

2025

# Pharmaceutical & Healthcare Advertising Outlook Report

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



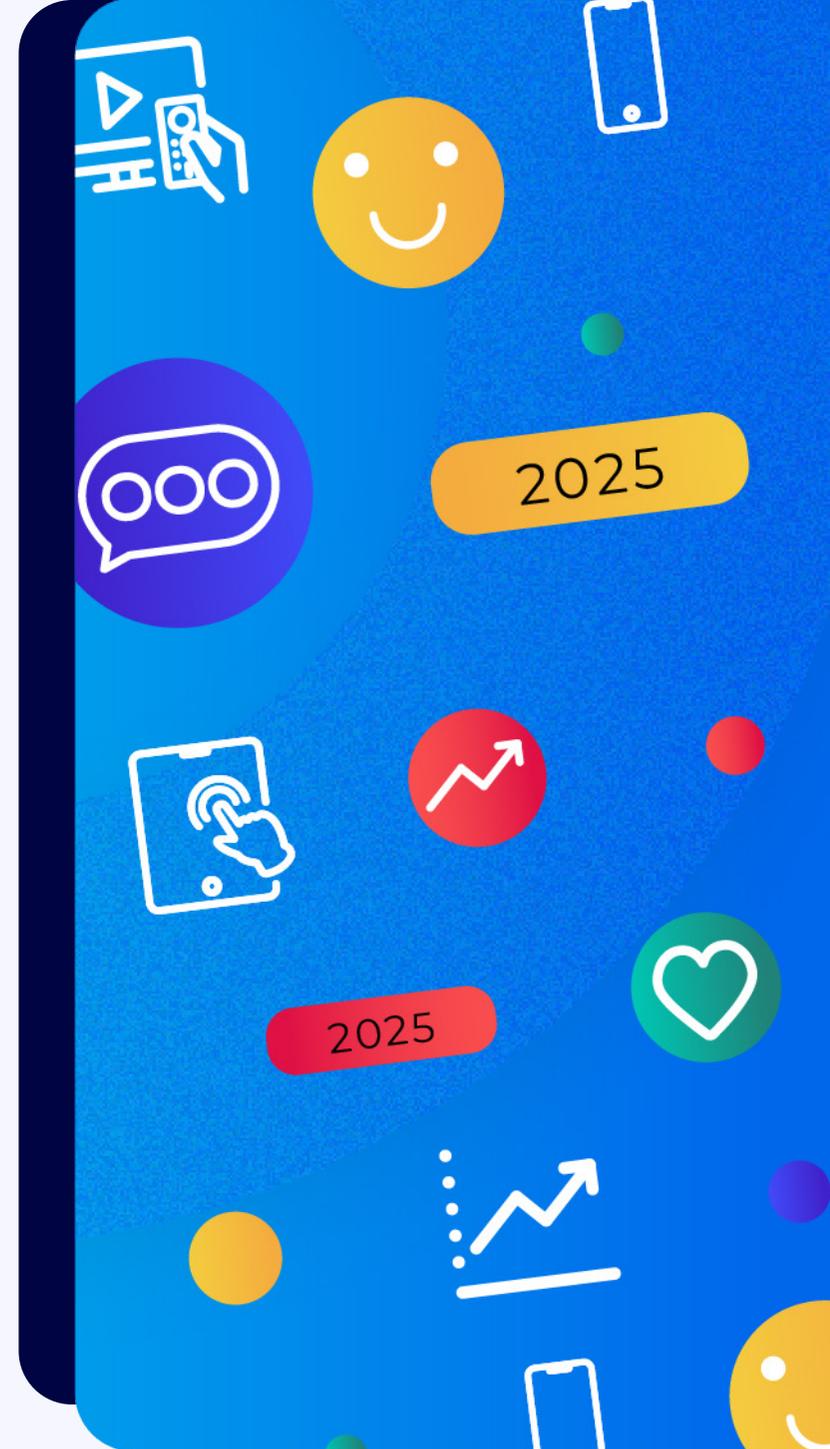
# Table of contents

<b>Introduction</b> .....	3
<b>Insight 01:</b> Ad spending: Pharma/health marketers continue to prioritize digital channels .....	4
<b>Insight 02:</b> TikTok/social video: Fastest-growing consumer trend .....	5
<b>Insight 03:</b> Automation: A critical investment .....	6
<b>Insight 04:</b> Shifting focus: Preparing for a multi-ID future .....	7
<b>Insight 05:</b> Measurement: Critical for ad verification .....	8
<b>Insight 06:</b> Creative-media gap: Small strides, big opportunities .....	9
<b>Conclusion and Methodology</b> .....	10
<b>About Mediaocean and Flashtalking</b> .....	11

# Introduction

Thank you for reading Mediaocean's 2025 Pharmaceutical (Pharma) and Healthcare (Health) Advertising Outlook 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, with the most recent data points used in this research based on surveys conducted in November 2024.



