

Marketer's Guide

▶ Innovative thinking to make a lasting impact on your business growth.

Dedicated to Your Good Health

How TV Drives Discovery & Encourages Education in the Pharma DTC Category





Multiscreen TV encourages ailment sufferers to educate themselves for better health

Although many American adults currently suffer from a medical condition of some sort, they are always looking for ways to better their physical and mental well-being and they **view prescription remedies as an effective way to improve the quality of their lives.**

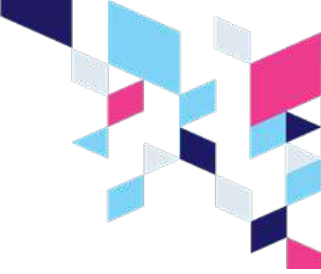
When it comes to ailments, most adults will conduct their own research on appropriate treatments and will also consult their doctor as well. **TV advertising plays an outsized role in this process.**

While TV accounts for approximately one-quarter of all direct-to-consumer prescription remedy (DTC) ad spend, it's much more likely than any other media to **drive brand discovery, inspire prospective patients to seek out more information online and encourage them to discuss treatments with their doctor** so they can make more informed decisions about their health.

TV's impact is even greater when **advanced solutions such as audience-based buying and addressable TV** are implemented within video campaigns to more precisely reach relevant patients and healthcare practitioners across multiscreen TV platforms.

Continue reading to learn more about how **multiscreen TV drives discovery and encourages both exploration and education** by ailment sufferers and for pharma brands...

How multiscreen TV guides patients on their path to treatment



1

Scope of Ailments in America

Most U.S. adults suffer from some sort of medical condition and are using prescription remedies for treatment

2

Adults Want to Live Healthier Lives

Most U.S. adults believe that prescription remedies have improved their lives

3

Dissecting Pharma TV Ad Investment

While adhering to strict advertising guidelines, brands are using TV to support remedies that combat serious, invasive diseases and other severe conditions

4

TV Drives Discovery & Encourages Education

No other media platform inspires ailment sufferers to conduct further research and have discussions with their doctor so they can make more informed decisions about their health like TV does

5

'Advanced TV' Enables Greater Precision

Audience-based TV buying and addressable TV solutions deliver precise targeting and outcomes throughout a patient's path to treatment

1

Scope of Ailments in America

Most U.S. adults suffer from some sort of medical condition and are using prescription remedies for treatment

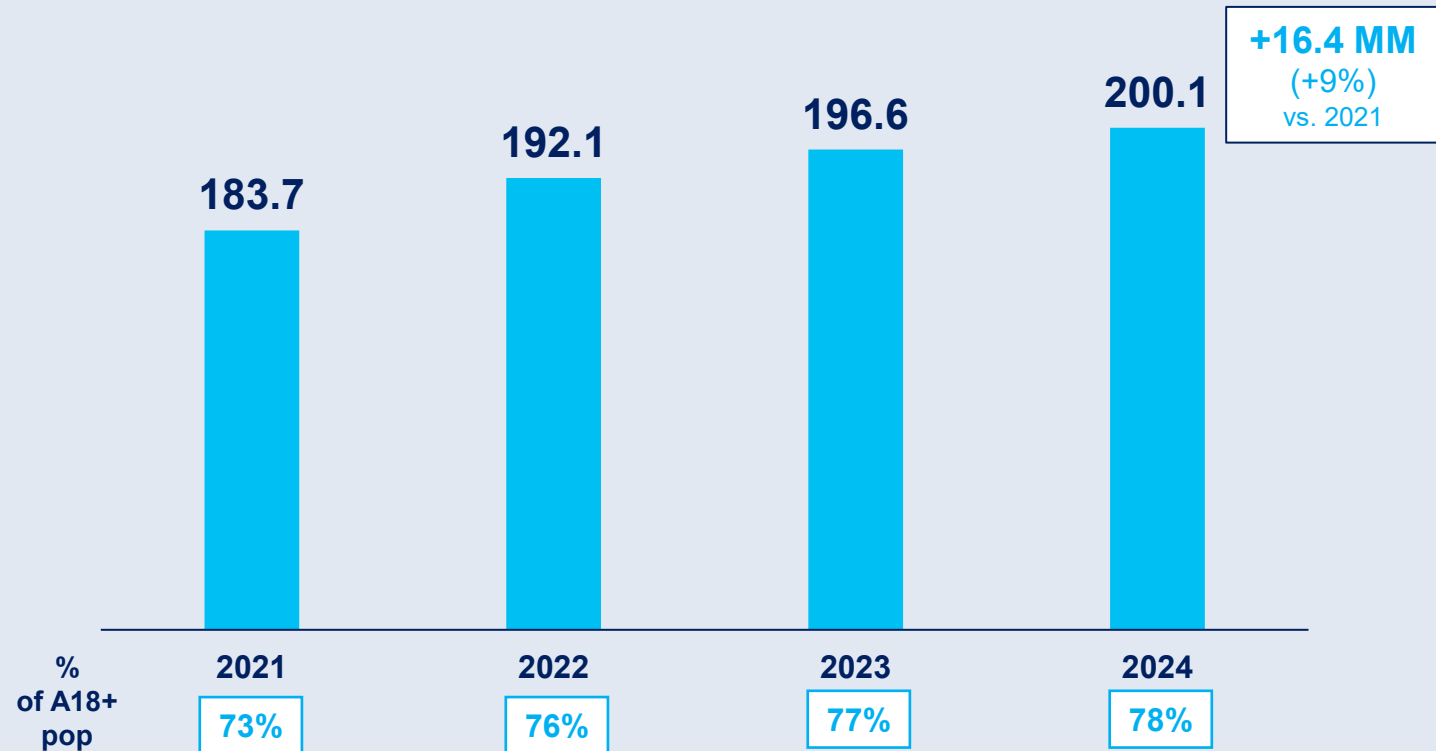


Over 200 million adults currently suffer, or have recently suffered, from some sort of medical ailment

78%

of adults 18+ are currently suffering a medical ailment, or 200 million adults

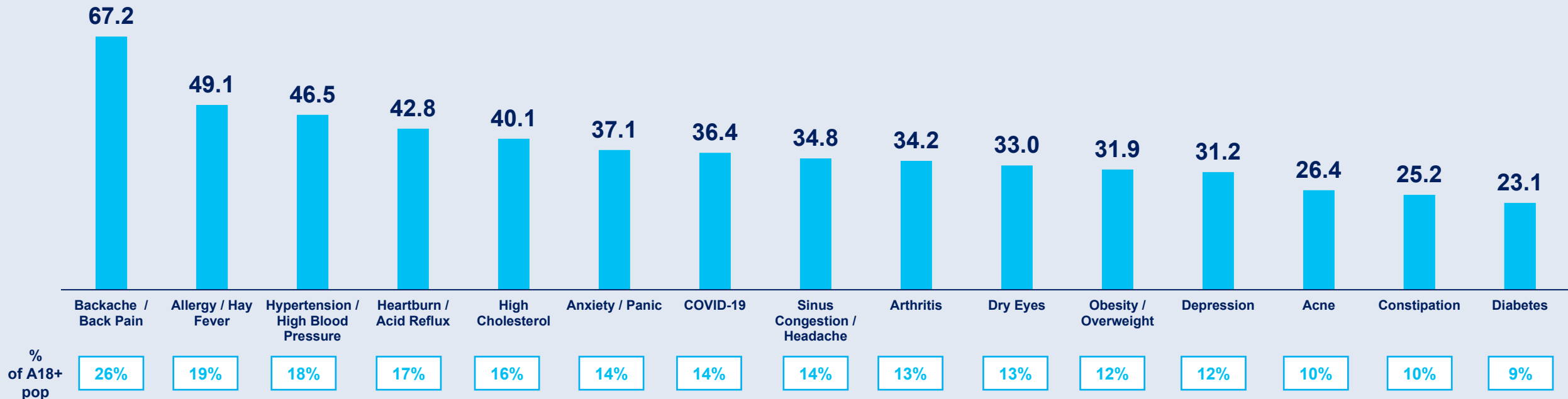
Have/Had an Ailment* in the last 12 months
Adults 18+
in millions



Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Studies: 2021, 2022, 2023 & 2024, Adults 18+. *See appendix (page 54) for a full list of ailments that are included in this universe.

The top 15 ailments include backaches and pain, allergies, high blood pressure, heartburn, high cholesterol, anxiety, Covid, headaches and more

Top 15 Ailments* That Adults Currently Have / Had in the last 12 months
Adults 18+
in millions

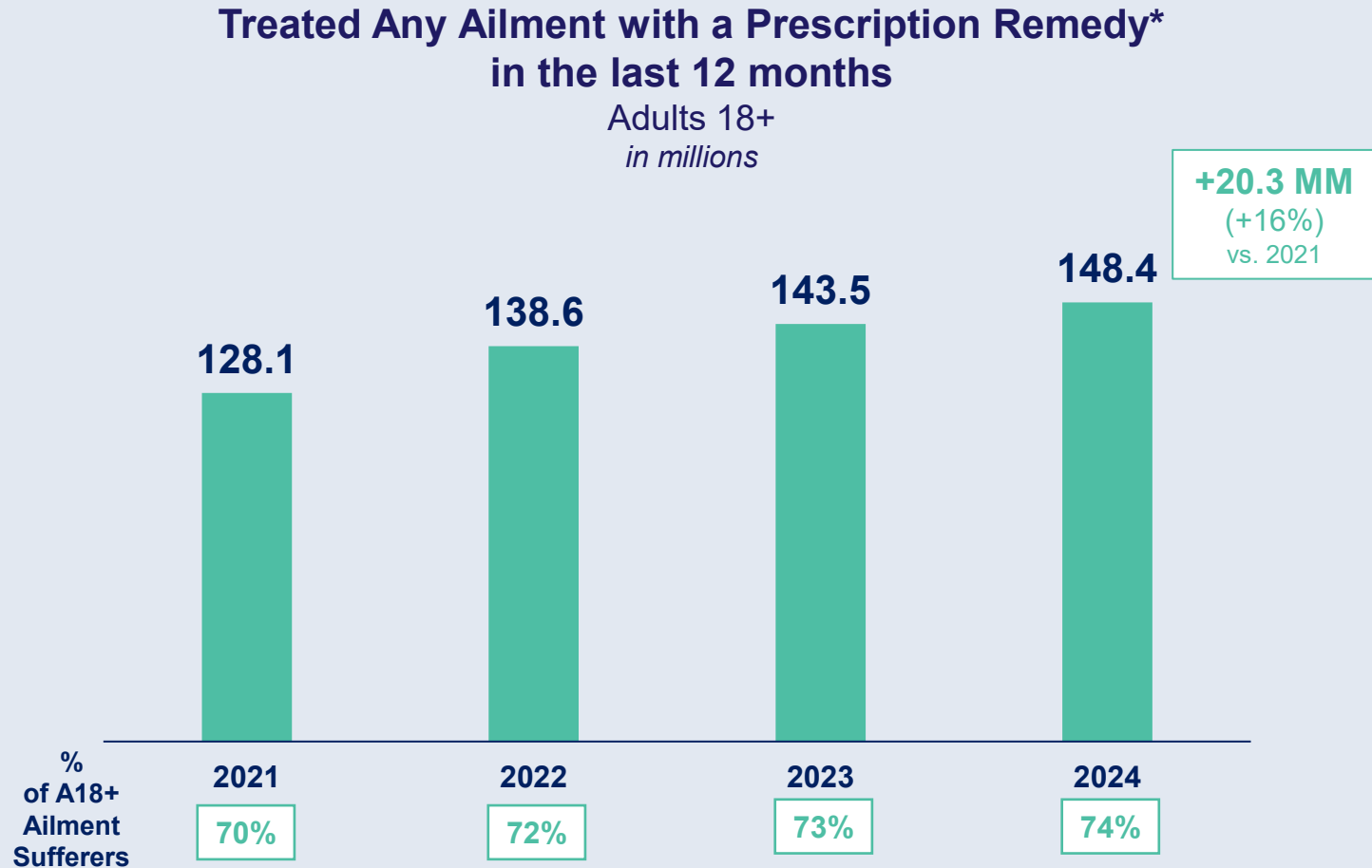


Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Study 2024, Adults 18+. *See appendix (page 53) for the full list of ailments. Arthritis represents 'any,' Diabetes represents 'any.'

Three-quarters of ailment sufferers are using, or have recently used, at least one prescription remedy for treatment

74%

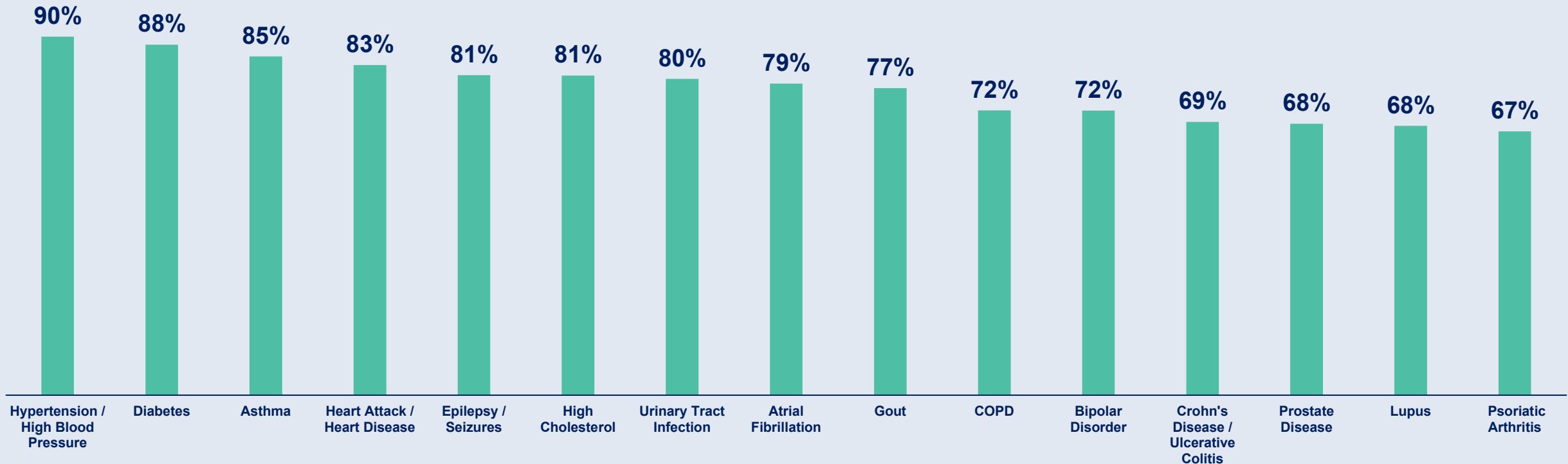
of adult 18+ ailment sufferers are using a prescription remedy as treatment, or nearly 150 million adults



Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Studies: 2021, 2022, 2023 & 2024, Adults 18+. *Prescription remedy includes both branded and generic remedies.

