

A photograph of two women in a living room, both bending over at the waist. The woman on the left is wearing a pink long-sleeved shirt and tan overalls. The woman on the right is wearing a black tank top and grey leggings. They are positioned in front of a green sofa with a white pillow. The floor is covered with a red and blue patterned rug. The title 'Beyond The Prescription' is overlaid in large white text, and the subtitle 'Exploring the full impact of pharma ads' is below it in smaller white text. At the bottom, there are logos for 'M/GNA MEDIA TRIALS' and 'deepintent+'.

Beyond The Prescription

Exploring the full impact of pharma ads

M/GNA MEDIA TRIALS

deepintent+

Pharma advertising is traditionally
focused on promoting medications.

**But does its impact
extend further**



Our goals

1

Determine whether pharma ads have an impact that extends beyond brand building

2

Quantify the impact of pharma ads across audience cohorts

3

Explore opportunities for pharma brands

Our Methodology

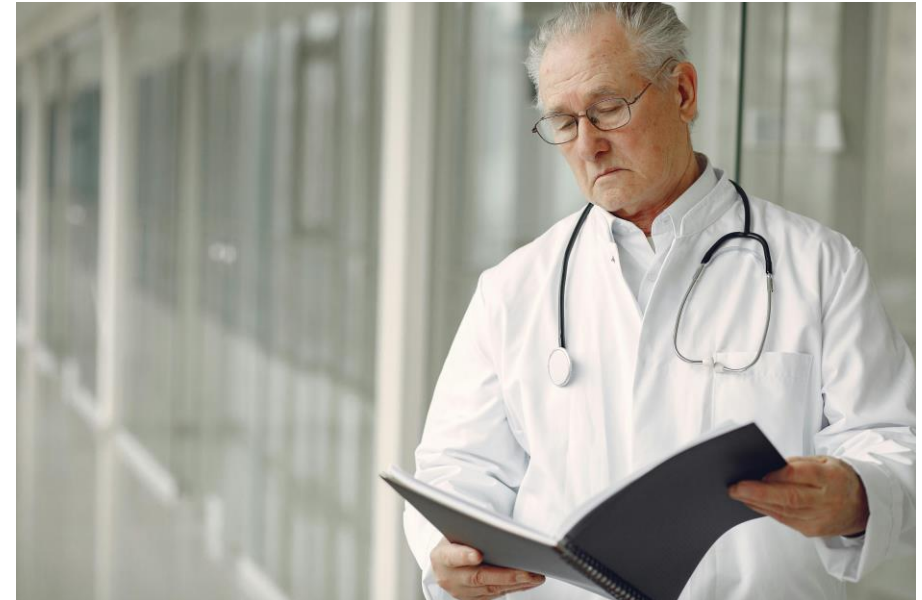
Patient interviews



- Total: n=1,166
- Age: 18+
- Those who see a healthcare provider at least once a year

Online survey to understand patients' opinions of pharma ads today, and what value, if any, they receive

Doctor interviews



- Total: n=1,001
- Age: 30+
- Doctors with a mix of specializations (including general practitioners) who have practiced medicine for longer than a year

Online survey to uncover doctors' views on pharma ads and their impact on patients



Pharma ads do their primary job

Raising awareness of treatment options

Interestingly, learning about new medications isn't driven by older generations alone. **61% of adult Gen Z and 62% of Millennials** have learned about new treatment options from pharma ads

Going deeper

Additional value of pharma ads



Pharma ads...

Serve as a top educational resource for nearly 1/3 of people

Source of awareness for health conditions or medications
% selected pharma ads



29%

Of patients rely on pharma ads as one of the top ways they become aware of health conditions or medications

Pharma ads...

Guide better health management

Opinion of pharma ads

% agree or strongly agree



48%

Said pharma ads help them make informed decisions about their health

Pharma ads help people...

Discover new health conditions

Past impact of pharma ads

% yes



55%

Discovered a health condition
they didn't know they had

If not for pharma ads...

62%

Would have missed out on
learning about the condition

Pharma ads help patients...