## Ad spending: Pharma/health marketers continue to prioritize digital channels

To make informed decisions, pharma/health marketers need a clear understanding of the broader trends shaping advertising spending. Our research indicates that the industry's wave of optimism from 2024 will carry into 2025.

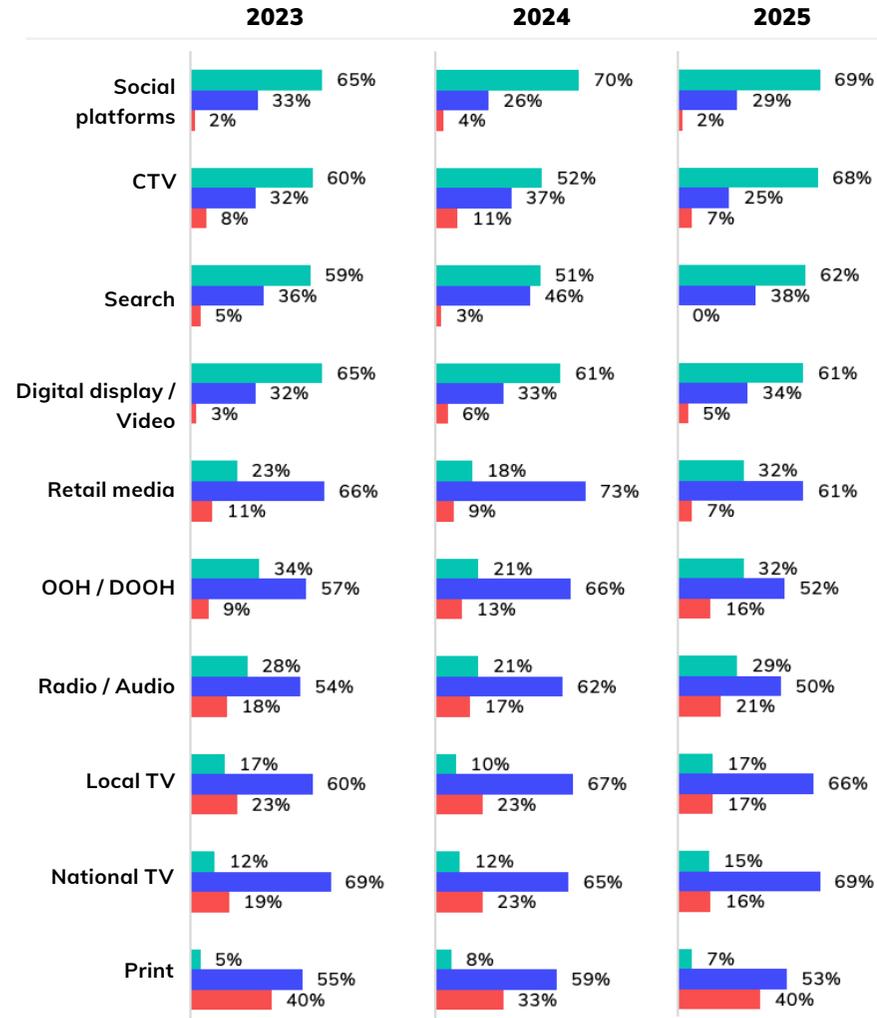
Social Media and Connected TV (CTV) remain the fastest-growing channels, with a consistent rise in investment that aligns with consumer engagement and time spent. In our recent survey, Search beat out Digital Display/Video by 1% to place in the top three. Specifically, 69% of survey healthcare respondents plan to increase their Social Media ad spending, 68% for CTV and 62% for Search. Additionally, 29%, 25%, and 38% of marketers, respectively, intend to maintain their investments in these channels.

