willingness to innovate suggests that organizations are consciously aligning generative AI investments with their strategic goals.

Conversely, Marketing (9%) and Finance (3%) lag significantly in adoption. This disparity suggests the need for cross-departmental collaboration to fully harness generative AI's potential and create strategic alignment across all operational functions.

Level of GenAI adoption

Respondents selecting 'at scale implementation'

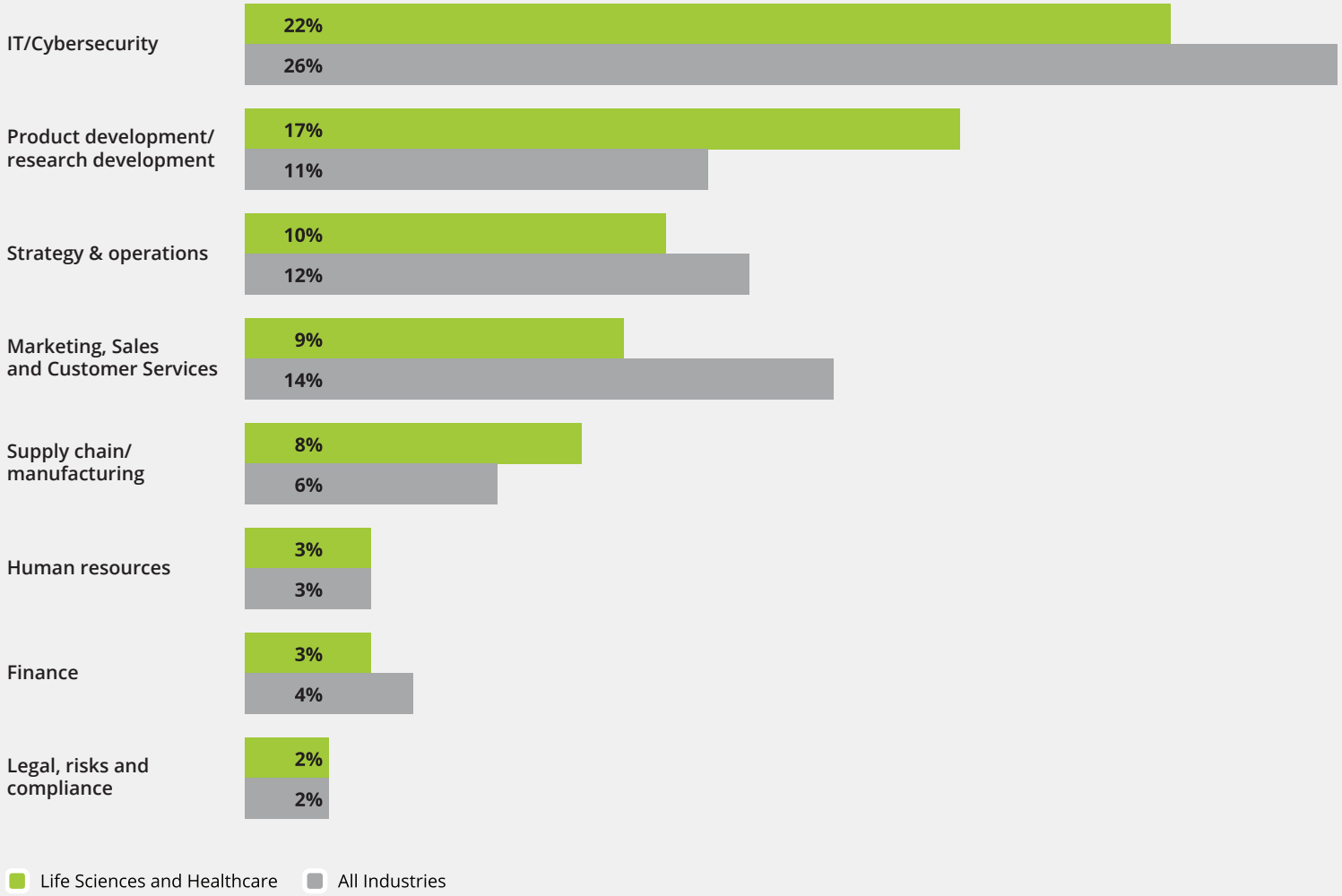


Figure 3 *Q: What is your organization's current adoption level of generative AI across the following functions?*

