

Corporate R&D of the Future

How evidence and AI shape R&D decision-making

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Foreword

R&D leaders are under pressure to deliver more, faster. Timelines are long and costs are rising. And there are great expectations that AI can help solve these problems. But when I talk with our customers, the conversation rarely stays on AI for long; it turns to the evidence underneath it. For R&D leaders, it is crucial that their teams can find, connect and trust the evidence when a big decision is on the line.

That is where we come in. At Elsevier, our role is to help R&D teams achieve their goals by bringing together trusted content, precision AI and domain expertise. We do that in partnership with our customers, in pursuit of our shared purpose: to advance human progress.

We created this global report, Corporate R&D of the Future, to help companies make smarter decisions. To do that, we asked more than 1,000 R&D professionals around the world from six industries how confident they are in their evidence, what gets in the way of using it well and where AI fits.

The findings reveal a paradox at the heart of R&D: most respondents are confident in their evidence and feel they can get what they need, yet most also say their organization has, at some point, made an important decision on evidence that later proved flawed. That's the nature of R&D, where decisions move quickly and can't always wait for perfect information. Confidence is not the same as certainty.

R&D decisions need to be fast. AI moves even faster. What looks settled today may not look that way in a year. This report is a starting point: We're hosting roundtables with R&D leaders to test what we've found and hear what it looks like in practice, and we're committed to keeping the conversation going as we support their innovation and discovery. I encourage you to read the report and share your thoughts with us.



Stuart Whayman

President, Corporate Markets
Elsevier

Executive summary

The growth of corporate R&D, driven by AI and digital technologies, is putting pressure on R&D organizations to increase their innovation output using a variety of data sources and evidence to support critical decisions.

Corporate R&D of the Future 2026

Survey:
Online survey by email invitation

Date:
August to October 2026

Respondents:
1,038 R&D leaders, managers and researchers at R&D-led corporations

Geography:
55 countries in 5 regions: North America, South America, Europe, Middle East & Africa and APAC.

Responses are weighted; see the appendix on page 38 for details.



Confident, but caught out

76% of respondents are confident in the quality of the evidence behind important R&D decisions, yet 63% say their organization has at some point made an important R&D decision on evidence later found to be inaccurate, incomplete or outdated. See chapter 1 on page 10.

Access is not the same as integration

78% indicate their teams can access the third-party evidence they need, yet only 36% report no barriers at all and 42% say evidence is scattered across too many sources. 30% say it is not always clear what evidence exists, whether or not they have access. See chapter 2 on page 17.

Similar problems, different verdicts

R&D leaders and managers and R&D researchers report fragmented systems and scattered evidence at similar rates, though R&D researchers report other problems more often, such as deciding before all the evidence is in (57% vs. 46%), while R&D leaders and managers are much more positive about how well their organization copes. The divide is clearest in North America. See chapter 3 (page 22) and the role comparisons in every chapter.

High expectations, slower start in smaller organizations

Respondents in small organizations are the most likely to expect leading organizations to be able to make faster decisions without compromising evidence quality (94%), yet the least likely to use AI regularly (34%) and the most likely to decide before all the evidence is in (64%). See the box in chapter 4.

Ready on paper, not yet in the workflow

74% say their organization is well prepared to realize the full potential of AI in R&D, but fewer (63%) say AI is effectively integrated into R&D workflows, falling to 56% in small organizations. See chapter 3 on page 22.

Three regions, three perspectives

Among R&D leaders and managers, North America is the most critical about its evidence, Europe puts the most weight on regulatory compliance, and APAC is the most confident and the most likely to treat AI outputs as essential evidence. See chapter 4 on page 30.



Main findings

Chapter 1:

Data in R&D today – access, confidence and doubt (page 10)

How respondents perceive the role of data and evidence in decision-making.



63% say their organization has made an important R&D decision using data or evidence later found to be inaccurate, incomplete or outdated.



78% have access to the third-party evidence they need.



51% say their organization has had to make important R&D decisions before it has all the desired evidence.



47% say that gaps in data quality and evidence reduce their confidence in decisions.

Chapter 2:

Connected R&D – facing challenges today (page 17)

The barriers R&D organizations must overcome in terms of connecting data and evidence.



The top three barriers are scattered sources (42%), slow finding and synthesis (32%) and not knowing what evidence exists (30%); only 36% report no barriers to accessing external evidence.



75% say that R&D knowledge and insights are well shared and used across the business.



71% say that internal R&D data is effectively connected with external evidence.



64% say that data from different systems is easy to synthesize for decision-making.



The top three sources of essential evidence are internal experimental or proprietary data (71%), regulatory guidance (66%) and internal analysis from R&D colleagues (62%).

Chapter 3:

AI in R&D – use, perception and building trust (page 22)

Perceptions and behavior related to AI in corporate R&D.



86% say their organizations are using or piloting AI in R&D.



47% say AI is used regularly in the organization's R&D.



Compliance (55%), ease of use and integration (54%), and training for factual accuracy and safety (54%) would increase willingness to use AI.



74% say their organization is well prepared to realize the full potential of AI in R&D and 71% say AI is having a positive impact on R&D efficiency and effectiveness, but fewer, 63%, say AI is effectively integrated into their R&D workflows.



71% use AI for data analysis, 70% for literature search and 70% for competitive intelligence.

Chapter 4:

The future of R&D (page 30)

A vision of corporate R&D of the future.



81% say that AI will fundamentally transform how R&D decisions are made.



48% say that implementing AI at scale will be a significant challenge.



86% expect organizations that combine AI with trusted, high-quality evidence will outperform those that do not.



87% predict that leading R&D organizations will be able to make faster decisions without compromising evidence quality.



The top three priorities for the coming five years are building AI skills across the organization (65%), turning data and evidence into actionable insights (62%) and tailoring AI to organizational knowledge and workflows (59%).

Conclusion (page 35)

What does corporate R&D of the future need?



Skill development and training



Internal processes



Internal infrastructure



External AI tools

Introduction



Corporate research and development (R&D) is under pressure to produce more, faster. Companies are facing increasing risks and broadening concerns, from talent constraints to sustainability issues. And while AI promises support, its effective use also demands investment. For corporate R&D organizations, efficient and robust decision-making has never been more important in this complex environment.

The impact of AI on corporate R&D innovation is clear, with AI tools improving efficiency, supporting processes across the research cycle and accelerating innovation.[1] The technology is leading to change more broadly: according to the OECD, AI and digital industries are the driving force behind significant growth in R&D expenditure, from 3% in 2024 to 6% in 2025.[2] WIPO's Global Innovation Index 2026 reveals that, in real terms, global corporate R&D increased by 5.8% in 2025 to $1.5 trillion, while R&D more broadly is expected to grow to a projected $3.4 trillion in 2026.[3]

To take full advantage of this growth, R&D organizations must overcome a number of barriers. Despite the increasing volume of information being generated and made available across a variety of sources, many R&D teams are tackling data fragmentation, inconsistent quality, disconnected systems and gaps in evidence that can reduce confidence in decisions. This can slow down timelines and hinder decision-making processes, ultimately affecting productivity, innovation and commercial success.

To counter this, R&D organizations are leveraging technology and connecting data sources to improve efficiency and ensure their decisions are underpinned by reliable evidence. Understanding where they are on that journey and identifying the barriers and opportunities ahead can help build a picture of corporate R&D of the future.

Tracking trends and predicting the future of corporate R&D

To support R&D in its high-pressure environment, Elsevier conducts research, gathering views and highlighting opportunities. Our previous studies have revealed trends in the research ecosystem, including the rise of AI, and the potential futures across various sectors.

- *Insights 2024: Attitudes toward AI*[4] — A baseline for the use, perception and expectation of AI in research.
- *Researcher of the Future 2025*[5] — Insights into how research is evolving.
- *Corporate Researcher of the Future 2025*[1] — A focused look at Researcher of the Future data through a corporate R&D lens.

In 2026, we conducted the Corporate R&D of the Future study: a global study of professionals involved in R&D activities, outputs, evidence and decision-making within industrial, corporate and commercial organizations. Focusing on six R&D-intensive sectors — pharma/biotech, medical technology (MedTech), chemicals & materials, electronics & semiconductors, aerospace, defense & automotive and energy & resources — we aimed to explore the future of corporate R&D.

The study examines how R&D leaders and researchers are navigating an increasingly complex R&D environment, with questions exploring the role of data, evidence, AI and decision-making in driving innovation and competitive advantage. You can explore the full results in the accompanying databook released with this report.

Corporate R&D of the Future 2026

Survey:
Online survey by email invitation

Date:
August to October 2026

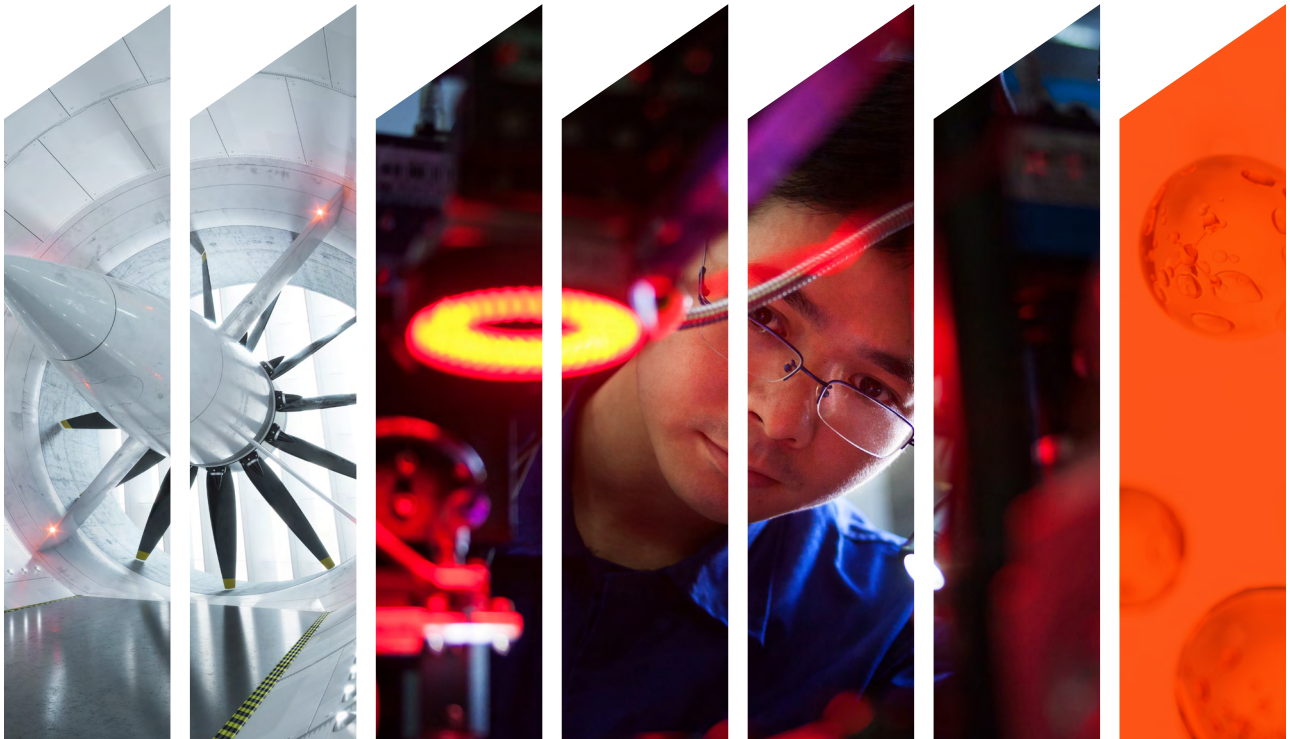
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Geography:
55 countries in 5 regions: North America, South America, Europe, Middle East & Africa and APAC.