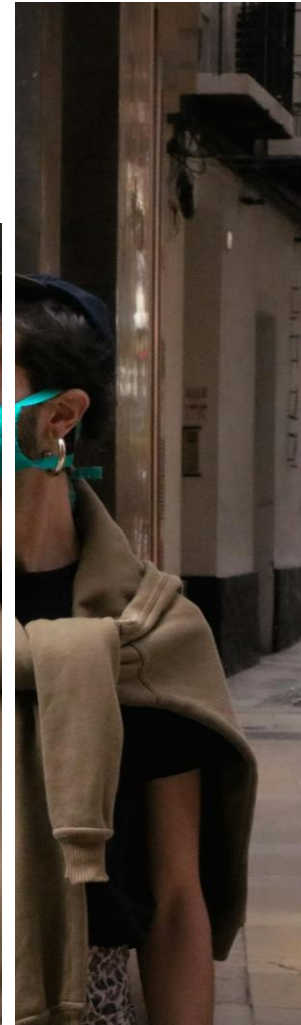
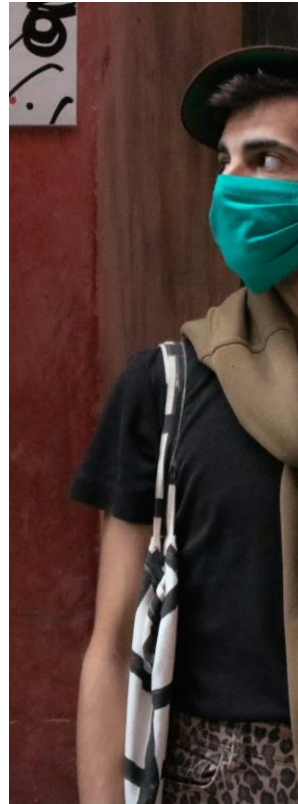
Better manage existing conditions

Past impact of pharma ads

% yes

54%

Said pharma ads helped them better manage an existing health condition



If not for pharma ads...

61%

Said their overall understanding of the condition would have been less comprehensive

Even doctors see patient benefits from pharma ads

Doctors' opinion of the impact of pharma ads
% agree or strongly agree

92%

Said pharma ads increase patients' **awareness of treatment options**

91%

Said pharma ads improve patients' **understanding of their condition**

In fact, doctors see lasting benefits from pharma ads on enhanced proactive care

Doctors' opinion of the impact of pharma ads
% agree or strongly agree



A person with long blonde hair, seen from behind, is kayaking on a calm river. They are wearing a green life vest and holding a black paddle. The sun is low on the horizon, creating a golden glow and reflecting off the water's surface. The background is a dense forest with trees lining the riverbanks.

Top beneficiaries

What patient cohorts benefit more?

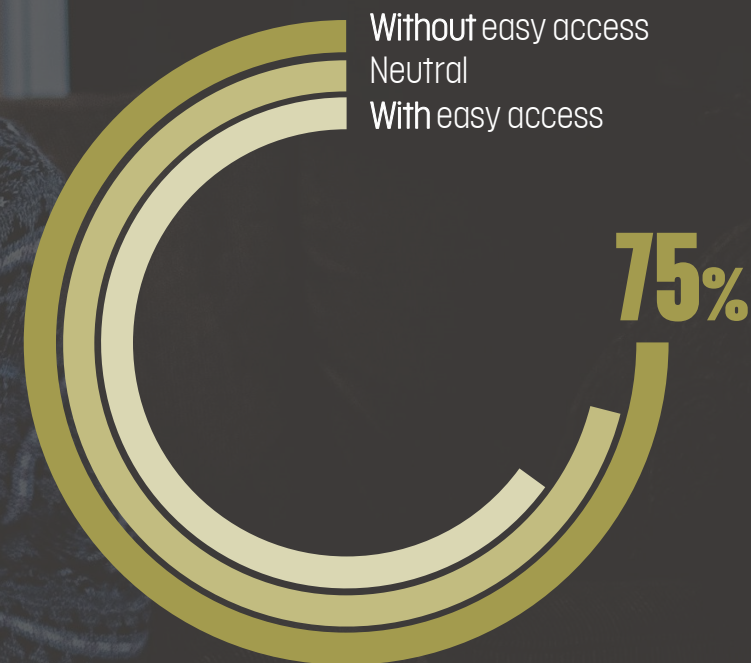
Pharma ads are especially helpful among those with limited access to healthcare

