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POC & IN-PHARMACY MEDIA WORKS



POINT OF CARE
MARKETING
ASSOCIATION

March 2026

Solomon Firm Overview

Deep industry expertise

Bankers experienced in working with clients on their most important M&A and financing transactions

12+
Industries

Diversified Platform

40+
Partners /
Managing
Directors

Across M&A, Strategic
and Capital Advisory

200+
Bankers

In Chicago, Miami,
New York and Tampa

Solomon Media & Entertainment Group Global Coverage Focus

\$200B+

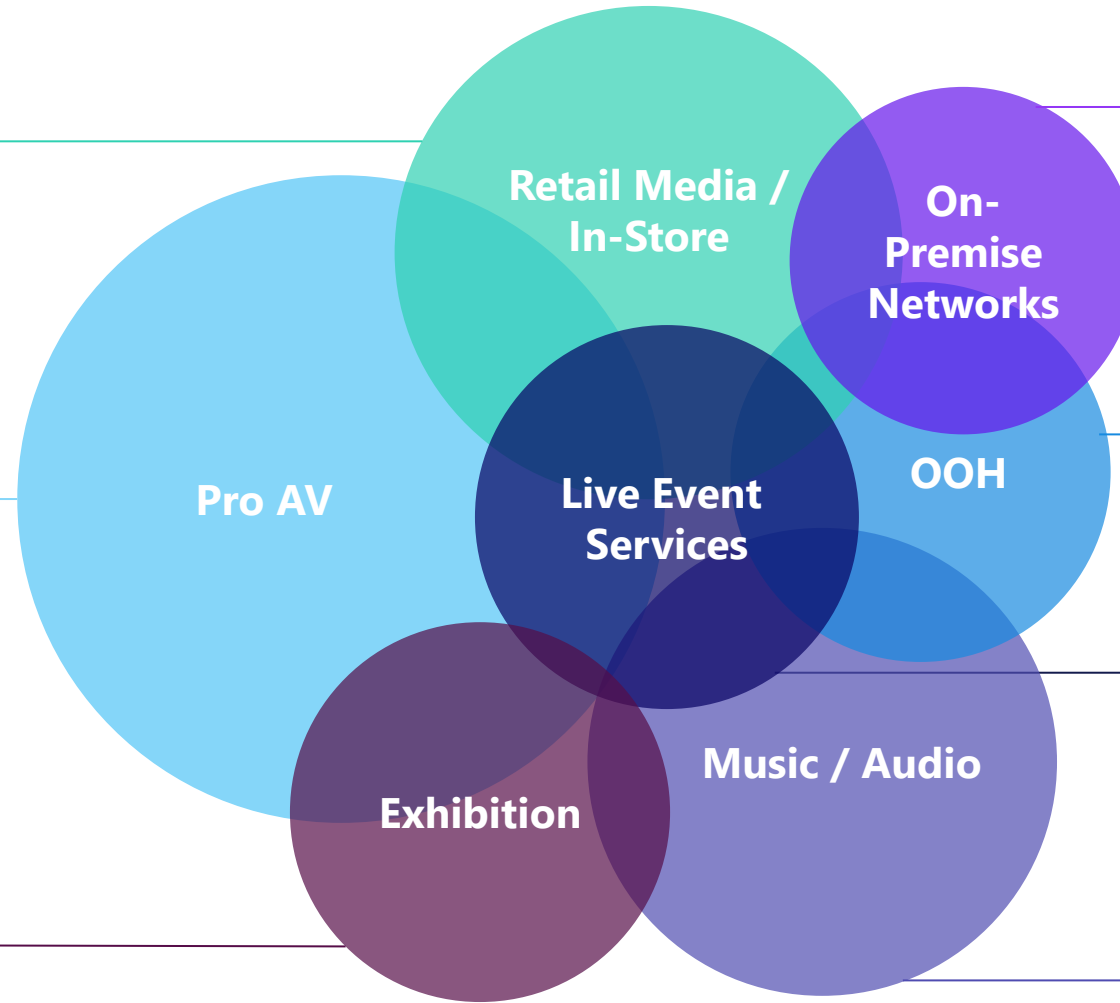
Retail Media / In-Store

\$300B+

Pro AV

\$45B+

Exhibition



\$16B+

On-Premise Networks

\$50B+

Out of Home

\$57B+

Live Event Services

\$100B+

Music / Audio

Select Solomon Transactions

Healthcare - Health Tech



Grocery - Pharmacy



Media - Entertainment - Tech Services



POC AND IN-PHARMACY MEDIA LANDSCAPE

Corporations Across Industries Are Becoming Active Participants in Media

Pharmaceutical businesses and hospitals are producing high-quality content to extend their brands