Engagement with generative AI reveals a strong interest in advancing technology. In parallel with functional adoption, Agentic AI is the leading area of interest, supported by 54% of respondents. The combination of multiple language models, or multi-agent systems, fascinates 47%, demonstrating enthusiasm for collaborative AI solutions. Additionally, 41% acknowledge the importance of multimodal capabilities for integrating diverse data sources to enrich AI outcomes.

AI technology development

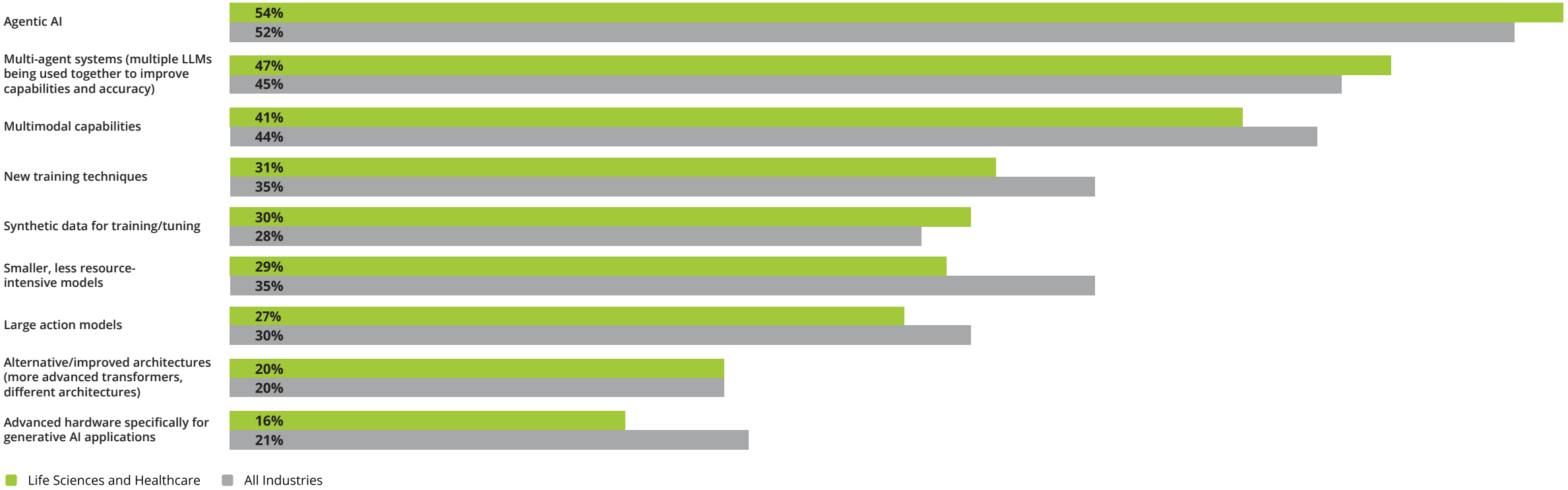


Figure 4 *Q: What generative AI technology developments is your organization most interested in?*

This appetite for technological exploration exists amid trust challenges and concerns about threats. Organizations seem inclined to embrace transformative capabilities even while grappling with the implications of use. Bridging this tension will be essential for unlocking the full value of generative AI.

Capturing the opportunity in Life Sciences and Healthcare requires a shift from caution to commitment. Companies should act now by identifying strategic use cases, investing in trust-enhancing governance and exploring advanced technologies like agentic AI. Those that lead will define the future of innovation in the industry.