Responses are weighted; see the appendix on page 38 for details.

Explore the report:

- Chapter 1: Data in R&D today — access, confidence and doubt (page 10). How respondents perceive the role of data and evidence in decision-making.
- Chapter 2: Connected R&D — facing challenges today (page 17). The barriers R&D organizations must overcome in terms of connecting data and evidence.
- Chapter 3: AI in R&D — use, perception and building trust (page 22). Perceptions and behavior related to AI in corporate R&D.
- Chapter 4: The future of corporate R&D (page 30). A vision of corporate R&D of the future.
- Conclusion (page 35). What corporate R&D of the future needs.



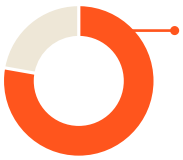
Chapter 1:

Data in R&D today — access, confidence and doubt

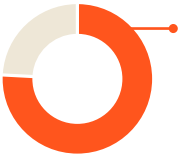
Key findings:



63%
say their organization has made an important R&D decision using data or evidence later found to be inaccurate, incomplete or outdated.



78%
have access to the third-party evidence they need.



76%
are confident in the quality of the data used to support decisions.



51%
say their organization has had to make important R&D decisions before it has all the desired evidence.



47%
say that gaps in data quality and evidence reduce their confidence in decisions.

Data is crucial in R&D: it provides important evidence at every stage of the research cycle, can ensure confidence in decisions, and can be used to determine strategy and direction in innovation.[6] Sources ranging from peer-reviewed studies to real-world data, which is increasingly important,[7] can be brought together to support daily work and long-term planning. This study reveals R&D leaders' and researchers' perceptions of their organizations' access to decision-critical data, what those sources look like and how confident they are in the evidence used in R&D.



Access to and confidence in data and evidence

Respondents generally report feeling confident in their organizations' access to and use of data. About four in five (78%) respondents agree that their organization's R&D teams can access the third-party scientific and technical evidence they need when making important decisions.

> *"We maintain strong access to relevant scientific and technical resources which allows [researchers] to validate internal findings against external evidence when evaluating projects."*
>
> **R&D manager, APAC**

Respondents in APAC (90%) are most likely to have access to third-party evidence, compared to 73% in North America and 77% in Europe. Respondents in South America are least likely to agree (59%), though the respondent base is small.

> *"Some external technical information is not easily available or updated which makes it harder to support R&D decisions with current evidence."*
>
> **R&D researcher, North America**

Over three-quarters (76%) of respondents are confident in the quality of the data and evidence used to support important R&D decisions in their organizations. As with access to evidence, respondents in APAC (89%) are most likely to agree, followed by those in North America (73%) and Europe (72%). Again, acknowledging the small base size, agreement is lowest in South America (58%).

Many of the comments from respondents highlight the vital role of quality assurance in corporate research, acting as a source of trust. As one R&D manager in Europe says, "data undergoes established quality checks and validation, giving us confidence that it is reliable and suitable."

Confidence in the quality of the data and evidence varies by industry: it is highest among respondents in pharma and biotech (85%) and lowest in energy and resources (69%). Those in large organizations (81%) are more likely than those in small ones (71%) to be confident in their data. You can explore the full results in the accompanying databook released with this report.

This may be in part due to the availability of experts to handle and verify data. In their comments, many respondents talk about this being a critical factor, specifically mentioning human knowledge and review of data.

> *"Experienced engineers and technical experts are involved in reviewing the evidence, and evidence used for decisions is generally relevant and up to date."*
>
> **R&D leader, Europe**

Respondents who report low confidence in the evidence they use refer to challenges like variable data quality, limited traceability of the source of evidence and fragmented systems (see page 18 for more on this topic).

> *"Data quality differs across sources and some evidence is incomplete making it difficult to fully rely on for key decisions."*
>
> **R&D researcher, North America**

In general, R&D leaders and managers are more optimistic: leaders are more likely than researchers to be confident in the evidence (at 84% vs 68%) and to say they can access the evidence they need (85% vs 71%).

Data gaps, decision-making and confidence

Despite the majority of respondents saying they have access to the data and evidence they need, about half (51%) say their organization has had to make important R&D decisions before it has all the desired evidence.

For many, this is a necessary compromise in the R&D process, as one respondent explains: "We make R&D decisions based on the information we already have. It is not possible to wait for every detail. Good decisions can be made based on current and available R&D data, even if they are only '98%' correct."

Time and resources might be at a greater premium for smaller companies, and comments suggest this may help explain the greater likelihood of small organizations to decide before all the evidence is in (64%, compared to 46% of mid-sized and 47% of large companies).

> *"Waiting for perfect data is rarely practical in R&D, especially when experiments can take weeks or months to complete."*
>
> **R&D manager, APAC**

> *"Evidence gathering is both expensive and time consuming. Therefore, it is not always economically feasible to gather all the desired evidence."*
>
> **R&D researcher, North America**

At the regional level, deciding early is least common in North America (44%). And R&D researchers are more likely than R&D leaders and managers to say their organization decides before all the evidence is available (57% vs 46%).

Decision-making ahead of evidence availability appears linked to respondents' confidence in important R&D decisions: about half of respondents (47%) agree that gaps in data quality and evidence reduce their confidence.

> *"Sometimes gaps in documentation can make it harder to understand how data was generated and reduces the confidence in decision making."*
>
> **R&D researcher, South America**

At the individual respondent level, the two go together: 64% of those whose organization decides before it has all the evidence say gaps reduce their confidence, against 30% of the rest.

The link holds across individual respondents, not regional averages: North America, for example, has the lowest share deciding early (44%) but is among the most likely to say gaps reduce confidence (52%).

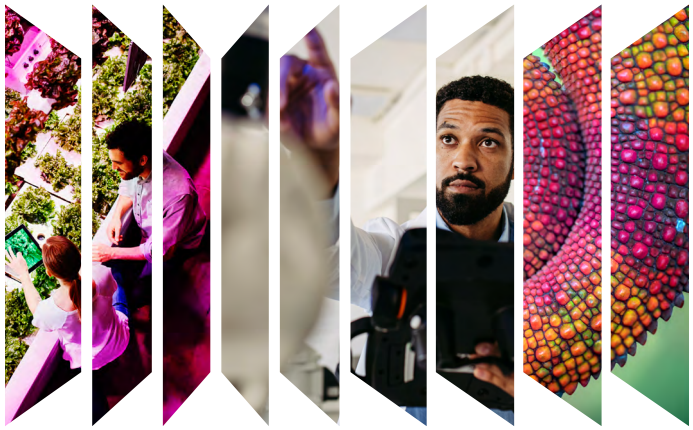


Figure 1

Deciding without all the evidence goes with lower confidence



Each grid is a share of its own group, so the percentages in the two grids (64% and 30%) do not add to 100%. "All other respondents" includes those who disagreed or were neutral. Agree or strongly agree with each statement. The comparison is between individual respondents; regional averages do not show the same pattern. This shows an association, not cause. Base n=1,009 respondents who answered both statements. Weighted 50-50 by role. Statements: "My organization has to make important R&D decisions before it has all the evidence it would ideally want." and "Gaps in data quality and evidence reduce confidence in important R&D decisions in my organization."

Small organizations are the most likely to say gaps reduce confidence (54%), as are respondents in North America (52%); South America, a smaller base, is higher at 65%. Those in Europe (45%) and APAC (42%) are less so.

"In my industry, we cannot afford to have gaps in data quality and evidence. If we do, we'll be asked to do further testing or do further research until we have sufficient data points to, at the very least, indicate a trend. So, my organization doesn't even let a decision get to the point where people have low confidence in important R&D decisions."

R&D researcher, North America

Decisions underpinned by flawed evidence

Even if data is available for decision-making, there is a chance it could be incomplete or inaccurate — a particular concern for information that comes from GenAI tools.[5] Another important aspect of data validation and reviewing evidence is making sure it is up to date, especially given the rapid pace of scientific advancement.

Asked whether their organization has, at some point, made an important R&D decision using data or evidence that was later found to be inaccurate, incomplete or outdated, almost two-thirds (63%) of those who answered say yes.

Agreement is similar across industries, ranging from 56% to 68%. Regionally, those in North America and Europe (66%) are more likely to agree than those in APAC (57%).

> *"Poor data quality creates doubt around whether an experimental failure was caused by bad science or flawed data."*
>
> **R&D leader, APAC**

Despite a 16 percentage-point gap when it comes to confidence in data, agreement that decisions have been made on flawed data is similar among R&D leaders and managers (63%) and R&D researchers (62%).

The confidence paradox

Confidence and experience are linked but not opposites. Almost everyone who is not confident or neutral about their evidence (96%) reports a past flawed decision, but so do more than half of those who are confident.

Figure 2

Confident respondents still report flawed decisions



Each grid is a share of its own group, so the percentages in the two grids (54% and 96%) do not add to 100%. Overall, 42% of all respondents are both confident and report a past flawed decision. "Ever": no timeframe or severity was asked, so this shows an association, not frequency or severity. "Not confident or neutral" includes neutral answers (most of this group). Questions: "I am confident in the quality of the data and evidence used to support important R&D decisions in my organization" (agree or strongly agree = confident) and "To your knowledge, has your organization ever found that an important R&D decision was made using data or evidence that was later found to be inaccurate, incomplete, or outdated?" (yes). Base n=907 respondents who answered both questions. Weighted 50-50 by role.

Factors casting doubt on R&D decisions

What affects R&D professionals' confidence in the evidence behind key R&D decisions? For 18% of respondents, nothing reduces their confidence.

Overall, the top factors that reduce respondents' confidence are:



The evidence is not sufficiently robust or reliable **(36%)**



Different sources point to different conclusions **(34%)**



The evidence is difficult to interpret or apply **(31%)**



The evidence is difficult to combine **(31%)**

Respondents in North America cite the most reasons for doubt, including unreliable evidence (46%), and only 4% say nothing reduces their confidence. Conversely, those in APAC cite the fewest reasons for doubt, with 33% saying nothing reduces their confidence.

Respondents at large organizations are more likely to say the evidence they need does not yet exist (25%) and to distrust AI-generated outputs (22%), while those at small organizations are more likely to find evidence hard to interpret (37%).

Respondents in the energy and resources sector are most likely to find evidence hard to combine (41%).