Scenario: Storytelling as a Brand Tool



“Illuminated” series spotlights athletes managing stress, part of Adidas’ “You Got This” campaign



Elevating to long-form content production with relevant storylines would supercharge brand



Launched in-house TV and film production studio “Northwell Studios” to develop and own scripted / unscripted entertainment



Expanded flagship podcast “That’s Understandable” into a narrative, patient-led storytelling platform



Scaled long-form, season-based video programming “Tomorrow’s Cure”, shifting to documentary-style content in addition to podcasts

POC / In-Pharmacy Media Is a Core Advertising Channel in the AI-Evolving World

Real world assets are future-proofed against AI disruption

AI Disruption

AI is transforming the advertising landscape and weakening the effectiveness of other media channels



Ad Spend Reallocation

Digital advertising will decline as AI results limit click through; advertisers expected to reach consumers through other mediums



Out of Home (OOH) Insulation

Consumers will continue to interact with the physical world; OOH will remain an integral outlet for advertisers to reach consumers



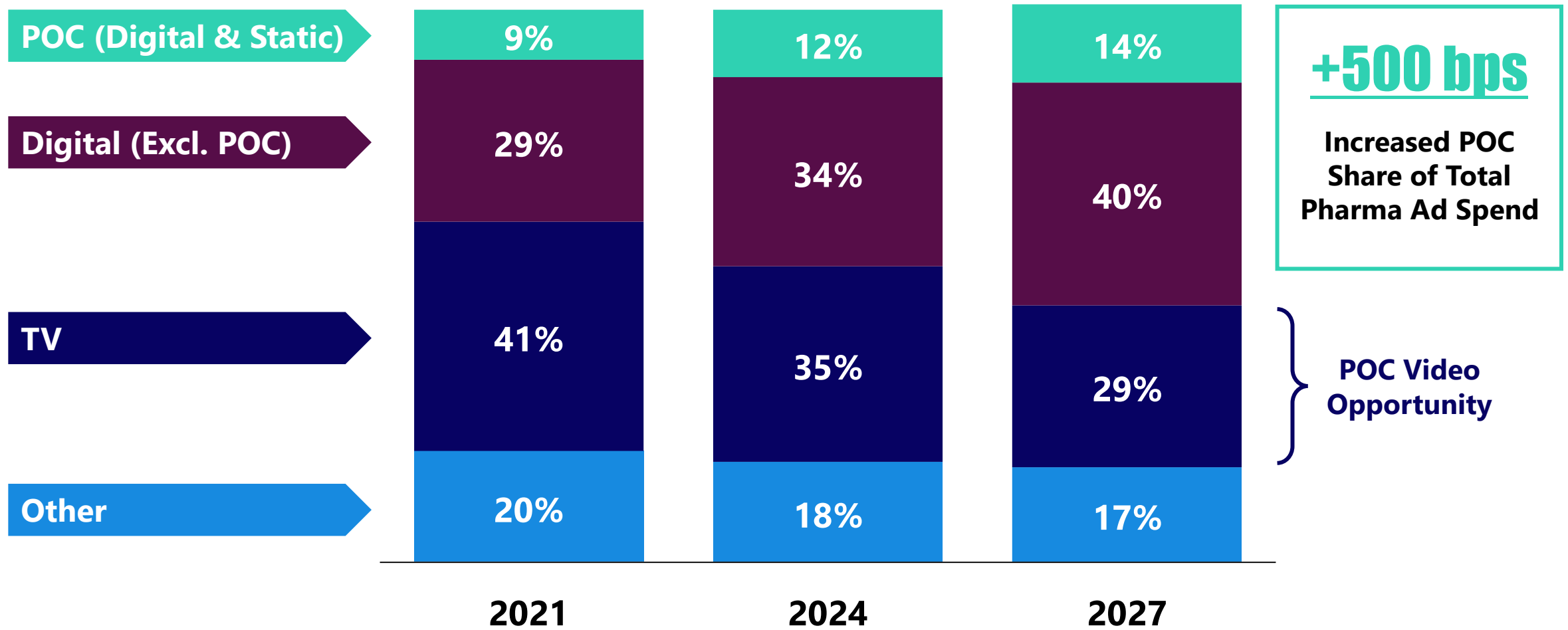
POC / In-Pharmacy

Proven, measurable impact on patients / consumers making key medical decisions in doctors' offices and pharmacies