Building the Foundations for Generative AI at Scale

Building the Foundations for Generative AI at Scale

With generative AI initiatives on the rise, a notable 17% of organizations report that over 60% of their workforce has access to AI tools—slightly above the 15% cross-industry average. However, access alone is not enough. Thirty-three percent of respondents indicate that less than 20% of their workforce who has access actively use these tools in day-to-day operations. This gap illustrates an industry that is enthusiastic about AI but hesitant to fully embrace it.

Limited utilization highlights an opportunity for organizations to foster a culture of meaningful engagement with AI tools. This begins with setting a clear generative AI agenda that aligns with the organization's strategic objectives. Use cases should be selected across the value chain—sequenced to drive measurable outcomes. This strategic alignment ensures that AI efforts are not just exploratory but outcome-driven. In parallel, governance and risk frameworks must be developed to address ethical and regulatory considerations. With these elements in place, organizations can then focus on workforce enablement—encouraging regular use of AI tools through targeted upskilling and change management initiatives.

Workspace access and usage

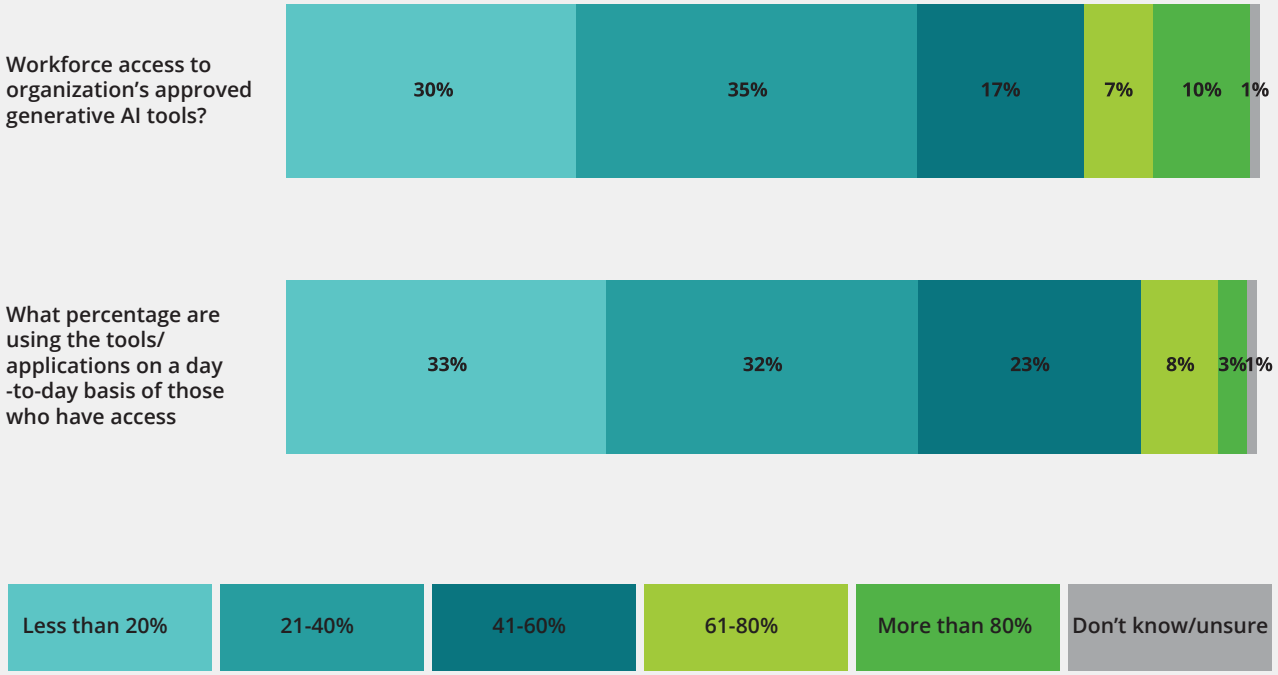


Figure 5

Q: How many in your organization have access to organization's approved generative AI tools and what percentage of those are using the tools/applications on a day - day basis as part of their workflow?