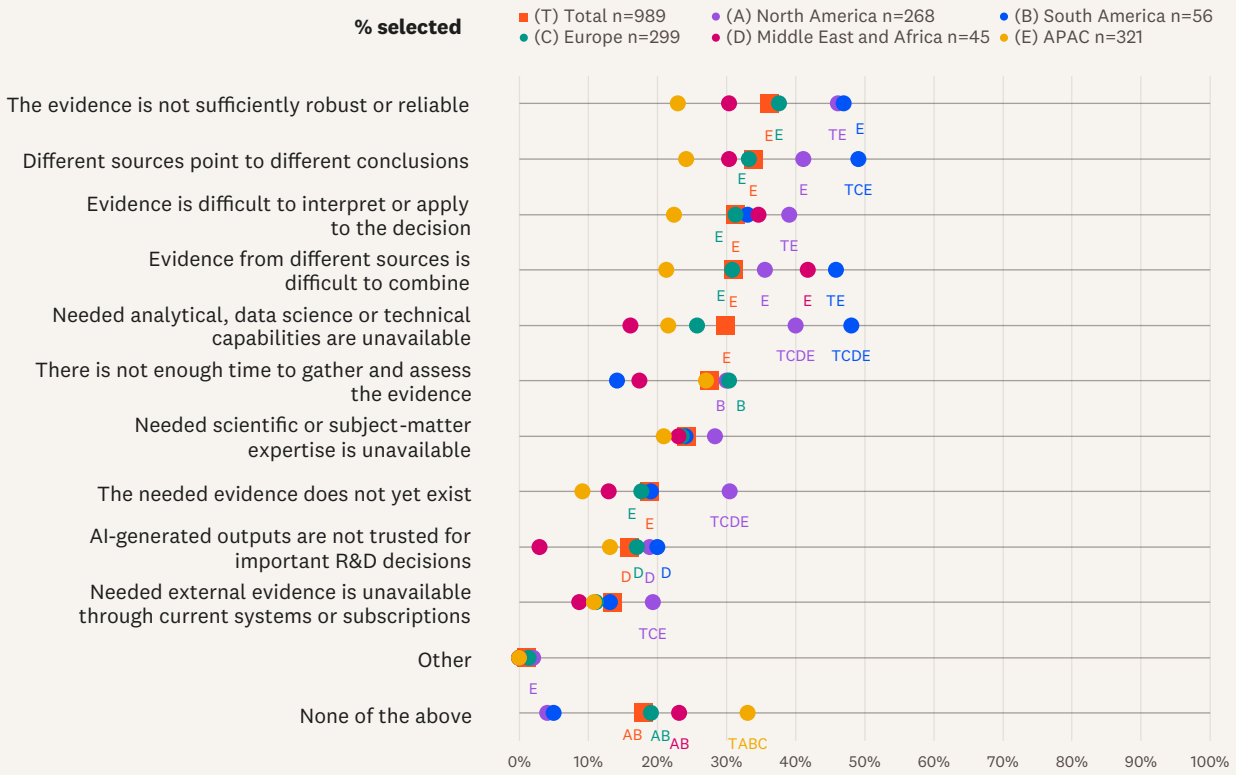
> *"We have strong confidence in our R&D decisions because they are supported by reliable scientific evidence from lab preclinical and clinical data with continuous cross validation and internal review."*
>
> **R&D leader, APAC**

R&D researchers are more likely than R&D leaders and managers to cite evidence that is hard to combine (37% vs 25%) and unreliable evidence (41% vs 31%) as factors reducing their confidence in decisions.



Figure 3

Reliability and conflicting findings are the leading sources of doubt in R&D decisions

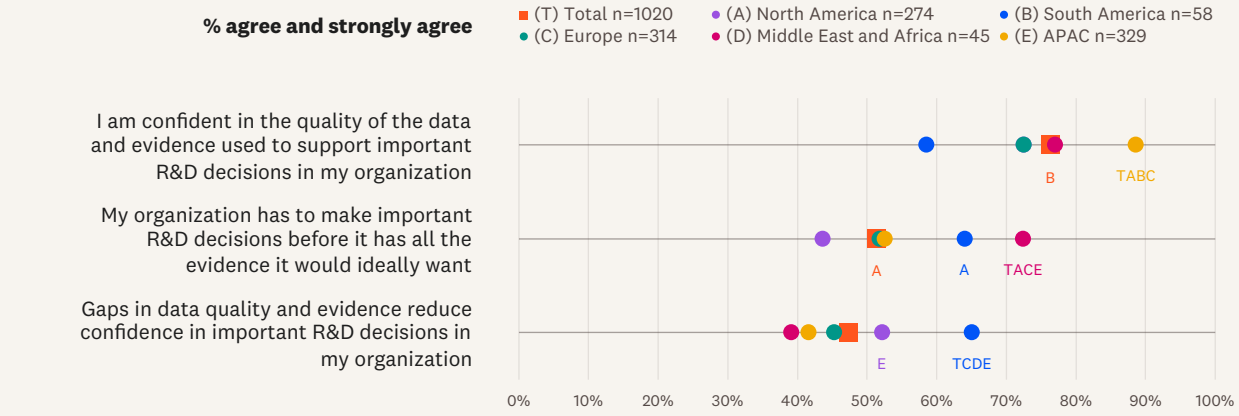


Significantly higher between groups (indicated by letter, e.g. T = Total)

Question: Which of the following, if any, reduce your confidence in the data and evidence used for your organization's most important R&D decisions? Select all that apply (includes 'None of the above'). Don't know, not applicable, prefer not to say and blank answers are excluded from the base (n=32, 3% of those asked).

Figure 4

Confidence in R&D evidence is high, yet gaps in evidence affect decision-making



Significantly higher between groups (indicated by letter, e.g. T = Total)

Bases by statement range from 1,013 to 1,020.

Question: To what extent do you agree or disagree with each of the following statements about R&D in your organization? Perceptions of the respondent's own organization. The second and third statements are negatively worded: agree = the issue is present. Don't know, not applicable, prefer not to say and blank answers are excluded from the base (up to 1% of those asked).

Chapter 2:

Connected R&D — facing challenges today

Key findings:



The top three barriers are scattered sources (**42%**), slow finding and synthesis (**32%**) and not knowing what evidence exists (**30%**); only **36%** report no barriers to accessing external evidence. (See the accompanying databook for details.)



The top three sources of essential evidence are internal experimental or proprietary data (**71%**), regulatory guidance (**66%**) and internal analysis from R&D colleagues (**62%**).



75%
say that R&D knowledge and insights are well shared and used across the business. (See the accompanying databook for details.)



71%
say that internal R&D data is effectively connected with external evidence.



64%
say that data from different systems is easy to synthesize for decision-making. (See the accompanying databook for details.)

Data connection — between external and internal sources as well as systems within the business — is crucial for R&D. Respondents' comments suggest that fragmentation of data sources creates inefficiencies that slow down the R&D process and limits access to decision-critical evidence. Although respondents generally report being satisfied with the connection between sources used in their R&D, they also identify challenges in using those sources.

> *"Fragmented data sources and disconnected systems create silos that slow down analysis and reduce transparency and weaken confidence in outcomes."*
>
> **R&D leader, Europe**

Data connection and fragmentation

At the global level, the survey results paint a mixed picture of data connection: 75% of respondents agree that R&D knowledge and insights are well shared and used across the business, 71% say that internal R&D data is effectively connected with external evidence and 64% agree that data from different systems is easy to synthesize for decision-making.

> *"We have created an R&D environment where connected data, shared knowledge and close collaboration come together to support decisions."*
>
> **R&D leader, APAC**

The most notable difference is between R&D leaders and managers and R&D researchers: leaders and managers are significantly more likely to say knowledge is well shared (at 84% vs. 65%), internal and external data are connected (81% vs. 61%) and data is easy to synthesize (74% vs. 54%).

However, many respondents highlight the challenges of fragmented data sources: 35% say fragmented data sources or disconnected systems make R&D decision-making more difficult.

> *"For senior decision makers, pairing proprietary R&D insights with independent clinical evidence creates a broader, more balanced picture of technology efficacy."*
>
> **R&D leader, North America**

> *"External evidence is available but it is not consistently linked with our internal R&D data so there is requirement of additional manual effort to compare and validate findings."*
>
> **R&D researcher, North America**

While experiences are similar among R&D leaders and managers and R&D researchers (with 33% and 37% agreeing respectively), fragmentation is felt most at small organizations (45% saying fragmentation makes decisions more difficult, compared to 29% of those at large organizations).

Access is not the same as integration

Over half (56%) of those who say their teams can access the evidence they need still report at least one barrier; 52% report scattered sources, slow synthesis or not knowing what exists, while only 8% say they lack access to sources.

Respondents at large organizations have the best access (83%), yet 59% of those with access still report a barrier.

Almost a third (30%) say it is not always clear what evidence exists, whether or not they have good access, and 41% of all respondents both have good access and struggle to pull evidence together. Access still matters: 91% of those without good access report a barrier.

Essential evidence sources

Respondents cite several different types of evidence as being essential, with some variation by region, sector and respondent group. The top three sources of evidence reflect the importance of data generated by the organization itself and the value of internal expertise, as well as the impact of regulatory guidance on R&D decisions.



Internal experimental or proprietary data
(71%)



Regulatory guidance
(66%)



Internal analysis from R&D colleagues
(62%)

External sources of essential evidence include clinical, field trial or validation study results (58%), which is most important for those in pharma and biotech (78%) and MedTech (73%), and least in electronics and semiconductors (36%). Peer-reviewed literature is an essential source of evidence for nearly half globally (46%), with agreement highest in pharma and biotech (62%) and lowest in aerospace, defense and automotive (34%).

Market intelligence (57%) and patent databases (52%) reflect the commercial needs of corporate R&D, while 35% see AI-generated outputs as essential, which may reflect the speed and efficiency respondents associate with AI.

For respondents in Europe, internal analysis from R&D colleagues (72%) and curated databases (57%) are more likely than the global average to be considered essential. Those in APAC are more likely to cite external experts (58%) and peer-reviewed literature (57%).

Overall, R&D leaders and managers are more likely than R&D researchers to consider AI-generated outputs (at 44% vs. 27%), peer-reviewed literature (54% vs. 38%) and patent databases (57% vs. 48%) essential evidence sources.

"We combine experimental results, historical data and expert knowledge to support decisions."

R&D manager, APAC

View of the future

"The biggest impact would come from AI systems that continuously analyze global patents research and regulatory updates to provide real-time insights for pipeline decisions, clinical benchmarking and faster freedom to operate reviews."

R&D manager, APAC

Barriers to external evidence

Respondents report that their R&D teams face various barriers when it comes to using external evidence in the R&D process. Scattered sources (42%) are the top barrier in every region, industry and size, and those at small organizations are most likely to experience this as a barrier (50%).

> *"The tools are not yet fully integrated with our R&D systems so teams still rely on manual processes and separate data sources for many tasks."*
>
> **R&D researcher, North America**

> *"[The] main challenge is not the amount of data but making sure information from different sources is consistent and meaningful when viewed together."*
>
> **R&D manager, North America**

The second most cited barrier is slow finding and synthesis (32%). Agreement is highest among respondents at small organizations (38%), and R&D researchers are more likely than R&D leaders and managers to agree (35% vs. 28%).

