

It's Not Versus. It's Premium Video.

How data bridges the gap between Linear,
CTV, OTT, and Addressable TV



What You'll Learn

The linear and advanced TV ecosystem has been evolving for years, yet marketers continue to debate the role of traditional TV advertising versus connected TV (CTV), over-the-top (OTT), addressable options, and virtual multichannel video programming distributors (vMVPDs).

Understandably, the debate stems from dramatic viewership shifts in an increasingly fragmented TV ecosystem. CTV ad spending is projected to more than double from 20% of TV ad spend in 2021 to 59% in 2029.¹

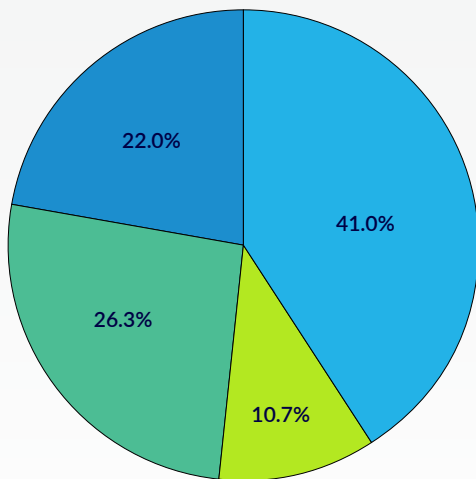
This trend is further underscored by declining linear TV viewership, dropping from 50.5% of total time spent with TV to 44.2% from May 2024 to May 2025. Streaming platforms have seen a surge in popularity, growing from 38.8% to 44.8% of viewership during the same period,²

and most adults now use at least one ad-supported streaming service.³ It's time to transcend this outdated dichotomy and embrace the power of data-driven audience targeting across all premium video channels.

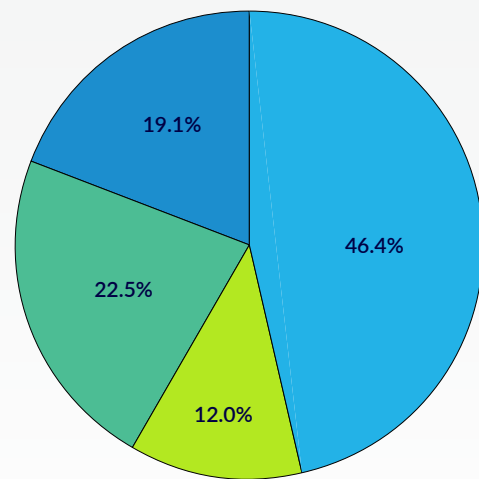
An outdated either/or approach often overlooks the core challenge: How can brands effectively connect with increasingly fragmented audiences?

Share of Monthly Time Spent with TV

August 2024



August 2025



■ Broadcast
 ■ Cable
 ■ Streaming
 ■ Other

Source: Nielsen The Gauge Report, August 2024 & August 2025

The truth is that success doesn't lie in deciding between linear versus other TV formats. Leveraging data to create impactful audiences and omnichannel strategies is the key to reaching niche consumers, regardless of where they're watching. Savvy marketers understand that the key to success lies in finding the right audience on a mix of channels at scale, not getting bogged down in the linear vs. digital debate.

Data-powered precision targeting has redefined TV's role in pharma marketing since the COVID-19 pandemic, shaping how brands approach audience buying and creative strategy. Clinging to outdated models means missing critical opportunities to engage niche patient populations and drive better health outcomes for consumers. TV is no longer a simple, top-of-funnel reach and awareness tool. It's a powerful platform driving quantifiable business results.

In this piece, we'll explore:

- Leveraging all premium video channels – linear, CTV, OTT, addressable, and vMVPDs – to connect with target audiences in more meaningful ways.
- Why TV is a unique channel for pharma marketers.
- How healthcare brands navigate privacy laws.

Success isn't determined by clinging to an outdated binary debate, but by embracing a holistic, data-driven video strategy.

U.S. TV and Connected TV (CTV) Ad Spend



Source: EMARKETER Forecast, March 2025

TV, streaming, video: Premium environments drive patient action

Instead of debating between linear and advanced TV formats, marketers should focus on the power of premium video and audience-based buying strategies that transcend these traditional boundaries. This paradigm shift is particularly crucial for pharma brands aiming to reach niche audiences on a broad impact medium.

Multiscreen Strategies for Modern Viewers

As the media consumption habits of viewers evolve, so too must the strategies employed by marketers. The perception of TV has expanded beyond the traditional set to include any device, especially for younger viewers.³ With nearly six in ten adults now cordless, video streaming becomes essential for optimizing reach in multiscreen TV campaigns.³

Multiplatform buying strategies not only capture greater consumer attention but also heighten purchase intent.⁴

Premium environments drive impact

When advertising on linear, OTT, CTV, vMVPD, or addressable platforms, brands are positioned in a safer, more trusted environment. Ads placed within premium environments capture attention, drive brand favorability, and inspire consumer action. In fact, ads in premium settings deliver conversion rates that are 233% higher compared to non-premium environments.⁶ This heightened effectiveness is not just a matter of placement but of resonance.

