

2025 H2

Pharmaceutical & Healthcare Market Report

Key insights on consumer, advertising, and media trends, with data gathered from leading marketing industry professionals.

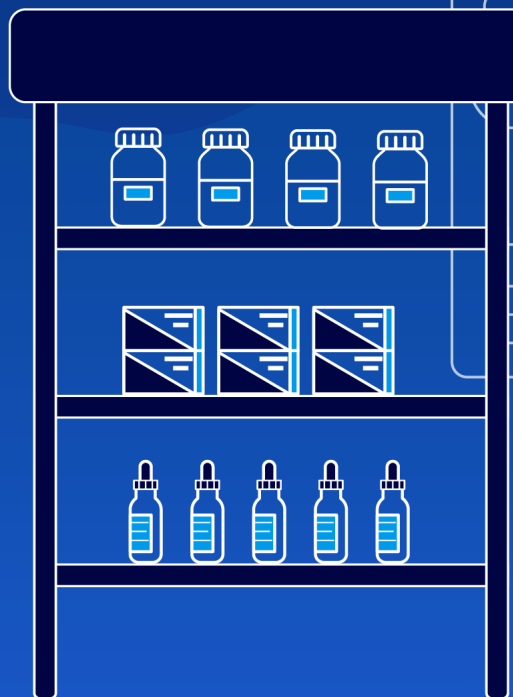


Table of contents

Introduction	3
Insight 1: Ad spend signals strong confidence for pharma/health	4
Insight 2: Strategic priorities: Measurement and performance	5
Insight 3: Pharma/health marketers double down on Gen AI.....	6
Insight 4: Gen AI moves from exploration to execution.....	7
Insight 5: Personalization and precision take priority as CTV matures.....	9
Conclusion and Methodology	11



Introduction

Thank you for reading Mediaocean's 2025 H2 Pharmaceutical (Pharma) and Healthcare (Health) Market Report. These insights reflect input from marketing professionals, focused on key consumer and technology trends along with projected media investments.

We primarily surveyed marketers and agencies, but also included perspectives from media companies, measurement firms, tech platforms, and other industry cohorts. This is the fourth in our series of bi-annual vertical market reports reflecting over 385 pharma/health respondents, with the first published in January 2024. The most recent data points used in this research are based on surveys conducted in May 2025.



Ad spend trends signal strong confidence for pharma/health

Pharmaceutical and healthcare marketers are entering the second half of 2025 with one of the most positive investment outlooks across all surveyed verticals. Spending is expected to increase in 8 out of 10 media channels, pointing to a sector that's leaning into omnichannel growth and audience engagement with renewed conviction.

Social Platforms (88%) and Digital Display/Video (88%) lead all channels, with the latter seeing a 44% jump in planned spend from H1—underscoring the industry's growing reliance on digital video for outreach to both consumers and healthcare providers (HCPs). Search (63%) remains a staple, though growth has slowed slightly, up just 2%, signaling stability amid broader Gen AI disruption across discovery channels.

Retail Media (50%) and OOH/DOOH (57%) saw meaningful gains in expected investment—rising 56% and 78%, respectively. These shifts reflect a broader strategy to meet patients in contextually relevant moments, both online and in the physical world.