Many ailments with the highest usage of prescription remedies reflect serious, invasive diseases and other severe conditions

% of Ailment Sufferers that Used Prescription Remedies for Treatment
Adults 18+
in millions

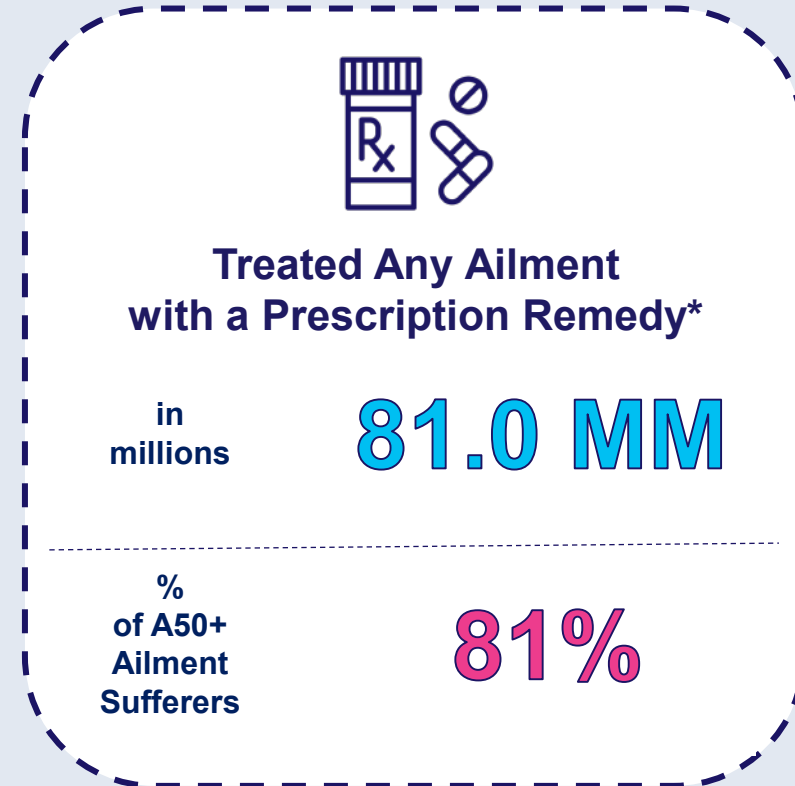
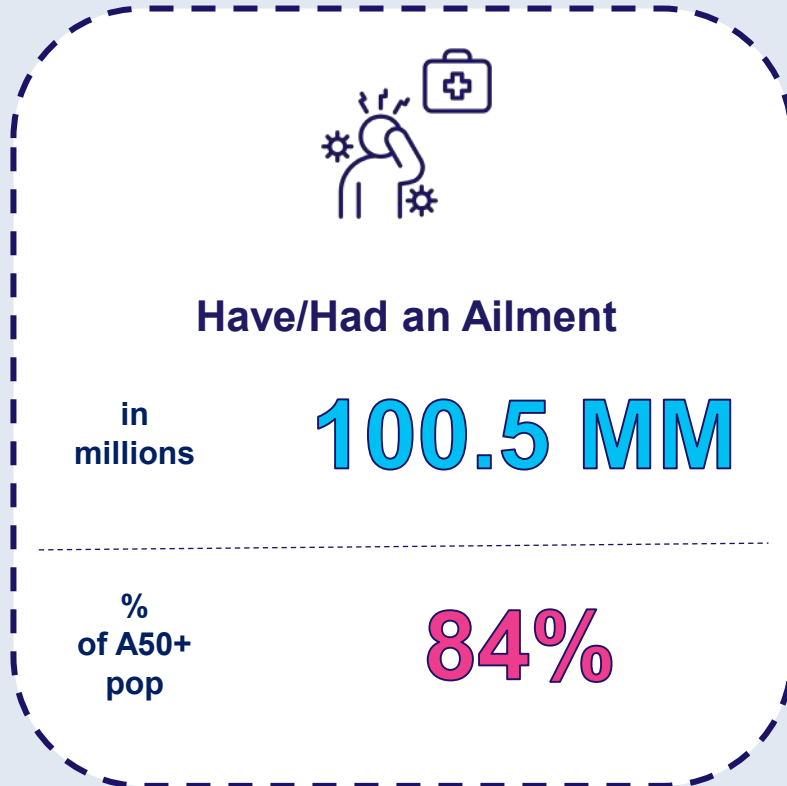


Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Study 2024, Adults 18+. *See appendix (page 55) for the full list by ailment. Diabetes represents 'any.' COPD = Chronic Obstructive Pulmonary Disease

Naturally, the incidence of ailments is higher for adults 50+ as over 100 million have an ailment and 80% use a prescription remedy for treatment

In the Last 12 months...

Adults 50+

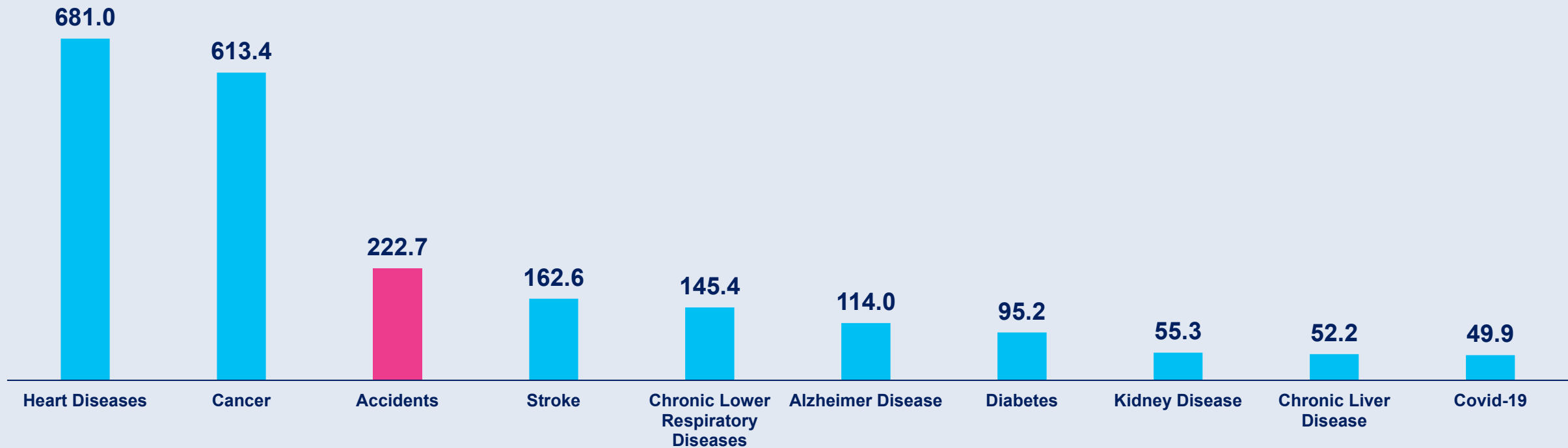


Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Study 2024, Adults 50+. *Prescription remedy includes both branded and generic remedies.

The importance of prescription remedies is obvious, as nine of the 10 leading causes of death are due to serious, invasive diseases

▶ These nine ailments accounted for **1,968,960 deaths** in 2023

The 10 Leading Causes of Death in the U.S.
2023
in thousands



Source: National Center for Health Statistics, National Vital Statistics System, mortality data file, data for 2023, December 2024.

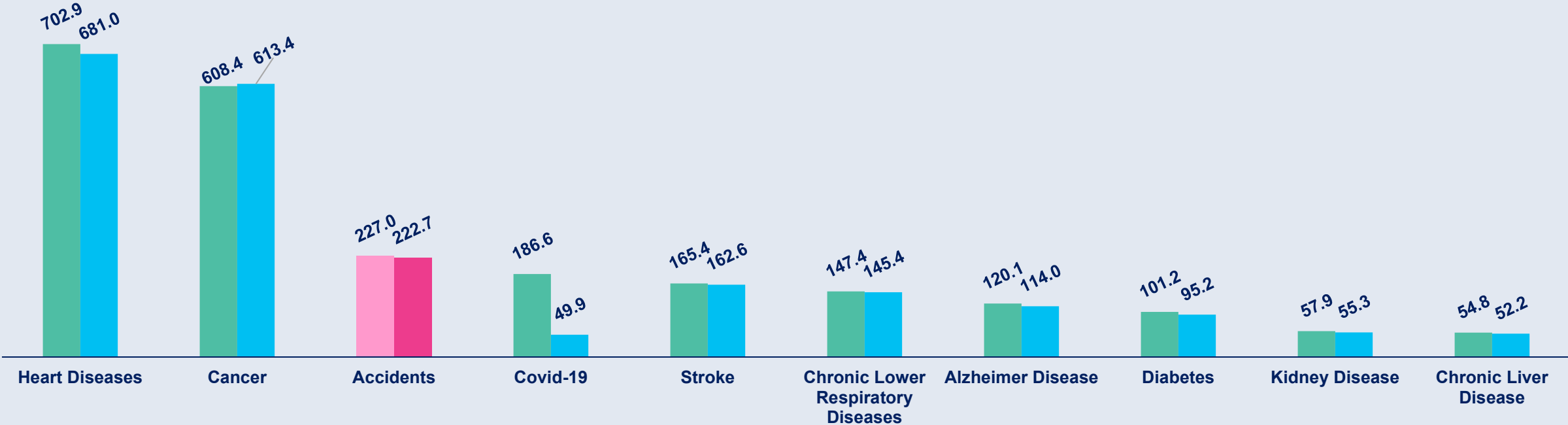
Prescription remedies have certainly played a role in helping decrease recent mortality rates among the top causes of death in the U.S.

▶ More ailment sufferers are getting relief from prescription remedies as eight of the nine ailments saw YoY declines

The 10 Leading Causes of Death in the U.S.

2022 vs. 2023
in thousands

■ 2022 ■ 2023



Source: National Center for Health Statistics, National Vital Statistics System, mortality data file, data for 2022 & 2023, December 2024.

2

Adults Want to Live Healthier Lives

Most U.S. adults believe that **prescription remedies** have improved their lives



Most U.S. adults are always looking for ways to live healthier and improve their mental well-being

Health Attitudes % any agree



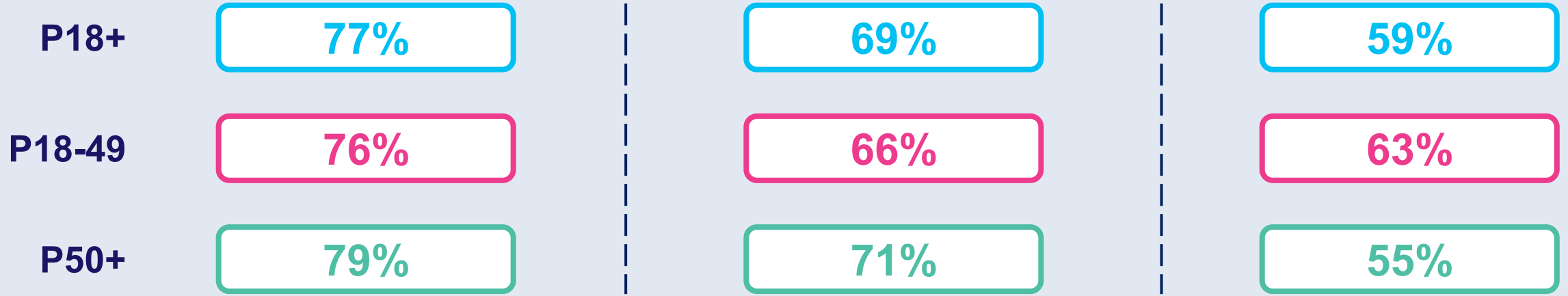
'I am always looking for new ways to live a healthier life'



'I make sure I exercise regularly'



'I often look for products or services that can help improve my overall mental well-being'



Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Study 2024. Any agree = agree completely or somewhat agree.

They also do their own thorough research on treatments and prescription remedies and will listen to their doctors as well

Health Attitudes % any agree



'I research treatment options on my own before asking my doctor about them'

P18+

60%

P18-49

61%

P50+

58%



'Before I begin taking any drug, I look for as much information about it as possible'

73%

71%

75%



'I always do what my doctor tells me to do'

70%

65%

77%

Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Study 2024. Any agree = agree completely or somewhat agree.

Most people, especially older adults, believe that prescription remedies are very effective, and that medicine has improved the quality of their lives

Health Attitudes % any agree



'Prescription drugs are more effective than over-the-counter remedies'

P18+

57%

P18-49

53%

P50+

62%



'Medication has improved the quality of my life'

67%

61%

75%

Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Study 2024. Any agree = agree completely or somewhat agree.

3

Dissecting Pharma TV Ad Investment

While adhering to strict advertising guidelines, brands are using TV to support remedies that **combat serious, invasive diseases and other severe conditions**



Pharma DTC category spends over \$26 billion annually across TV and digital, with approximately one-quarter of that ad spending going to TV

Pharmaceutical Category (DTC Prescription Remedies Only): TV & Digital Spending
in billions

■ TV Spend ■ Digital Spend



Source: TV Spend = VAB analysis of Nielsen Ad Intel data, calendar year 2022-2024. TV media includes Cable TV, Network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV; excludes promos and PSAs. Pharma represents 'Pharmaceutical Houses' sub-group category. Digital Spend = eMarketer Forecast, August 2024; includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets and other internet-connected devices (including CTV), and includes all the various formats of advertising on those platforms. Pharma DTC, or direct-to-consumer pharma advertising (DTCPA), refers to the marketing and advertising of pharmaceutical products directly to consumers as patients.

About \$4 billion of digital ad spend is in social media, however there are no clear FDA guidelines on regulating influencers or comment sections



Unclear Guidelines

Beyond ads, there are **no clear guidelines** for regulating social media influencers, their comment sections, direct messages, or other ways they can communicate with their followers about prescription medicines.



Out-of-Date Policies

The FDA has **not updated its guidance on prescription drug promotion for social media since 2014**. The social media landscape has evolved dramatically in the last 11 years, including the creation of TikTok in 2016.



Lack of Warnings

Social media advertisements **often lack clear side effect warnings**, and consumers often have to navigate to a different page to find them

This is in stark contrast to TV advertising which is required to adhere to strict advertising guidelines from the Food & Drug Administration (FDA)

▶ In May 2024, incremental additions were made to a longstanding body of prescription drug advertising regulations for the TV industry

Five General Standards for Pharma DTC Advertising Introduced in the FDA's New Rule

Consumer Friendly Language

Advertisements **must clearly state** the name of the drug and the major statement of side effects. Ads **should not include** technical or medical jargon familiar only to health care professionals.

Understandable Audio Information

Audio information **must be understandable** in terms of volume, articulation, and pacing, and should be at least as understandable as the rest of the commercial. "Rapid fire" disclosures in advertisements **are not permitted**.

No Distractions

Television advertisements **must present** the major statement concurrently in the audio and visual portions of the ad

Textual Information Must Be Easily Readable

The on-screen text in television advertisements **must be presented** against a contrasting background for sufficient duration and in a font size and style that is easily readable.