POC Ad Spend Has Accelerated as Ad Dollars Shift to Trusted Digital Mediums

Pharma companies are increasingly looking to reach consumers / patients in the physical world

US Pharmaceutical Advertising Spend Breakdown by Channel



POC Advertising Has a Meaningful Impact on the Customer Experience

Doctors' offices create safe environments where customers actively seek healthcare information and ask providers questions

90%

Value POC information on health risks and ways to reduce them⁽¹⁾

63%

Take-action rate following POC ad exposure⁽²⁾

20%

Requested a pharma brand following POC ad exposure⁽³⁾

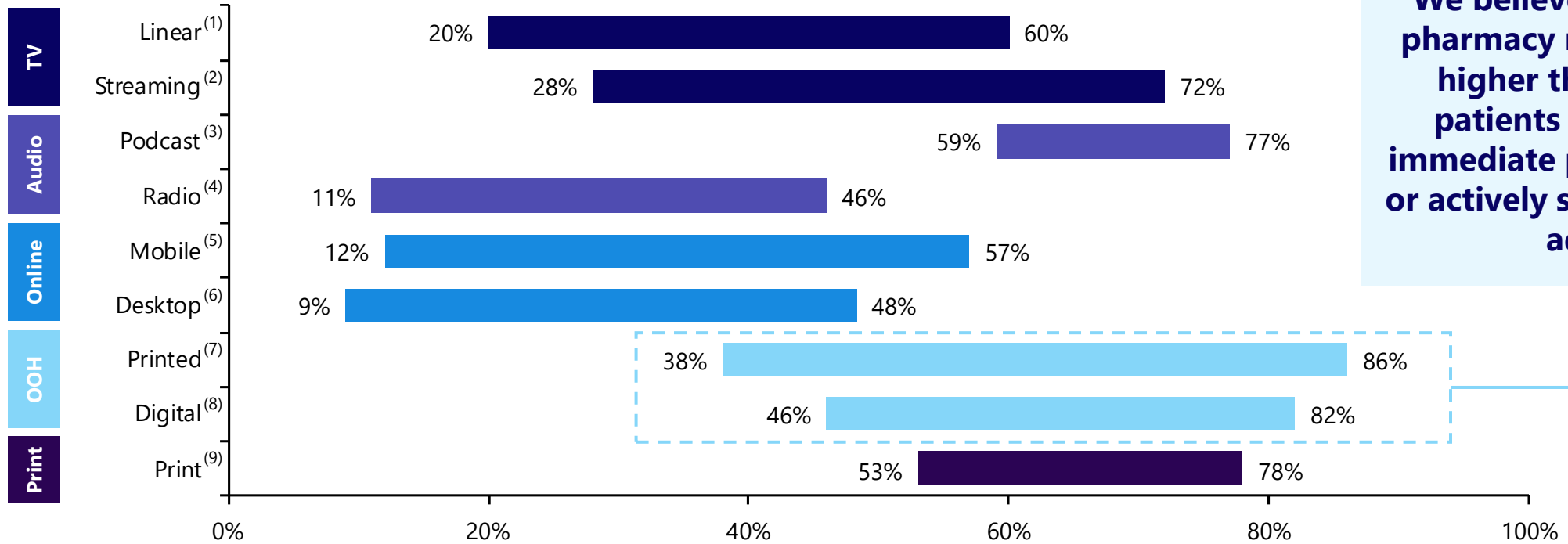
1. eMarketer.

2. M3 MI 2025 MARS Consumer Health Study. Take-action rate represents patients who discussed an ad with a doctor, friend, relative or pharmacist, asked a doctor for a sample or prescription for a specific brand, did additional online research on the brand or product, reacted to direct response vehicles (e.g., used QR code, downloaded an app, watched a video) or changed purchasing habits (e.g., used a coupon, switched brands).

3. M3 MI 2025 MARS Consumer Health Study. Represents patients who either asked their doctor for a product sample of a prescription drug or to prescribe a specific drug.