On the other hand, Print and TV continue to experience a decline in investment. While more pharma/health marketers are decreasing their budgets in these areas than increasing them, the majority still report maintaining their current levels. This shift underscores the growing importance of digital and social media in shaping healthcare advertising strategies and reaching target audiences effectively compared to traditional channels.



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

● Increase ● Maintain ● Decrease



Source: Mediaocean 2025 Advertising Outlook Report

Methodology: Survey of 62 leading pharmaceutical and healthcare advertising industry professionals conducted through TechValidate in November 2024

## TikTok/social video: Fastest-growing consumer trend

When we asked pharma/health marketers to identify the most critical consumer technology and media trends, Generative AI (Gen AI) maintained its top position, with 69% ranking it as critical—a notable 10% increase compared to our last survey. TikTok and Social Video Platforms saw the most remarkable growth, with 46% of healthcare marketers identifying them as critical technologies—a substantial 28% increase year-over-year. This underscores the growing influence of social platforms, driven in part by younger generations like Gen Z gaining purchasing power. As a generation that increasingly turns to platforms like TikTok for research—often in place of Google or YouTube—pharma/healthcare marketers have a unique opportunity to connect with and engage this emerging audience more effectively.

Gen Z and Millennials are increasingly turning to TikTok and YouTube to explore and learn about health, wellness, and lifestyle topics. These younger consumers are more proactive about their health and are open to discovering wellness solutions through these platforms on a daily basis. User-generated content and influencer partnerships play a crucial role in making the messaging more credible, as audiences tend to trust content creators more than traditional advertisements.

For the pharmaceutical and healthcare industry, TikTok and other social video platforms offer a unique opportunity to connect with this tech-savvy demographic. Health topics can be complex, but TikTok makes education accessible and engaging.

Brands can break down intricate subjects like symptom awareness, medication adherence, and disease prevention into easy-to-understand, bite-sized videos.

Healthcare brands often face challenges in explaining complex products or treatments, but TikTok's visual and dynamic format allows brands to create compelling visuals and relatable analogies that simplify mechanisms of action, benefits, and usage instructions.

This approach not only makes the information more digestible but also helps in building trust and connection with younger audiences.

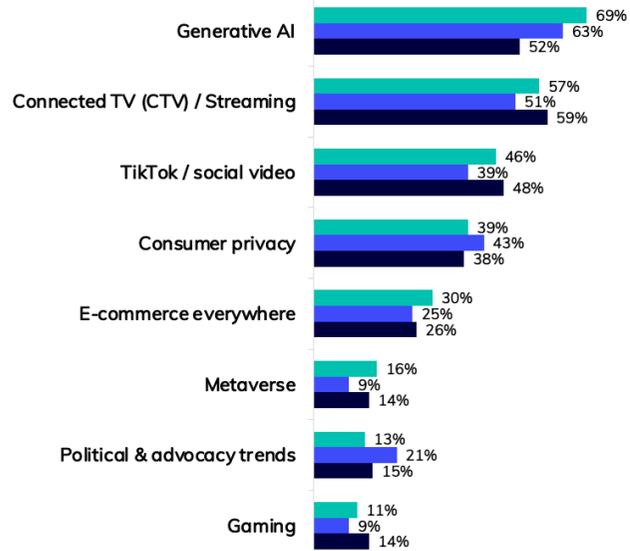
Embracing social video can help build trust and engagement with younger audiences, while also providing valuable insights into consumer preferences and behaviors. By leveraging these platforms effectively, marketers can enhance their brand's visibility and credibility, ultimately driving more informed and confident purchases.

2025

mediaocean

### What are the most important consumer trends you're watching for 2025?

● November 2024 ● July 2024 ● November 2023



Source: Mediaocean 2025 Advertising Outlook Report

Methodology: Survey of 62 leading pharmaceutical and healthcare advertising industry professionals conducted through TechValidate in November 2024