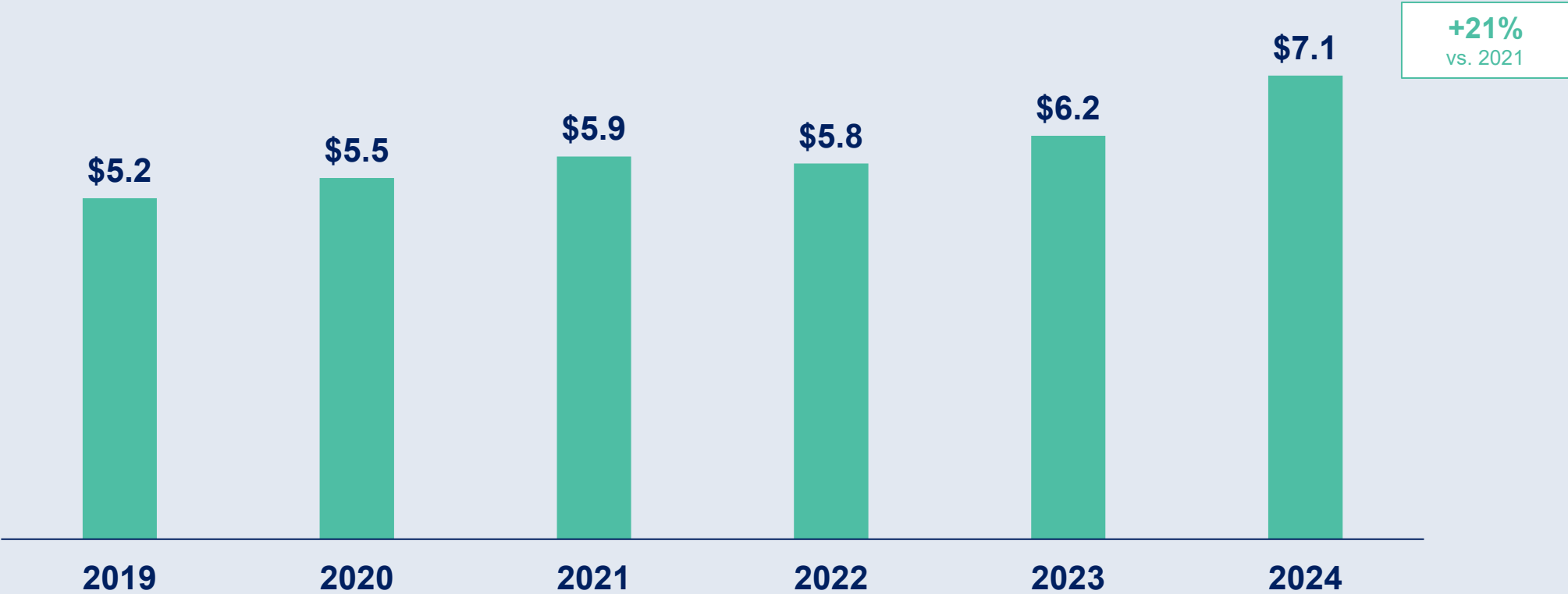
Major Statement Must be Presented Concurrently in Text and Audio

Advertisements **cannot have** statements, text, images or sounds that detract from comprehension of the major statement. In particular, no other sounds, including music, should be in the audio during the side effect disclosure portion of the ad.

Source: Food and Drug Administration, Direct-to-Consumer Prescription Drug Advertisements: Presentation of the Major Statement in a Clear, Conspicuous, and Neutral Manner in Advertisements in Television and Radio Format, November 2023

Pharma DTC TV spend is now \$7 billion annually, up 21% since 2021 which closely aligns with the increase of people taking prescription remedies

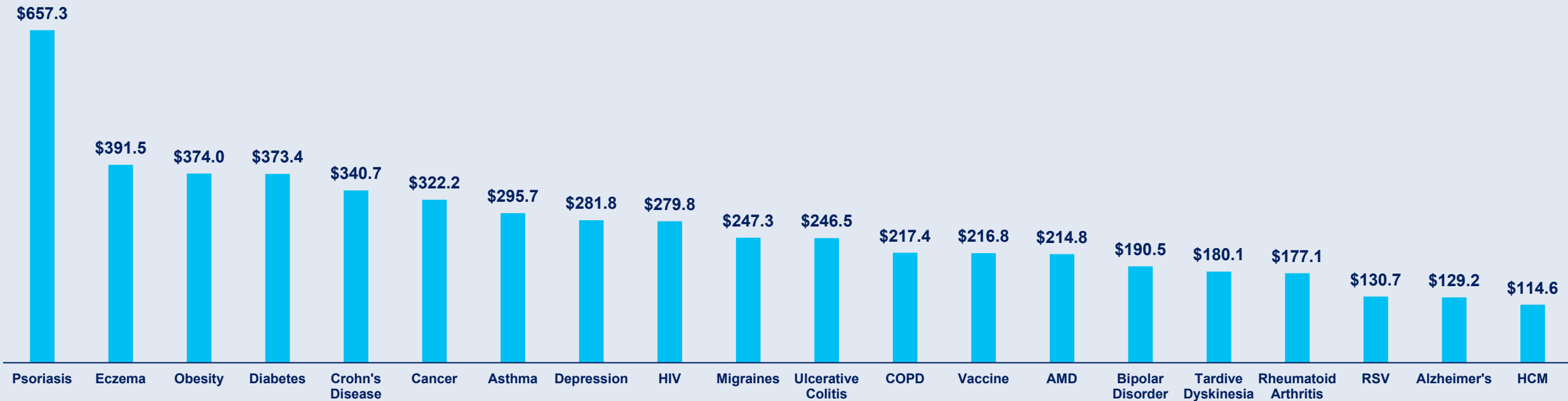
Pharmaceutical Category (DTC Prescription Remedies) TV Spending
in billions



Source: VAB analysis of Nielsen Ad Intel data, calendar year 2019-2024. TV media includes Cable TV, Network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV; excludes promos and PSAs. Pharma represents 'Pharmaceutical Houses' sub-group category. Pharma DTC, or direct-to-consumer pharma advertising (DTCPA), refers to the marketing and advertising of pharmaceutical products directly to consumers as patients.

The top TV spending subcategories include remedies for serious, invasive diseases and other severe conditions

Top 20 DTC Prescription Remedy Subcategories by TV Investment Spend
CY 2024
in millions



Source: VAB analysis of Nielsen Ad Intel data, calendar year 2024. TV media includes Cable TV, Network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV; excludes promos and PSAs. Pharma represents 'Pharmaceutical Houses' sub-group category. COPD = Chronic Obstructive Pulmonary Disease; AMD = Age-related macular degeneration; RSV = Respiratory syncytial virus; HCM = Hypertrophic cardiomyopathy. Diabetes TV spending is specifically from Type 2 remedies; Cancer TV spending includes a mix of melanoma, lung, prostate, breast and neck cancer remedies.

55% of the \$7 billion in Pharma DTC TV advertising was from 20 brands that offer remedies to predominately combat serious, invasive diseases

Top 20 Prescription Remedy Brands by TV Investment Spend CY 2024

Crohn's Disease /
Psoriasis /
Ulcerative Colitis

Skyrizi
risankizumab-rzaa
(\$501.5 MM)

Rheumatoid Arthritis
Ulcerative Colitis / Eczema

RINVOQ
upadacitinib
(\$466.7 MM)

Eczema / Asthma

DUPIXENT
(dupilumab) Injection
(\$389.1 MM)

Obesity

ONCE-WEEKLY
wegovy
semaglutide injection 2.4 mg
(\$362.9 MM)

Depression /
Alzheimer's

REXULTI
brexpiprazole
2mg tablets
(\$272.7 MM)

Psoriasis /
Ulcerative Colitis

Tremfya
(guselkumab)
(\$184.5 MM)

Diabetes

Jardiance
(empagliflozin) tablets
(\$163.5 MM)

Depression /
Bipolar Disorder

Vraylar
(cariprazine) capsules
(\$155.7 MM)

Psoriasis

SOTYKTU
(deucravacitinib) 6 mg tablets
(\$149.3 MM)

Diabetes

ONCE-WEEKLY
OZEMPIC
semaglutide injection 0.5mg, 1mg, 2mg
(\$143.1 MM)

COPD

BREZTRI
AEROSPHERE[®]
budesonide / glycopyrronium / formoterol
fumarate dihydrate pressurized inhalation
suspension
(\$133.1 MM)

RSV

AREXVY
(RESPIRATORY SYNCYTIAL VIRUS
VACCINE RECOMBINANT, ADJUVANTED)
(\$130.7 MM)

HCM

CAMZYOS
(mavacamten) capsules
(\$114.3 MM)

Migraines / Wrinkles

BOTOX
(\$106.3 MM)

AMD

EYLEA
(aflibercept) Injection
(\$104.1 MM)

Bipolar Disorder

CAPLYTA
(lumateperone) capsules
(\$99.1 MM)

Tardive Dyskinesia

INGREZZA
SPRINKLE
(valbenazine) capsules
(\$97.3 MM)

Cancer

KEYTRUDA
(pembrolizumab)
(\$97.1 MM)

Psoriasis

Otezla
(apremilast) 30mg tablets
(\$96.5 MM)

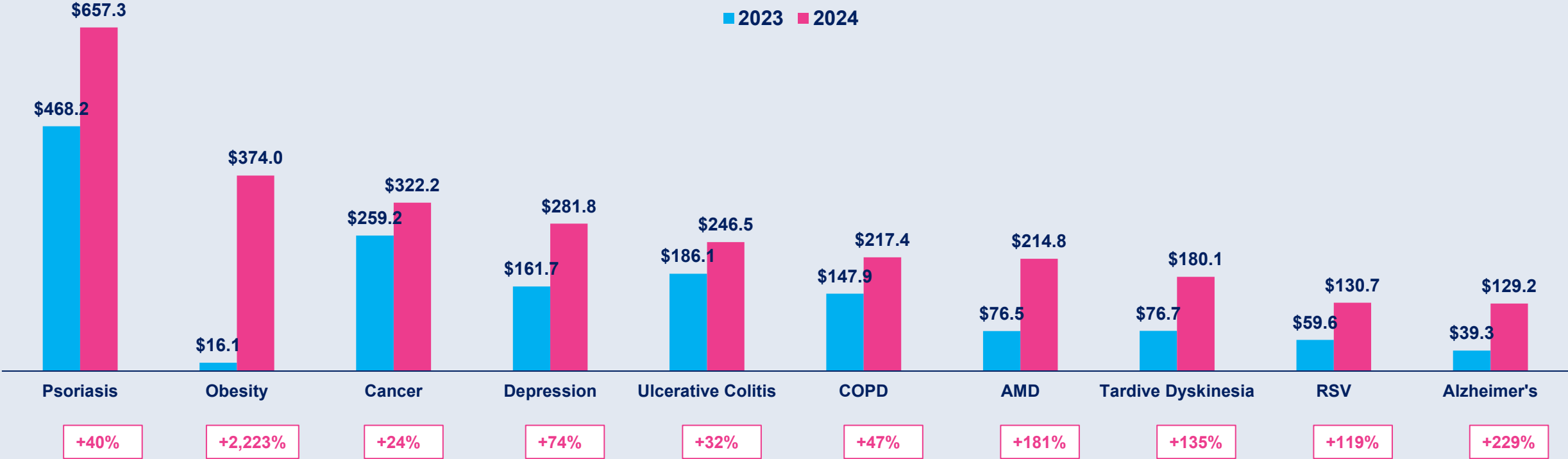
Menopause

VEOZAH
(fezolinetant) tablets 45mg
(\$95.0 MM)

Source: VAB analysis of Nielsen Ad Intel data, calendar year 2024. TV media includes Cable TV, Network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV; excludes promos and PSAs. Pharma represents 'Pharmaceutical Houses' sub-group category. COPD = Chronic Obstructive Pulmonary Disease; AMD = Age-related macular degeneration; RSV = Respiratory syncytial virus; HCM = Hypertrophic cardiomyopathy. Diabetes TV spending is specifically from Type 2 remedies; Cancer TV spending includes a mix of melanoma, lung, prostate, break head and neck cancer remedies.

Remedies for chronic skin conditions, obesity, cancer, depression and colitis were among those with the biggest YoY increases in TV ad spend

Prescription Remedy Subcategories: Largest YoY Increases in TV Investment
 CY 2023 vs. 2024
in millions (ranked by 2024 TV spending)



Source: VAB analysis of Nielsen Ad Intel data, calendar year 2023-2024. TV media includes Cable TV, Network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV; excludes promos and PSAs. Pharma represents 'Pharmaceutical Houses' sub-group category. COPD = Chronic Obstructive Pulmonary Disease; AMD = Age-related macular degeneration; RSV = Respiratory syncytial virus; HCM = Hypertrophic cardiomyopathy. Based on subcategories with \$100MM+ TV spending in 2024. *See appendix (page 56) for a list of brands with the largest YoY TV investment increase.

4

TV Drives Discovery & Encourages Education

No other media platform inspires ailment sufferers to **conduct further research** and **have discussions with their doctor** so they can make **more informed decisions about their health** like TV does



Frequent TV viewers are much more likely than the average adult to have a variety of ailments which makes them a high value audience

▶ 'Heavy' TV Viewers over index the average adult population for 12 of the top 15 ailments

Top 15 Ailments: % of Adult 18 Population vs. % of 'Heavy' TV Viewers
in millions

	Backache / Back Pain	Allergy / Hay Fever	Hypertension / High Blood Pressure	Heartburn / Acid Reflux	High Cholesterol	Anxiety / Panic	COVID-19	Sinus Congestion / Headache	Arthritis	Dry Eyes	Obesity / Overweight	Depression	Acne	Constipation	Diabetes
% of A18+ pop	26%	19%	18%	17%	16%	14%	14%	14%	13%	13%	12%	12%	10%	10%	9%
% of 'Heavy' TV Viewers	31%	19%	28%	21%	24%	14%	12%	16%	21%	16%	16%	14%	7%	12%	16%
Index	117	101	153	123	152	96	88	115	154	128	128	111	70	118	174

***How to read:** 'Heavy' TV viewers are 17% more likely to have a 'backache / back pain' ailment than the average adult 18+ population

Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Studies: 2021, 2022, 2023 & 2024, P18+ Study Universe. Arthritis represents 'any,' Diabetes represents 'any.' 'Heavy' TV Viewer = Top 1 (Heavy) TV Quintile, includes men who watch 47.5+ hours weekly and women who watch 49.5+ hours weekly.

Frequent TV viewers are very responsive to pharma TV ads and therefore much more likely to take actions on their path to treatment

39%

of 'heavy' TV viewers have taken an action after seeing a healthcare ad
(115 index vs. average adult 18+)

'Heavy' TV Viewers vs. Adults 18+ Actions taken in the last 12 months after seeing a healthcare ad

+17%

more likely to have...

Consulted a pharmacist

+21%

more likely to have...

Visited a product or drug website

+56%

more likely to have...

Discussed an ad with their doctor

+29%

more likely to have...

Asked their doctor to prescribe a specific drug

Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Study 2024, P18+ Study Universe. *Prescription remedy includes both branded and generic remedies. 'Heavy' TV Viewer = Top 1 (Heavy) TV Quintile, includes men who watch 47.5+ hours weekly and women who watch 49.5+ hours weekly.