Viewers inherently trust premium video content, associating it with value and brand perception. The emotional

richness of premium video content can quadruple the effectiveness of ads in building brand equity, creating an indelible impact on viewers.⁷

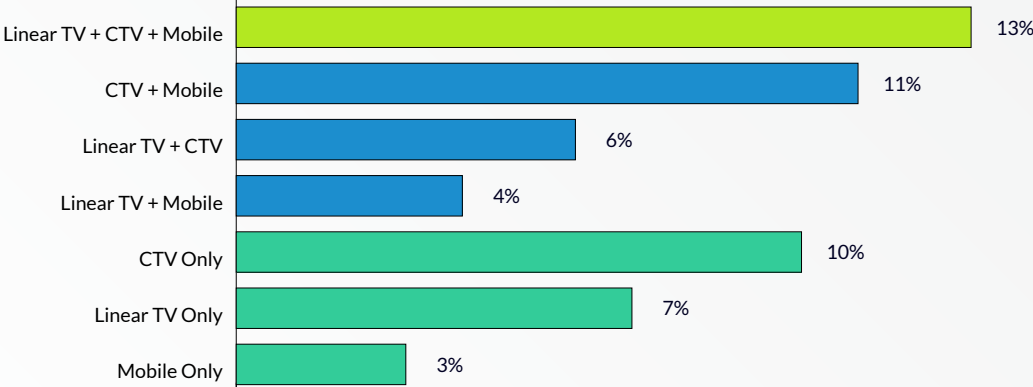
Precision targeting bridges the multiscreen landscape

With near-universal household penetration and consistent engagement across age and device types, multiscreen TV provides broad reach, making it an indispensable element of a comprehensive marketing strategy. Ads in live content amplify brand positivity through shared, emotional, high-engagement environments, solidifying the role of video as a pivotal element in audience-based buying strategies.

But with so many providers to work with, how can marketers find the right audience for their brand? Using simple, traditional demographic buying often casts too

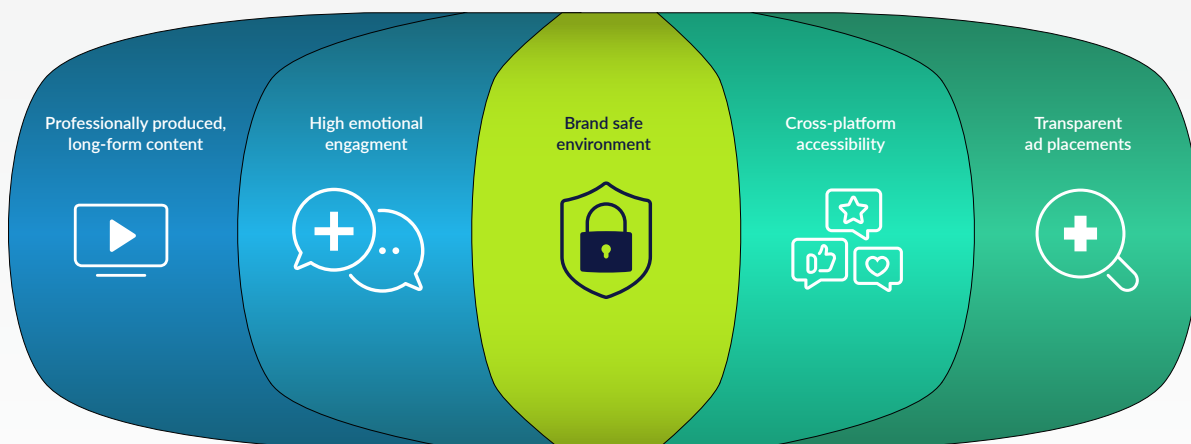
Full Media Mix Drives Purchase Intent

% of people likely to consider a company or brand after watching an ad



Source: Spectrum / MAGNA Media Trends, Ad Mix Synergy: Myth or Reality?, 2023

Premium Video = Multiscreen TV



wide of a net, especially for healthcare brands seeking to educate patients and providers about specific treatment options. Data-driven audience targeting ensures messages reach the right patients and providers, maximizing ROI.

Audience-based buying offers precision, measurable outcomes, and cross-screen consistency, ensuring that pharma brands deliver the most relevant message to their target audience at the appropriate stage in their health or buying journey.