In third place, not knowing what evidence exists is a barrier for 30% globally, with highest agreement in APAC (36%). Evidence not being trusted or relevant is a barrier for 19% globally.

View of the future

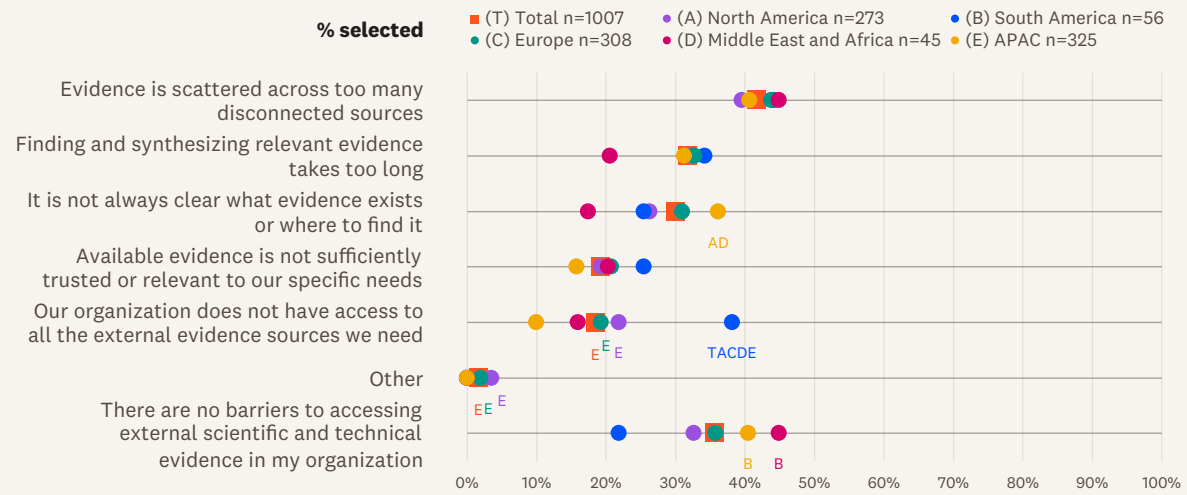
"I think one aspect that deserves more attention is how the future of R&D will depend not only on technological sophistication but also on the ability of organizations to cultivate genuine trust in the evidence being shared."

R&D manager, APAC



Figure 5

Fragmented evidence sources remain the leading barrier to effective access

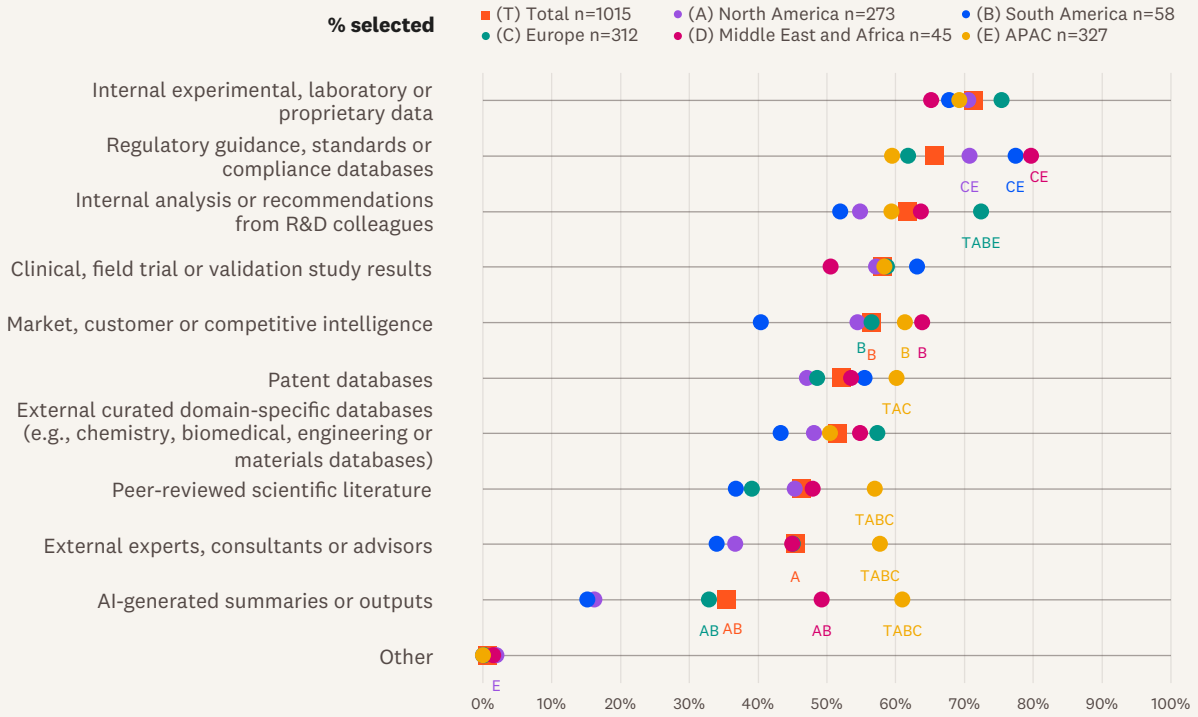


Significantly higher between groups (indicated by letter, e.g. T = Total)

Question: What are the biggest barriers your R&D teams face when accessing the external scientific and technical evidence they need? Select all that apply (includes 'no barriers'). Don't know, not applicable, prefer not to say and blank answers are excluded from the base (n=14, 1% of those asked).

Figure 6

R&D decisions draw on diverse evidence sources, with internal data playing a central role

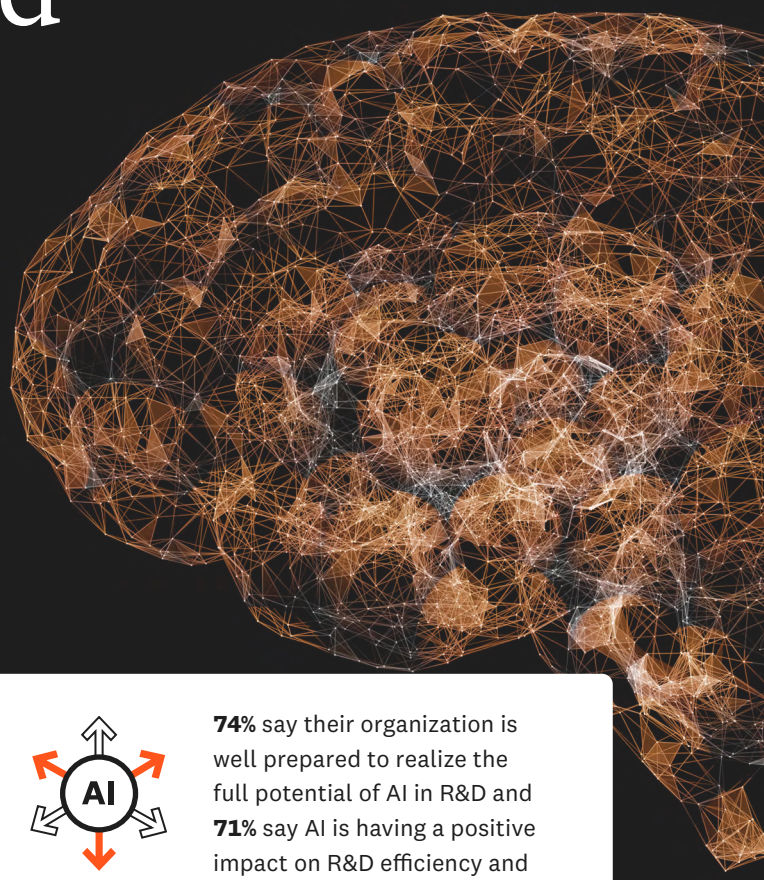


Significantly higher between groups (indicated by letter, e.g. T = Total)

Question: Which of the following sources of evidence are essential when making important R&D decisions? Select all that apply; sources seen as essential. Don't know, not applicable, prefer not to say and blank answers are excluded from the base (n=6, 1% of those asked).

Chapter 3:

AI in R&D — use, perception and building trust



According to a report by PwC, AI is no longer optional in R&D; it has become an essential tool in the corporate researcher's day-to-day work across all phases of the innovation life cycle.[8] Given the ongoing rapid pace of development in AI technology,[9] as well as the reported gap in access to AI tools,[10] it is important to understand how R&D organizations are using AI and where they encounter challenges. This study reveals that most R&D organizations are using or piloting AI today, but there are opportunities to improve the positive impact of AI tools.

Key findings:



86% say their organizations are using or piloting AI in R&D.



47% say AI is used regularly in the organization's R&D.



71% use AI for data analysis.



70% use AI for literature search.



70% use AI for competitive intelligence.

74% say their organization is well prepared to realize the full potential of AI in R&D and **71%** say AI is having a positive impact on R&D efficiency and effectiveness, but fewer, **63%**, say AI is effectively integrated into R&D workflows.



Compliance (55%), ease of use and integration (54%) and training for factual accuracy and safety (54%) would increase willingness to use AI.

"AI allows our teams to review scientific evidence more efficiently and identify important findings quickly while supporting faster data analysis and continued human oversight."

R&D leader, APAC

Use of AI in R&D today

Use of AI tools in the R&D process varies across geographies, industries and groups. Overall, 86% of respondents say their organizations are using or piloting AI in R&D. At the individual level, 84% say they personally use AI for at least one of the nine R&D activities surveyed; this compares with 67% of corporate researchers in 2025 who said that they had used AI tools for work (38% in 2024).[1]

Almost half (47%) of respondents say AI is used regularly in their organization's R&D. AI is being piloted at 40% of respondents' organizations, 11% say adoption is planned and only 3% say their organization has no plans to adopt AI.

> *"AI systems are not treated as external add-ons but as intrinsic components of our evidence pipelines harmonizing fragmented inputs into coherent insights that strengthen confidence in outcomes."*
>
> **R&D leader, APAC**

The regular use of AI is roughly even in Europe (50%), APAC (49%) and North America (45%), with lower reported usage in South America (26%, noting the small base size). And while respondents say AI is used regularly in R&D at their large (53%) and mid-sized (50%) organizations, at small ones regular use of AI is slower (34%). At these small organizations, 22% plan to adopt AI but have yet to start.

Looking at the numbers through an industry lens, chemicals and materials is furthest behind, with 37% saying their organization uses AI regularly for R&D and 48% piloting the technology.

> *"Being in the evaluation phase in pilot programs, they have not been adopted broadly enough to become part of our routine."*
>
> **R&D manager, APAC**

R&D leaders and managers are more likely than R&D researchers to say AI is used regularly (55% vs. 39%), while R&D researchers are more likely to say it is being piloted (46% vs. 33%). Reporting of combined use or piloting is similar for both groups.