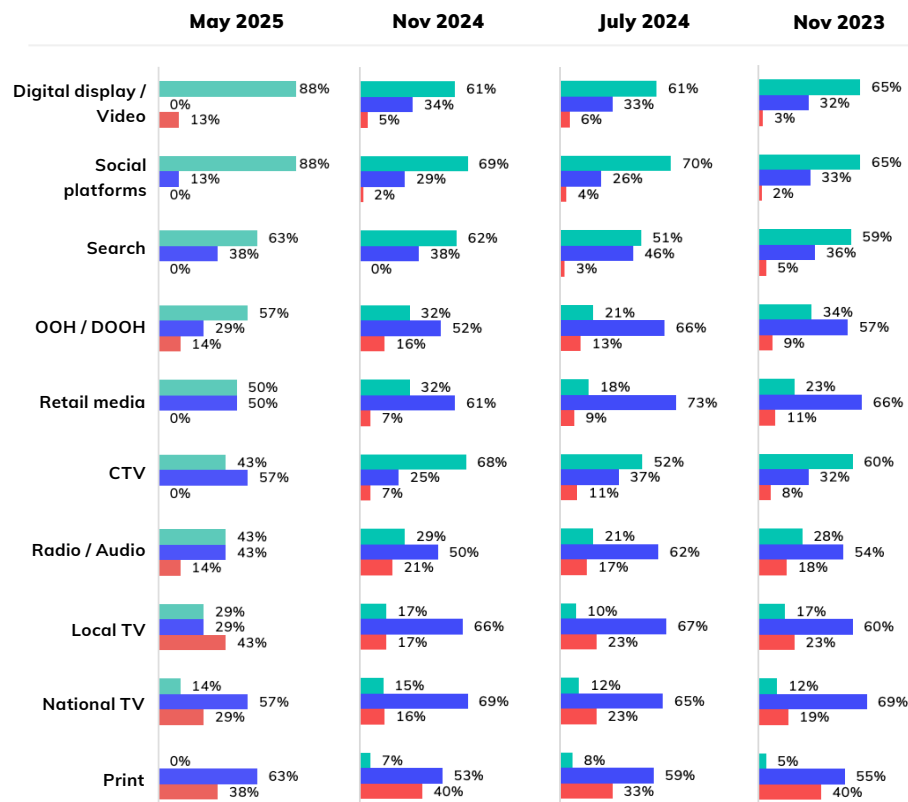
CTV (43%) saw a 37% drop in the number of marketers planning to increase spend, with zero respondents planning to decrease investment—suggesting the dip is more about recalibration than retreat. Radio/Audio (43%) also saw healthy gains, with a 48% rise in planned spend, pointing to continued interest in storytelling-driven media.

Local TV (29%) and National TV (14%) show more modest investment plans, though Local saw a notable



For each media channel below, do you expect to increase, decrease, or maintain your spend?

● Increase ● Maintain ● Decrease



Source: Mediaocean 2025 H2 Pharmaceutical and Healthcare Market Report
Methodology: Four surveys of 387 total Pharmaceutical and Healthcare marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025

71% lift versus H1—likely tied to regional campaigns or health awareness initiatives. Print (0%) continues to decline, with no marketers increasing spend and 38% planning to pull back, reinforcing the broader shift toward dynamic and measurable channels.

Overall, pharmaceutical and healthcare marketers are doubling down on full-funnel engagement strategies, embracing both established and emerging media to reach audiences with precision, impact, and scale.



Strategic priorities: Measurement and performance

As they head into the second half of 2025, pharma/health marketers are sharpening their focus on accountability and impact. Measurement & Attribution Capabilities (63%) emerged as a leading priority—up 37% from the previous wave—reflecting a continued push toward greater transparency, media efficiency, and outcomes-based planning. While down slightly from previous waves, Performance-Driven Paid Media (63%) continues to anchor marketing strategies as a driver of efficiency and impact.

Brand Advertising (53%) also saw a notable resurgence, up 21% since late 2024. This signals a growing recognition of the need to balance performance metrics with long-term brand equity—especially important in a sector where trust, education, and reputation are key to patient engagement and provider adoption.

Other capabilities, including Creative Testing & Analysis (26%) and Automation (26%), held steady, reinforcing a sustained investment in optimizing how campaigns are built and delivered. Meanwhile, First-Party Data Mastery (32%) dipped slightly, suggesting it may now be viewed as a table-stakes capability rather than a differentiator, especially as more marketers build out foundational data infrastructures.