The power of premium video and audience-based buying lies in the ability to leverage data-driven insights to connect with audiences in meaningful ways. By embracing a holistic video strategy, pharma brands can navigate the complex media ecosystem and achieve unparalleled success.

Quick Facts

What is Audience-based TV buying?

Segmenting viewers beyond traditional demographics.

Quick Facts

Data-driven audiences increase multiscreen reach by 38%

Working with NBC Universal and Swoop, a prescription psoriasis medication tested two campaigns on linear and streaming TV using traditional demographic targeting and a data-driven target audience.

Leveraging audiences built on a rich data foundation drove

awareness and higher on-site engagement, increasing script lift.

The data-driven audience reached 38 percent more potential patients than demographic targeting. New patient prescriptions were 7 percent higher than the traditional demo targeting, and search volume increased 22 percent.⁹

Data-driven audiences reduce waste

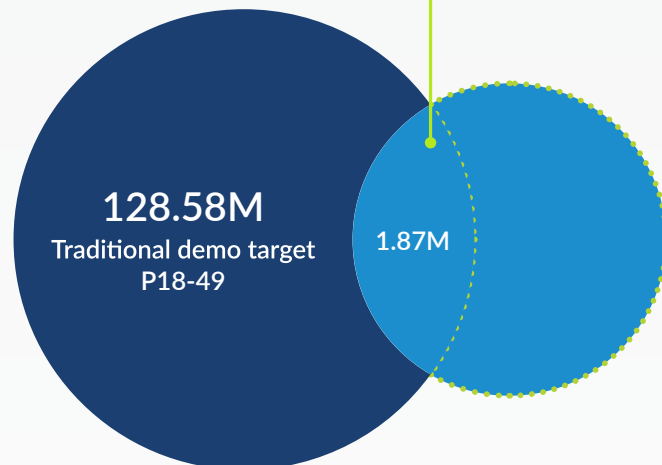
Working with Swoop to reach likely condition sufferers, a pharma brand tested a data-driven audience against traditional demographic targeting, and the results showed six out of 10 likely condition sufferers were not reached with traditional linear planning.⁸

Total demo target P18-49 - 130.45M

Total data-driven patient target of likely condition sufferers - 4.26M

56% of a Swoop data-driven audience was not reached by traditional demo targeting.

Only 1% of the P18-49 demographic target was in the Swoop data-driven target audience.



6 out of 10

condition-sufferers were not reached with traditional linear TV planning

Source: Swoop/Nielsen measurement study 2021

Evolving pharma TV strategies within a highly regulated environment

For pharma marketers, reaching the right audience with the right message is not just about brand awareness — it's about fostering meaningful conversations between patients and healthcare providers (HCPs) that can lead to improved health outcomes.

As the industry shifts towards more data-driven strategies, the role of TV in pharma marketing has been fundamentally transformed.

Healthcare was one of the last sectors to transition from traditional demographic targeting to data-driven audience segmentation. This shift gained momentum in 2020, as the COVID-19 pandemic altered consumer habits and limited pharma reps' direct interactions with physicians.

Focusing on the right audience, instead of channel mix

Pharma marketers are increasingly channel agnostic, focusing on rich audience data to engage each audience

effectively. Traditional demographic targeting risks wasting advertising dollars and missing critical connections with patients and providers. By leveraging data foundations, they drive action-based metrics tied to script lift and on-site engagement.

TV ads are becoming a primary source of information about new medications, a recent survey from Cadent found that 62 percent named TV as their primary source for learning about new prescriptions.¹⁰ This was second only to doctors (68 percent). TV ads won't replace doctor-patient relationships, but this medium can be used to help people access important health information that can guide discussions in the doctor's office.

The impact of treatment ads is significant: A recent survey from Swoop found two-thirds of chronic condition respondents took action after seeing a treatment ad, and 53 percent took action specifically around treatment.¹¹ These actions range from inquiring about treatment options

and specific medications to scheduling appointments to discussing diagnoses and symptoms. Patients reported visiting pharmaceutical company websites and starting or switching medications after seeing an ad.

Precision targeting has evolved TV's role in healthcare marketing from a siloed awareness tool to a dynamic platform for storytelling, reputation building, and value demonstration.

Pharma advertisers focused on using premium video to reach the right audiences at the right time embrace data-driven insights and leverage premium video across all channels to tell compelling stories and build brand reputation. The evolution of TV strategies in pharma marketing reflects a broader trend towards precision, integration, and impact—ensuring that every message resonates with those who need it most.

Navigating privacy legislation while delivering relevant advertising

In the ever-evolving landscape of data privacy, healthcare marketers are faced with the dual challenge of adhering to stringent regulations while ensuring that crucial health information reaches those who need it most. With consumers demanding transparency, consent, and value in exchange for their data, brands that clearly communicate their data practices can build deeper, more trusting relationships.