Adults of all ages are much more likely to get information on ailment remedies from pharma TV ads than any other media

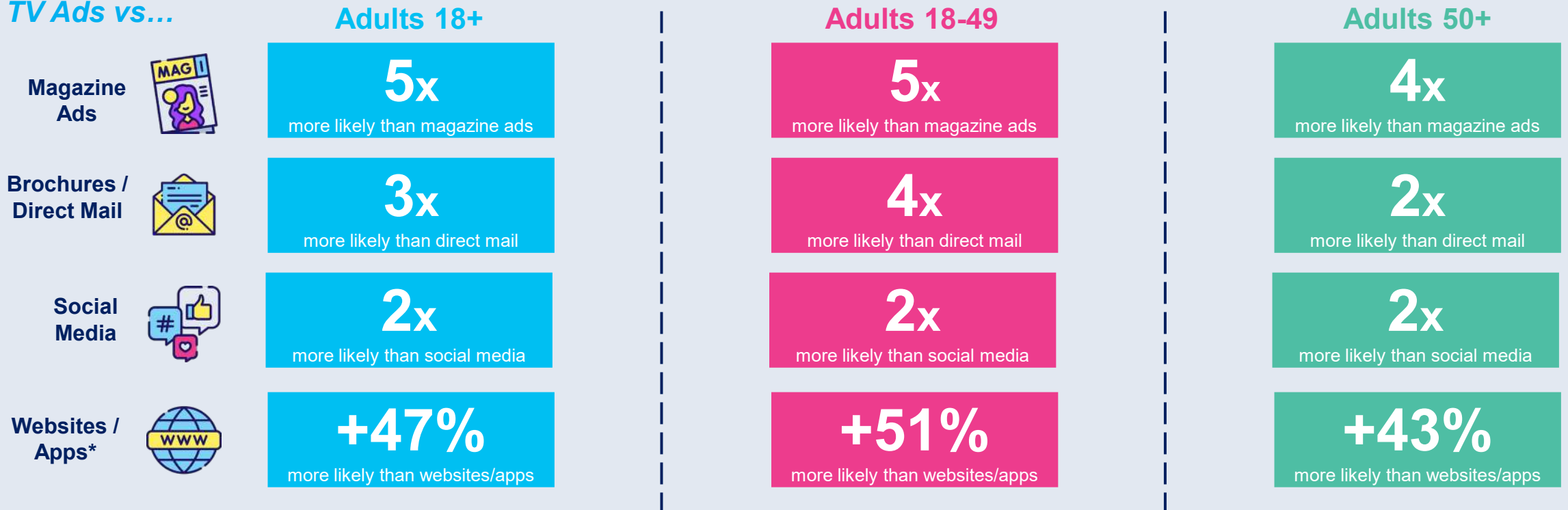
▶ Although there are almost 3x more pharma ad dollars spent in digital than invested in TV, consumers are much more likely to get information from TV ads

How did you obtain information about an ailment or prescription drug?


Media platforms only

Adults were **much more likely** to get remedy information from **TV ads** than any other media

TV Ads vs...



Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Study 2024, P18+ Study Universe. Statement based on 'in last 12 months.' *excludes health information-related websites/apps.



To further prove TV's ability to drive patient discovery and encourage further research, we conducted an analysis on how **TV campaigns impacted branded online search** across 58 first-time pharma DTC TV advertisers...

How to read the charts later in this section:

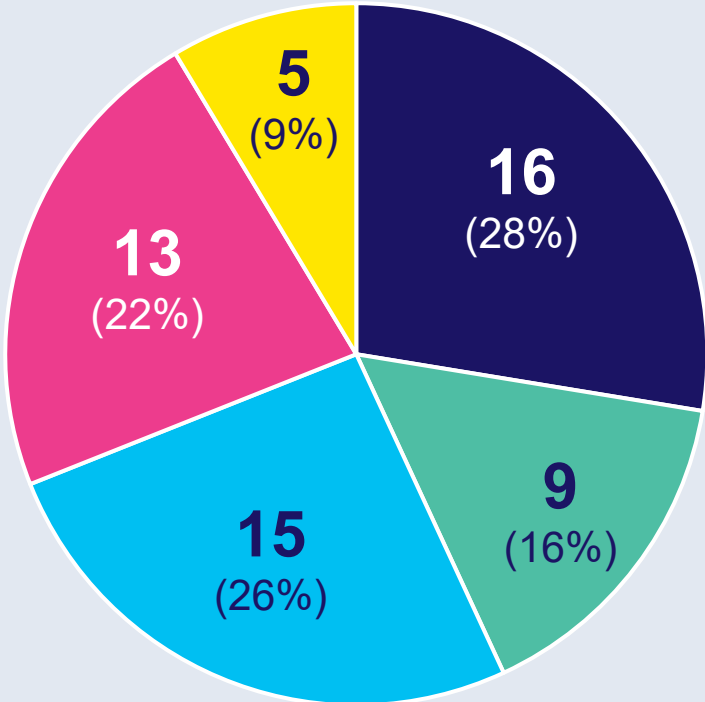
Google Search Index = represents search interest relative to the highest point during a specific time period for a given region, a value of **100 is the peak popularity for the term**, a value of 50 means that the term is half as popular.

The average length of time between a prescription drug remedy receiving FDA approval and the launch of their first TV campaign is **23 months**

of Months Between FDA Approval & First-Time TV Campaign Launch

58 brand analysis

■ Less than Six Months ■ Six Months to a Year ■ One to Two Years ■ Two to Five Years ■ Five+ Years

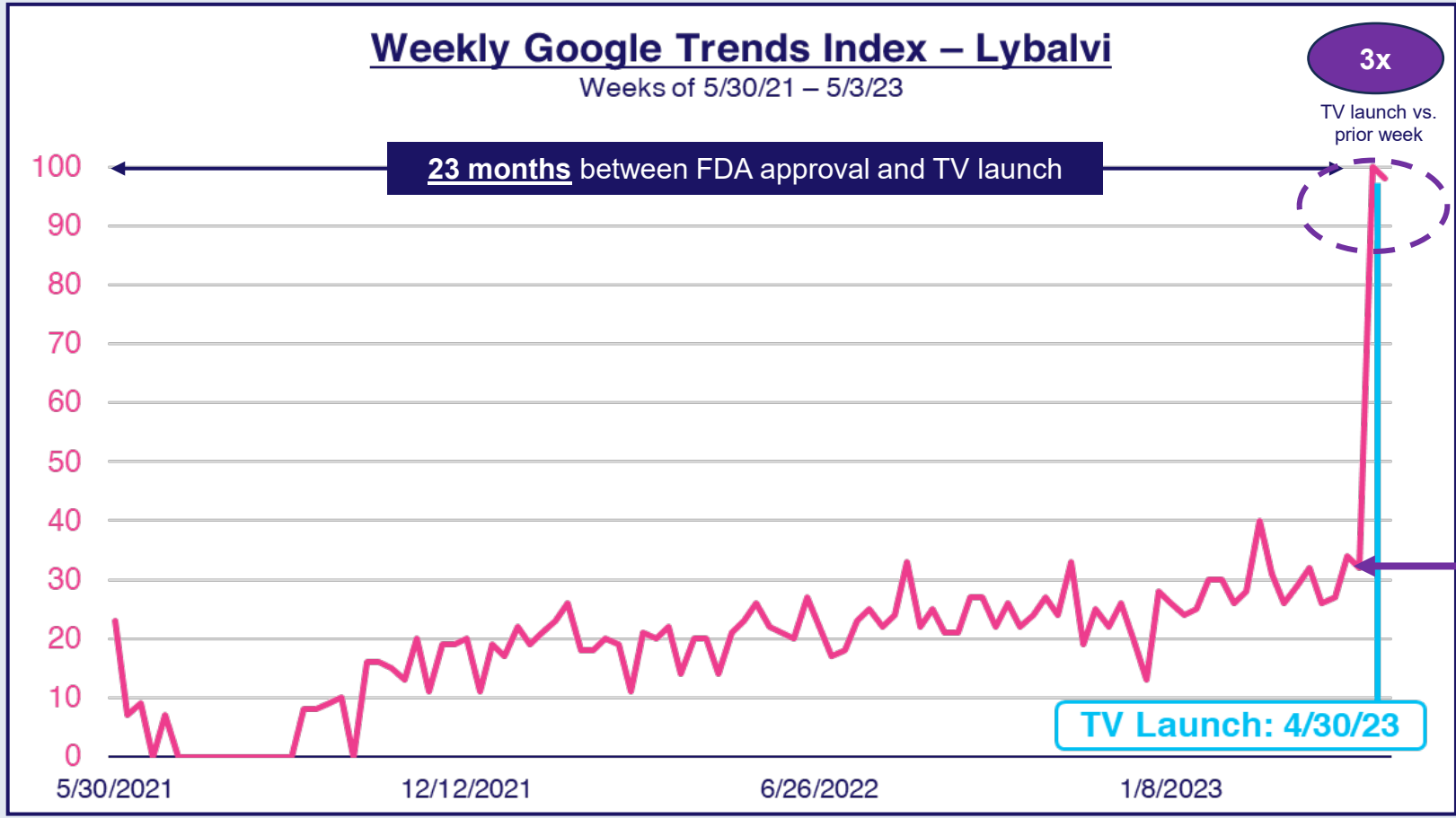


*based on an analysis of **58 prescription drug brand remedies** that launched their first TV campaign **between Jan 2021 – June 2024**

Source: VAB analysis of Nielsen Ad Intel data, calendar year 2021 - June 2024. TV media includes cable TV, network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV; excludes promos and PSAs. Pharma represents brands within 'Pharmaceutical Houses' sub-group category.

Lybalvi: This treatment for bipolar disorder saw its branded online search triple once their first TV campaign launched, 23 months after approval

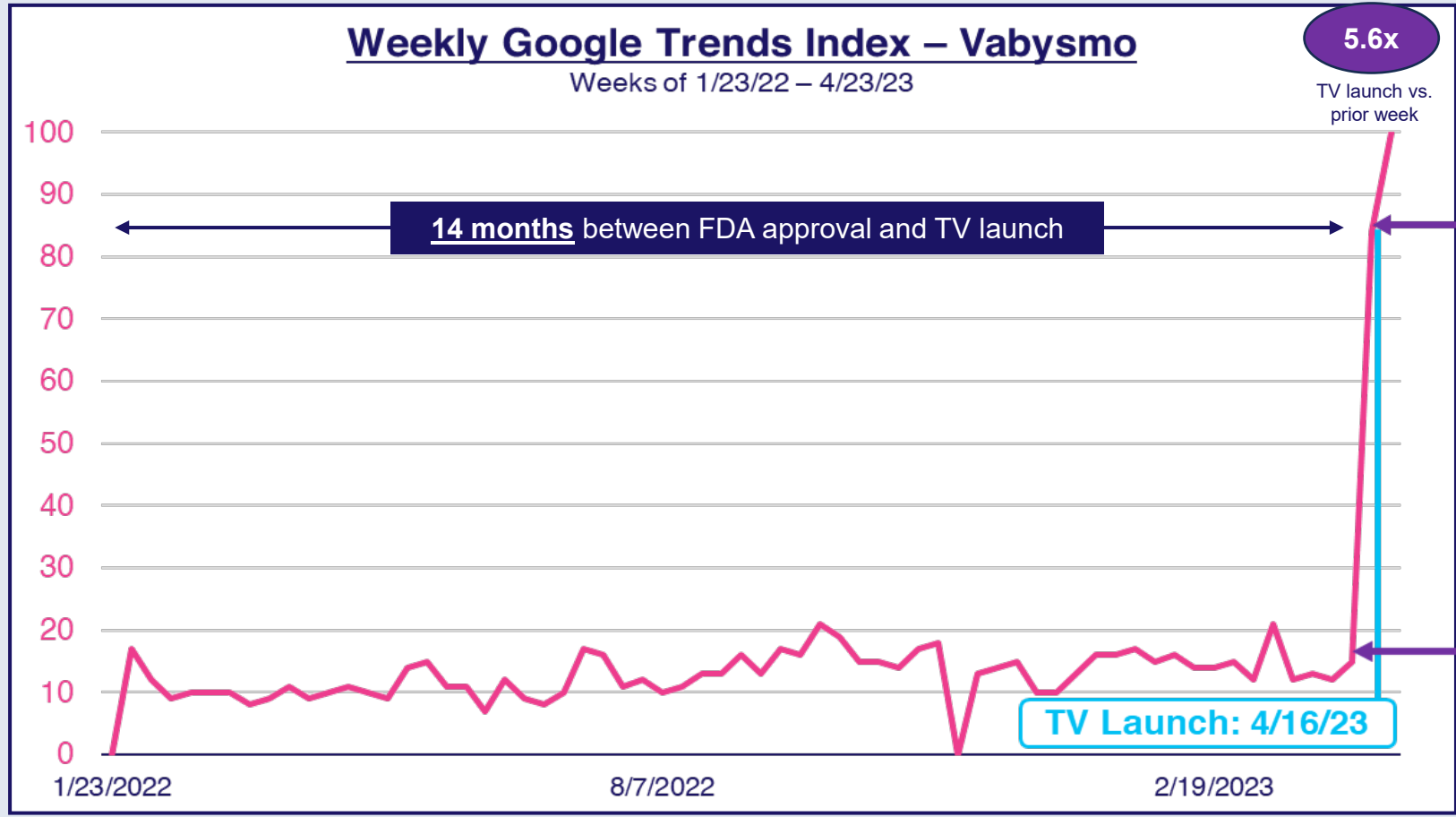
This Chart Plots:
The level of relative weekly Google search activity (for Lybalvi) prior to its high point in search activity (the spike at the end of TV launch week)



Source: VAB analysis of Google Trends, United States only, branded web search. Time period for each brand is based on their FDA approval date through TV campaign launch. Google Search Index represents search interest relative to the highest point on the chart for the given region and time period, a value of 100 is the peak popularity for the term, a value of 50 means that the term is half as popular. VAB analysis of Nielsen Ad Intel, TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, January 2021 – June 2024 (calendar months); Note: Light blue line marks the first day of TV spending.