## Automation: A critical investment

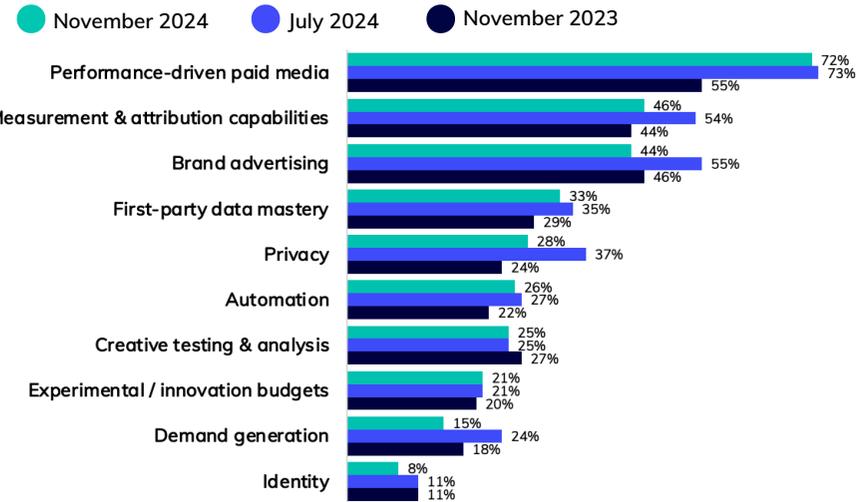
Compared to our July 2024 survey, all investments decreased or remained the same in selection. With that said, Automation remains a critical capability with 26% of healthcare respondents identifying it as a critical capability, compared to 27% in our previous survey. That makes for the smallest decrease among the set here.

Automation and AI work together to streamline omnichannel workflows. With Automation, pharmaceutical and healthcare advertisers can use a single platform for all channels, eliminating time wasted on manual, redundant tasks. Innovative ad tech platforms use Automation and AI to help build compelling, brand-safe creative at scale, surface actionable insights, optimize campaigns, and drive better business outcomes across channels.

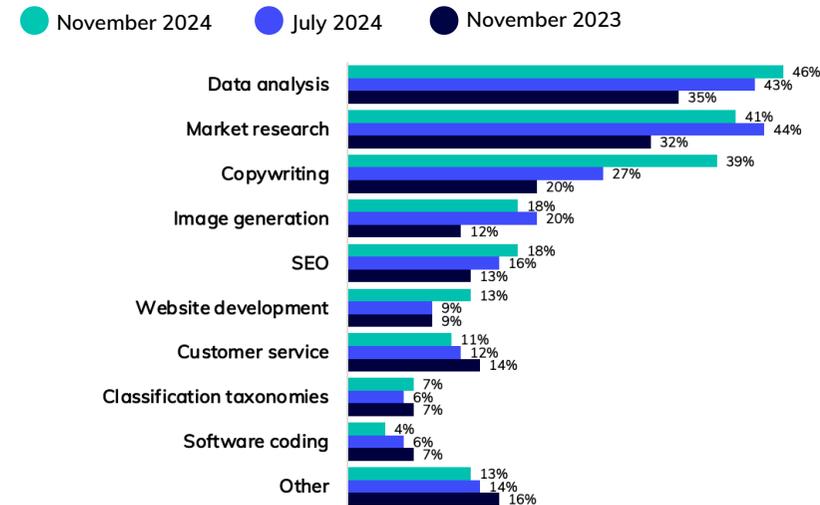
As pharma/health advertisers increasingly implement Automation into their processes and technologies, they are finding it easier to streamline workflows and apply AI to solve practical challenges. The most common applications of AI remain Data Analysis and Market Research, with 46% and 41% of use cases, respectively. Copywriting and Image Generation follow with 39% and 18% of use cases.



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



How are you currently using Generative AI in your marketing?



Source: Mediaocean 2025 Advertising Outlook Report

Methodology: Survey of 62 leading pharmaceutical and healthcare advertising industry professionals conducted through TechValidate in November 2024



## Shifting focus: Preparing for a multi-ID future

Healthcare advertisers are less concerned about preparing for a cookieless future compared to last year. In 2023, 36% of pharma/health advertisers were concerned about this issue, while in 2024, 33% were concerned. Google's announcement that they will no longer deprecate cookies but instead provide more prominent opt-out mechanisms for consumers signals the continued need for innovative solutions in omnichannel measurement.

Digital channels are top of mind for advertisers as they head into 2025, as the top two ranked concerns are the poor ability to manage reach and frequency across CTV and digital channels and the decline in the ability to measure campaign effectiveness on tech platforms and the open web. Without the ability to accurately manage and measure key variables, optimal campaign effectiveness can't be achieved. To address these concerns, healthcare advertisers must adopt a multi-ID approach that includes cookies alongside other identifiers to ensure to enhance their measurement capabilities.