Advertising Effectiveness – Solomon Study and Recall Comparison Analysis (July 2025)

Advertising recall defined as advertising effectiveness in which respondents were exposed to an advertisement and then at a later point in time, respondents were asked if they remembered the advertisement on an aided or unaided basis



We believe POC and in-pharmacy recall could be higher than OOH, as patients are either in immediate purchase mode or actively seeking medical advice

Sources: Outfront (2025), Vistar (2024), Emarketer (2023), Nielsen (2023), Premium Content Alliance (2023), Dentsu (2023), MARU/Matchbox (2023), RAMetrics (2023), Comcast (2022), Nielsen (2022), tvScientific (2021), The Drum (2021), Kickstand Communications (2021), Newsworks (2020), Nielsen (2020), Thinkbox (2020), Comcast (2020), National Library of Medicine (2020), Talon Outdoor (2019), Comcast, Effectv and MediaScience (2019), Survata (2019), The Harris Poll (2019), IAB (2019), Ipsos (2019), Magna Global (2018), Coda (2016-2018), Nielsen Case Campaign Effect Study (2017), Kantar Media (2014), True Impact, Canada Post.

Note: Represents aggregation of publicly available studies on advertising recall from 2017 – 2022. Ranges shift depending on aided vs. unaided recall basis, length of time for recall and sample size / nature and scope.

1. Includes traditional cable or satellite channel television.
2. Includes over-the-top (OTT) media services such as streaming services and smart TVs.
3. Includes host-read and non-host-read podcast advertisements.
4. Includes terrestrial and non-terrestrial / streaming radio, including either analog radio or digital audio over a variety of radio formats (broadcast, simulcast, satellite radio, internet radio, via streaming, media on the internet) and a range of 1-7 mentions of the brand in a given segment.
5. Includes interactive and non-interactive banner ads that appear embedded in mobile websites, downloaded apps or in mobile games on smartphones and tablets. Does not include text ads via short message service (SMS).
6. Includes all forms of desktop display advertising on websites, including text, image, flash, video and audio.
7. Includes all forms of outdoor advertising, including billboards, posters, wallscapes, rotary programs, transit, airport advertising and in retail venues.
8. Includes digital media used for marketing outside of the home and includes digital billboards, digital placed based networks and digital signage.
9. Includes advertising in newspapers, magazines, directories, direct mail and circulars.

In-Pharmacy Advertising Unlocks New Opportunities for POC Media

Pharmacies are becoming essential points of care, with patients receiving preventive screenings and trusted healthcare education, as well as primary care services from over 40% of pharmacies

Pharmacies Are Accessible

90%

of Americans live within
5 miles of a pharmacy

~2x

More visits to pharmacists than primary care providers from patients with chronic conditions

Consumers Trust Advice from Pharmacists

70%+

Support pharmacists testing for / treating common illnesses, screening for cholesterol / diabetes and helping to prevent chronic diseases

68%

More likely to visit the pharmacist again if provided with educational materials previously

Consumers Trust and Are Influenced by Educational Material Provided in Pharmacies