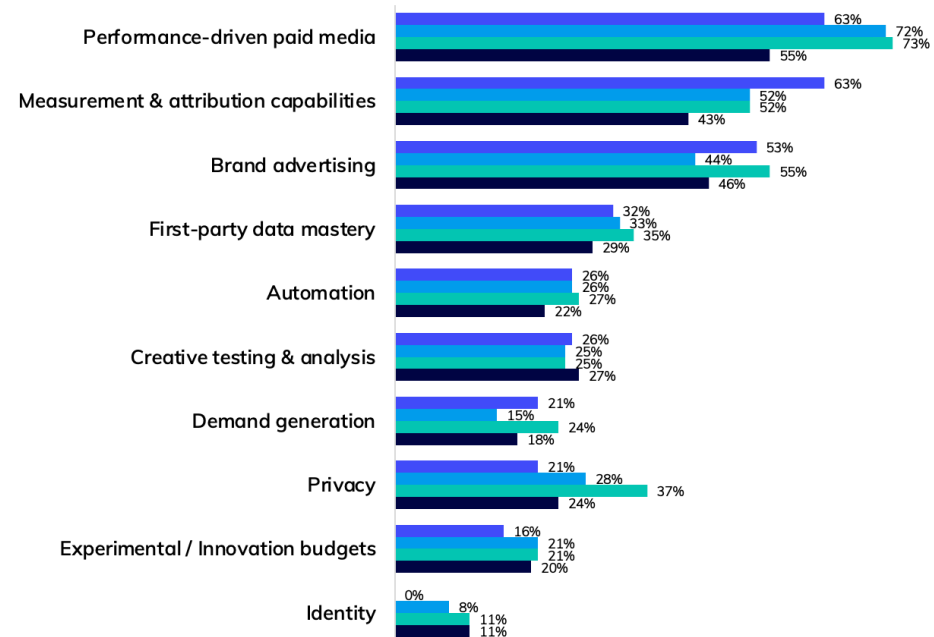
Smaller but growing areas of focus include Demand Generation (21%), which saw a 40% lift, pointing to renewed attention on driving awareness and interest across patient and HCP audiences.

Conversely, Privacy (21%) and Experimental/Innovation Budgets (16%) saw notable declines, while Identity (0%) dropped off completely—a signal that marketers may



Given current macroeconomic conditions, which advertising capabilities and media investments are most critical?

● May 2025 ● November 2024 ● July 2024 ● November 2023



Source: Mediaocean 2025 H2 Pharmaceutical and Healthcare Market Report

Methodology: Four surveys of 387 total Pharmaceutical and Healthcare marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025

be deprioritizing future-looking frameworks in favor of immediate executional needs. Uncertainty around data policies and delays in regulatory shifts may be prompting a back-to-basics approach in the near term.

Ultimately, pharmaceutical and healthcare marketers are zeroing in on what drives measurable business value. With performance pressure rising, the emphasis is clear: prove it, optimize it, and scale what works.





Pharma/health marketers double down on Gen AI

Pharmaceutical and healthcare marketers are keeping a close eye on Generative AI, which was selected as the most-watched consumer trend for H2. Selected by 78% of respondents—up 13% from late 2024—Gen AI continues to dominate attention across the industry, signaling its growing influence in patient engagement, personalized content, and health communications. As AI-powered tools become more accessible and multimodal capabilities mature, marketers are rapidly exploring how to leverage them for content generation, audience segmentation, and even regulatory-safe messaging solutions.

While digital innovation continues to capture interest, there's also a sharp turn toward social responsibility and real-world context. Political & Advocacy Trends (22%) saw a 69% increase since late last year—reflecting heightened sensitivity to election cycles, healthcare policy shifts, and the broader intersection of public discourse and brand positioning. In a regulated industry where trust is paramount, this trend suggests that marketers are more attuned to how cultural and legislative changes may shape consumer expectations.

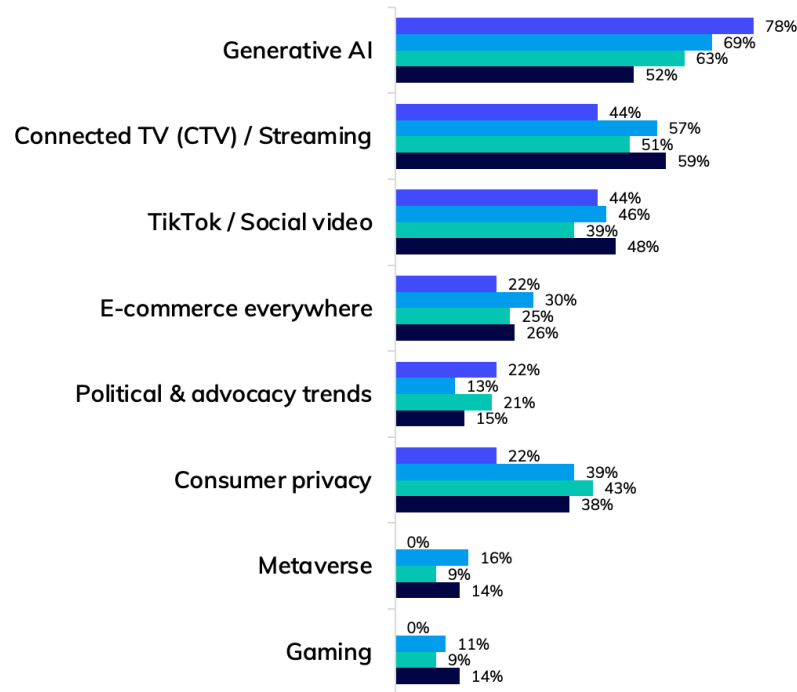
Other digital-first trends like CTV/Streaming (44%) and TikTok/Social Video (44%) remain important, though both declined modestly in prioritization. Marketers appear to be moving from discovery to refinement, focusing on mastering creative, messaging, and targeting within these maturing formats.