The value of multi-ID measurement is evident in several key areas: reach, frequency, and attribution. Multi-ID measurement allows pharma/health advertisers to better understand user exposure across various formats, browsers, and devices, thus improving the accuracy of their reach metrics.

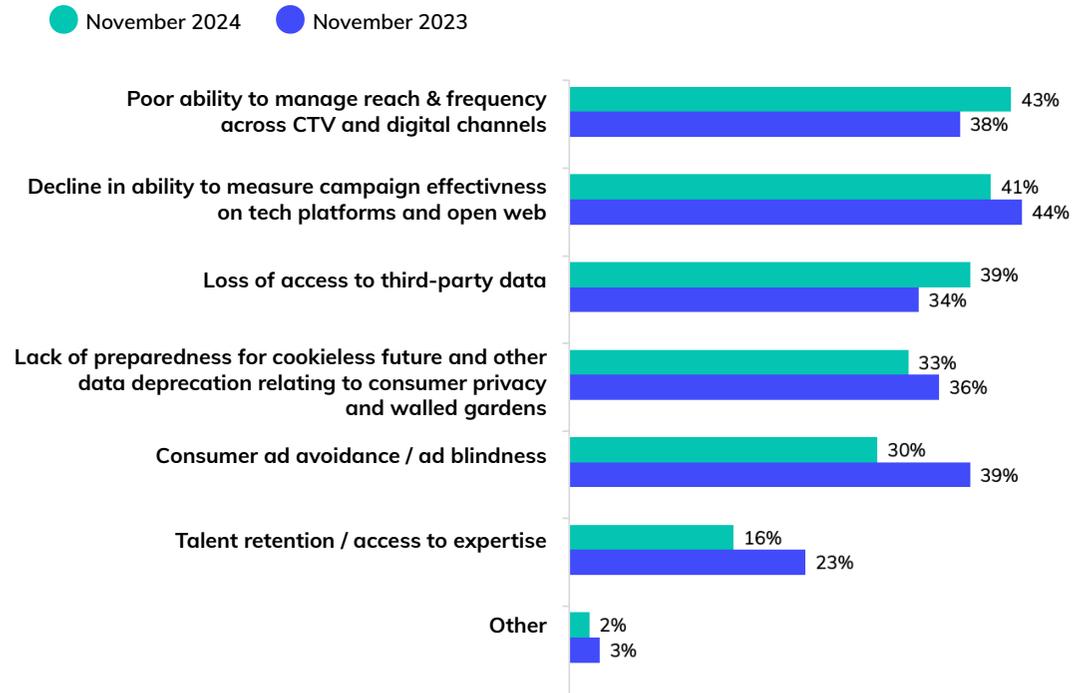
These solutions provide a more consistent and reliable way to measure how often users are exposed to ads, ensuring that frequency caps are set and maintained effectively.

The attribution of conversions to paid media by accurately linking ad exposures to subsequent site activity, regardless of the browser or device used, ensures a more accurate measurement of media impact.

By embracing multi-ID solutions, pharma/health advertisers can futureproof their measurement, and ensure they are accurately tracking campaign effectiveness in 2025.



### What are your largest areas of concern in your media and marketing initiatives?



Source: Mediaocean 2025 Advertising Outlook Report

Methodology: Survey of 62 leading pharmaceutical and healthcare advertising industry professionals conducted through TechValidate in November 2024

## Measurement: Critical for ad verification

As concerns around ad verification grew in the past year, we introduced this question in our July 2024 survey. Our latest findings show that the aspects of verification considered most important by healthcare marketers when selecting partners and evaluating ROI are in a state of flux.