Interestingly, 36% of organizations engaged in over 20 generative AI experiments, reiterating a culture of innovation and experimentation essential for refining AI solutions. However, for about a quarter of the more conservative organizations a cautionary mindset is evident in pursuing AI experiments. Approximately 24% are running fewer than ten proofs of concept. This reluctance could signal an overarching strategy focused on risk management, ensuring all aspects of AI align with existing capabilities and regulatory frameworks.

Despite growing optimism around generative AI, significant barriers continue to hinder adoption. Chief among them is the risk of real-world consequences from AI-driven mistakes, cited by 38% of respondents—slightly above the cross-industry average of 35% . This reinforces the industry's deeply rooted caution, shaped by its close connection to public health. Concerns about the reliability of AI outputs are also widespread, with 33% pointing to issues such as bias, hallucinations and inaccuracies. In parallel, 31% of Life Sciences professionals worry about not achieving the expected value from AI investments, a concern that mirrors cross-industry sentiment. Together, these factors reflect a broader hesitancy that could limit both the pace and depth of AI integration unless offset by safeguards and clearly defined value cases.

Marketplace impediments

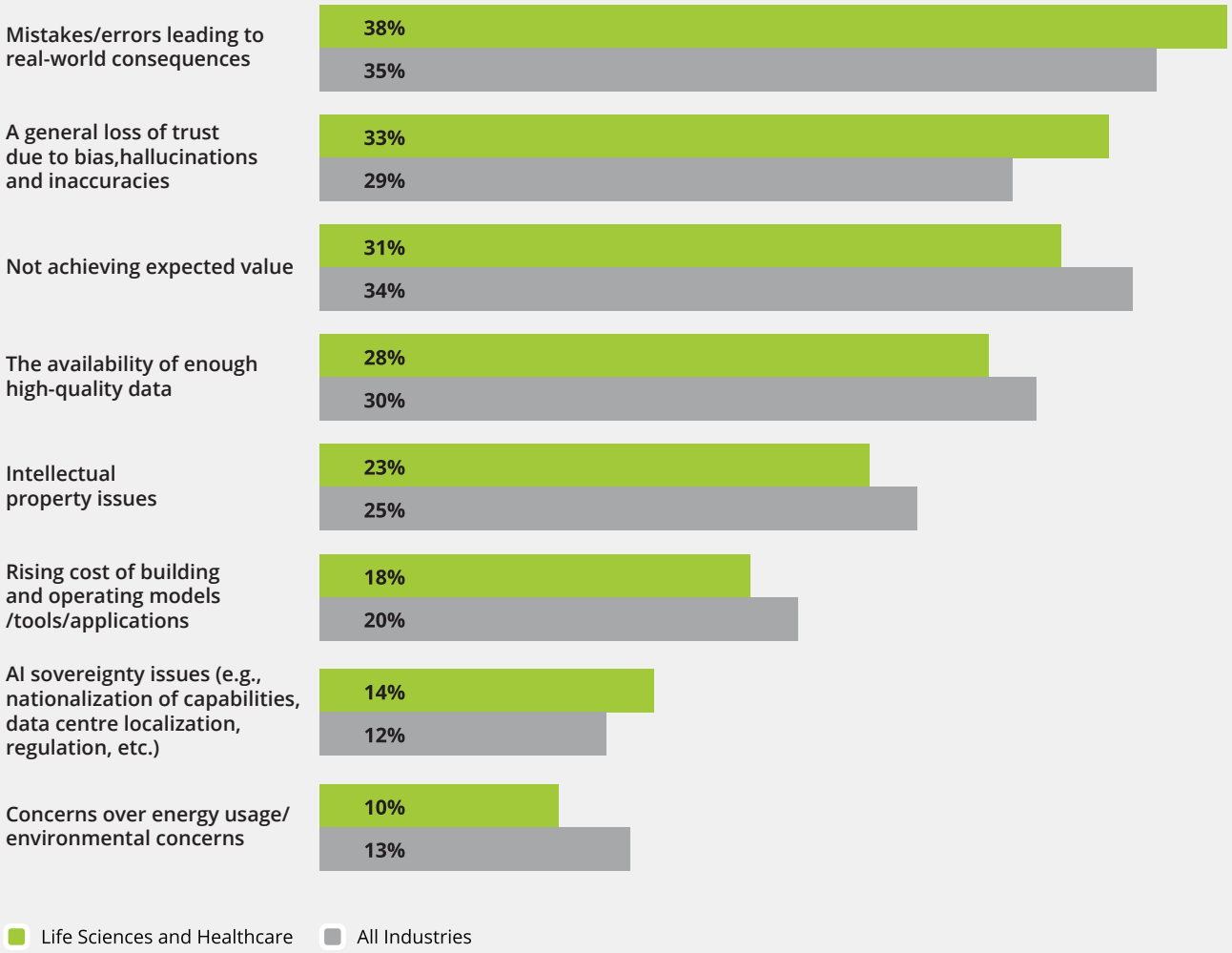


Figure 6 *Q: Which of the following do you think could MOST slow overall market adoption of generative AI over the most two years?*

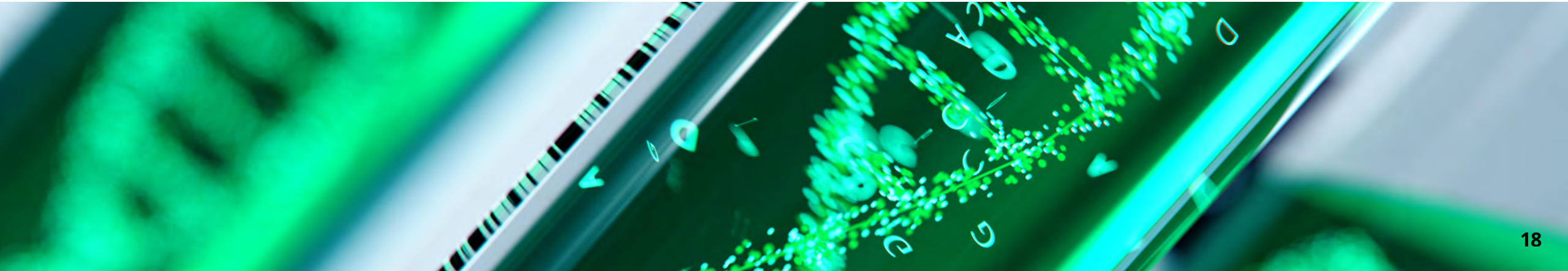