Consumer Privacy (22%) and E-Commerce Everywhere (22%) continued to trend downward, each falling by more than 25%. This decline could indicate that these areas, while still relevant, have become baseline requirements rather than evolving strategic priorities.



What are the most important consumer trends you're watching for?

● May 2025 ● November 2024 ● July 2024 ● November 2023



Source: Mediaocean 2025 H2 Pharmaceutical and Healthcare Market Report
Methodology: Four surveys of 387 total Pharmaceutical and Healthcare marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025

Meanwhile, interest in Gaming and the Metaverse dropped off entirely in this wave, pointing to a clear reallocation of attention toward more immediate, tangible technologies and societal developments.

All told, pharmaceutical and healthcare marketers are prioritizing tech that drives personalization and automation, while closely monitoring political and cultural forces that may influence brand trust and patient decision-making.



Gen AI moves from exploration to execution

Pharmaceutical and healthcare marketers are moving rapidly from exploration to execution when it comes to Generative AI. Market Research (100%) surged to the top use case in this wave—up 144% since late 2024—showcasing AI's expanding role in synthesizing insights and informing go-to-market strategy in a more agile and cost-effective way.

Data Analysis (63%) also continues to lead, reinforcing Gen AI's value in distilling complex datasets into actionable insights. But perhaps most notable this wave is the explosive growth in executional and creative applications. Website Development (50%) climbed nearly 285%, as marketers embrace AI-assisted UX, content structuring, and modular web frameworks that support compliance and accessibility standards.

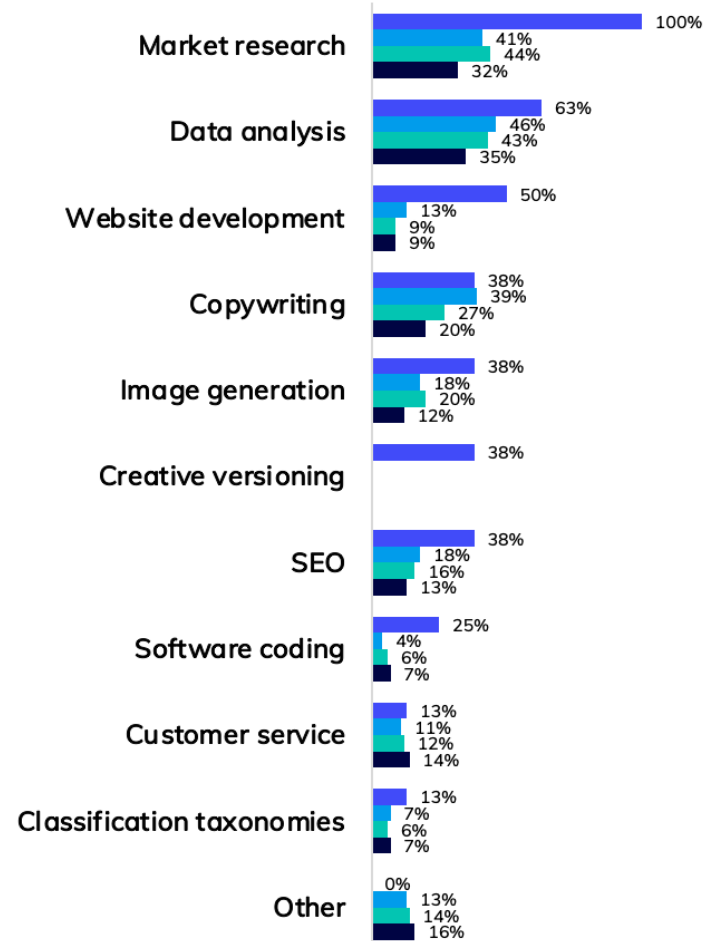
Creative functions are gaining momentum as well. Copywriting (38%), Image Generation (38%), and SEO (38%) have all risen steadily, while Creative Versioning (38%) debuted in the survey as a key workflow—pointing to growing demand for dynamic creative production that can flex across audiences, formats, and channels. Even Software Coding (25%) and Classification Taxonomies (13%) saw meaningful increases, suggesting marketers are tapping into AI to support more technical marketing infrastructure.