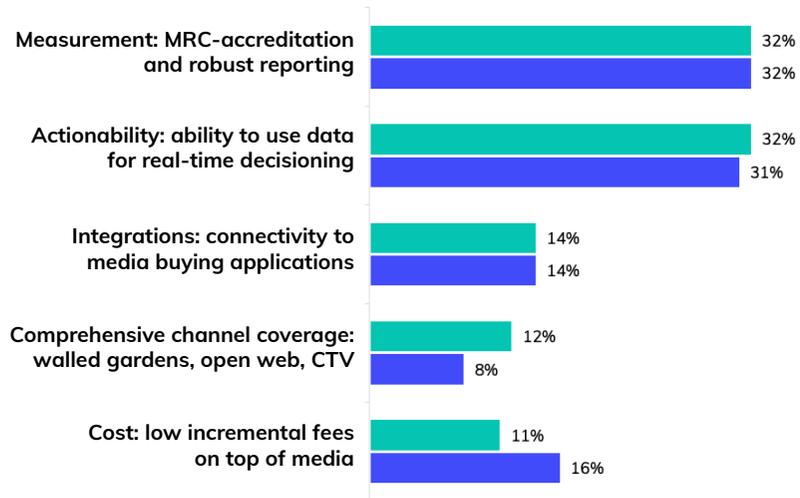
While Measurement, particularly with Media Rating Council (MRC) accreditation and robust reporting, remains a top priority, Actionability has tied it as the most important factor with a 3% increase in our November 2024 survey. Pharma/health advertisers need intuitive data access with flexible reporting that provide actionable analytics. The ability to use data for real-time decision-making is crucial for ad verification, as it allows healthcare advertisers to be proactive with their media strategies and apply insights to optimize campaign performance.

In a separate survey conducted in October 2024 on ad verification and brand safety, 87% of marketers agreed that rebuilding trust in ad verification is essential, and 75% of respondents viewed brand safety as more critical than it was six months ago. 66% of marketers surveyed also advocated for a verification model focused on factoring positive content engagement rather than relying strictly on-site exclusions and negative keywords.



### What aspect of ad verification is most critical when selecting partners and evaluating return on investment?

● November 2024 ● July 2024



Source: Mediaocean 2025 Advertising Outlook Report

Methodology: Survey of 62 leading pharmaceutical and healthcare advertising industry professionals conducted through TechValidate in November 2024

For our 2025 Advertising Outlook Report, Integrations (for connectivity to media buying applications) came in third. Verification solutions must be seamlessly integrated with ad servers to ensure an end-to-end streamlined workflow, which increases efficiency, reduces errors, saves time, and cuts costs in both media and verification processes.

Comprehensive Channel Coverage (including walled gardens, the open web, and CTV) and Cost rounded out the fourth and fifth places. Advertisers have faced challenges such as limited options, higher costs, and a slowdown in innovation due to the concentration of services with two primary providers. As we enter 2025, a positive security model for verification presents compelling opportunities for pharma/healthcare marketers.

## Creative-media gap: Small strides, big opportunities

In our research, 87% of respondents in the pharma/health category reported that they do not have fully synchronized media and creative processes and technologies, a slight improvement from 89% in our 2024 Advertising Outlook Report. Only 13% of advertisers are fully synchronized in 2025 compared to 11% in 2024. Despite this initial progress, the industry still has significant room for improvement.

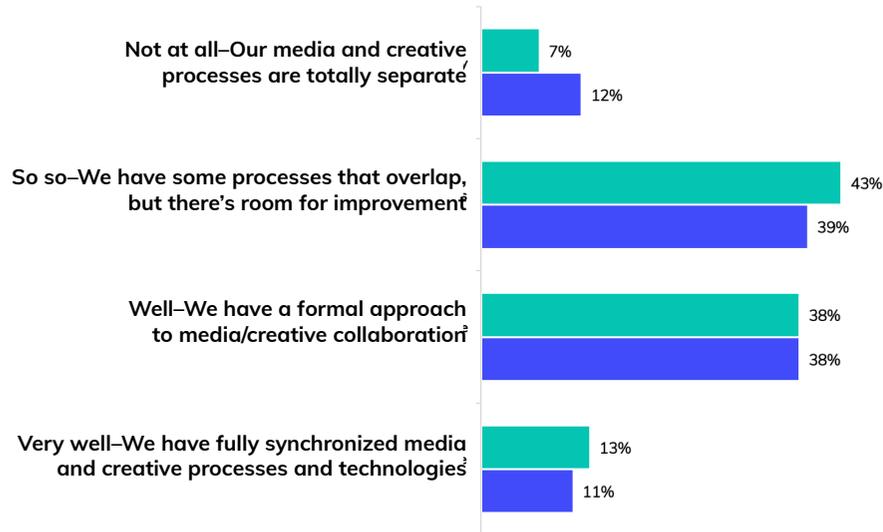
The “creative-media” gap is primarily caused by an overemphasis on media at the expense of creative content. This disparity has a profound impact, especially in a world where consumers increasingly respond to and reward personalized experiences. Closing this gap represents the most significant growth opportunity for healthcare brands.