Past impact of pharma ads by access to healthcare
% yes

Discovered a new health condition



Better managed an existing health condition



Surprisingly, adult Gen Z derive the most value from pharma ads

Past impact of pharma ads by generation
% yes



Adult Gen Z



Millennials



Gen X



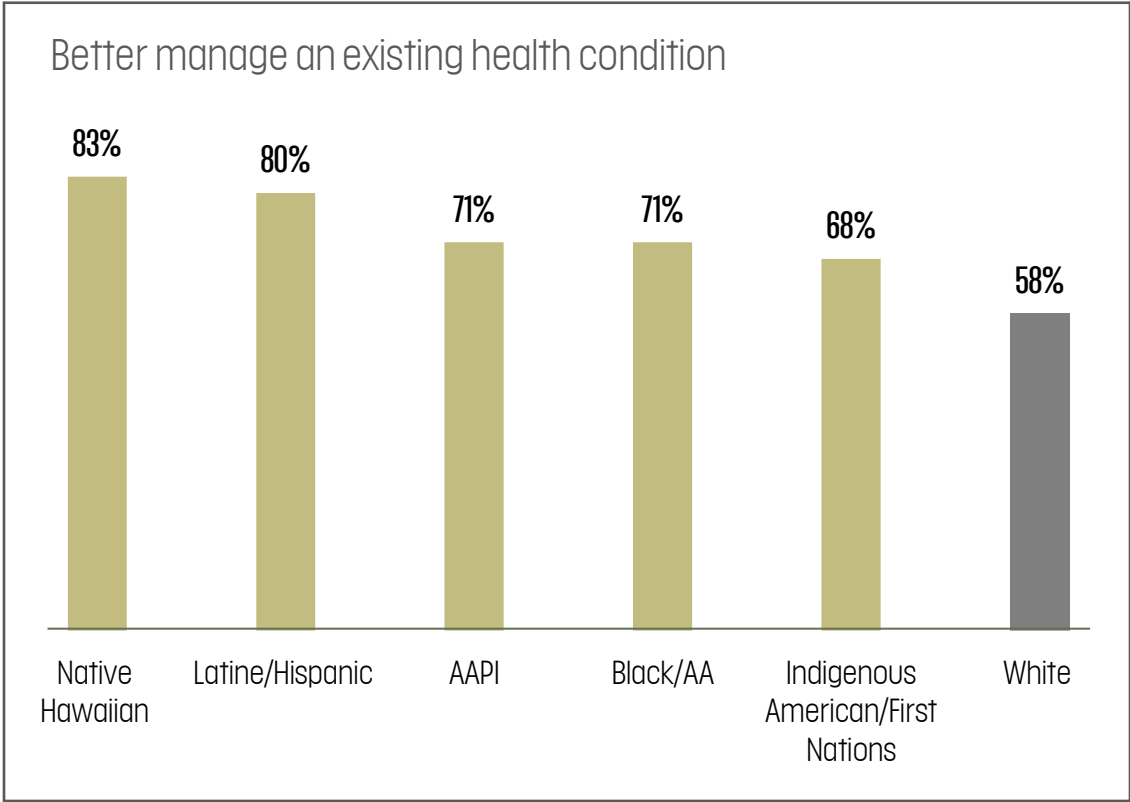
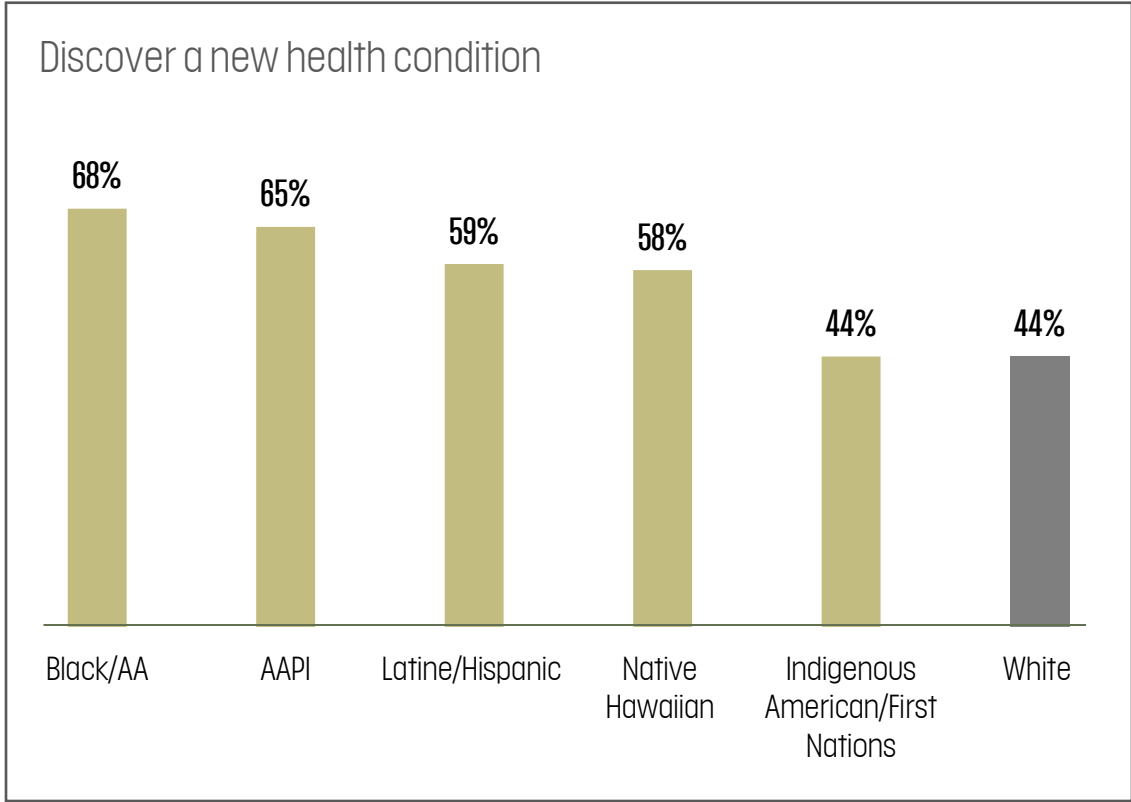
Boomers