How respondents are using AI

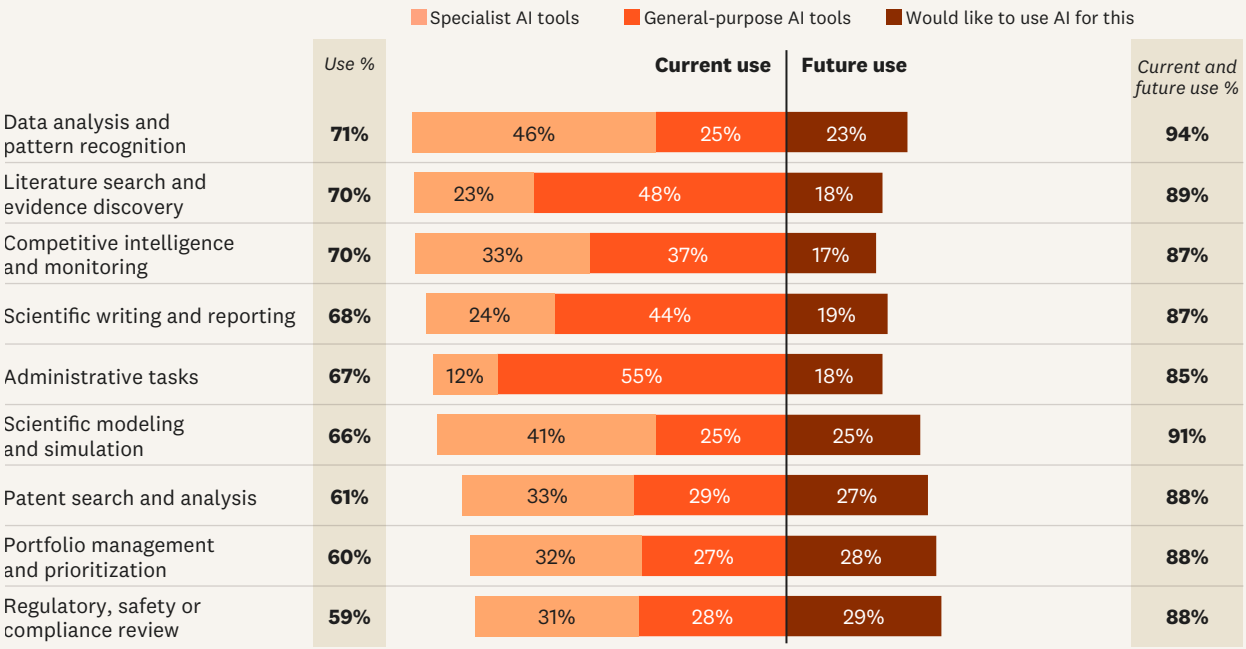
At least 59% of respondents report personal use of AI for each of the nine activities surveyed, reflecting the broad applicability of AI tools across R&D activities. Data analysis (71%), literature search (70%) and competitive intelligence (70%) are the most common uses.

When it comes to data analysis, 71% of respondents use AI for this activity, compared with 49% in 2025.[1] Large organizations (82%) use AI for data analysis more than small organizations (55%). You can explore the full results in the accompanying databook released with this report.

> *"We have identified specific research activities where AI improves speed and efficiency without replacing scientific judgment."*
>
> **R&D leader, APAC**

Figure 7

Current and future use of AI, by activity



Weighted 50-50 by role. Bases range from 903 to 976 depending on the activity.

Question: For which of the following activities do you personally use AI tools in your work related to R&D? Share using general-purpose or specialist AI tools (personal use, not organizational use). Don't know, not applicable, prefer not to say and blank answers are excluded from the base (n=45 to 118, up to 12% of those asked, depending on the activity). Activity labels are abbreviated; see Figure 8 for the full survey wording.

For information-gathering activities including literature search (70%, compared with 61% in 2025[1]) and competitive intelligence (70%), general-purpose AI tools are more commonly used (48% and 37% respectively, vs. 23% and 33% using specialist tools). In comparison, for patent search (61%), they are slightly more likely to use specialist tools (33% vs. 29%).

Over two-thirds of respondents (68%) use AI for scientific writing, most often general-purpose tools (44% compared to 24% using specialist tools). Respondents in pharma and biotech are most likely to use AI for this activity (79%) and those in aerospace, defense and automotive less so (53%).

> *"AI can summarize and explain that information in a clear way, helping us to make decisions without needing deep technical knowledge."*
>
> **R&D researcher, Europe**

Two-thirds (66%) of respondents say they use AI tools for modeling – most often specialist tools (41%, vs. 25% general-purpose). R&D leaders and managers are more likely than R&D researchers to use AI for modeling (72% vs. 60%).

For portfolio management (60%), specialist tools are marginally preferred over general-purpose ones, at 32% vs. 27%. R&D leaders and managers are more likely than R&D researchers to use AI for portfolio management (66% vs. 53%).

Finally, 59% of respondents use AI for regulatory review, with those in APAC most likely to cite this activity (70%) and those in North America least likely (45%).



AI perceptions

Respondents shared their perceptions of AI through three questions: whether their organization is prepared to realize AI's potential, whether AI is having a positive impact on R&D and whether the technology is effectively integrated.

> *"AI has become part of the way we work every day, not just an add on."*
>
> **R&D researcher, Europe**

Three-quarters (74%) of respondents globally say their organization is well prepared to realize the full potential of AI in R&D, 71% that AI is having a positive impact on R&D efficiency and effectiveness, and 63% that AI is effectively integrated into R&D workflows.

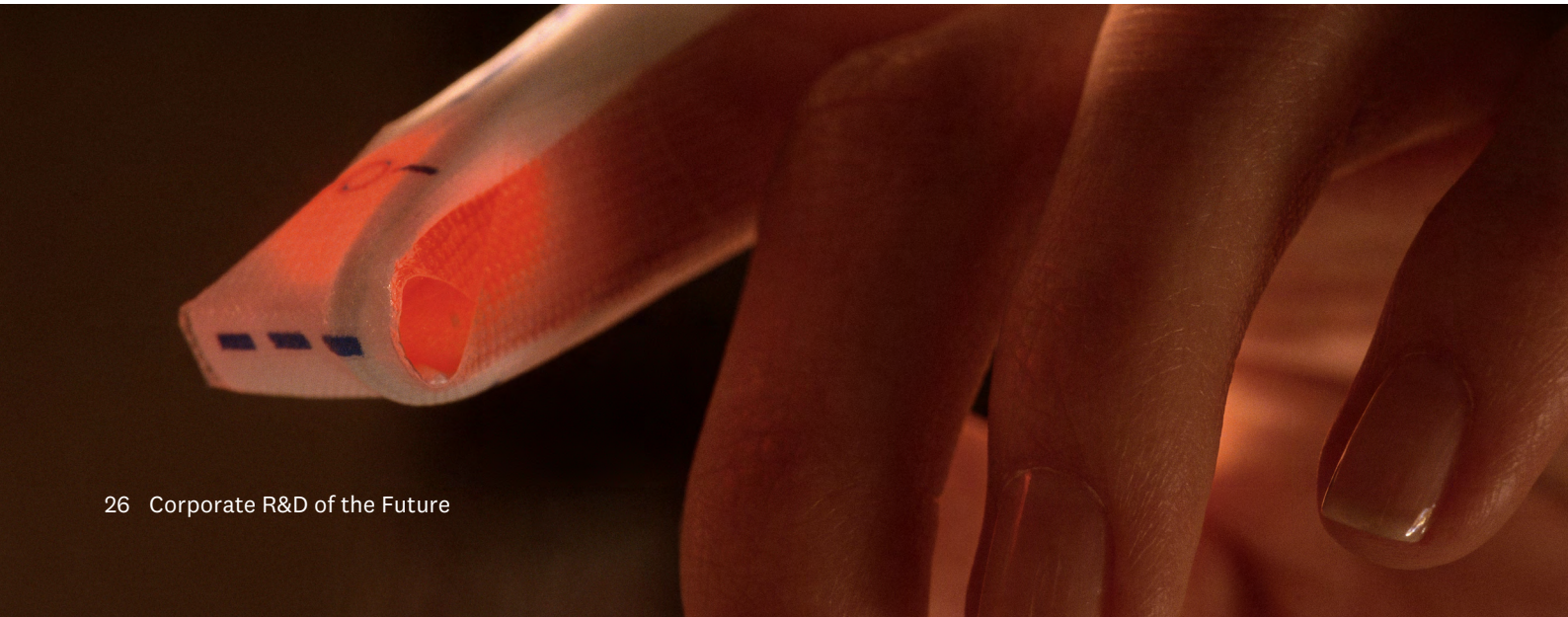
> *"Teams no longer spend days or weeks manually stitching spreadsheets together, fixing formatting errors or debating which dataset is accurate. Now the AI eliminates those manual bottlenecks and human errors and making the decision process fast and reliable."*
>
> **R&D manager, APAC**

Across the board, respondents in APAC are the most positive (with agreement at 81% realizing AI's potential, 83% that it is having a positive impact and 75% that AI is effectively integrated). Those in North America are less likely to see a positive impact (60%) or the integration of AI tools (54%). These relatively low numbers are driven by R&D researchers in the region, of whom 47% see a positive impact and 39% integration. In comparison, North American R&D leaders and managers are more likely to see positive impact (78%) and integration (74%), in line with those in Europe (at 78% and 69%).

Large organizations are more likely to see a positive impact (79%) and integration (68% vs. 56% at small organizations). Respondents in chemicals and materials are least likely to agree that AI tools are integrated (55%).

The clearest difference is by role: R&D leaders and managers are more positive about AI in general compared to R&D researchers, being more likely to say AI is integrated (72% vs 54%), having a positive impact (80% vs 63%) and that their organization is well prepared (80% vs 68%).

The results reflect previous findings that corporate researchers are optimistic about the potential impact of AI: in the 2025 corporate survey, 76% of respondents expected AI tools to save them time in the next two to three years and almost half (49%) said they thought AI would accelerate the discovery of new knowledge.



Willingness and trust

Respondents evaluate several factors that would increase their willingness to use AI (note: there was no option to choose "none of the above," so while responses reflect proportions, they are likely to be inflated).

Compliance with laws and regulations would increase willingness for 55% of respondents, and up to 64% in Europe. Following this are ease of use and integration with workflows (54%), training for factual accuracy and safety (54%), guaranteed confidentiality (53%) and AI being trained on high-quality, peer-reviewed content (51%, up to 60% in Europe).

> *"Confidentiality is the number one concern across the board, in order to use AI we have to know if we can use the client's data in AI tools which is not always the right approach [if] the client is not ok with that."*
>
> **R&D manager, North America**

Similar problems, different verdicts

Though R&D leaders and managers and R&D researchers report data problems at similar rates, 56% of researchers expect scaling AI to be a significant challenge, compared with only 16% of C-suite respondents and 42% of team managers.

R&D leaders and managers are much more positive about how their organizations cope, by 14 to 20 percentage points on confidence, access, connected data, data synthesis, knowledge sharing and AI integration and impact.

The divide holds after allowing for organization size, industry, region and connection to R&D. The gap is clearest in North America (significant on seven of nine measures), partial in Europe (five of nine) and small in APAC (one of nine).