To address these gaps, brands need to implement independent ad tech platforms that connect the silos between teams, allowing the delivery of more efficient production, versioning, and distribution of creative. Essential to this solution is the enablement of personalization to ensure the most relevant and impactful brand message reaches the right consumer at the right moment.



### How well synchronized are your media efforts?

● November 2024 ● November 2023



Source: Mediaocean 2025 Advertising Outlook Report

Methodology: Survey of 62 leading pharmaceutical and healthcare advertising industry professionals conducted through TechValidate in November 2024

The ability to deploy intelligence for a deep understanding of what messages are connecting with different audiences and environments with granularity and transparency of data is imperative.

With a comprehensive creative ad tech stack, pharma/health advertisers can seamlessly integrate with existing platforms and collaborate with partners in both creative and media domains, empowering teams to effectively bridge the creative-media gap.

# Conclusion

In 2025, the pharmaceutical and healthcare advertising industry is poised for continued growth and transformation.

The sustained increase in ad spending, particularly in digital channels, underscores a market that is highly attuned to the continued shift in consumer attention. Advertisers are maintaining and even expanding their budgets from the previous year, signaling a strong commitment to leveraging advertising for business success.

The steady rise of TikTok and social, driven by Gen Z, has solidified its position as a critical tactic in the healthcare advertising world. By leveraging these platforms effectively, marketers can enhance their brand's visibility and credibility, ultimately driving more informed and confident consumption.

Automation is also playing a more significant role, as advertisers seek to optimize their omnichannel strategies. By streamlining workflows, automation saves time and reduces manual, repetitive tasks, allowing teams to focus on more strategic initiatives.

Accurate measurement remains a top concern, and advertisers need to adopt a multi-ID approach. This strategy, which combines cookies with other identifiers, is essential for improving reach, frequency, and attribution, ensuring that pharma/health campaigns are effectively measured and optimized.

The ad verification space has seen groundbreaking developments, compelling healthcare marketers to reassess and prioritize their partnerships.

The emphasis on measurement and actionability is crucial to maintaining high standards of ad delivery and ensuring that every dollar spent yields tangible results.

Despite some progress, the creative-media gap continues to be a critical issue. To bridge this divide, the industry must implement independent ad tech platforms that can connect silos, enable personalization, and deploy advanced intelligence.

This integration is vital for creating cohesive, effective advertising strategies that resonate with consumers and drive business outcomes.

2025 will be a year of significant advancements and challenges in the pharmaceutical and healthcare advertising industry. By embracing AI, automation, and multi-ID measurement, and by addressing the creative-media gap, advertisers are well-positioned to navigate the complexities of the market and achieve their goals in the coming year.

A graphic titled "Methodology" featuring a central blue circle with a white megaphone icon. Surrounding the megaphone are several smaller icons: a globe, a smiley face, a heart, and a yellow dot. A purple line connects these icons in a circular path. The graphic is set against a white background with a blue border.

## Methodology

This survey, conducted via TechValidate in November 2024, references data collected from a specific subset of 62 leading pharmaceutical and healthcare advertising industry professionals as part of the Mediaocean 2025 Advertising Outlook Report, which surveyed 688 marketers worldwide.

## 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, Flashtalking, an innovative ad server and creative personalization platform, as well as Protected by Mediaocean, an MRC-accredited ad verification solution.

Visit [www.mediaocean.com](http://www.mediaocean.com) for more information.



## About Flashtalking

Flashtalking unleashes the power of creative to make media work better. As the leading independent platform for personalization, orchestration, and intelligence across all marketing channels, our Creative Ad Tech bridges the gap between creative and media. We provide AI and automation to connect the silos between teams and deliver more efficient production, versioning, and distribution of creative. Our solutions operate at scale across CTV, Video, Display, Social, Native, Audio, DOOH, and Retail Media channels. As part of Mediaocean, Flashtalking is tied into the industry's core ad infrastructure for omnichannel planning, buying, and billing. Visit [www.flashtalking.com](http://www.flashtalking.com) for more information.