Discovered a new health condition	52%	48%	49%	31%
Better managed an existing condition	63%	59%	56%	40%

Patient survey; Adult Gen Z n= 155, Millennial n= 321, Gen X n= 286, Boomers n= 404
Have messages from pharma companies ever led to any of the following outcomes in the past? - Helped you find out about a health condition you didn't know you had Have messages from pharma companies ever led to any of the following outcomes in the past? - Helped you better manage a health condition

Pharma ads are especially likely to serve as an educational tool for multicultural audiences

Past impact of pharma ads by ethnicity/race
% yes

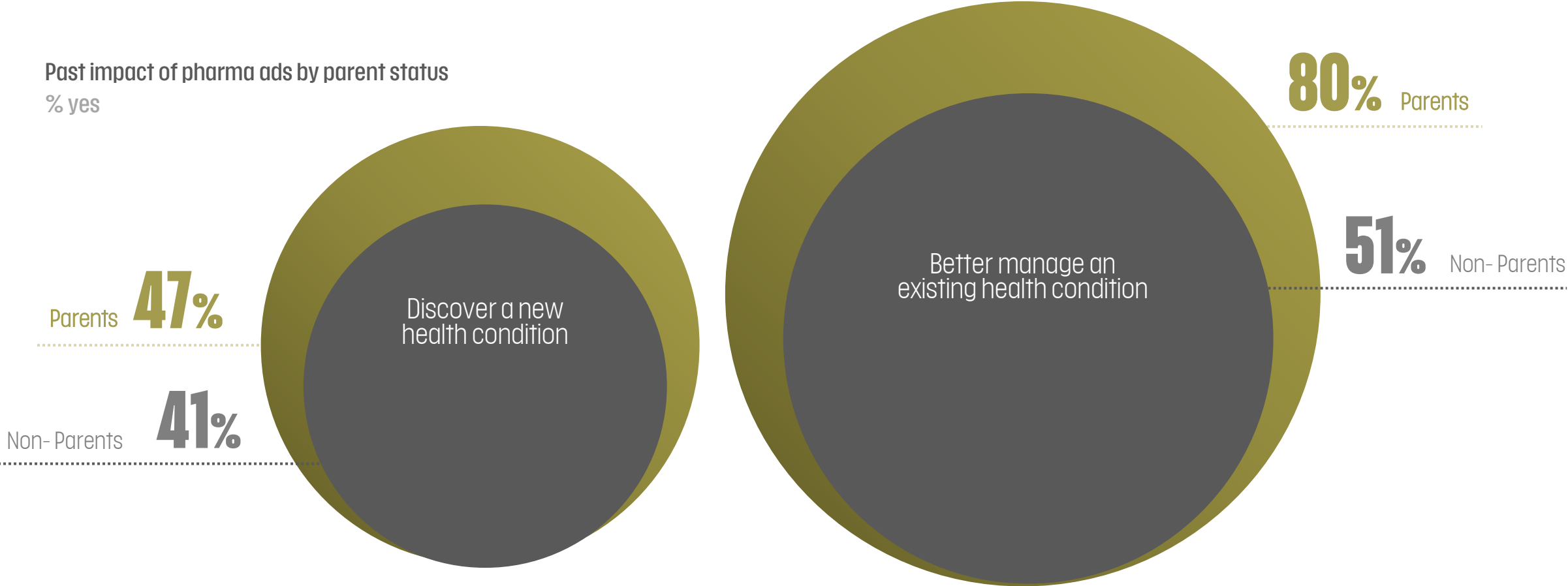


Patient survey; Black/AA n= 233, Asian/Pacific Islander n= 136, Hispanic n= 153, Native Hawaiian n= 64, Indigenous American/First Nation n= 87, White n= 595
Have messages from pharma companies ever led to any of the following outcomes in the past? - Helped you find out about a health condition you didn't know you had Have messages from pharma companies ever led to any of the following outcomes in the past? - Helped you better manage a health condition

Caregivers of children better manage health conditions

Pharma ads also help parents find out about health conditions for someone close to them (57% vs. 43% for not-parents)

Past impact of pharma ads by parent status
% yes



Patient survey; Parents n= 366, Non-parents n= 800
Have messages from pharma companies ever led to any of the following outcomes in the past? - Helped you find out about a health condition you didn't know you had Have messages from pharma companies ever led to any of the following outcomes in the past? - Helped you better manage a health condition