When asked about the future, 57% of respondents expect Major Disruption in media planning and buying in the next 12 months, while 75% predict Gradual Change in creative optimization.



How are you using Generative AI in your marketing?

May 2025 November 2024 July 2024 November 2023



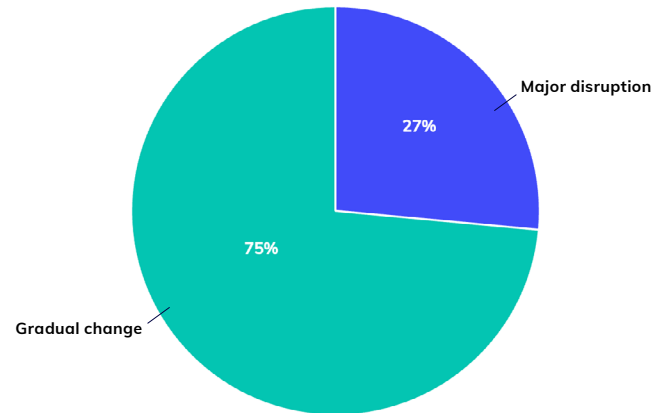
Source: Mediaocean 2025 H2 Pharmaceutical and Healthcare Market Report
Methodology: Four surveys of 387 total Pharmaceutical and Healthcare marketing professionals conducted through SurveyMonkey and TechValidate between November 2023 and May 2025

While marketers may still be navigating regulatory guardrails and legacy systems, there's no question that AI is becoming integral to marketing operations across both strategy and execution.

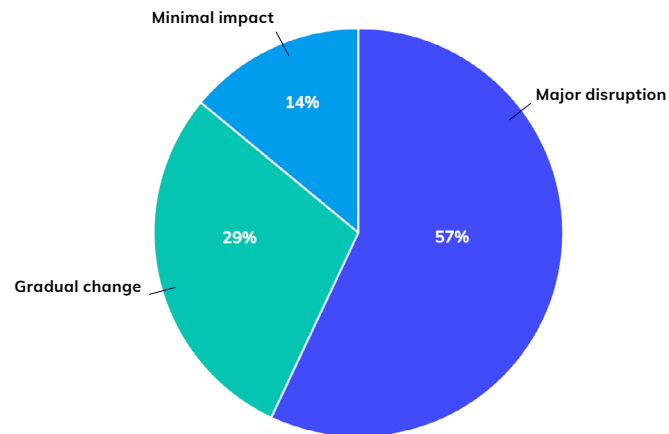
AI's shift from back-end analysis to front-end enablement is accelerating—and for pharmaceutical and healthcare brands, the imperative is clear: operationalize the tech, scale responsibly, and deliver smarter, faster, and more personalized experiences that meet patients and professionals where they are.



What impact do you believe AI will have on **creative optimization** in the next 12 months?



What impact do you believe AI will have on **media planning and buying** in the next 12 months?



Source: Mediaocean 2025 H2 Pharmaceutical and Healthcare Market Report
Methodology: Survey of 27 total Pharmaceutical and Healthcare marketing professionals conducted through SurveyMonkey in May 2025



Personalization and precision take priority as CTV matures

As CTV matures into a core channel for pharma/health marketers, priorities are shifting toward relevance, measurement, and outcomes. When asked which aspect of CTV is most important for full-funnel performance, Personalizing Ads with Dynamic and Relevant Creative Messages (50%) ranked highest—underscoring a growing need to deliver tailored messaging that resonates with both patients and healthcare professionals across platforms and devices.

