



Accelerating success in health industries

**5 essential actions from the PwC
Global Compliance Survey 2025**

PwC's Global Compliance Survey 2025



Introduction

Companies in the health industries (HI), including those in the health services, pharmaceutical and medical technology (medtech) sectors, understand that compliance with quality standards, laws and regulations is fundamental to their purpose—protecting what matters. Delivering trust in the medicine, devices and services they provide is central to the wellbeing of patients and the health of the broader societal and economic ecosystems they live in.

Maintaining trust requires companies to carefully navigate a complex regulatory landscape at each stage of the development, sales, and service lifecycle, and deliver innovation at the pace expected. This typically involves an increasingly complex value chain involving manufacturers, sales channels, healthcare professionals (HCPs), third party organisations and other frontline delivery organisations within complex and varied healthcare systems. Nine out of ten respondents in our survey reported an increase in the complexity of their organisation's compliance requirements over the past three years, with impacts

on their performance and ability to deliver strategic initiatives, like digital transformation. This presents an opportunity for HI compliance leaders to recalibrate and refocus so that they continue to give their organisations the confidence to navigate complexity, move faster and protect what matters.

Five actions that health compliance leaders can take now

- 01 | Recheck your risk blind spots
- 02 | Embrace compliance as a pioneer
- 03 | Share in the digital delights
- 04 | Embrace compliance as 'competitive confidence'
- 05 | Grow the compliance professional of the future

Recheck your risk blind spots

Check that enterprise risk management and first line controls have been updated to address the latest compliance threats, laws and regulations—and they are aligned.

The compliance risk landscape is shifting in response to the introduction of new laws and regulations with international reach and unprecedented macro forces and crises in recent years. PwC US's [Next in Pharma 2025](#) publication explores some of these changes for pharmaceutical companies. It is a good time to relook at the impact of these changes and align the response to compliance risks across the organisation; for example, in updated compliance risk assessments and third-party monitoring. Our survey found that the following factors were top of mind for HI respondents when anticipating what will impact compliance activities over the next three years:

- Cyber-attacks and data breaches (55%)—this may require further alignment with CISO functions
- Increasing regulation and enforcement by agencies (54%)—this can drive a business case for optimised and automated tools to capture, assess and implement changes and remedial actions. The level of

regulation and enforcement will vary between countries, not least due to changes in the geopolitical landscape. Such differences can also create additional complexity for companies that operate globally across jurisdictions, particularly in implementing global policies

- Availability and use of GenAI/ AI (50%)—this makes it important to consider whether compliance risks are embedded in a responsible AI framework
- Changes in how HCPs, organisations and patients are engaged (44%), for example, changes in the commercialisation of medicines—this may mean that policies, training and guidance for third-party interactions require a refresh
- Disruption to healthcare delivery models (40%), such as 'healthcare@ home' and direct-to-consumer programmes—this changes the risk profile in areas like sales compliance and data privacy and protection

01

Embrace compliance as a pioneer

Set a bold strategy for how compliance and similar functions can harness their influence and lead transformation.

Our study highlighted the rise of the ‘compliance pioneers,’ who are successfully navigating the complex quality and regulatory landscape, embracing transformation and having strategic influence in the company. For HI, there is a sense of urgency—and opportunity—to accelerate transformation and pioneer new approaches to compliance. We found that only 12% of HI respondents consider themselves to be leading in compliance, yet 36% aim to be leading within three years. Senior management sponsorship, training and communication and

‘coordination between different teams’ are seen as the most important factors in this transformation. Outlining these in a bold mid- and long-term strategy can help obtain buy-in and lay out the steps and investment needed to realise it. PwC’s [The Future of Compliance in the Pharmaceutical Industry](#) publication explores some of these topics further.

02

Only
12%
of HI respondents consider themselves to be leading in compliance

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Share in the digital delights

Set clear targets for how compliance can capture the benefits from a rapid evolution in technology and data.

03

HI companies, particularly those in the pharmaceutical sector, have experienced significant shifts in the use of technology and data, spurred by cost and competitive pressures, the pandemic (which drove changes to R&D and patient interaction) and latterly, the rise of AI. There has also been a push in the industry to digitise information and connect the dots between data silos, which is a particular challenge for the industry.