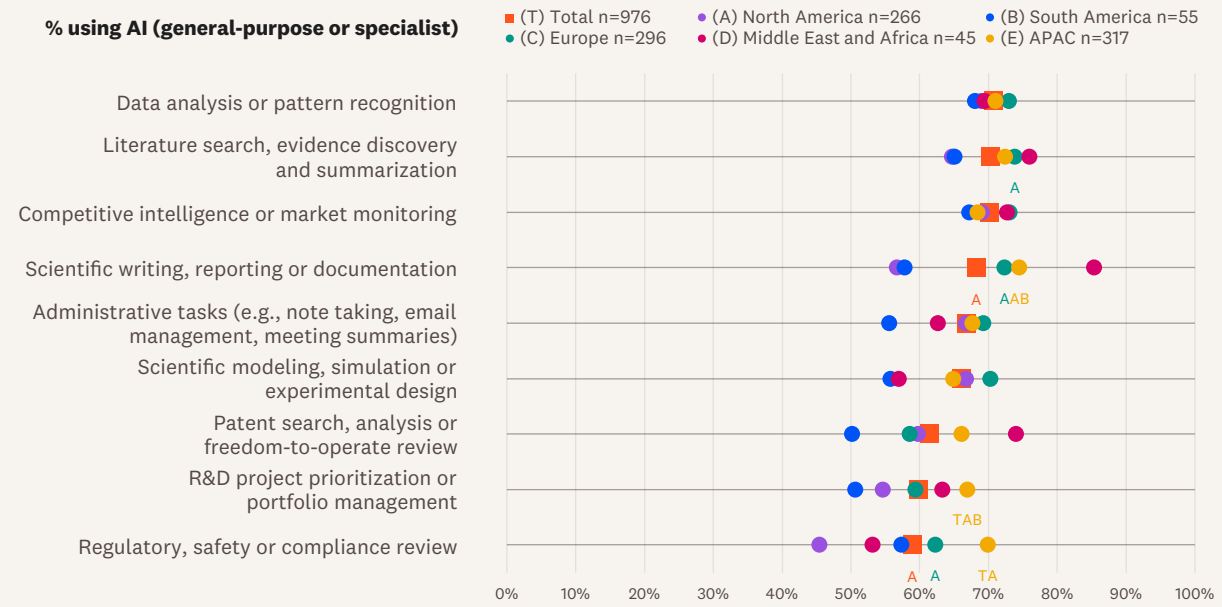
Views by seniority level (% agree or strongly agree)

	C-suite	Senior leader	Team manager	Individual contributor
Confident in evidence quality	89%	84%	84%	68%
Data easy to synthesize	86%	75%	71%	54%
Internal and external data connected	80%	82%	80%	61%
AI integrated into workflows	65%	75%	70%	54%
Scaling AI a significant challenge	16%	41%	42%	56%
Base	56	345	358	262

Bases: C-suite n=56, senior leaders n=345, team managers n=358, individual contributors n=262. Don't know answers are excluded, so bases vary slightly by statement. The 17 respondents who preferred not to give their seniority are not shown.

Figure 8

Personal AI use spans a wide range of R&D activities



Significantly higher between groups (indicated by letter, e.g. T = Total)

Bases range from 903 to 976 depending on the activity.

Question: For which of the following activities do you personally use AI tools in your work related to R&D? Share using general-purpose or specialist AI tools (personal use, not organizational use). Don't know, not applicable, prefer not to say and blank answers are excluded from the base (n=45 to 118, up to 12% of those asked, depending on the activity).

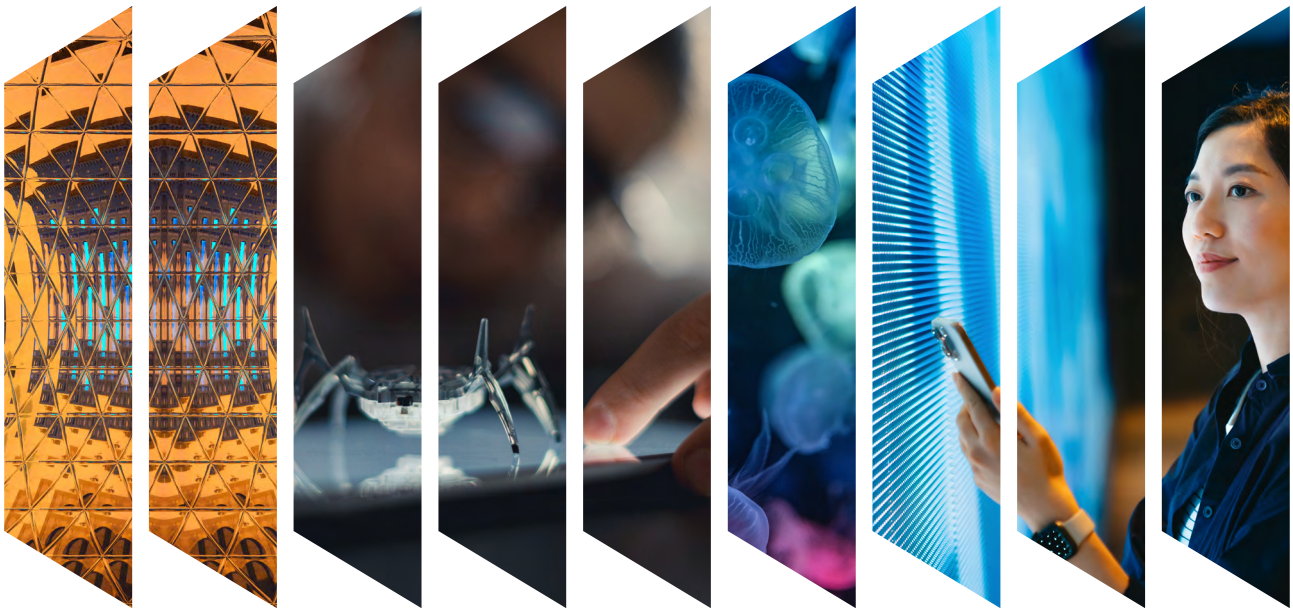
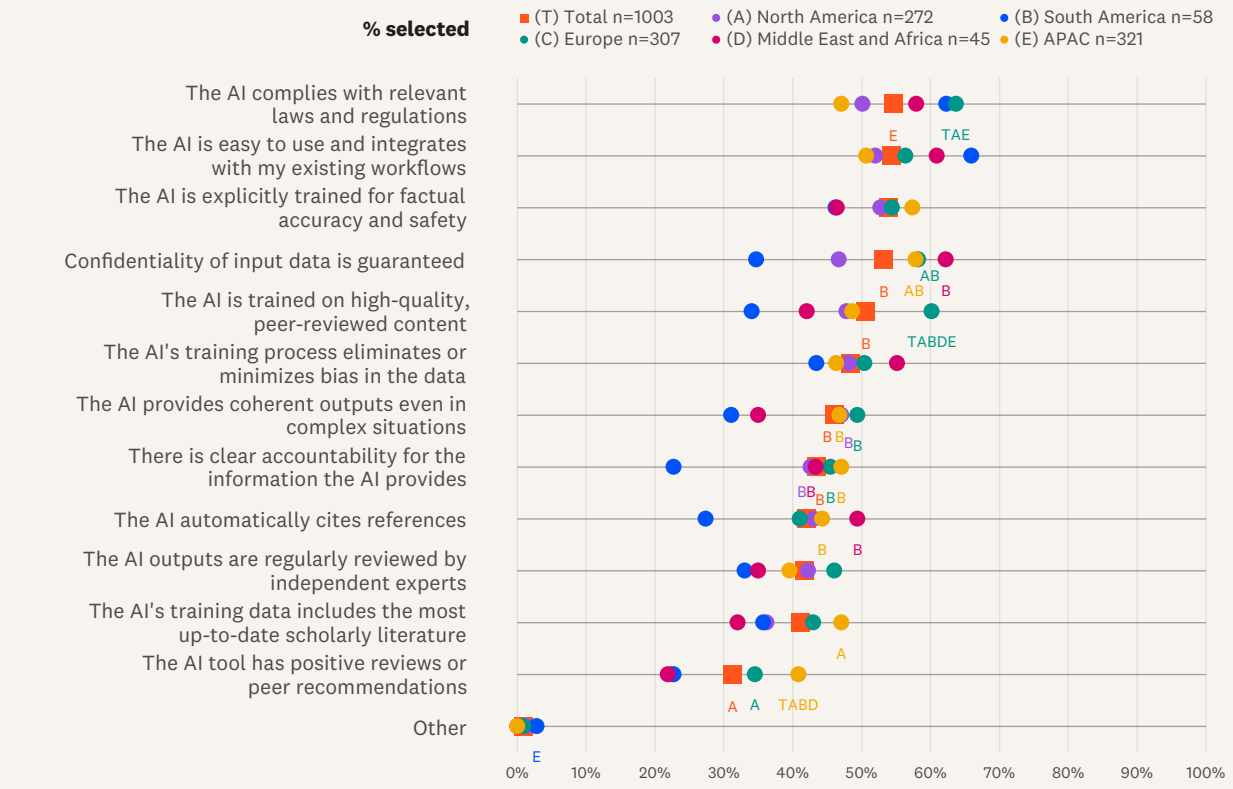


Figure 9

Usability, compliance and accuracy are key to wider AI use



Significantly higher between groups (indicated by letter, e.g. T = Total)

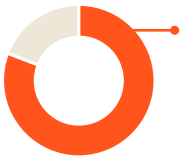
Question: Which of the following factors would increase your willingness to use an AI tool for work purposes? Select all that apply. There was no 'none of the above' option, so shares are likely inflated. Don't know, not applicable, prefer not to say and blank answers are excluded from the base (n=18, 2% of those asked).



Chapter 4:

The future of corporate R&D

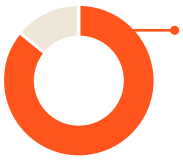
Key findings:



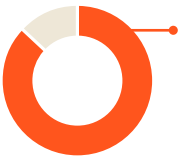
81%
say that AI will fundamentally transform how R&D decisions are made.



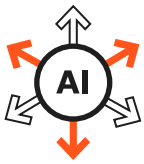
48%
say that implementing AI at scale will be a significant challenge.



86%
expect organizations that combine AI with trusted, high-quality evidence will outperform those that do not.