The challenge of Data Quality remains critical to effective AI utilization. In our survey, 28% of respondents highlighted the availability of high-quality data as a barrier, which is slightly below the average across industries of 30%. To fully leverage generative AI, organizations build a trusted data foundation—making data accessible, high-quality and compliant with LSHC regulations. This includes addressing data fragmentation and aligning platforms with common ontologies such as OMOP and FHIR. Additionally, organizations must decide on the right AI infrastructure strategy that meets cost economics and sovereignty needs, especially in a sector where data sensitivity and regulatory oversight are paramount.

In parallel, increased cross-functional collaboration is vital. Nearly 49% of Life Sciences professionals reported improving collaboration across departments, mirroring the trend across industries. Collaborative efforts facilitate the sharing of knowledge and best practices, leading to more comprehensive AI implementations. Additionally, 44% of organizations emphasized standardized development practices, to streamline processes and reduce variability in order to enhance the quality of AI outputs.

Ethical governance is also under scrutiny. A proactive 35% of Life Sciences organizations have reworked their ethical and compliance frameworks, exceeding the average across industries of 32%. This shift acknowledges the ethical complexities posed by AI, especially regarding patient data. Building out governance and risk frameworks in parallel with infrastructure and data efforts is essential to mitigate bias and ensure transparency.

Finally, organizations must measure value and iterate. Establishing feedback loops and performance metrics allows for continuous improvement and ensures that generative AI initiatives remain aligned with strategic goals.