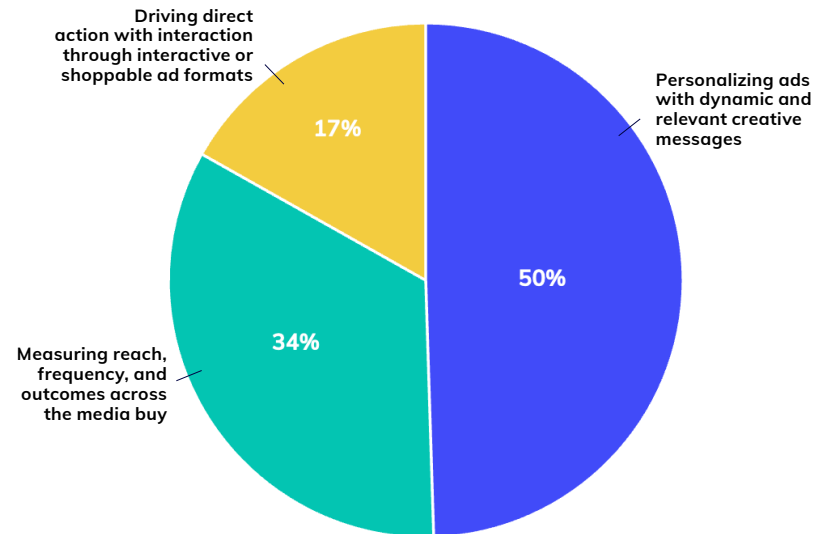
Measuring Reach, Frequency, and Outcomes (34%) followed closely, reflecting continued emphasis on accountability and ROI. Marketers are no longer just looking to expand awareness—they want proof of impact across the entire funnel. Interestingly, Driving Direct Action via Interactive or Shoppable Formats (17%) also showed momentum, suggesting a growing appetite for innovation as brands explore more engaging ways to connect with viewers.

That focus on results is echoed in the metrics marketers value most in CTV and live sports campaigns. Completion Rates (67%), Conversions (67%), Engagement Time (67%), and Reach (67%) all tied as top priorities—signaling a desire for both scale and performance.

Yet despite this progress, challenges remain, largely due to fragmentation. A striking 86% of respondents cited Limited Cross-Channel Visibility as the top obstacle, followed by Data Silos (57%) and Overlapping Audiences (57%).



What aspect of CTV is most important to drive full-funnel performance?



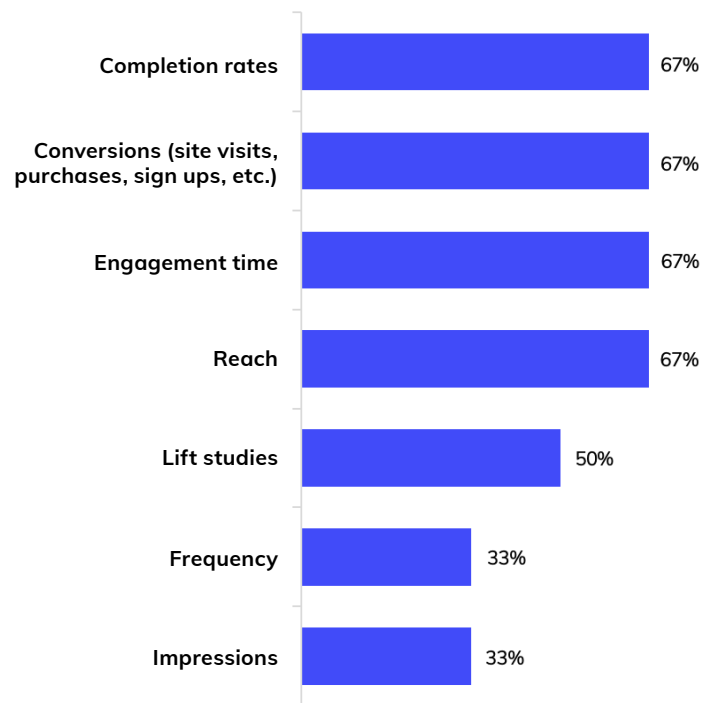
Source: Mediaocean 2025 H2 Pharmaceutical and Healthcare Market Report
Methodology: Survey of 27 total Pharmaceutical and Healthcare marketing professionals conducted through SurveyMonkey in May 2025

These hurdles can make it difficult to deliver consistent messaging without overexposing the same users, reducing overall effectiveness and wasting spend.