In-Pharmacy Advertising Has a Notable Impact on Consumer Actions

34% Took medication

30% Made an appointment to see a doctor

32% Refilled a prescription

17% Consulted a pharmacist

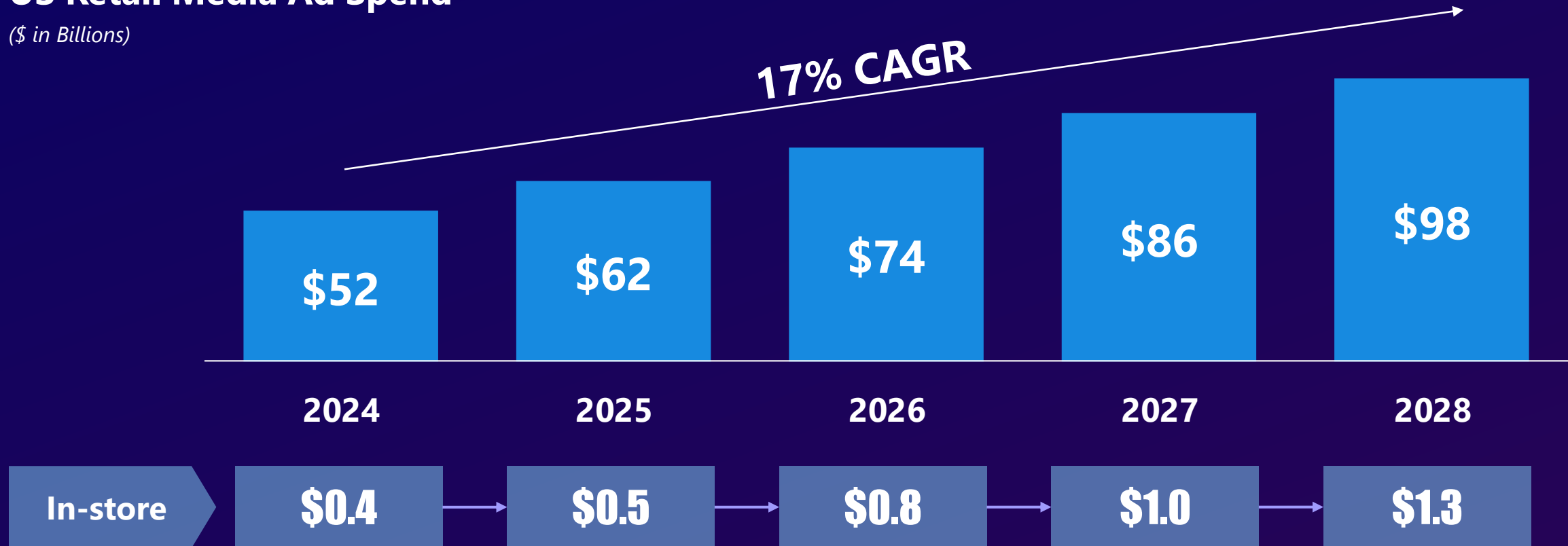
With nontraditional providers (including pharmacies) projected to capture ~30% of US primary care by 2030, in-pharmacy networks will expand in reach and influence

Continued Retail / In-Store Media Growth Serves as a Catalyst for In-Pharmacy Growth

In-store retail media is <1% of total US retail media, showing a long runway for growth

US Retail Media Ad Spend

(\$ in Billions)



Pharmacies, including pharmacy-enhanced grocery and convenience stores, are a major channel for in-store ad dollars

Pharmacy-Enhanced Grocery and Retail Stores Lead in Monthly Audience Reach

In-pharmacy advertising reach is competitive with leading digital video and social media platforms

Monthly Audience Reach

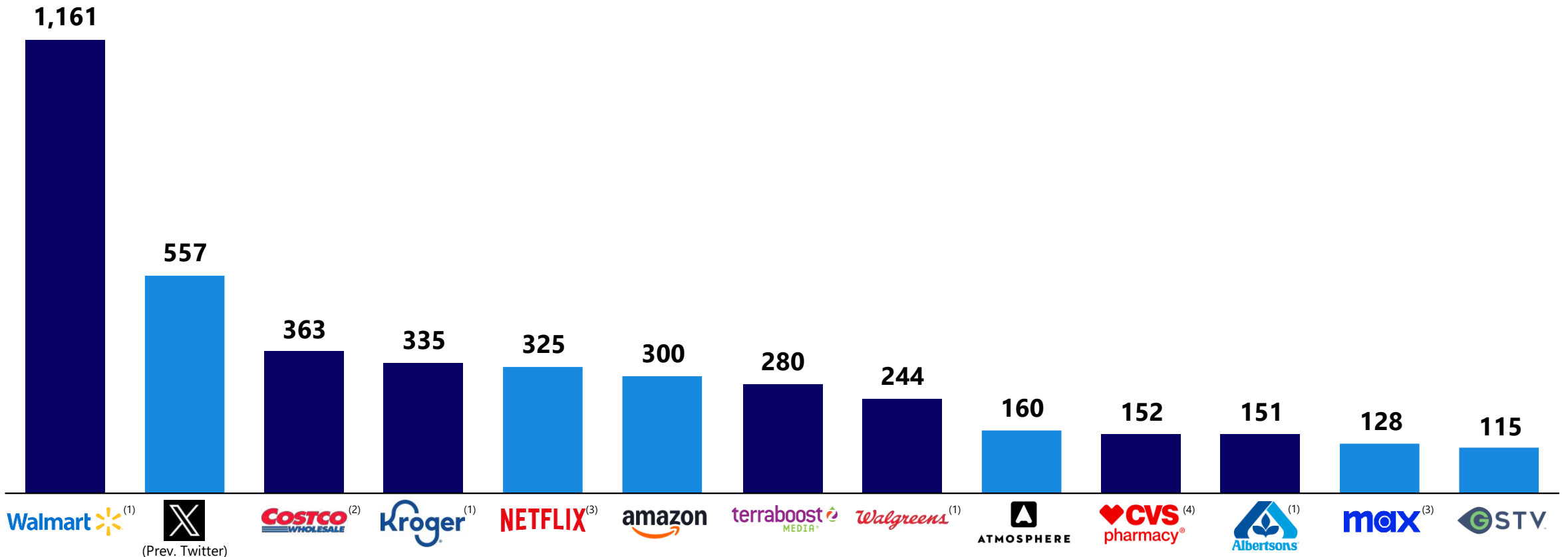
(Millions)