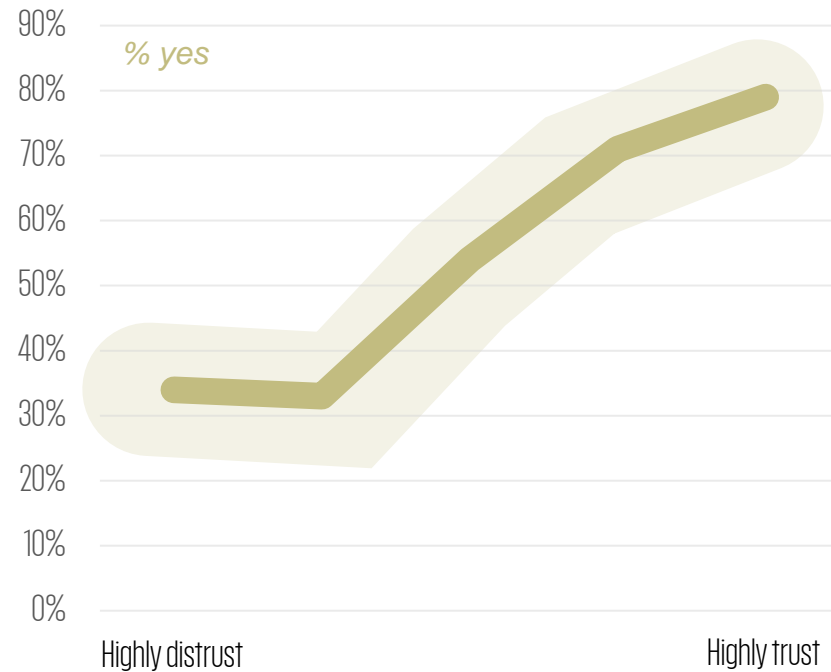
For brands

An opportunity

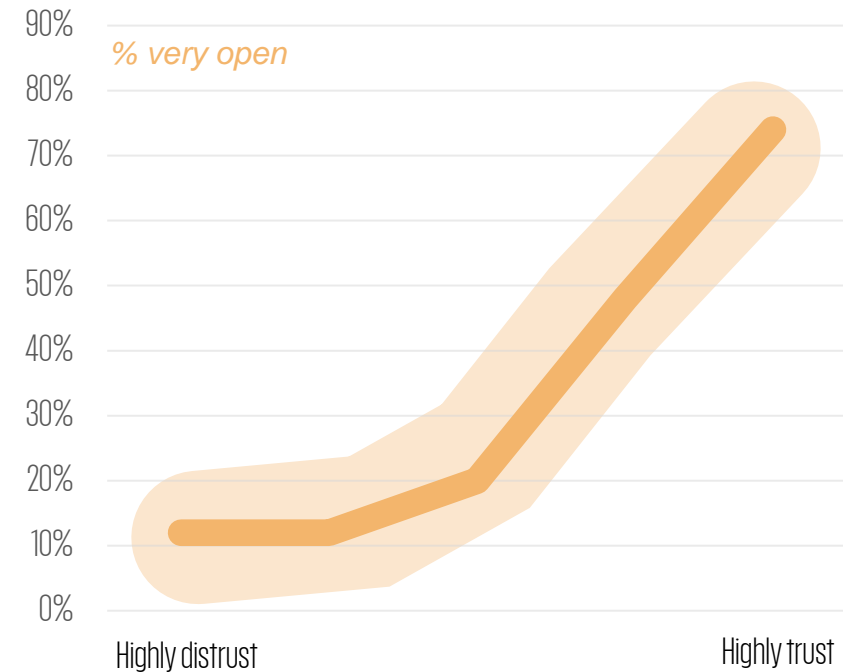
Greater trust in pharma ads = greater benefit for patients & brands

The more people trust pharma ads, the more likely they are to have benefited from them