Vabysmo: This treatment for eye conditions saw more than a five-fold lift in branded search once TV launched, which continued through the campaign

This Chart Plots:
 The level of relative weekly Google search activity (for Vabysmo) prior to its high point in search activity (the spike at the end of TV launch week)



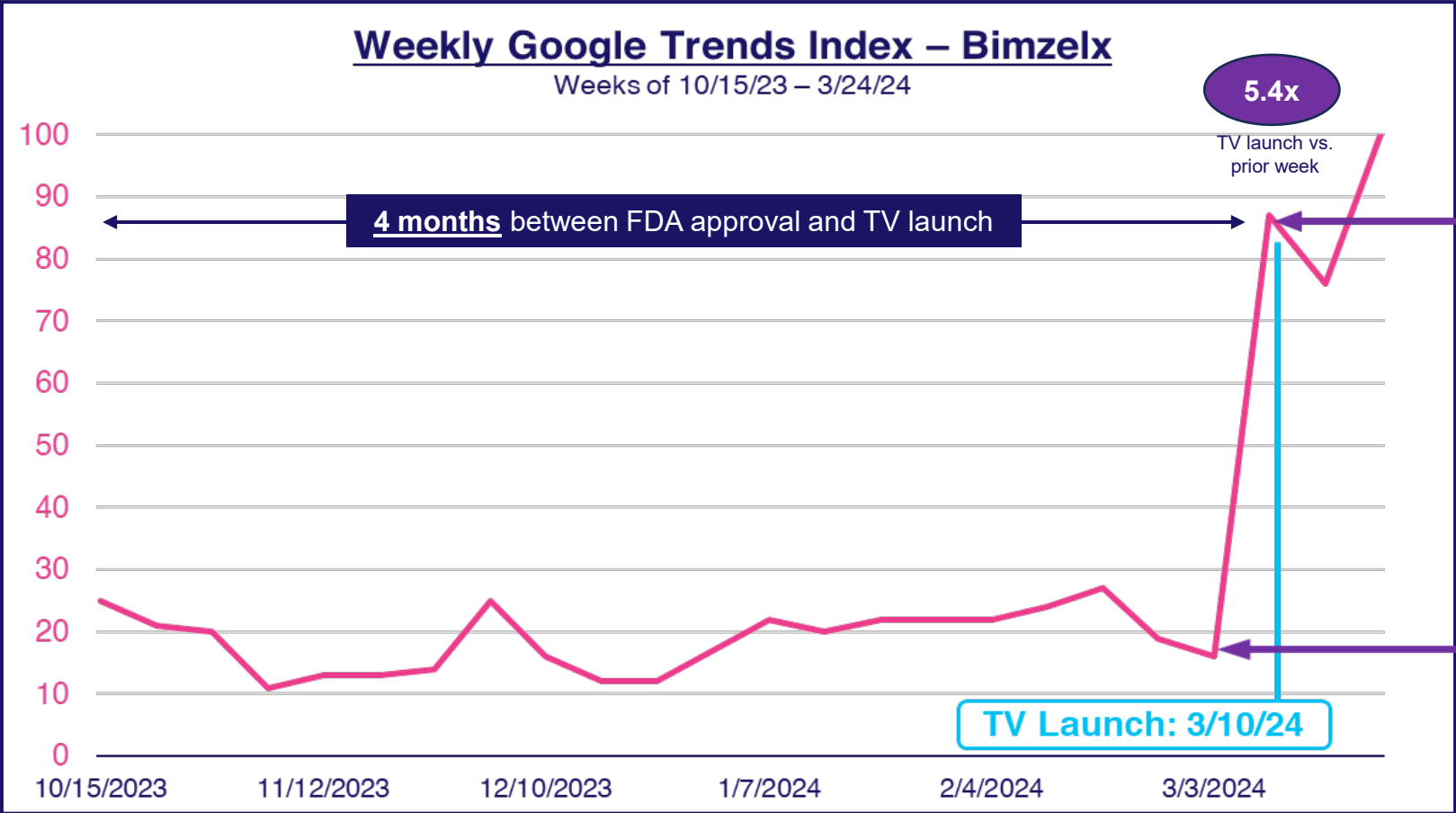
Level of Vabysmo search activity at the end of TV launch week (**84 index**)

Level of Vabysmo search activity just before 4/16 TV campaign launch began (**15 index**)

Source: VAB analysis of Google Trends, United States only, branded web search. Time period for each brand is based on their FDA approval date through TV campaign launch. **Google Search Index represents search interest relative to the highest point on the chart for the given region and time period, a value of 100 is the peak popularity for the term, a value of 50 means that the term is half as popular.** VAB analysis of Nielsen Ad Intel, TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, January 2021 – June 2024 (calendar months); Note: **Light blue line marks the first day of TV spending.**

Bimzelx: This treatment for plaque psoriasis launched TV quicker and saw a five-fold lift in branded search, which continued through the campaign

This Chart Plots:
 The level of relative weekly Google search activity (for Bimzelx) prior to its high point in search activity (the spike at the end of TV launch week)



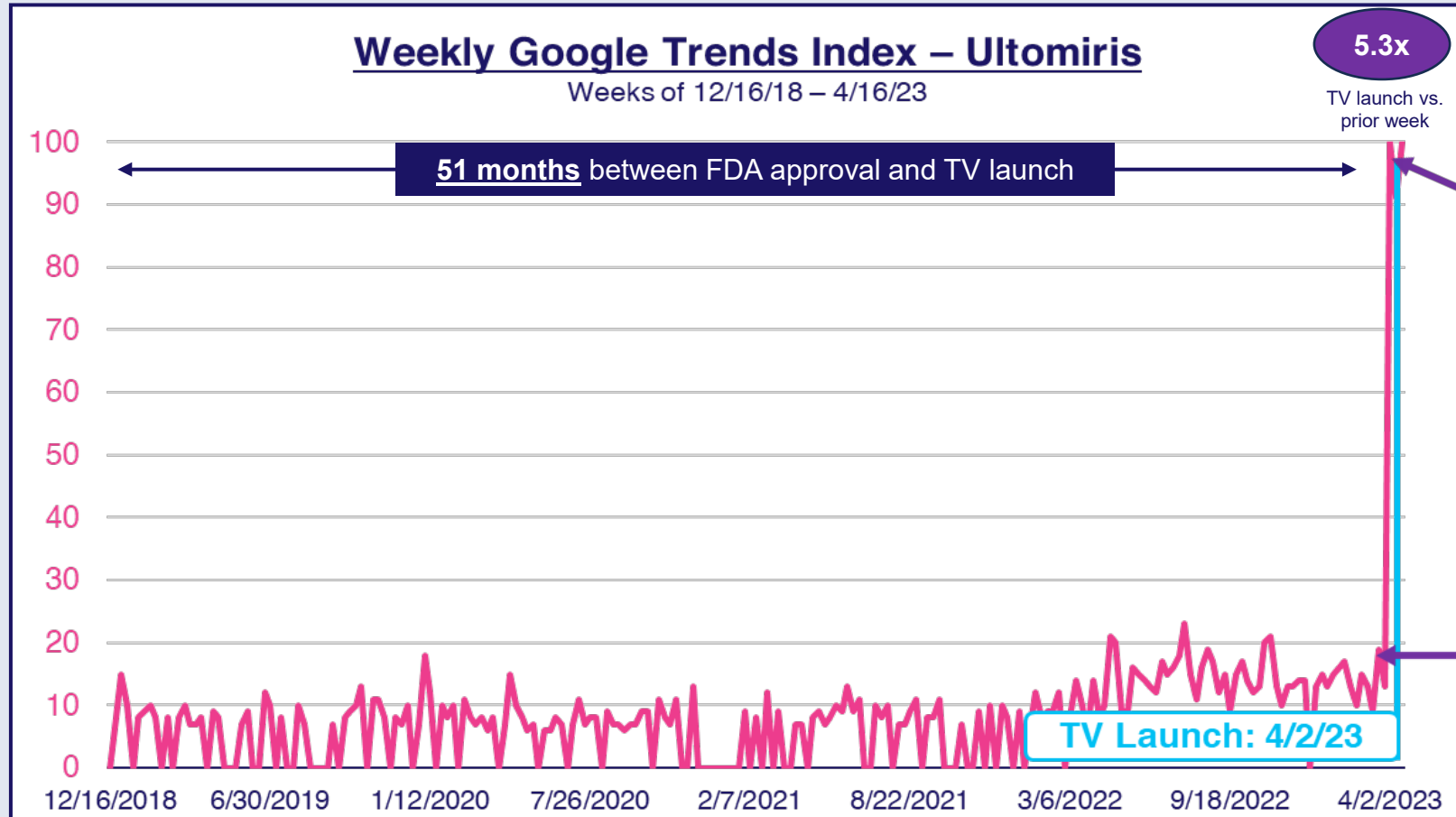
Level of Bimzelx search activity at the end of TV launch week (87 index)

Level of Bimzelx search activity just before 3/10 TV campaign launch began (16 index)

Source: VAB analysis of Google Trends, United States only, branded web search. Time period for each brand is based on their FDA approval date through TV campaign launch. Google Search Index represents search interest relative to the highest point on the chart for the given region and time period, a value of 100 is the peak popularity for the term, a value of 50 means that the term is half as popular. VAB analysis of Nielsen Ad Intel, TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, January 2021 – June 2024 (calendar months); Note: Light blue line marks the first day of TV spending.

Ultomiris: This treatment for autoimmune conditions saw a similar spike in branded search even after launching TV 51 months after FDA approval

This Chart Plots:
The level of relative weekly Google search activity (for Ultomiris) prior to its high point in search activity (the spike at the end of TV launch week)



Source: VAB analysis of Google Trends, United States only, branded web search. Time period for each brand is based on their FDA approval date through TV campaign launch. Google Search Index represents search interest relative to the highest point on the chart for the given region and time period, a value of 100 is the peak popularity for the term, a value of 50 means that the term is half as popular. VAB analysis of Nielsen Ad Intel, TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, January 2021 – June 2024 (calendar months); Note: Light blue line marks the first day of TV spending.

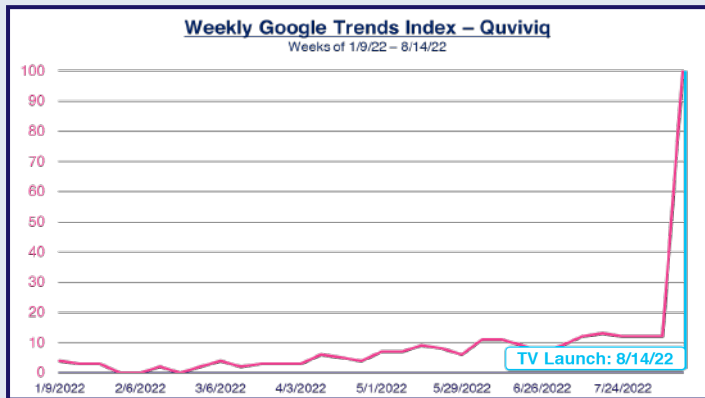
The ‘immediate spike’ effect of first-time TV campaigns on branded online search was mostly consistent across our full analysis of 58 pharma brands

First Time Pharma TV Advertisers - Weekly Google Trends Index

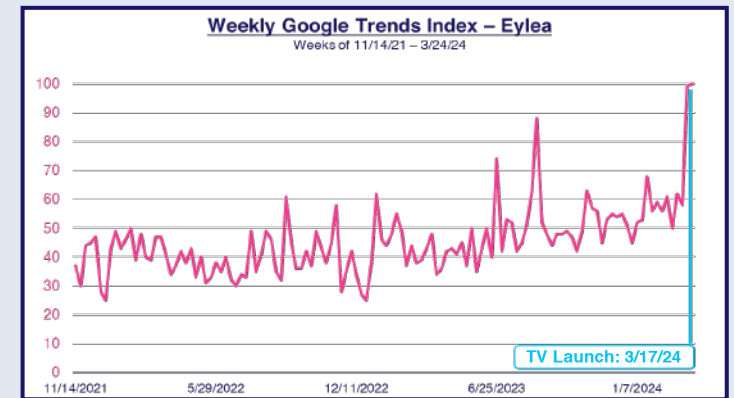
FDA Approval Date through TV Campaign Launch



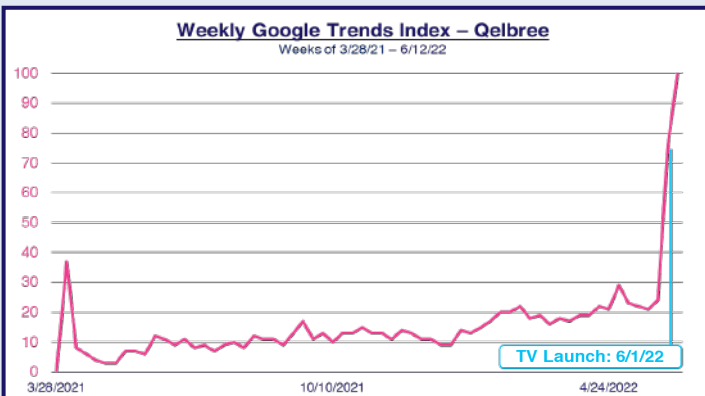
7 months between FDA approval and TV launch



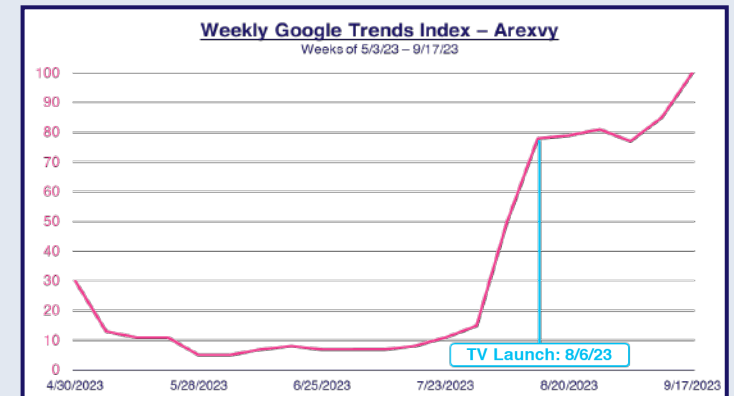
27 months between FDA approval and TV launch



14 months between FDA approval and TV launch



3 months between FDA approval and TV launch



Source: VAB analysis of Google Trends, United States only, branded web search. Time period for each brand is based on their FDA approval date through TV campaign launch. **Google Search Index represents search interest relative to the highest point on the chart for the given region and time period, a value of 100 is the peak popularity for the term, a value of 50 means that the term is half as popular.** VAB analysis of Nielsen Ad Intel, TV spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, January 2021 – June 2024 (calendar months); Note: **Light blue line marks the first day of TV spending for each brand.**

The impact of TV is evident as most new pharma TV advertisers saw their highest branded search volume occur once their first campaign launched

85%

of 58 first-time pharmaceutical TV advertisers saw their highest brand search volume once their TV campaign launched

Source: VAB analysis of Google Trends, United States only, branded web search. Google Search Index represents search interest relative to the highest point on the chart for the given region and time period. Note: Time period for each brand is their FDA approval date through 1/31/25. VAB analysis of Nielsen Ad Intel, TV activity based on reported spending across national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, January 2021 – June 2024 (calendar months). Analysis reflects 49 out of 58 brands with the highest brand search volume after they launched in TV. *See appendix (page 50) for a list of all 58 brands analyzed.

Sampling of the 58 Pharmaceutical Brands Analyzed*

ONCE-WEEKLY **wegovy**[®]
semaglutide injection 2.4 mg

CABENUVA
cabotegravir 200 mg/mL; rilpivirine 300 mg/mL
extended-release injectable suspensions

Myfembree[®]
(relugolix, estradiol, and norethindrone acetate) tablets
40 mg, 1 mg, 0.5 mg

QUVIVIQ[™]
(daridorexant) ^{IV} 25mg, 50mg tablets

Apretude
cabotegravir 200 mg/mL
extended-release injectable suspension

BREZTRI AEROSPHERE[®]
budesonide / glycopyrronium / formoterol fumarate dihydrate pressurized inhalation suspension

AREXVY[®]
(RESPIRATORY SYNCYTIAL VIRUS VACCINE RECOMBINANT, ADJUVANTED)

EYLEA[®]
(afibercept) Injection

SUNOSI[®]
(solriamfetol) ^{IV}
75, 150 mg tablets

Qelbree[®]
vardenafil
extended-release tablets

phexxi[®]
(lactic acid, citric acid, and potassium bitartrate) Vaginal Gel
1.8%, 1%, 0.4%

SOTYKTU[®]
(deucravacitinib) 6 mg tablets

Paxlovid[®]
(nirmatrelvir ^{IV} tablets | ritonavir ^{IV} tablets)

imbruvica[®]
(ibrutinib)
420, 280, 140 mg tablets | 140, 70 mg capsules
70 mg/mL oral suspension

COMIRNATY[®]
(COVID-19 Vaccine, mRNA)

mounjaro[®]
(tirzepatide) injection 0.5 mL
2.5 mg | 5 mg | 7.5 mg | 10 mg | 12.5 mg | 15 mg

BREZTRI AEROSPHERE[®]
(budesonide 160 mcg, glycopyrrolate 9 mcg and formoterol fumarate 4.8 mcg) Inhalation Aerosol

LYBALVI[®]
olanzapine and samidorphan
5 mg/10 mg -10 mg/10 mg -15 mg/10 mg
20 mg/10 mg tablets

EVENITY[®]
(romosozumab-aqqg)
injection 105 mg/1.17 mL

Austedo XR[®]
(deutetrabenazine) extended-release
ONCE-DAILY
8 mg, 12 mg, 18 mg, 24 mg, 30 mg, 36 mg, 42 mg, and 48 mg tablets

Slynd[®]
(dospirenone) tablets 4 mg

LEQVIO[®]
(inclisiran) injection
284 mg/1.5 mL

ONCE-DAILY INGREZZA[®]
(valbenazine) capsules

Opzelura[®]
(ruxolitinib) cream 1.5%

Kerendia[®]
(finerenone) tablets
10 mg - 20 mg

GEMTESA[®]
(vibegron) 75 mg tablets

Plenity[®]

Protaren[™]
(Ketoprofen 10%)

Arestin[®]
minocycline HCl 1 mg
MICROSPHERES






CIBINQO[®]
(abrocitinib) tablets
60mg, 120mg, 240mg

Then we looked at how increasing TV spend **encourages more ailment sufferers to visit pharmaceutical parent company websites** for more information...