Pharmacies, including pharmacies in retail / grocery stores



Social media, streaming and other digital platforms



1. Represents total monthly in-store and online customers (calculated from a reported daily or weekly customer count).

2. Represents 145 million members (reported as of late 2025), assuming an average monthly store visit count

of 2.5 times per member (average 30 visits annually, per Investopedia).

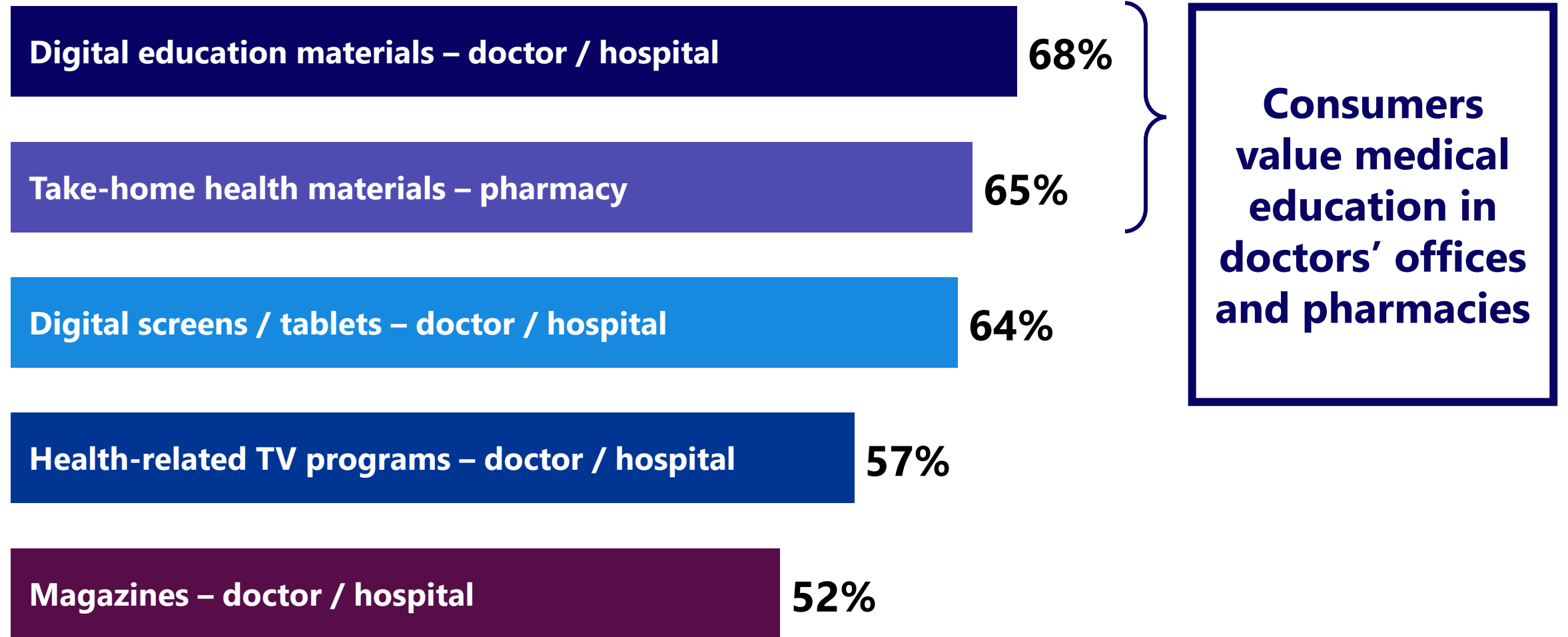
3. Represents paid subscribers.