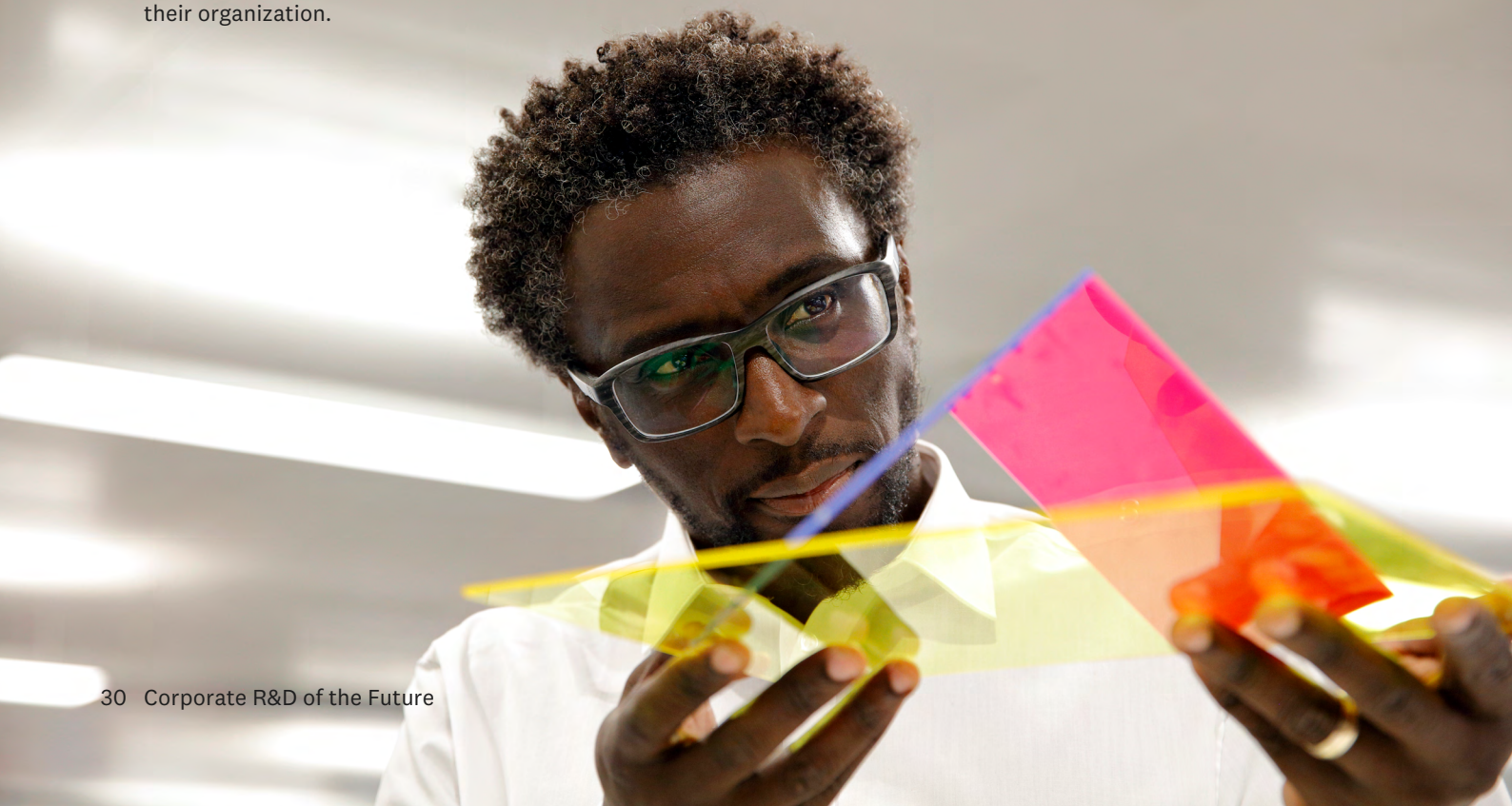


87%
predict that leading R&D organizations will be able to make faster decisions without compromising evidence quality.



The top three priorities for the coming five years are building AI skills across the organization (**65%**), turning data and evidence into actionable insights (**62%**) and tailoring AI to organizational knowledge and workflows (**59%**).

Most respondents' organizations are already using or piloting AI, and most believe its impact on decision-making will be transformative in the near future. Looking ahead, the results suggest that tomorrow's R&D organizations are likely to rely even more on AI than they do today, with trusted tools supported by skills and workflows tailored to their organization.



AI outlook

Four in five (81%) respondents say that AI will fundamentally transform how R&D decisions are made. But almost half of respondents (48%) believe that implementing AI at scale will be a significant challenge.

> *"AI is a double-edged sword… it has a risk of using the wrong information, and the AI hallucination can never be eliminated."*
>
> **R&D professional, APAC**

Scaling is seen as a challenge more in North America (56%) and Europe (50%) than APAC (34%). Small organizations are less likely to see scaling as a challenge (42%). Possible explanations are that fewer of them have started using AI regularly (34%) and that scaling is potentially easier in a smaller organization. R&D researchers are more likely than R&D leaders and managers to agree that scaling is a challenge (56% vs. 40%).

> *"I don't think that companies will have the ability or willingness to truly integrate AI into R&D decision-making within the next five years; most of the time, R&D personnel will be using their own private AI to process data."*
>
> **R&D manager, APAC**

Respondents at mid-sized organizations are the most likely to expect transformation (88%, compared to 76% at large organizations). Chemicals and materials is the least likely industry to expect transformation (73%). R&D leaders and managers are more likely to expect AI to transform decisions (84% vs 78% R&D researchers).

Connected data and trusted evidence

About nine in ten respondents agree that access to trusted, high-quality evidence (92%) and integrating data across systems (91%) will become increasingly important, and that connecting internal and external data will bring a competitive advantage (90%). More than four in five (84%) expect the next wave of breakthroughs to come from connecting previously disconnected data, ideas and disciplines, with agreement ranging from 91% in APAC to 77% in Europe.

Most respondents agree that organizations combining AI with trusted, high-quality evidence will outperform those that do not (86%). Separately, 87% agree that leading R&D organizations will be able to make faster decisions without compromising evidence quality (ranging from 94% in small organizations to 81% in large ones).

Priorities

Respondents identify priorities for the next five years, highlighting the parallel importance of AI infrastructure and the availability and integration of robust evidence.

Top priorities:

- Building AI skills across the organization (65%)
- Turning data and evidence into actionable insights (62%)
- Tailoring AI to organizational knowledge and workflows (59%)
- Building trust in AI outputs (52%)
- Knowledge capture and reuse (49%)
- Integrating external evidence with internal data (47%)
- Making external evidence easier to find and use (46%)

Respondents in Europe and APAC are the most likely to prioritize building trust in AI outputs (59% and 60%), and those in Europe the most likely to prioritize making external evidence easier to find (55%) and knowledge capture (56%). Those in North America are least likely to prioritize trust in AI outputs (37%) and making external evidence easier to find (37%).

Those in pharma and biotech R&D are the most likely to prioritize making external evidence easier to find (55%), while those in aerospace, defense and automotive are least likely to prioritize trust in AI outputs (42%).

R&D researchers are more likely than R&D leaders and managers to prioritize knowledge capture and reuse (53% vs. 45%).

"AI has significant potential to improve R&D, but its greatest value will come from helping researchers generate, access and interpret high-quality evidence more efficiently, rather than replacing scientific judgment. Reliable experimental data, reproducibility and domain expertise will remain essential for decision-making."

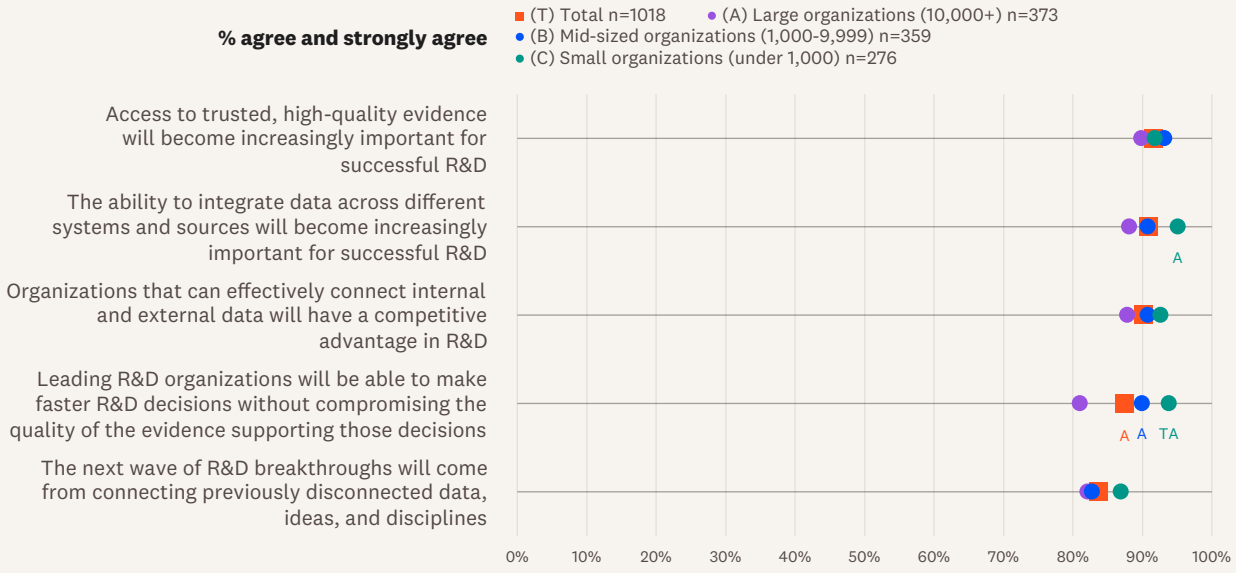
R&D researcher, APAC

Smaller organizations: high expectations, slower start

Respondents in small organizations have high expectations: 94% expect leading R&D organizations to make faster decisions without compromising evidence quality. Yet only 34% say their organization uses AI regularly (around half elsewhere) and 22% plan to adopt it but have not started. This group is also more likely to decide before all the evidence is in (64%) and to struggle with fragmented systems (45%) and scattered sources (50%). Over three-quarters (77%) of R&D researchers in small organizations say decisions are made before all the evidence is in, compared to 50% in other organizations. These differences hold after allowing for role, region and industry.

Figure 10

Connected data and trusted evidence are seen as foundations of future R&D



Significantly higher between groups (indicated by letter, e.g. T = Total)

Bases range from 1,011 to 1,018 by statement.

Question: Weighted 50-50 by role. Thinking about corporate R&D over the next five years, to what extent do you agree or disagree with each of the following statements? Agree or strongly agree. Don't know, not applicable, prefer not to say and blank answers are excluded from the base (n=3 to 10, up to 1% of those asked). The statement on faster decisions combines two ideas

Three regional profiles, three different perspectives

Looking at the results regionally, three profiles emerge: R&D leaders and managers in APAC are confident in AI, face fewer challenges and are most likely to perceive its benefits. On the opposite side are those in North America, who are the most critical of the evidence they use and the most likely to see scaling AI as a significant challenge. Respondents in Europe form the final group, which takes the middle ground on most measures but places the most weight on regulatory compliance.