Navigating the complexities of generative AI adoption demands vigilance. By setting a clear agenda, building a trusted data foundation, selecting the right infrastructure, embedding governance, investing in talent and measuring outcomes, Life Sciences organizations can unlock transformative value. The insights garnered from the latest survey emphasize the importance of continuous adaptation, championing ethical responsibilities and fostering innovative collaborations to prepare for the future landscape of AI in Life Sciences and Healthcare increasingly dominated by generative AI.



Looking Ahead: Navigating the Future of Generative AI in Life Sciences and Healthcare

As the Life Sciences and Healthcare industry stands on the brink of a transformative era marked by generative AI, organizations must adopt a strategic and cohesive approach to fully leverage the opportunities while effectively mitigating associated challenges. The successful integration of generative AI hinges on strengthening foundational elements, including talent acquisition, governance, risk management and a robust framework of trust.

To create a strong talent pipeline, organizations should prioritize comprehensive training and upskilling initiatives. By fostering a culture of continuous learning and innovation, they can effectively equip their workforce to navigate the complexities of generative AI. Organizations may also benefit from partnerships with educational institutions and industry leaders to accelerate the development of specialized capabilities required for implementation.

Central to this integration is the establishment of transparent and rigorous governance frameworks that enhance compliance and build trust among stakeholders. This entails not only adherence to regulatory standards but also the development of ethical guidelines governing AI use, reducing risks related to data integrity and AI-generated outputs. Investments in tools that improve the explainability and reliability of AI decisions will further reinforce stakeholder confidence and support broader acceptance.

Addressing the gap between AI access and actual usage remains a critical priority. While many organizations report significant workforce access to generative AI tools, regular and active usage remains low. This underlines the need to cultivate a culture of engagement and ensure that technology investments translate into daily operational value. Organizations experimenting widely with generative AI—through proofs of concept and pilot initiatives—are better positioned to iterate, learn and scale effectively.

Quality assurance processes are increasingly important in building trust in AI-generated outputs. Organizations should begin implementing enhanced testing and validation protocols to address concerns about bias, inaccuracies and unintended consequences. Standardized development practices and increased cross-functional collaboration can further support consistency, compliance and knowledge-sharing across departments.

As organizations align their technological investments with strategic goals, identifying high-impact functional areas—such as IT/cybersecurity and product development—will help concentrate resources where value can be most immediately realized. Emerging technologies such as agentic AI and multi-agent systems represent promising frontiers for specialized applications in the industry, offering the potential to expand capabilities and deepen automation.

In conclusion, the future of Life Sciences and Healthcare organizations lies in strategic investments across training, governance, ethical frameworks and quality assurance. By integrating these elements with intentionality and foresight, organizations can not only adapt to industry evolution, but also emerge as leaders in harnessing the transformative power of generative AI. The potential for enhanced precision, collaboration and innovation is within reach—positioning the industry for a future defined by innovation-led growth.

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About the Deloitte AI Institute

The Deloitte AI Institute™ helps organizations connect all the different dimensions of the robust, highly dynamic and rapidly evolving AI ecosystem. The AI Institute leads conversations on applied AI innovation across industries, using cutting-edge insights to promote human-machine collaboration in the Age of With™.

The Deloitte AI Institute aims to promote dialogue about and development of artificial intelligence, stimulate innovation, and examine challenges to AI implementation and ways to address them. The AI Institute collaborates with an ecosystem composed of academic research groups, startups, entrepreneurs, innovators, mature AI product leaders and AI visionaries to explore key areas of artificial intelligence including risks, policies, ethics, future of work and talent, and applied AI use cases. Combined with Deloitte's deep knowledge and experience in artificial intelligence applications, the institute helps make sense of this complex ecosystem and, as a result, delivers impactful perspectives to help organizations succeed by making informed AI decisions.