Going forward, HI respondents to our survey said that they will continue to invest in technology and data in the following areas:

- Data & predictive analytics (57%)—e.g. real-time monitoring and reporting of expenses and transfers of value to HCPs
- Training (40%)—e.g. cross-border medical awareness campaigns for HCPs (avoiding challenges associated with traditional training methods)
- Risk assessment (40%)—e.g. screening/monitoring third parties and compliance risk assessments

This represents a good opportunity to pilot new approaches and build innovation into compliance plans, including how data can be accessed and used differently. It often requires a ‘leap of faith’ to try new techniques, but companies are investing more and seeing success. HI respondents report various benefits from integrating technology into compliance activities, including better visibility of risks (70%), faster identification and response to compliance issues (51%) and an increase in productivity, efficiency and cost savings (45%). We have also seen companies look at connecting data across different risk domains to generate better insights—leveraging AI in some cases—which can support more intelligent and faster decisions around the risks they want to take.



70%

consider the introduction of AI to represent an overall positive net benefit

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Embrace compliance as ‘competitive confidence’

Look for opportunities to embed agile compliance early in service and product development and strategic initiatives to accelerate delivery.

04

The door is open for ‘the strategic compliance officer’. Our survey found that 50% of HI respondents thought compliance leaders had significant influence on strategic business decisions and changes. Seven in 10, for example, expect compliance involvement in strategic digital transformation initiatives over the next three years, which is an imperative for the industry. Compliance professionals understand the risks and rules associated with such changes and can help the business address them early and build controls into new processes.

Our survey found that those classed as compliance pioneers are involved earlier in product and service development than others—this might include a QA role and consulting on the requirements and risks those leading the development need to factor in. This is particularly important in HI R&D processes, where the trust of regulators, HCPs and patients is critical to moving forward and securing a competitive advantage earlier. This is also important for the adoption of technology and new data techniques in traditional HI processes (e.g. HCP engagement, environmental, financial, regulatory and transparency reporting), particularly the rapid uptake of AI use of real world/big data. Where such processes are transformed with automation and AI, companies can see other benefits, such as lower rates of manual errors and a reduction in effort in reconciling and auditing data (and fixing errors). The good news is that 70% of HI respondents consider the introduction of AI to represent an overall positive net benefit. This requires, however, a change in mindset for some in compliance to embrace and capture these benefits—not least the compliance officers that lead the way.

Grow the compliance professional of the future

Compare your compliance skills and capabilities today against those expected tomorrow—and build a connected talent strategy that can keep pace.

Changes in the HI ecosystem and its compliance risk landscape have an inevitable impact on the talent compliance needs to develop to address them. Our survey indicates changes in technology and data use will significantly influence the compliance talent strategy in the next three years (63% agree). HI respondents cite skills in technology (24%) and data management and analytics (21%) as current gaps that could impact their ability to provide effective compliance. In addition to technology skills, there is also an increasing emphasis placed on critical-thinking,

business acumen and communication skills that underpin the impact compliance professionals can make with their business stakeholders. This is particularly important for companies in the pharmaceutical and health services sectors who expect compliance to be able to partner with first line business functions as they engage external stakeholders in a way they understand (e.g. HCPs/heathcare organisations (HCOs), and patient organisations). Compliance can also support engagement with public and commercial institutions (e.g. JVs, partners, distributors) and regulators and enforcement agencies. Similarly, collaboration with internal audit in the third line can help amplify capabilities for the organisation overall and prevent duplication, for example, sharing data, tools, approaches and talent to move quicker up the maturity scale and address risks together.

To address these gaps, companies are having to look beyond the traditional legal and compliance talent pools and approaches to attract,



hire and retain the right professionals with these skills. This includes talent sharing across the organisation (e.g. with internal audit or business teams), hiring technical roles like data scientists, and creating communities of interest inside and outside the organisation to bolster learning.

05

63%

say changes in technology and data use will significantly influence the compliance talent strategy in the next three years

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Further reading

Read the full PwC Global Compliance Survey 2025 [here](#). To learn more about related topics, please see:

- [AI-powered healthcare: Shaping the future of population health](#)
- [Next in Health](#) podcast series
- [Next in health services 2025: Secure your future with resilience and reinvention](#)
- [Next in Pharma 2025](#)
- [Productivity or pioneering? Your industry’s GenAI adoption play](#)
- [The future of care](#)
- [The Future of Compliance in the Pharmaceutical Industry](#)
- [2025 Outlook: Global M&A Trends in Health Industries](#)

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