Increased TV investment by major pharma companies drove more website traffic from people interested in doing further research on remedies

Pharmaceutical Parent Company: Average Monthly TV Spend vs. Website Traffic Analysis

Four-Year Period: January 2021 – December 2024
24-month vs. 24-month comparison

	 Bristol Myers Squibb™	 Boehringer Ingelheim	 GSK	 Pfizer	 Roche
<u>Avg. Monthly TV Spend (MM):</u>					
Jan '21 - Dec '22:	\$19.3	\$15.1	\$28.3	\$36.9	\$8.6
Jan '23 - Dec '24:	\$28.4	\$17.3	\$36.5	\$39.0	\$14.8
% Difference:	+47%	+14%	+29%	+6%	+71%
<u>Avg. Monthly Unique Visitors (000):</u>					
Jan '21 - Dec '22:	58	149	57	529	52
Jan '23 - Dec '24:	95	509	94	632	207
% Difference:	+65%	+242%	+66%	+19%	+295%

Source: VAB analysis of Comscore mediametrix multiplatform media trend data, P18+. January 2021 – December 2024 (calendar months), figures are based on monthly averages. VAB analysis of Nielsen Ad Intel, January 2021 – December 2024 (calendar months). TV media includes cable TV, network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV; excludes promos and PSAs.

5

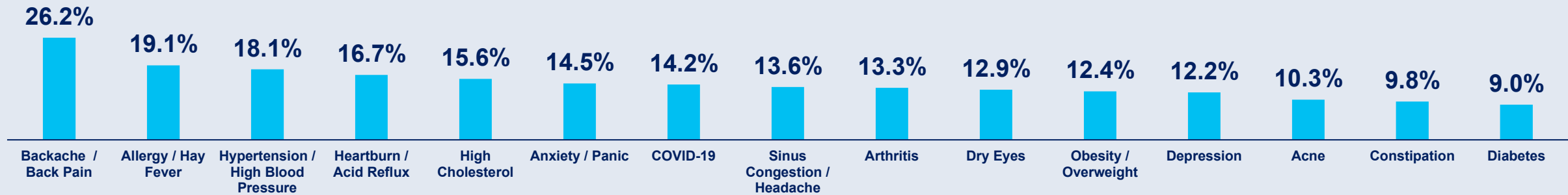
‘Advanced TV’ Enables Greater Precision

Audience-based TV buying and addressable TV solutions deliver **precise targeting** and **outcomes** throughout a patient’s path to treatment



Most top ailments have a limited number of potential patients, therefore precision targeting plays an important role in pharma brands' media mix

Top 15 Ailments* That Adults Currently Have / Had in the last 12 months
% of Adults 18+
in millions



Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Study 2024, P18+. Arthritis represents 'any,' Diabetes represents 'any.'

Brands, especially those with finite targets, are utilizing audience-based TV buying to achieve the top priorities for their video ad campaigns

Audience-Based TV Buying (ABB)

refers to the practice of **segmenting viewers beyond traditional demographics** to target a group of consumers based on **behavioral, attitudinal, lifestyle** and/or **transactional** data

Most Important Priorities for Video Campaigns

% of respondents that ranked each between #1-3 in priority



Reaching the Right Audience

61%



Driving Cost Efficiencies

43%



Maximizing 'Attention' Among Target Audience

40%

Source: VAB / Spectrum Reach / Advertiser Perceptions 'Audience-Based Buying Survey,' February 2023 (n=210). Survey base: Advertising decision-makers who are involved in buying or planning digital video, cable / broadcast TV, or advanced TV. Q15. Please rank the 3 most important priorities for your [companies/main client's] video campaigns (Rank 1-3; 1 = most important). Base = Total Respondents. To learn more, download VAB's ['Unlocking Brand Growth with Audience-Based Buying.'](#)

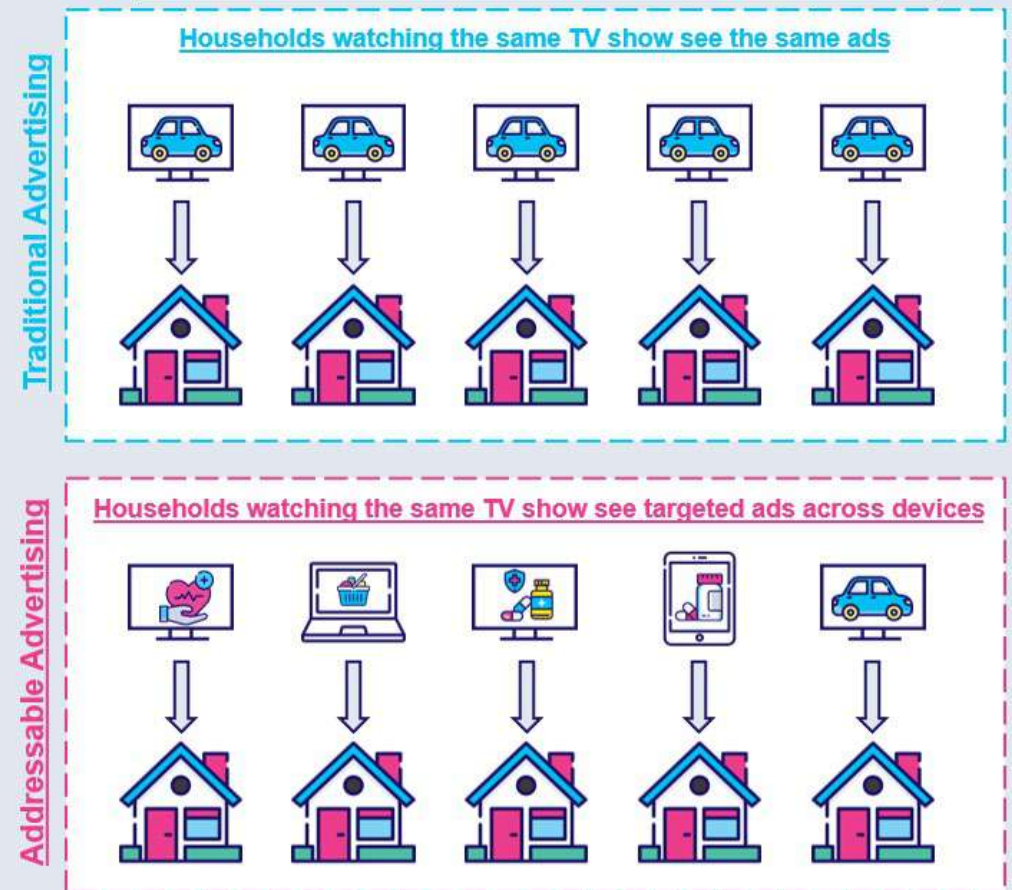
Within ABB, Addressable TV enables brands to show their ads to only the targeted households that are watching a specific network and program

Addressable TV

Video advertising solution where a **single message from an advertiser is precisely matched to an advertiser-defined audience segment**. This enables different commercials to be targeted to different households on the same TV network at the same time when the viewer is watching.

Addressable TV **uses authenticated data and advanced technology** to facilitate the targeting of relevant messages to qualified audience segments **in adherence to business and consumer privacy compliance requirements**.


The Difference Between Traditional and Addressable TV Advertising



To learn more, download VAB's ["What is Addressable TV?"](#)

'Audience-based TV buying' target customization capabilities enables pharma brands to more precisely reach relevant patients and practitioners

Select examples of custom targets developed for audience-based TV campaigns

 =consumer / patient target

 =healthcare professional target

People diagnosed with a specific condition

Patients who had no prior use of the Rx brand

Clinically-relevant patient audiences for the brand

Highly qualified healthcare professionals (HCP)

HHs exposed to competing brands' TV ads in previous months

OTC treaters

Hard-to-reach healthcare professionals treating neurological movement disorders

Competitive Rx remedy users

People with relevant symptoms

High-level job title / industry in healthcare, finance, government

HHI \$100K+

Custom targeted DTC patient-modeled audiences by buying platforms

'Audience-based TV buying' produces outcomes throughout a patient's path to treatment, especially among remedy and relief actions

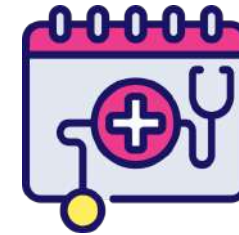
Select examples of outcomes achieved through audience-based TV campaigns



Greater Audience
Quality



Higher On-Target
Reach



HCP Visits



Increase in patient-driven
diagnostic screening



Prescription
Lifts



'New to Brand'
Starts

Key Marketer Takeaways

Multiscreen TV encourages ailment sufferers to educate themselves for better health

- ▶ **Almost eight out of 10 adults suffer** from some sort of medical condition, with three-quarters of these sufferers using at least one prescription remedy for treatments
- ▶ Most adults conduct their own research and consult their doctor when it comes to their physical and mental well-being; and they find that **prescription remedies are most effective** at improving their quality of life
- ▶ Although many more dollars are spent in digital, **TV ads** are the **primary driver of brand discovery for patients by far** and are also more likely to encourage ailment sufferers to **conduct further research** and consult their doctor for more information
- ▶ More specifically, **TV ads drive mid-funnel results** within a patient's path to treatment as 85% of new TV advertisers saw their **highest branded search volume** occur once they launched their first campaign
- ▶ **Advanced TV solutions** like audience-based buying and addressability create **greater precision** and **outcomes** throughout a patient's path to treatment

Discover more: Looking for more data, insights and takeaways?

Check out this related content



The Power of Premium Video
What It Means for Multiscreen TV and Why It Matters to Marketers



Best in Show
Five Advantages of Multiscreen TV, From Brand to Performance



Breaking Through
How New Advertisers Are Using TV To Ignite Interest & Turn Consumers Into Customers



A Commanding Presence
How Ad Continuity in Multiscreen TV Drives Incremental Growth for Brands



Disconnect to Reconnect
How Real-Life Shared Experiences Are the Antidote for Social Media Isolation Among Gen Z



What is Addressable TV?
Embracing Innovation Through the Exploration of Modern Ad Solutions



Unlocking Brand Growth with Audience-Based Buying
A Fresh Look at How Marketers Are Adopting Innovative TV Strategies



Reaching the Right Audiences
Why Brands and Agencies are Increasing Their Adoption of Audience-Based TV Buying



What is Brand Safety?
A Look Into Critical Issues Impacting Marketers Today



Pharma Category
Brand Success Stories Highlighted Through Real-World Multiscreen TV Case Studies

About VAB

VAB plays a dual role in the video advertising industry. We are leading the change to bring about a more innovative and transparent marketplace. We also provide the insights and thought leadership that enables marketers to develop business-driving marketing strategies.

Drawing on our marketing expertise, we **simplify** the complexities in our industry and **discover** new insights that **transform** the way marketers look at their media strategy.



We are committed to your business growth and proud to offer VAB members, brand marketers and agencies ***complimentary access*** to our continuously-growing Insights library. **Get immediate access at theVAB.com.**