Learn More

Methodology

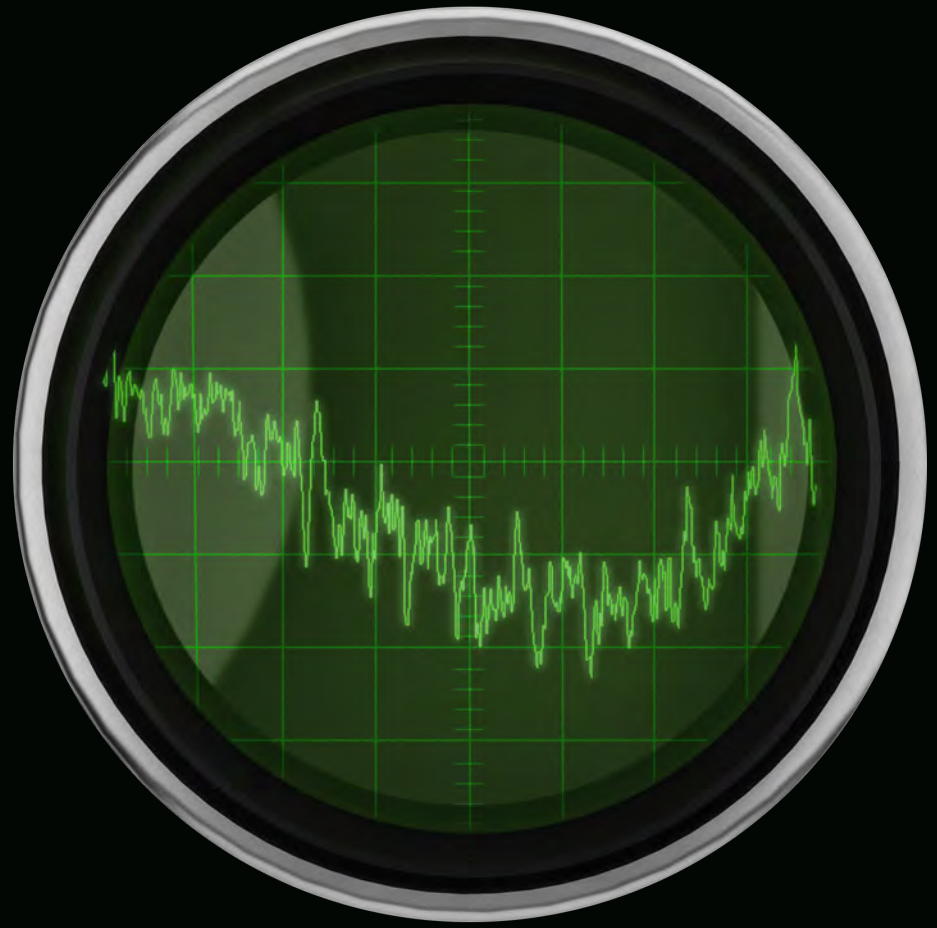
To obtain a global view of how Generative AI is being adopted by organizations on the leading edge of AI, Deloitte surveyed 2,773 leaders between July and September 2024.

Respondents were senior leaders in their organizations and included board and C-suite members, and those at the president, vice president and director levels. The survey sample was split equally between IT and line of business leaders. Fourteen countries were represented: Australia (100 respondents), Brazil (115 respondents), Canada (175 respondents), France (130 respondents), Germany (150 respondents), India (200 respondents), Italy (75 respondents), Japan (100 respondents), Mexico (100 respondents), the Netherlands (50 respondents), Singapore (75 respondents), Spain (100 respondents), the United Kingdom (200 respondents), and the United States (1,203 respondents).

All participating organizations have one or more working implementations of AI being used daily. Plus, they have pilots in place to explore Generative AI or have one or more working implementations of Generative AI being used daily. Respondents were required to meet one of the following criteria with respect to their organization's AI and data science strategy, investments, implementation approach and value measurement: influence decision-making, are part of a team that makes decisions, are the final decision-maker, or manage or oversee AI technology implementations.

All statistics noted in this report and its graphics are derived from Deloitte's fourth quarterly survey, conducted July – September 2024; The State of Generative AI in the Enterprise: Now decides next, a report series. N (Total leader survey responses) = 2,773

The survey data was supplemented with case studies and qualitative findings derived from 15 interviews with executives and AI and data science leaders at large organizations across a range of industries.



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