Consumers are increasingly aware of how their data is used, with 98% stating that responsible data use is essential to their brand experience.¹² Yet, 81% of U.S. adults express concern about how companies handle their data.¹³ As privacy laws continue to evolve, healthcare marketers must navigate these complex regulations without compromising on the delivery of vital health information.

The evolving data privacy legislation landscape

The landscape of privacy legislation is rapidly changing, with 20 states having passed comprehensive data privacy laws and three states enacting laws specific to health data. Additionally, 10 states have pending legislation targeting 2026 and beyond. As these regulations grow to impact half of the population across the U.S., healthcare marketers and video platform providers must reassess the knee-jerk reaction of suppressing entire states from marketing campaigns and instead adopt more sophisticated, compliant approaches to audience targeting.

The intersection of healthcare marketing and privacy law may be complex, but it's not insurmountable. By partnering with compliant, innovative companies, healthcare brands can effectively reach their audiences while respecting privacy and adhering to legal requirements. This calls for a thoughtful approach to targeting, emphasizing the importance of investigating partners thoroughly and understanding data flow.

Marketers should prioritize patient outcomes by connecting them with the information and treatments they need, all while embracing innovative solutions that meet both regulatory requirements and marketing demands. Staying informed about evolving privacy laws is crucial, as is the willingness to adapt strategies accordingly.

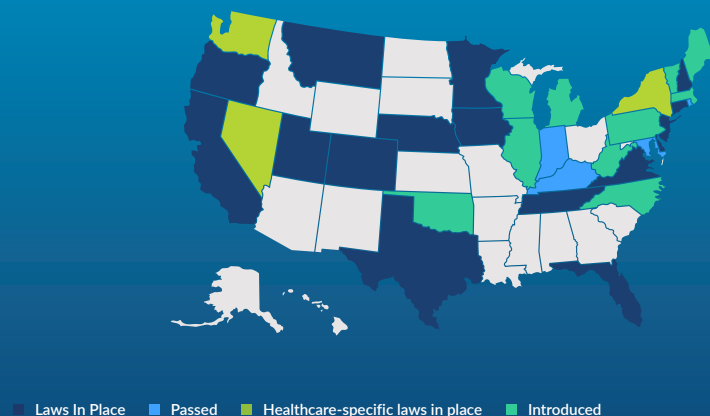
Suppressing entire markets is a blunt instrument that ultimately does a disservice to patients, particularly those with rare diseases who may miss out on critical information about treatments or clinical trials. Instead, leveraging advanced, privacy-compliant targeting methods ensures that the right information reaches the right people at the right time, all while respecting and protecting consumer privacy.

By striking the right balance between privacy protection and effective communication, healthcare marketers can continue to drive progress while building trust with the communities they serve. Through transparent practices and innovative strategies, brand managers can ensure that messages resonate with those who need it most, fostering a healthier future for all.

Pharma marketers can achieve this balance by:

1. Avoiding the use of inferred health data
2. Ensuring all data collection and utilization adheres to ethical standards and regulations
3. Partnering with technology providers who prioritize privacy and compliance

States with Privacy Laws Pharma Marketers Should Know



Source: IAPP, 'US State Privacy Legislation Tracker,'

Key Takeaways



Savvy marketers are moving beyond the linear vs. streaming debate and embracing a data-driven approach that connects fragmented audiences across all premium video platforms.



With the growth of scalable, data-driven technologies and solutions, multiscreen TV has fully evolved into a measurable, performance-based platform, enabling pharma marketers to spark informed conversations between patients and providers that drive quantifiable health outcomes.



Audience-based buying empowers pharma brands to reach niche patient populations across multiscreen TV, combining emotional storytelling with data-driven precision in brand-safe environments.



Even in a highly regulated environment, pharma marketers can effectively reach the right patients by partnering with compliant, innovative video platforms that are successfully balancing privacy, transparency and precision targeting.

About Swoop

Swoop is a market leader in privacy-safe, award-winning omnichannel healthcare marketing solutions. Our platform connects patients, HCPs, and brands at scale across all channels, delivering unmatched engagement and proximity to patients throughout their health journey. By combining AI-driven technology with real-world data (RWD), first- and zero-party data, and engagement data, Swoop empowers pharma marketers to make faster, more precise decisions that improve patient outcomes.

About VAB

The Video Advertising Bureau (VAB)—whose members include premium multiscreen TV providers and distributors, alongside a broader community of influential media companies—plays a dual role in the video advertising industry. VAB is fiercely advocating for the changes that bring about a more innovative and transparent marketplace. VAB also provides the insights and thought leadership that enable marketers to develop business-driving marketing strategies. Visit VAB online and access its continuously growing content library at thevab.com.

Sources

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