4. Represents monthly in-store customers (calculated from a reported daily customer count).

POC / In-Pharmacy Advertising Delivers Value Across Formats

More than half of US adult respondents valued information received through on-premise ads

POC Health Information Sources Valued by US Adults

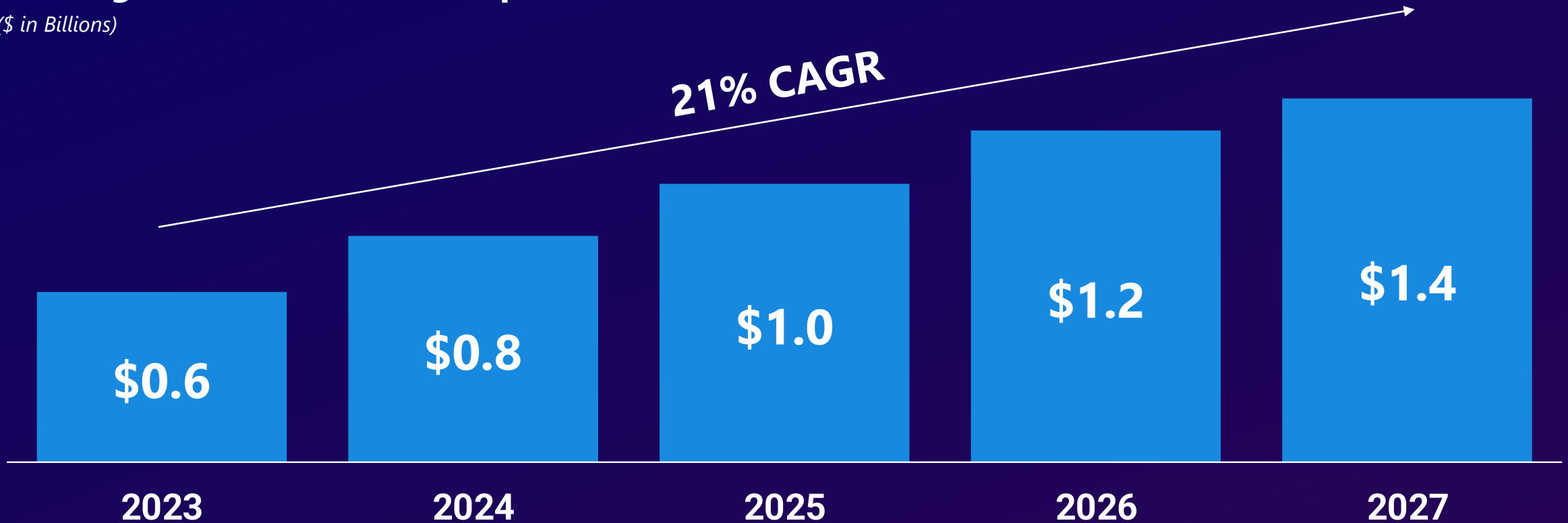


Programmatic Adoption Is a Continuous Catalyst for DOOH Spend Across All Channels

Automated ad purchasing is faster and more efficient for media networks, agencies and ad buyers

US Programmatic DOOH Ad Spend

(\$ in Billions)



Programmatically-enabled POC and in-pharmacy networks will continue to attract healthcare advertisers as programmatic DOOH becomes more mainstream

CASE STUDIES

POC Case Study: Health Monitor®

Leading omnichannel POC network with a focus in specialty physician offices, delivering trusted healthcare content via 35k exam room screens, back-office signage and educational publications