Appendix: Universes of sufferers by ailment

Ailments/Remedies: Have / Had In last 12 months

Ailments	Weighted (000)				Composition (%)			
	Spring 2021	Spring 2022	Spring 2023	Spring 2024	Spring 2021	Spring 2022	Spring 2023	Spring 2024
Any	183,735	192,074	196,620	200,124	72.9%	75.8%	77.1%	78.0%
Acne	22,976	25,493	25,287	26,446	9.1%	10.1%	9.9%	10.3%
ADD/ADHD	6,492	7,593	9,280	11,377	2.6%	3.0%	3.6%	4.4%
Addiction/Substance Abuse			2,375	2,796			0.9%	1.1%
Allergy/Hay Fever	43,566	46,258	47,264	49,081	17.3%	18.3%	18.5%	19.1%
Anxiety/Panic	30,232	33,572	34,577	37,111	12.0%	13.2%	13.6%	14.5%
Arthritis - ANY			33,518	34,227			13.2%	13.3%
Arthritis/Osteoarthritis	19,974	21,828	23,161	23,955	7.9%	8.6%	9.1%	9.3%
Arthritis/Psoriatic Arthritis (PsA)			2,319	2,184			0.9%	0.9%
Arthritis/Rheumatoid Arthritis (RA)	12,426	11,417	11,483	11,840	4.9%	4.5%	4.5%	4.6%
Asthma	14,233	14,572	14,950	15,593	5.7%	5.8%	5.9%	6.1%
Atrial Fibrillation (Afib)	3,935	3,695	3,975	4,487	1.6%	1.5%	1.6%	1.8%
Backache/Back Pain	57,828	60,808	65,182	67,192	22.9%	24.0%	25.6%	26.2%
Bipolar Disorder	4,158	3,514	3,765	4,125	1.7%	1.4%	1.5%	1.6%
Cancer - ANY			7,542	7,424			3.0%	2.9%
Cancer - Breast Cancer (women only)			1,331	1,315			0.5%	0.5%
Cancer - Colorectal Cancer			400	415			0.2%	0.2%
Cancer - Lung Cancer			488	479			0.2%	0.2%
Cancer - Other			3,333	3,232			1.3%	1.3%
Cancer - Skin Cancer/Melanoma			2,816	2,802			1.1%	1.1%
Cataracts		4,882	5,545	5,299		1.9%	2.2%	2.1%
Chronic Obstructive Pulmonary Disease (COPD)	2,516	1,818	1,947	3,095	1.0%	0.7%	0.8%	1.2%
Chronic/Severe Pain	9,398	8,413	8,249	8,758	3.7%	3.3%	3.2%	3.4%
Cold Sores	12,210	11,674	11,843	11,914	4.8%	4.6%	4.7%	4.6%
Constipation	19,652	22,148	23,846	25,181	7.8%	8.7%	9.4%	9.8%
COVID-19 (Coronavirus)			31,094	36,375			12.2%	14.2%
Crohn's Disease/Ulcerative Colitis	2,023	1,883	1,969	1,993	0.8%	0.7%	0.8%	0.8%
Dandruff/Dry Scalp	15,966	17,227	17,793	19,211	6.3%	6.8%	7.0%	7.5%
Depression	25,924	28,015	29,246	31,242	10.3%	11.1%	11.5%	12.2%
Diabetes - ANY	20,911	21,060	22,654	23,084	8.3%	8.3%	8.9%	9.0%
Diabetes (Type 1-Insulin Dependent)	3,587	3,027	2,966	3,221	1.4%	1.2%	1.2%	1.3%
Diabetes (Type 2-Non-Insulin Dependent)	17,717	18,357	20,001	20,206	7.0%	7.2%	7.9%	7.9%
Dry Eyes	28,368	30,769	31,713	33,001	11.3%	12.1%	12.4%	12.9%
Eczema/Skin Itch/Rash	15,252	17,280	17,090	18,112	6.1%	6.8%	6.7%	7.1%
Epilepsy/Seizures	1,142	1,336	1,312	1,333	0.5%	0.5%	0.5%	0.5%
Erectile Dysfunction (ED) (men only)	3,793	4,835	5,481	5,394	1.5%	1.9%	2.2%	2.1%
Fibromyalgia	4,232	4,074	4,274	4,399	1.7%	1.6%	1.7%	1.7%
Flu	12,238	7,828	11,029	15,920	4.9%	3.1%	4.3%	6.2%
Gout	4,008	3,925	3,708	4,088	1.6%	1.6%	1.5%	1.6%
Hair Loss/Alopecia	11,723	12,743	13,435	12,635	4.7%	5.0%	5.3%	4.9%
Hearing Loss	9,738	9,837	10,521	10,938	3.9%	3.9%	4.1%	4.3%
Heart Attack/Heart Disease	6,119	5,469	6,041	6,002	2.4%	2.2%	2.4%	2.3%
Heartburn/Acid Reflux	39,379	40,631	41,121	42,758	15.6%	16.0%	16.1%	16.7%
Hepatitis	639	596	698	767	0.3%	0.2%	0.3%	0.3%
High Cholesterol	34,457	36,882	38,255	40,086	13.7%	14.6%	15.0%	15.6%
Hypertension/High Blood Pressure	43,135	44,489	46,408	46,460	17.1%	17.6%	18.2%	18.1%
Infertility			1,562	1,433			0.6%	0.6%
Insomnia	17,901	20,335	20,633	20,612	7.1%	8.0%	8.1%	8.0%
Irritable Bowel Syndrome (IBS)	7,143	7,958	8,673	8,521	2.8%	3.1%	3.4%	3.3%
Kidney Ailments	3,688	3,194	3,746	3,885	1.5%	1.3%	1.5%	1.5%
Lupus			1,082	1,045			0.4%	0.4%
Macular Degeneration	2,359	2,304	2,266	2,204	0.9%	0.9%	0.9%	0.9%
Menopause/Hormone Replacement (women only)	3,584	3,436	3,296	3,422	1.4%	1.4%	1.3%	1.3%
Migraine Headaches	17,183	18,441	19,980	21,256	6.8%	7.3%	7.8%	8.3%
Multiple Sclerosis (MS)	838	803	982	1,037	0.3%	0.3%	0.4%	0.4%
Muscle Strain/Sprain	12,467	15,656	16,946	15,656	5.0%	6.2%	6.7%	6.1%
Nail Fungus	9,600	9,845	9,576	10,209	3.8%	3.9%	3.8%	4.0%
Obesity/Overweight	26,194	30,225	30,895	31,911	10.4%	11.9%	12.1%	12.4%
Osteoporosis	4,915	5,241	5,687	5,853	2.0%	2.1%	2.2%	2.3%
Overactive Bladder	5,508	5,761	5,990	6,013	2.2%	2.3%	2.4%	2.3%
Prostate Disease (men only)	3,026	2,662	3,060	2,951	1.2%	1.1%	1.2%	1.2%
Psoriasis	3,796	4,385	4,495	4,311	1.5%	1.7%	1.8%	1.7%
Restless Legs Syndrome	8,935	7,632	7,491	7,702	3.5%	3.0%	2.9%	3.0%
Rosacea or Skin Disease	3,115	3,697	4,031	4,050	1.2%	1.5%	1.6%	1.6%
Sinus Congestion/Headache	28,496	30,204	32,482	34,849	11.3%	11.9%	12.7%	13.6%
Sleep Apnea	13,599	15,142	15,874	16,863	5.4%	6.0%	6.2%	6.6%
Snoring	16,867	18,937	20,328	21,595	6.7%	7.5%	8.0%	8.4%
Urinary Tract Infection (UTI)	11,279	10,417	11,018	11,842	4.5%	4.1%	4.3%	4.6%
Varicose Veins			7,278	7,412			2.9%	2.9%
Wrinkles	14,401	15,830	16,651	17,678	5.7%	6.2%	6.5%	6.9%
Yeast Infection (women only)	6,706	6,509	6,520	7,233	2.7%	2.6%	2.6%	2.8%

Composition % = ailment sufferers as a percent of the Adult 18+ population

Source: MRI-Simmons, Spring USA Doublebase Studies: 2021, 2022, 2023 & 2024, Adults 18+.



Appendix: Universes of prescription remedy users by ailment

Ailments/Remedies: Treated With Prescriptions In last 12 months																	
Ailments	Weighted (000)				Composition (%)				Ailments	Weighted (000)				Composition (%)			
	Spring 2021	Spring 2022	Spring 2023	Spring 2024	Spring 2021	Spring 2022	Spring 2023	Spring 2024		Spring 2021	Spring 2022	Spring 2023	Spring 2024	Spring 2021	Spring 2022	Spring 2023	Spring 2024
Any	128,100	138,568	143,499	148,366	69.7%	72.1%	73.0%	74.1%	Any	128,100	138,568	143,499	148,366	69.7%	72.1%	73.0%	74.1%
Acne	6,948	7,263	7,548	8,486	30.2%	28.5%	29.8%	32.1%	Fibromyalgia	2,411	2,272	2,564	2,533	57.0%	55.8%	60.0%	57.6%
ADD/ADHD	3,563	4,187	4,942	5,764	54.9%	55.1%	53.3%	50.7%	Flu	4,959	3,049	3,975	5,456	40.5%	38.9%	36.0%	34.3%
Addiction/Substance Abuse			844	980			35.5%	35.1%	Gout	3,004	2,909	2,705	3,166	75.0%	74.1%	73.0%	77.4%
Allergy/Hay Fever	15,706	16,735	18,307	19,415	36.1%	36.2%	38.7%	39.6%	Hair Loss/Alopecia	1,979	2,312	2,284	2,209	16.9%	18.1%	17.0%	17.5%
Anxiety/Panic	18,049	20,006	21,454	22,836	59.7%	59.6%	62.0%	61.5%	Hearing Loss	2,943	3,103	3,737	4,350	30.2%	31.5%	35.5%	39.8%
Arthritis - ANY			15,792	15,969			47.1%	46.7%	Heart Attack/Heart Disease	4,638	4,707	5,133	4,998	75.8%	86.1%	85.0%	83.3%
Arthritis/Osteoarthritis	8,161	8,875	9,474	9,808	40.9%	40.7%	40.9%	40.9%	Heartburn/Acid Reflux	16,823	17,663	17,560	18,117	42.7%	43.5%	42.7%	42.4%
Arthritis/Psoriatic Arthritis (PsA)			1,597	1,453			68.9%	66.5%	Hepatitis	300	296	349	367	46.9%	49.7%	50.0%	47.8%
Arthritis/Rheumatoid Arthritis (RA)	6,238	5,983	6,255	6,317	50.2%	52.4%	54.5%	53.4%	High Cholesterol	27,085	30,031	31,022	32,315	78.6%	81.4%	81.1%	80.6%
Asthma	11,573	12,372	12,832	13,321	81.3%	84.9%	85.8%	85.4%	Hypertension/High Blood Pressure	37,273	40,154	42,194	42,010	86.4%	90.3%	90.9%	90.4%
Atrial Fibrillation (Afib)	2,978	2,816	3,029	3,526	75.7%	76.2%	76.2%	78.6%	Infertility			652	576			41.7%	40.2%
Backache/Back Pain	17,842	18,756	20,482	21,204	30.9%	30.8%	31.4%	31.6%	Insomnia	5,733	6,506	7,188	7,503	32.0%	32.0%	34.8%	36.4%
Bipolar Disorder	3,189	2,651	2,703	2,962	76.7%	75.4%	71.8%	71.8%	Irritable Bowel Syndrome (IBS)	2,103	2,384	2,683	2,759	29.4%	30.0%	30.9%	32.4%
Cancer - ANY			3,963	4,055			52.5%	54.6%	Kidney Ailments	2,114	1,860	1,990	2,158	57.3%	58.2%	53.1%	55.5%
Cancer - Breast Cancer (women only)			922	865			69.3%	65.8%	Lupus			685	710			63.3%	67.9%
Cancer - Colorectal Cancer			223	214			55.8%	51.6%	Macular Degeneration	887	993	826	833	37.6%	43.1%	36.5%	37.8%
Cancer - Lung Cancer			229	229			46.9%	47.8%	Menopause/Hormone Replacement (women only)	1,726	1,768	1,881	2,045	48.2%	51.5%	57.1%	59.8%
Cancer - Other			1,750	1,675			52.5%	51.8%	Migraine Headaches	7,531	7,652	8,946	9,790	43.8%	41.5%	44.8%	46.1%
Cancer - Skin Cancer/Melanoma			1,030	1,289			36.6%	46.0%	Multiple Sclerosis (MS)	444	508	571	639	53.0%	63.3%	58.1%	61.6%
Cataracts		1,323	1,491	1,529		27.1%	26.9%	28.9%	Muscle Strain/Sprain	3,242	4,110	4,322	3,980	26.0%	26.3%	25.5%	25.4%
Chronic Obstructive Pulmonary Disease (COPD)	1,907	1,385	1,400	2,223	75.8%	76.2%	71.9%	71.8%	Nail Fungus	2,454	2,823	2,930	2,876	25.6%	28.7%	30.6%	28.2%
Chronic/Severe Pain	5,682	5,268	5,308	5,411	60.5%	62.6%	64.3%	61.8%	Obesity/Overweight	2,263	2,430	2,739	3,865	8.6%	8.0%	8.9%	12.1%
Cold Sores	4,161	3,830	4,262	4,301	34.1%	32.8%	36.0%	36.1%	Osteoporosis	2,557	2,705	2,973	3,207	52.0%	51.6%	52.3%	54.8%
Constipation	4,362	4,847	5,185	5,608	22.2%	21.9%	21.7%	22.3%	Overactive Bladder	2,280	2,351	2,464	2,623	41.4%	40.8%	41.1%	43.6%
COVID-19 (Coronavirus)			8,737	11,010			28.1%	30.3%	Prostate Disease (men only)	1,853	1,838	2,121	2,020	61.2%	69.0%	69.3%	68.5%
Crohn's Disease/Ulcerative Colitis	1,421	1,342	1,309	1,374	70.2%	71.3%	66.5%	68.9%	Psoriasis	2,084	2,590	2,502	2,569	54.9%	59.1%	55.7%	59.6%
Dandruff/Dry Scalp	3,247	3,280	3,561	4,035	20.3%	19.0%	20.0%	21.0%	Restless Legs Syndrome	2,643	2,568	2,872	2,982	29.6%	33.6%	38.3%	38.7%
Depression	17,358	18,772	19,505	20,693	67.0%	67.0%	66.7%	66.2%	Rosacea or Skin Disease	1,760	2,026	2,209	2,374	56.5%	54.8%	54.8%	58.6%
Diabetes - ANY	16,557	17,999	19,754	20,406	79.2%	85.5%	87.2%	88.4%	Sinus Congestion/Headache	7,981	7,669	8,560	9,573	28.0%	25.4%	26.4%	27.5%
Diabetes (Type 1-Insulin Dependent)	2,669	2,548	2,603	2,898	74.4%	84.2%	87.8%	90.0%	Sleep Apnea	8,015	9,461	9,926	10,793	58.9%	62.5%	62.5%	64.0%
Diabetes (Type 2-Non-Insulin Dependent)	14,108	15,615	17,281	17,688	79.6%	85.1%	86.4%	87.5%	Snoring	1,950	2,556	2,940	3,111	11.6%	13.5%	14.5%	14.4%
Dry Eyes	8,417	8,546	9,053	10,009	29.7%	27.8%	28.5%	30.3%	Urinary Tract Infection (UTI)	8,725	8,418	8,702	9,449	77.4%	80.8%	79.0%	79.8%
Eczema/Skin Itch/Rash	7,189	8,162	8,167	8,881	47.1%	47.2%	47.8%	49.0%	Varicose Veins			525	609			7.2%	8.2%
Epilepsy/Seizures	844	1,086	1,079	1,076	73.9%	81.3%	82.2%	80.7%	Wrinkles	1,888	1,794	1,811	1,947	13.1%	11.3%	10.9%	11.0%
Erectile Dysfunction (ED) (men only)	2,323	3,030	3,225	3,226	61.2%	62.7%	58.8%	59.8%	Yeast Infection (women only)	3,840	4,091	4,167	4,272	57.3%	62.9%	63.9%	59.1%

Composition % = % of ailment sufferers that have used a prescription remedy for treatment

Source: MRI-Simmons, Spring USA Doublebase Studies: 2021, 2022, 2023 & 2024, Adults 18+.







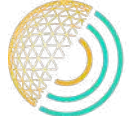







Appendix: Brands with the largest YoY TV spend increase include remedies for obesity, depression, Alzheimer's, chronic skin and heart conditions

Prescription Remedy Brands: Largest YoY Increases in TV Investment

CY 2023 vs. 2024

(ranked by increase in 2024 TV spending)

<p>Obesity</p>  <p>ONCE-WEEKLY wegovy[®] semaglutide injection 2.4 mg</p> <p>(+\$346.8 MM) (+2,154%)</p>	<p>Psoriasis / Ulcerative Colitis</p>  <p>Tremfya[®] (guselkumab)</p> <p>(+\$131.1 MM) (+245%)</p>	<p>Depression / Alzheimer's</p>  <p>REXULTI[®] brexpirazole (2mg) tablets</p> <p>(+\$122.3 MM) (+81%)</p>	<p>HCM</p>  <p>CAMZYOS[™] (mavacamten) 2.5, 5, 10, 15mg capsules</p> <p>(+\$114.3 MM) (N/A; \$0 in 2023)</p>	<p>AMD</p>  <p>EYLEA[®] (afibercept) Injection</p> <p>(+\$104.1 MM) (N/A; \$0 in 2023)</p>	<p>RSV</p>  <p>AREXVY[®] (RESPIRATORY SYNCYTIAL VIRUS VACCINE RECOMBINANT, ADJUVANTED)</p> <p>(+\$71.1 MM) (+119%)</p>
<p>COPD</p>  <p>BREZTRI[®] AEROSPHERE[®] budesonide / glycopyrronium / formoterol fumarate dihydrate pressurized inhalation suspension</p> <p>(+\$62.6 MM) (+88%)</p>	<p>Crohn's Disease / Psoriasis / Ulcerative Colitis</p>  <p>Skyrizi[®] risankizumab-rzaa</p> <p>(+\$53.8 MM) (+12%)</p>	<p>Menopause</p>  <p>VEOZAH[™] (fezolinetant) tablets 45mg</p> <p>(+\$46.7 MM) (+97%)</p>	<p>Psoriasis</p>  <p>Otezla (apremilast) 30mg tablets</p> <p>(+\$29.5 MM) (+44%)</p>	<p>Bipolar Disorder</p>  <p>CAPLYTA[®] (lumateperone) capsules</p> <p>(\$25.2 MM) (+34%)</p>	<p>Tardive Dyskinesia</p>  <p>INGREZZA[®] SPRINKLE (valbenazine) capsules</p> <p>(+\$20.5 MM) (+27%)</p>

Source: VAB analysis of Nielsen Ad Intel data, calendar year 2024. TV media includes Cable TV, Network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV; excludes promos and PSAs. Pharma represents 'Pharmaceutical Houses' sub-group category. COPD = Chronic Obstructive Pulmonary Disease; AMD = Age-related macular degeneration; RSV = Respiratory syncytial virus; HCM = Hypertrophic cardiomyopathy. Based on brands with \$95MM+ TV spending in 2024 and 10%+ increase vs. 2023.