As expectations grow, marketers are calling for a more connected and intelligent CTV ecosystem—one that enables audience-level personalization,

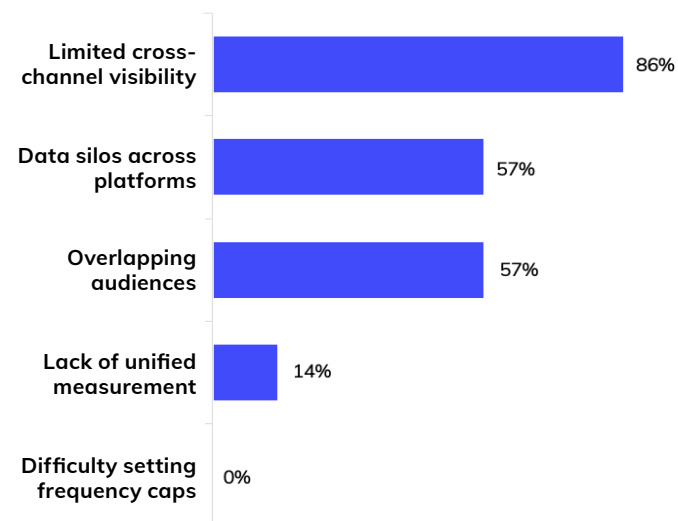
consistent measurement, and holistic frequency control. With trust, timing, and relevance all essential in healthcare marketing, CTV's ability to meet those demands will determine its staying power as a performance driver.

Which metrics are most important when evaluating CTV/live sports campaigns?



Source: Mediaocean 2025 H2 Pharmaceutical and Healthcare Market Report
Methodology: Survey of 27 total Pharmaceutical and Healthcare marketing professionals conducted through SurveyMonkey in May 2025

What are the biggest challenges you face with frequency management today?



Source: Mediaocean 2025 H2 Pharmaceutical and Healthcare Market Report
Methodology: Survey of 27 total Pharmaceutical and Healthcare marketing professionals conducted through SurveyMonkey in May 2025

Conclusion

Pharmaceutical and healthcare marketers enter the back half of 2025 with optimism and focus. Despite broader economic uncertainty, this vertical leads all others in planned increases to media investments, with budgets rising across the majority of channels. A clear shift toward omnichannel engagement and outcome-driven media is apparent.


Performance and measurement remain core priorities. While performance-driven media and attribution continue to lead, marketers are also reaffirming the importance of brand building in a trust-driven category. Investments in demand generation and automation point to a more mature, scalable approach to campaign execution.

Generative AI stands out as the most important consumer trend, with marketers rapidly adopting it for market research, content creation, and personalized communication. Political and advocacy trends are also rising in importance as brands recalibrate messaging in response to cultural and policy shifts. Meanwhile, interest in channels like CTV and TikTok has stabilized, and privacy and e-commerce have become standard parts of the digital landscape.

AI is moving from exploration to execution. From market research to website development to creative versioning, pharma/health marketers are embedding Gen AI across the marketing lifecycle. With 57% expecting major disruption in media planning and buying, the foundation is set for broader transformation.

CTV is firmly established as a full-funnel channel, with personalization and measurement as top priorities. Marketers are focused on delivering results across conversions, reach, and engagement—while seeking better tools to address fragmentation-related challenges like cross-channel visibility and data silos.

Looking ahead, success will come to pharmaceutical and healthcare brands that embrace intelligence, connectivity, and adaptability—turning complexity into clarity and performance into progress.



Methodology

This survey, conducted via SurveyMonkey in May 2025, references data collected from a specific subset of 27 leading pharmaceutical and healthcare advertising industry professionals as part of the Mediaocean 2025 H2 Market Report, which surveyed 464 marketers worldwide.

Note: Values shown in graphs are rounded to the nearest whole number; all percentage changes noted in the body copy are based on actual unrounded data.



About MediaOcean

MediaOcean is powering the future of the advertising ecosystem with technology that empowers brands and agencies to deliver impactful omnichannel marketing experiences. With over \$200 billion in annualized ad spend running through its software products, MediaOcean deploys AI and automation to optimize investments and outcomes. The company's advertising infrastructure and ad tech tools are used by more than 100,000 people across the globe. MediaOcean owns and operates Prisma, the industry's trusted system of record for media management and finance, Innovid, the leading independent ad tech platform for creative, delivery, measurement, and optimization, as well as Protected by MediaOcean, an integrated solution for ad verification and brand safety. Visit www.mediaocean.com for more information.