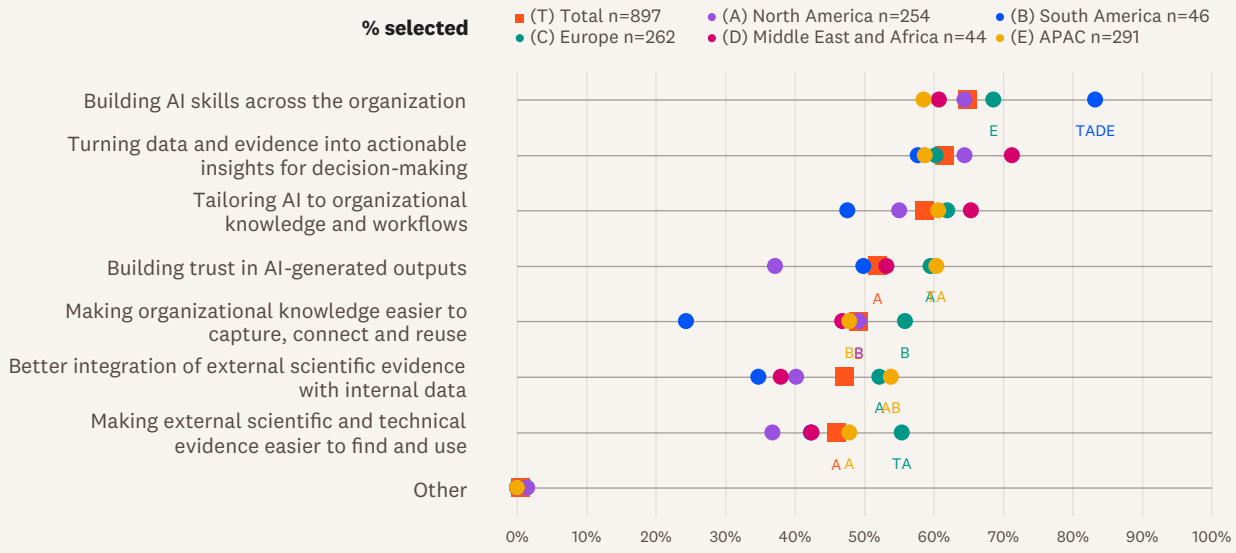
The figures are compared among R&D leaders and managers, so that differences in role mix between regions do not drive the results.

R&D leaders and managers	North America	Europe	APAC
Nothing reduces confidence in evidence	3%	20%	35%
Evidence not robust enough (reason for doubt)	42%	32%	23%
Scaling AI a significant challenge	52%	43%	28%
AI outputs essential evidence	30%	36%	61%
Want AI that complies with regulations	43%	62%	47%
Base	183	234	275

Bases are shown in the table (R&D leaders and managers). Don't know answers are excluded, so bases vary slightly by question. China is included in APAC; the APAC pattern holds without it. South America (n=34) and the Middle East & Africa (n=33) are too small to include. This keeps the n for the two regions not shown.

Figure 11

AI skills, actionable insights and tailored tools lead future priorities



Significantly higher between groups (indicated by letter, e.g. T = Total)

Question: Based on your experience, which of the following areas should your organization prioritize to improve R&D decision-making over the next five years? Select all that apply: shows interest, not a forced ranking. Don't know, not applicable, prefer not to say and blank answers are excluded from the base (n=124, 12% of those asked).



Conclusion



Corporate R&D organizations of the future will continue to work under pressure in a fast-paced environment, with expectations of tech-powered efficiency leading to more confident decisions in less time. AI tools are expected to play a key role: respondents already use them across a range of R&D activities, and they expect AI to fundamentally transform how R&D decisions are made.

Although most respondents share that they are confident in the data used in R&D decision-making, over half say that their organization has, at some point, made an important R&D decision on evidence later found to be inaccurate, incomplete or outdated. This highlights a potential area of risk for corporate R&D and underlines the importance of access to high-quality data sources.

In general, most respondents (78%) say their teams can access third-party evidence they need, yet only 36% report no barriers at all and 42% say evidence is scattered across too many sources. Moreover, over half of those whose teams do have access still report at least one barrier, and almost a third say it's unclear what evidence exists.

The findings also reveal a gap in perception between R&D leaders and managers and R&D researchers. Although both groups report fragmentation, leaders and managers are more positive about the solutions their organizations have.

Organization size is also linked to differences in several areas. For example, almost all respondents at small organizations expect that leading R&D organizations can make faster decisions without compromising evidence quality, yet this group is the least likely to use AI regularly.

Finally, three regional profiles emerge from the data: looking at responses from R&D leaders and managers, those in North America are most critical about the evidence they use, those in Europe place the most weight on regulatory compliance and those in APAC are most confident in their data, including AI outputs in their list of essential evidence.

Recommendations

From respondents' answers and comments, several potential action points emerge.



Build AI skills

65% of respondents say building AI skills across the organization is a priority for the next five years.

"Provide better training so R&D teams can use data and AI tools confidently."

R&D researcher, North America

"Building AI skills alongside existing technical experience could help employees make better use of research and testing data."

R&D leader, North America



Turn evidence into insights and capture knowledge

Respondents prioritize turning data and evidence into actionable insights (62%) and knowledge capture and reuse (49%), both of which will require support from internal processes.

"Integrating AI into data analysis makes it easier to turn complex engineering and clinical evidence into actionable development insights."

R&D leader, North America

"Establishing clear standards for validating AI-generated insights while using AI to identify meaningful relationships across historical experiments and research findings."

R&D researcher, North America



Tailor AI to organizational knowledge and workflows

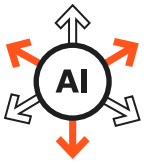
Tailoring AI to organizational knowledge and workflows (59%) and integrating external evidence with internal data (47%) are key priorities for the next five years.

"I believe the single change that matters most is creating a unified ecosystem where fragmented data streams converge into one coherent narrative for decision making."

R&D researcher, APAC

"I would focus on improving how data from different R&D systems is connected so teams can get a complete view before making important decisions."

R&D manager, APAC



Build trust in AI outputs

Over half (52%) prioritize building trust in AI outputs and 46% making external evidence easier to find and use.

"If AI would take away administrative work such as notebook keeping and reporting, our research output can see a 10-20% rise."

R&D researcher, North America

"We need to trust that our [interaction] with AI remains perfectly anonymous, and responses from AI are trustworthy (results should be flagged with a confidence score)."

R&D manager, Europe

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Appendix

Methodology

Elsevier conducted a large-scale quantitative survey of R&D professionals, including leaders, managers and researchers, across 55 countries. The research was conducted from August to October 2026.

Respondents were required to work in industrial, corporate or commercial organizations with a dedicated R&D function. Eligible participants had roles in which R&D activities, data, evidence and decision-making were either central to their responsibilities or a regular part of their work. Academic, government and other non-corporate organizations, as well as respondents with little or no connection to R&D, were excluded.

The Scopus author database was a source for participant recruitment, as was a panel provider, Jasper Colin, which provides R&D professionals. Participants were recruited using an email invitation containing a link to the online survey in English. The 1,038 survey responses include representation across:

- Regions
- Industry
- Role
- Organization size

Defining R&D leaders, managers and researchers — We defined roles using each respondent's answer to the question "Which of the following best describes your current seniority level?", with four options: C-suite or board-level executive (e.g. CEO, CSO, CTO, CPO); senior leader (VP, Director or equivalent); team manager or lead; and individual contributor or practitioner. Job titles were not collected, and the titles in the examples were shown to help respondents choose. In this report, R&D leaders and managers combines the first three groups (C-suite n=56, senior leaders n=345 and team managers n=358; n=759 in total, 73% of respondents), and R&D researchers are the individual contributors (n=262, 25%). The 17 respondents who preferred not to give their seniority are not included in the weighted results, because their role is needed to apply the weights. Influence over R&D decisions was asked separately and is not used to define the groups.

Throughout this report we show statistical differences between groups at the 95% confidence level. Results at the Total level have an error margin of approximately ± 3.5%, which assumes maximum variance in the response.

The Total is weighted by role so that R&D leaders and managers (C-suite, senior leaders and team managers, in their sample proportions) account for 50% and R&D researchers (individual contributors) for 50%. As leaders and managers make up 73% of respondents, this gives researchers an equal voice. The same weights apply in every segment, so each segment reflects its own mix of roles.

Base sizes shown in the report are unweighted. Tests use effective bases, which allow for the weights, and are conducted only when both comparison groups have at least 30.

Despite the weighting, the study is not without limitations due to self-selection, non-response biases and the lower response rates typical for online surveys of this nature (~2%). Therefore, there will be some non-sampling error associated with this study, as we cannot be sure responses accurately represent the views of the population for a given country or region. Significant differences in this report should be interpreted within this context, and while showing notable differences between groups, results are not necessarily generalizable to a whole country. Given the non-probability sampling methods, these tests are indicative.

Demographics and respondent breakdown

Countries by region

Respondents work in 55 countries. Regions are listed from largest to smallest, and countries within each region from the most respondents to the fewest (ties in alphabetical order). South America (n=59) and Middle East & Africa (n=45) are small bases.

APAC	**334**
India	97
China	83
Australia	50
Japan	49
Singapore	24
New Zealand	21
Taiwan	3
Indonesia	2
Philippines	1
South Korea	1
Thailand	1
Uzbekistan	1
Vietnam	1
Europe	**323**
United Kingdom	78
Germany	67
Italy	55
France	49
Spain	25
Netherlands	8
Switzerland	7
Belgium	6
Denmark	6
Austria	4
Norway	4
Sweden	4
Hungary	2
Croatia	1
Czech Republic	1
Luxembourg	1
Portugal	1
Romania	1
Russia	1
Serbia	1
Slovakia	1
North America	**277**
United States of America	255
Canada	21
Costa Rica	1
South America	**59**
Brazil	39
Colombia	6
Argentina	5
Mexico	5
Peru	2
Ecuador	1
Paraguay	1
Middle East & Africa	**45**
Saudi Arabia	12
Egypt	8
Qatar	7
United Arab Emirates	7
Bahrain	3
Eswatini	2
Kuwait	2
Ghana	1
Israel	1
Morocco	1
South Africa	1
Grand total	**1,038**

Respondents by industry

	n	%
Pharma and biotech	201	19%
Chemicals and materials	187	18%
Energy and resources	173	17%
Electronics and semiconductors	162	16%
Aerospace, defense and automotive	160	15%
MedTech	147	14%
Other	8	1%
Total	**1,038**	**100%**

Respondents by organization size

	n	%
Large (10,000 or more employees)	380	37%
Mid-sized (1,000 to 9,999 employees)	364	35%
Small (fewer than 1,000 employees)	277	27%
Don't know / prefer not to say	17	2%
Total	**1,038**	**100%**

Respondents by role

R&D leaders and managers are the C-suite, senior leaders and team managers. R&D researchers are individual contributors.

	n	%
R&D leaders and managers	**759**	**73%**
C-suite or board-level executive	56	5%
Senior leader (VP, Director or equivalent)	345	33%
Team manager or lead	358	34%
R&D researchers (individual contributors)	**262**	**25%**
Prefer not to say	17	2%
Total	**1,038**	**100%**

Percentages are of all respondents (n=1,038) and may not sum to 100% due to rounding. The role total adds the three leader and manager levels to the researchers and those who preferred not to say.

Acknowledgments

Our sincere thanks to the 1,038 R&D researchers and leaders who completed the survey. Your voices shaped this report.

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CS-3265
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