Appendix: Full list of the 58 brands included in the pharma DTC brand new TV advertisers' search analysis

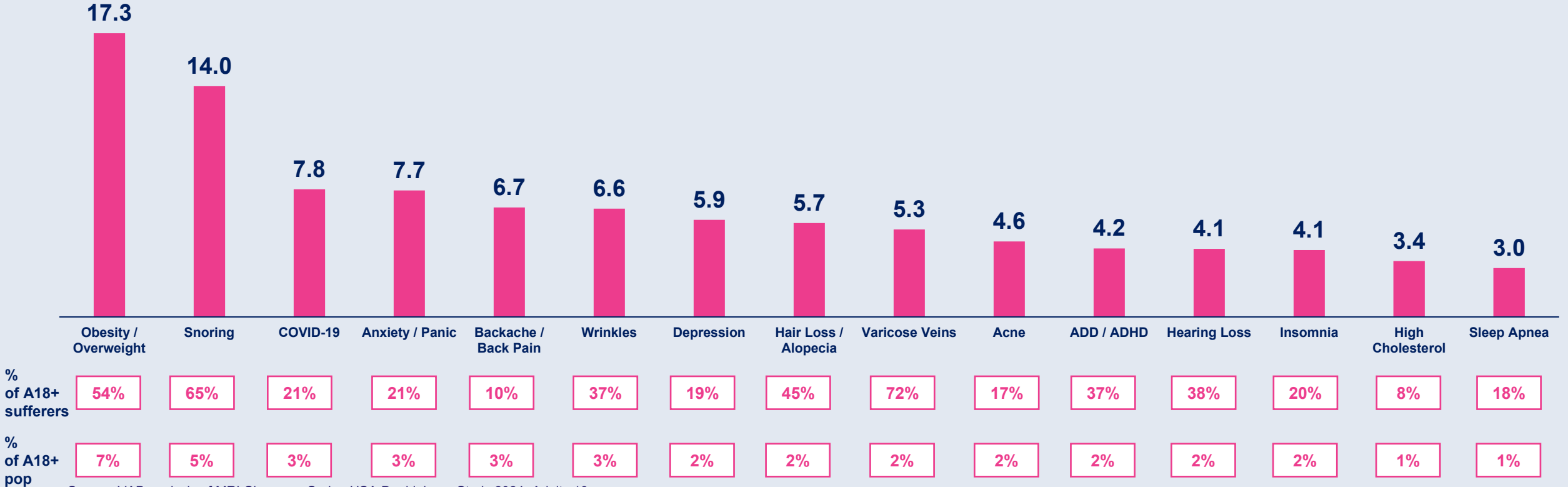
Brands	FDA Approval Date	TV Launch Month	Months Btwn Approval & Launch
ABRYSVO	5/31/2023	October 2023	4
AIRSUPRA Rx	1/11/2023	March 2024	14
Apellis	5/14/2021	June 2023	25
Apretude Rx	12/20/2021	September 2022	8
Arestin RX	2/16/2021	October 2023	30
AREXVY	5/3/2023	August 2023	3
Argenx	12/17/2021	January 2022	1
Austedo RX	8/30/2017	May 2021	44
Bimzelx Rx	10/17/2023	March 2024	4
Breztri RX	7/24/2020	February 2021	6
Cabenuva	1/21/2021	October 2021	8
Calquence	10/31/2017	October 2023	71
CAMZYOS Rx	4/28/2022	January 2024	20
Cibinqo Rx	1/14/2022	June 2022	5
Comirnaty Rx	8/23/2021	August 2022	11
Evenity Rx	4/9/2019	October 2022	42
EYLEA Rx	11/18/2021	March 2024	27
GEMTESA Rx	12/23/2020	January 2023	24
Imbruvica RX	11/13/2013	May 2021	90
Ingrezza RX	4/11/2017	May 2021	49
INVEGA HAFYERA Rx	9/1/2021	March 2024	30
Kerendia Rx	7/9/2021	August 2022	12
Kesimpta RX	8/20/2020	January 2021	4
Leqvio Rx	12/22/2021	March 2022	2
Librela Rx	5/5/2023	January 2024	7
LYBALVI Rx	6/1/2021	May 2023	23
Moderna	12/18/2020	May 2022	16
Mounjaro Rx	5/13/2022	February 2023	8
Myfembree Rx	5/26/2021	July 2022	13

Brands	FDA Approval Date	TV Launch Month	Months Btwn Approval & Launch
Novavax	10/3/2023	November 2023	1
Opill	7/13/2023	April 2024	8
Opzelura Rx	9/21/2021	March 2022	5
Paxlovid Rx	12/22/2021	January 2023	12
Phexxi	5/22/2020	February 2021	8
Plenity Rx	4/14/2019	January 2022	32
Qelbree Rx	4/2/2021	June 2022	14
Qulipta Rx	9/28/2021	January 2022	3
QUTENZA Rx	11/16/2009	August 2022	152
QUVIVIQ Rx	1/10/2022	August 2022	7
Slynd Rx	5/23/2019	April 2022	34
Solensia	1/13/2022	May 2023	15
SOTYKTU Rx	9/9/2022	February 2023	5
Spravato	3/5/2019	November 2023	56
Sunosi RX	3/20/2019	January 2021	21
SYFOVRE Rx	2/17/2023	May 2024	14
Tezspire Rx	12/17/2021	April 2022	3
Tyrvaya	10/15/2021	October 2023	23
ULTOMIRIS Rx	12/21/2018	April 2023	63
Upneeq	7/9/2020	October 2023	39
VABYSMO Rx	1/28/2022	April 2023	14
Velsipity Rx	10/12/2023	March 2024	4
Veozah	5/12/2023	October 2023	5
VOQUEZNA Rx	11/1/2023	April 2024	5
Vuity Rx	10/29/2021	March 2022	4
Vyepti Rx	2/21/2020	February 2022	23
Wegovy Rx	6/4/2021	June 2024	48
Xtandi Rx	8/31/2012	September 2022	120
Zeposia	3/26/2020	December 2021	19

Source: VAB analysis of Nielsen Ad Intel data, calendar year 2021 - June 2024. TV media includes cable TV, network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV; excludes promos and PSAs. Pharma represents brands within 'Pharmaceutical Houses' sub-group category.

Appendix: The conditions with the highest ‘non-usage’ of any remedy or treatment includes obesity, Covid, anxiety, backache and depression

% of Ailment Sufferers That Haven't Used Any Remedy or Treatment in the last 12 months
 Adults 18+
in millions



Source: VAB analysis of MRI-Simmons, Spring USA Doublebase Study 2024, Adults 18+.

Appendix: Universes of sufferers by ailment who have not used any remedy or treatment

Ailments: Have Not Treated In last 12 months

Ailments	Weighted (000)				Composition (%)			
	Spring 2021	Spring 2022	Spring 2023	Spring 2024	Spring 2021	Spring 2022	Spring 2023	Spring 2024
Any	55,635	53,506	53,121	51,758	30.3%	27.9%	27.0%	25.9%
Acne	3,655	4,398	4,493	4,595	15.9%	17.3%	17.8%	17.4%
ADD/ADHD	1,650	2,335	3,196	4,165	25.4%	30.8%	34.4%	36.6%
Addiction/Substance Abuse			657	833			27.7%	29.8%
Allergy/Hay Fever	1,776	1,817	1,758	1,647	4.1%	3.9%	3.7%	3.4%
Anxiety/Panic	5,581	6,937	7,047	7,697	18.5%	20.7%	20.4%	20.7%
Arthritis - ANY			2,902	2,830			8.7%	8.3%
Arthritis/Osteoarthritis	1,860	2,061	2,013	2,084	9.3%	9.4%	8.7%	8.7%
Arthritis/Psoriatic Arthritis (PsA)			183	105			7.9%	4.8%
Arthritis/Rheumatoid Arthritis (RA)	950	998	859	775	7.6%	8.7%	7.5%	6.5%
Asthma	417	717	796	800	2.9%	4.9%	5.3%	5.1%
Atrial Fibrillation (Afib)	145	266	292	306	3.7%	7.2%	7.3%	6.8%
Backache/Back Pain	5,737	6,372	6,657	6,654	9.9%	10.5%	10.2%	9.9%
Bipolar Disorder	378	412	513	555	9.1%	11.7%	13.6%	13.5%
Cancer - ANY			810	771			10.7%	10.4%
Cancer - Breast Cancer (women only)			68	108			5.1%	8.2%
Cancer - Colorectal Cancer			16	1			4.0%	0.2%
Cancer - Lung Cancer			10	24			2.0%	5.0%
Cancer - Other			514	439			15.4%	13.6%
Cancer - Skin Cancer/Melanoma			206	243			7.3%	8.7%
Cataracts		2,162	2,434	2,258		44.3%	43.9%	42.6%
Chronic Obstructive Pulmonary Disease (COPD)	51	52	87	268	2.0%	2.9%	4.5%	8.7%
Chronic/Severe Pain	530	431	376	418	5.6%	5.1%	4.6%	4.8%
Cold Sores	579	739	803	863	4.7%	6.3%	6.8%	7.2%
Constipation	1,763	2,291	2,487	2,706	9.0%	10.3%	10.4%	10.7%
COVID-19 (Coronavirus)			6,708	7,772			21.6%	21.4%
Crohn's Disease/Ulcerative Colitis	189	173	177	154	9.3%	9.2%	9.0%	7.7%
Dandruff/Dry Scalp	1,304	1,583	1,631	1,930	8.2%	9.2%	9.2%	10.0%
Depression	4,232	5,045	5,459	5,901	16.3%	18.0%	18.7%	18.9%
Diabetes - ANY	324	533	742	618	1.5%	2.5%	3.3%	2.7%
Diabetes (Type 1-Insulin Dependent)	16	24	32	6	0.4%	0.8%	1.1%	0.2%
Diabetes (Type 2-Non-Insulin Dependent)	308	509	710	612	1.7%	2.8%	3.5%	3.0%
Dry Eyes	1,289	1,466	1,479	1,788	4.5%	4.8%	4.7%	5.4%
Eczeema/Skin Itch/Rash	823	1,044	1,146	1,065	5.4%	6.0%	6.7%	5.9%
Epilepsy/Seizures	55	60	59	91	4.8%	4.5%	4.5%	6.8%
Erectile Dysfunction (ED) (men only)	952	1,421	1,840	1,650	25.1%	29.4%	33.6%	30.6%

Ailments	Weighted (000)				Composition (%)			
	Spring 2021	Spring 2022	Spring 2023	Spring 2024	Spring 2021	Spring 2022	Spring 2023	Spring 2024
Any	55,635	53,506	53,121	51,758	30.3%	27.9%	27.0%	25.9%
Fibromyalgia	532	546	583	690	12.6%	13.4%	13.6%	15.7%
Flu	893	620	781	1,145	7.3%	7.9%	7.1%	7.2%
Gout	216	225	220	197	5.4%	5.7%	5.9%	4.8%
Hair Loss/Alopecia	5,095	5,825	6,195	5,713	43.5%	45.7%	46.1%	45.2%
Hearing Loss	3,419	3,984	4,230	4,144	35.1%	40.5%	40.2%	37.9%
Heart Attack/Heart Disease	139	110	94	122	2.3%	2.0%	1.6%	2.0%
Heartburn/Acid Reflux	1,105	1,054	893	1,048	2.8%	2.6%	2.2%	2.5%
Hepatitis	95	118	116	115	14.9%	19.8%	16.6%	15.0%
High Cholesterol	2,113	2,824	3,180	3,397	6.1%	7.7%	8.3%	8.5%
Hypertension/High Blood Pressure	937	887	997	1,241	2.2%	2.0%	2.1%	2.7%
Infertility			435	442			27.8%	30.8%
Insomnia	3,502	4,325	4,307	4,072	19.6%	21.3%	20.9%	19.8%
Irritable Bowel Syndrome (IBS)	1,665	1,960	2,092	1,975	23.3%	24.6%	24.1%	23.2%
Kidney Ailments	532	582	651	645	14.4%	18.2%	17.4%	16.6%
Lupus			155	143			14.3%	13.7%
Macular Degeneration	219	289	355	329	9.3%	12.5%	15.7%	14.9%
Menopause/Hormone Replacement (women only)	534	601	647	587	14.9%	17.5%	19.6%	17.2%
Migraine Headaches	476	572	659	669	2.8%	3.1%	3.3%	3.1%
Multiple Sclerosis (MS)	77	58	56	113	9.2%	7.2%	5.7%	10.9%
Muscle Strain/Sprain	1,122	1,428	1,387	1,223	9.0%	9.1%	8.2%	7.8%
Nail Fungus	2,043	2,155	2,037	2,188	21.3%	21.9%	21.3%	21.4%
Obesity/Overweight	13,440	16,084	16,868	17,260	51.3%	53.2%	54.6%	54.1%
Osteoporosis	808	1,081	1,021	928	16.4%	20.6%	18.0%	15.9%
Overactive Bladder	1,646	2,091	2,229	2,119	29.9%	36.3%	37.2%	35.2%
Prostate Disease (men only)	284	224	347	369	9.4%	8.4%	11.3%	12.5%
Psoriasis	307	370	392	381	8.1%	8.4%	8.7%	8.8%
Restless Legs Syndrome	3,162	2,826	2,664	2,657	35.4%	37.0%	35.6%	34.5%
Rosacea or Skin Disease	485	634	688	628	15.6%	17.1%	17.1%	15.5%
Sinus Congestion/Headache	513	666	749	780	1.8%	2.2%	2.3%	2.2%
Sleep Apnea	2,001	2,471	2,783	2,975	14.7%	16.3%	17.5%	17.6%
Snoring	10,319	12,367	13,197	14,031	61.2%	65.3%	64.9%	65.0%
Urinary Tract Infection (UTI)	128	143	189	230	1.1%	1.4%	1.7%	1.9%
Varicose Veins			5,075	5,320			69.7%	71.8%
Wrinkles	4,348	5,833	6,416	6,589	30.2%	36.8%	38.5%	37.3%
Yeast Infection (women only)	130	36	75	96	1.9%	0.6%	1.2%	1.3%

Composition % = % of ailment sufferers that have not used any remedy or treatment

Source: MRI-Simmons, Spring USA Doublebase Studies: 2021, 2022, 2023 & 2024, Adults 18+.