Pharma ads help people better manage existing health conditions by trust level

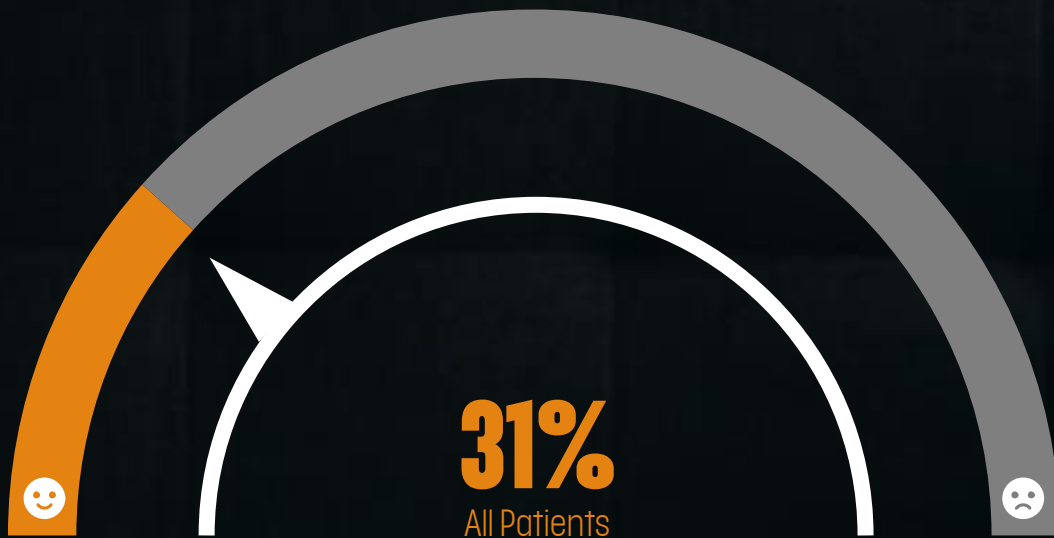


Openness to receiving pharma ads by trust level



However, there is a clear opportunity to build trust further

Trust in pharma messaging
% trust or highly trust



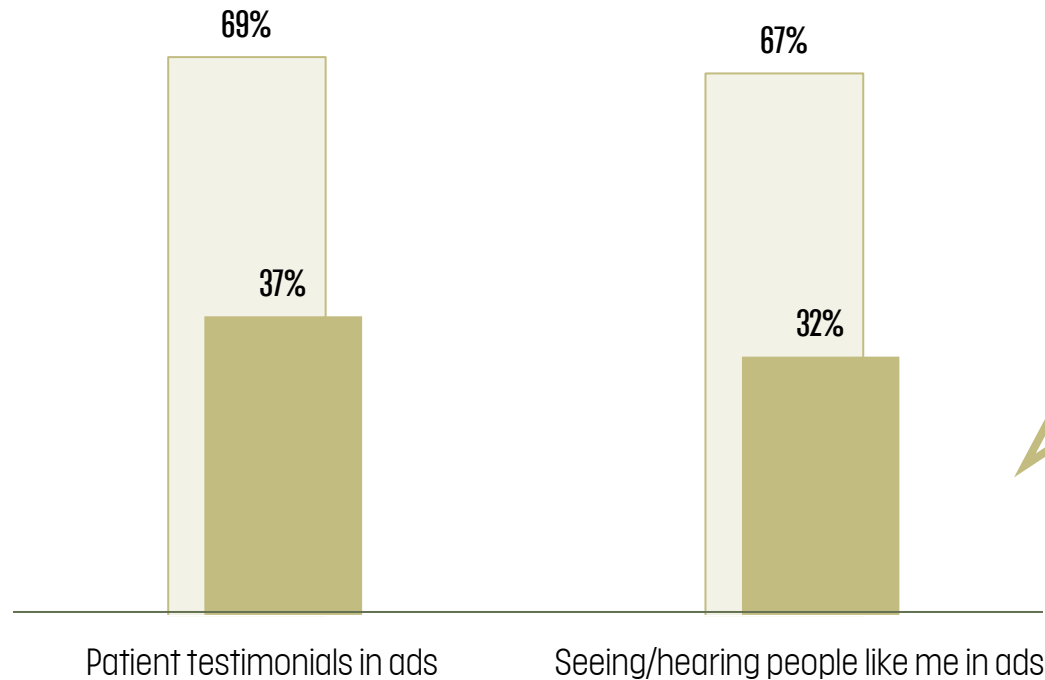
Generation	Healthcare Access	Ethnicity/Race	Parental status
Adult Gen Z: 38%	Easy access: 35%	Multicultural audience: 33%	Parents: 36%
Millennials: 36%	Neutral access: 19%	White: 24%	Non-parents: 29%
Gen X: 31%	Not easy access: 22%		
Boomers: 26%			

Build trust with patient-focused messaging & representation

There is a gap in what patients expect from pharma ads and what they typically see

Expectations from pharma ads
% yes

- Those who **expect** it in pharma ads
- Those who **typically see** it in pharma ads