Successful Track Record of Delivering Leading ROIs and NRx Uplift



70%

Specialists Motivated to Suggest Brand Advertised on Poster⁽¹⁾

45%

Average NRx Uplift

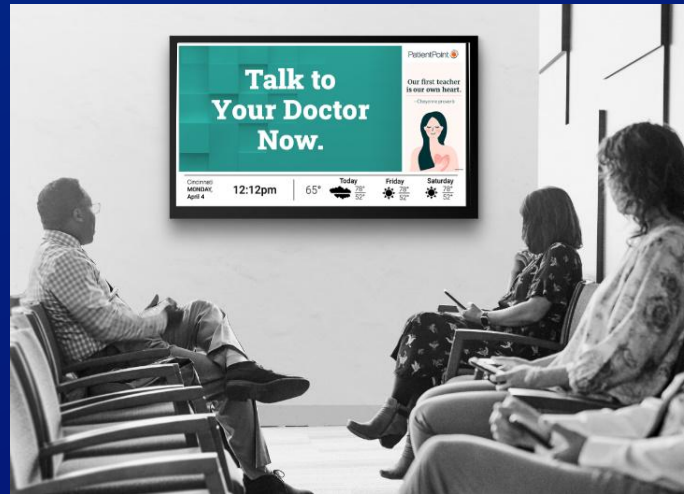
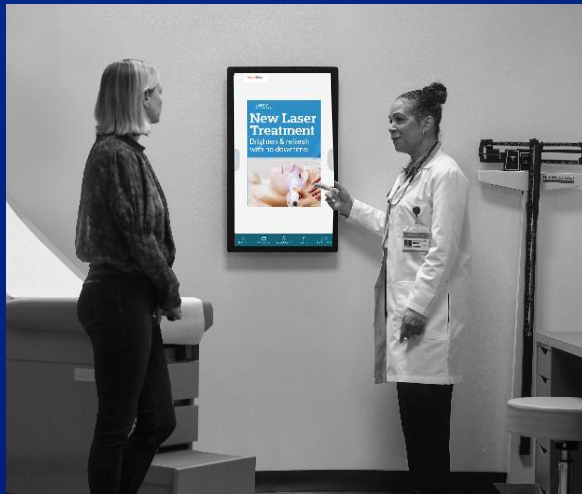
450k+ physicians across 250k+ medical offices

Health Monitor Reaches 150M+ Patients and Caregivers at and Beyond the POC

POC Case Study: PatientPoint

Largest digital screens network at the point of care, delivering behavior-changing health content to patients and healthcare providers throughout 350M annual patient visits

Offers Access at Every Point in the Healthcare Journey to Influence Decisions



10%

NBRx Lift for 85% of Campaigns

3:1

ROI for 80% of PatientPoint Clients

120k+ verified providers across 30k+ unique practices

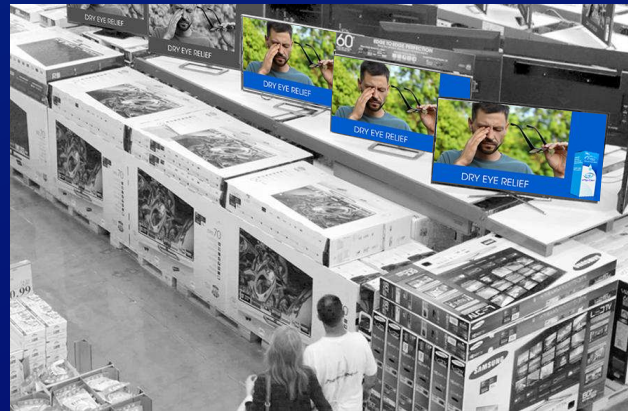
1 in 3 US Prescriptions Written Flows Through the PatientPoint Network

Pharmacy-Enhanced Retail Store Case Study: P|R|N

Leading digital in-store advertiser with operations in over 30 countries

Dry Eye Relief Brand Example Campaign Uplift

- Promote brand at Costco and drive purchase by running a multi-month campaign on the Costco TV Network
- Track results through Costco member mobile survey data



76%

Lift in Current
Purchase at Costco

72%

Lift in Future
Purchase at Costco

Prominent wellness kiosk advertising network across 49k+ US grocers, pharmacies and gyms

Rx Vaccine Awareness Example Campaign Uplift

- Raise awareness of the importance of getting vaccines and drive vaccination sales at the pharmacy
- Significant increase in awareness and sales in stores with Terraboost kiosks vs. stores without following a 14-week campaign



31x

Return on Ad Spend
per Week per Store

62%

Lift in Vaccine
Injections in Stores

SOLOMON IN CANNES

JOIN SOLOMON AT CANNES LIONS

Formal Invitation to Follow

Solomon Live at Cannes Lions
International Festival of Creativity



CANNES
LIONS

C-Level Exchanges

Tuesday, June 23

Plage la Petite Cannoise, Beachside Stage.

Yachtside Conversations

Wednesday, June 24

Accama Delta Yacht, Cannes Old Port

If you're interested in joining our c-suite conversations,
please contact canneslions@solomonpartners.com

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