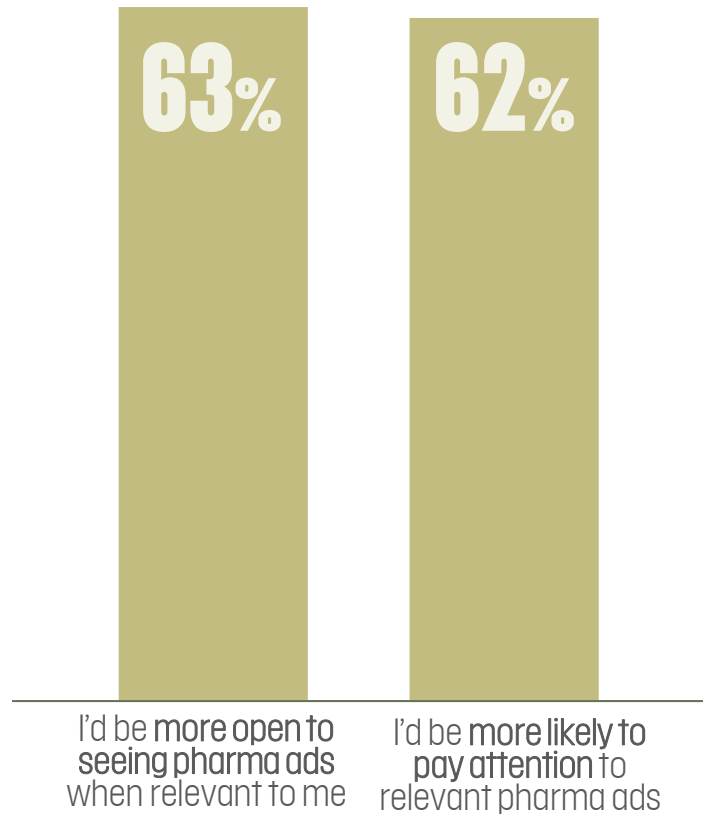
Those who typically see people like them in pharma ads...

White:  54%

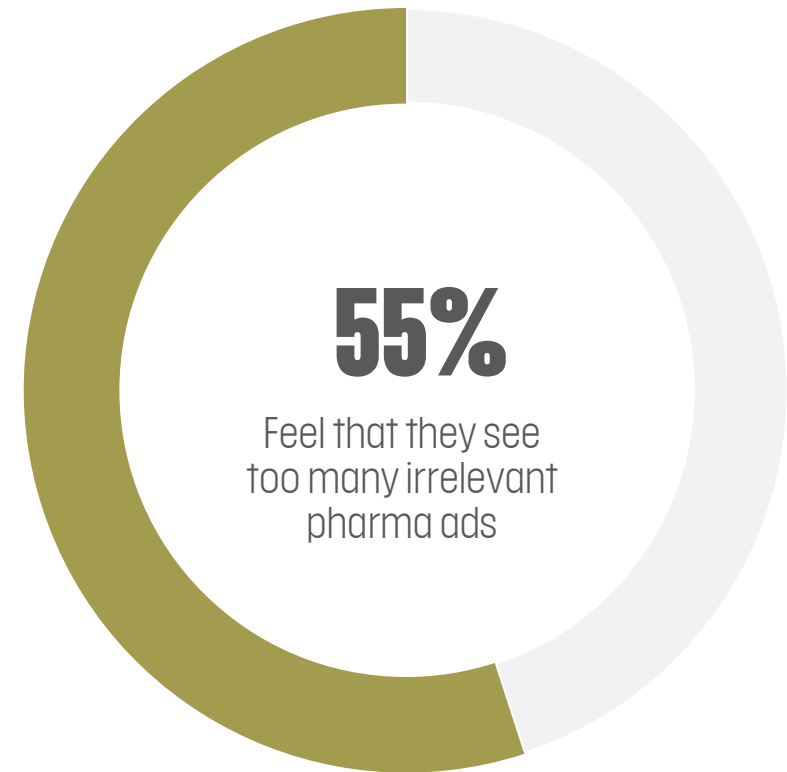
Multicultural:  8%

Strive for greater relevance

Relevance is a critical driver of ad receptivity



But many impressions are missing the mark on relevance



Implications

1

Engage younger generations and multicultural audiences

Younger demographics and multicultural audiences are particularly responsive to pharma messaging. Include these groups in media strategies when appropriate ensuring authentic representation

2

Align with health care providers

Healthcare providers see positive results from pharma ads. There is an opportunity to think more about integrated campaigns that share similar themes across both patients and providers

3

Prioritize relevance

Undoubtedly, relevance is every marketer's goal, but the industry must continue innovating new tools and technology to deliver on relevant pharma ads



Thank you

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