

May 2026

what marketers are asking



“How has the FDA’s crackdown on deceptive drug advertising affected multiscreen TV?”



In the six months after the FDA crackdown, pharma Rx brands increased TV spend by 53%

In September 2025, the FDA launched a crackdown on deceptive drug advertising with an initial issuance of over 100 letters to pharma companies.

As several marketers have asked us about the implications of the FDA's actions, specifically as it relates to pharma Rx advertising on multiscreen TV platforms, we took a deep dive into the category to understand:

- **Recent multiscreen TV investment trends** for the pharma Rx category, both before and after the FDA's initial crackdown in September 2025
- **TV ad duration (or commercial unit length) trends** for the pharma Rx category, both before and after the FDA's crackdown, including the following cuts:
 - Total TV & streaming
 - Prime time daypart
 - Sports events, news & entertainment genres
 - Pharma Rx product categories

Current federal mandates require that pharma Rx advertisements adhere to several rules and regulations



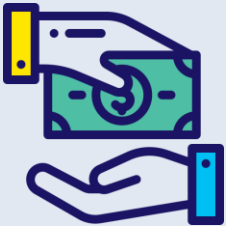
Present a fair balance between a product's risks & benefits



Avoid exaggerated benefits



Don't create a misleading overall impression



Properly disclose financial relationships



Include info regarding major side effects & considerations


In early September 2025, the FDA launched a crackdown on deceptive drug advertising

THE WALL STREET JOURNAL. 9/9/2025
Trump Executive Action Cracks Down on Pharmaceutical Ads
Administration says it is sending enforcement letters related to misleading campaigns

POLITICO 9/9/2025
Trump announces crackdown on pharmaceutical advertising
The administration is planning to take regulatory action to require companies to include more drug information

The New York Times 9/9/2025
Trump Moves to Crack Down on Drug Advertising
The administration is proposing a return to a 1990s-era policy that kept most drug ads off TV. That could dent the revenues of drugmakers and major networks.

CNBC 9/9/2025
Trump signs memo to crack down on direct-to-consumer pharma ads

 **REUTERS** 9/9/2025
US FDA stepping up enforcement of pharma ad rules, sends letters to companies

THE WRAP. 9/10/2025
Trump Orders Drug Advertising Crackdown as RFK Jr. Wants ‘Radical Transparency’ From Pharmaceutical Companies
HHS and the FDA will close a 1997 loophole that allowed drug companies to limit the number of side effects disclosed in TV commercials, while stepping up violation enforcement efforts

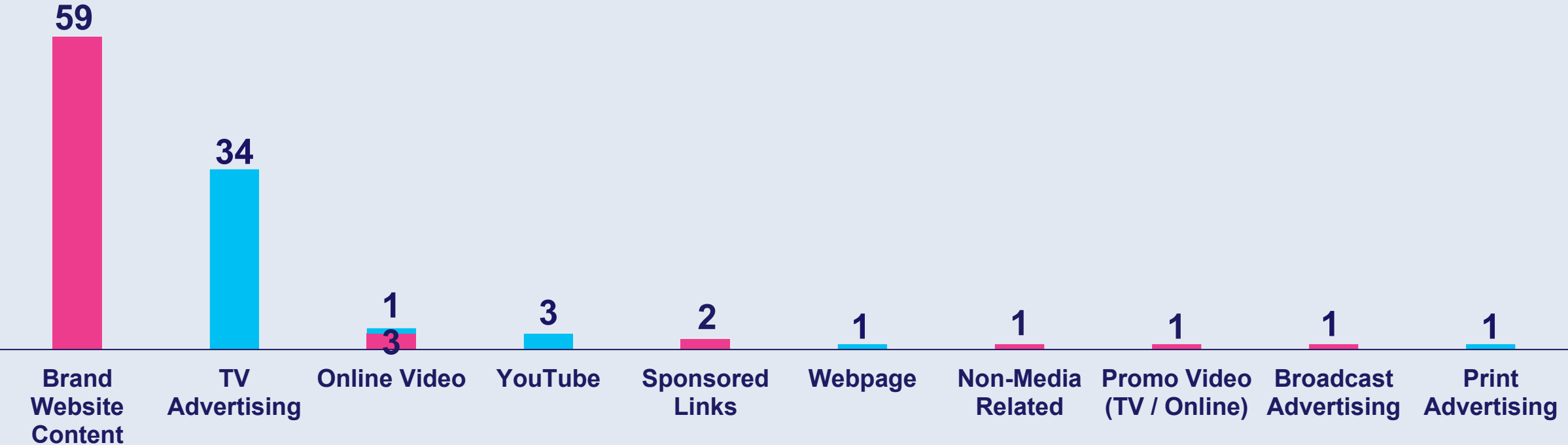
 9/10/2025
Trump signs memo directing FDA to crack down on pharmaceutical ads

The FDA crackdown involved over 65 ‘warning’ letters sent to pharma companies, 96% of which were targeted towards digital & social platforms

▶ In total, over 100 letters were sent to pharma companies by the FDA on September 9th, 2025; 65% of which were targeted towards digital & social platforms

FDA ‘Warning’ or ‘General Notice’ Letters by Media
based on letters sent on 9/9/25

■ ‘Warning’ Letter ■ ‘Untitled’ Letter*



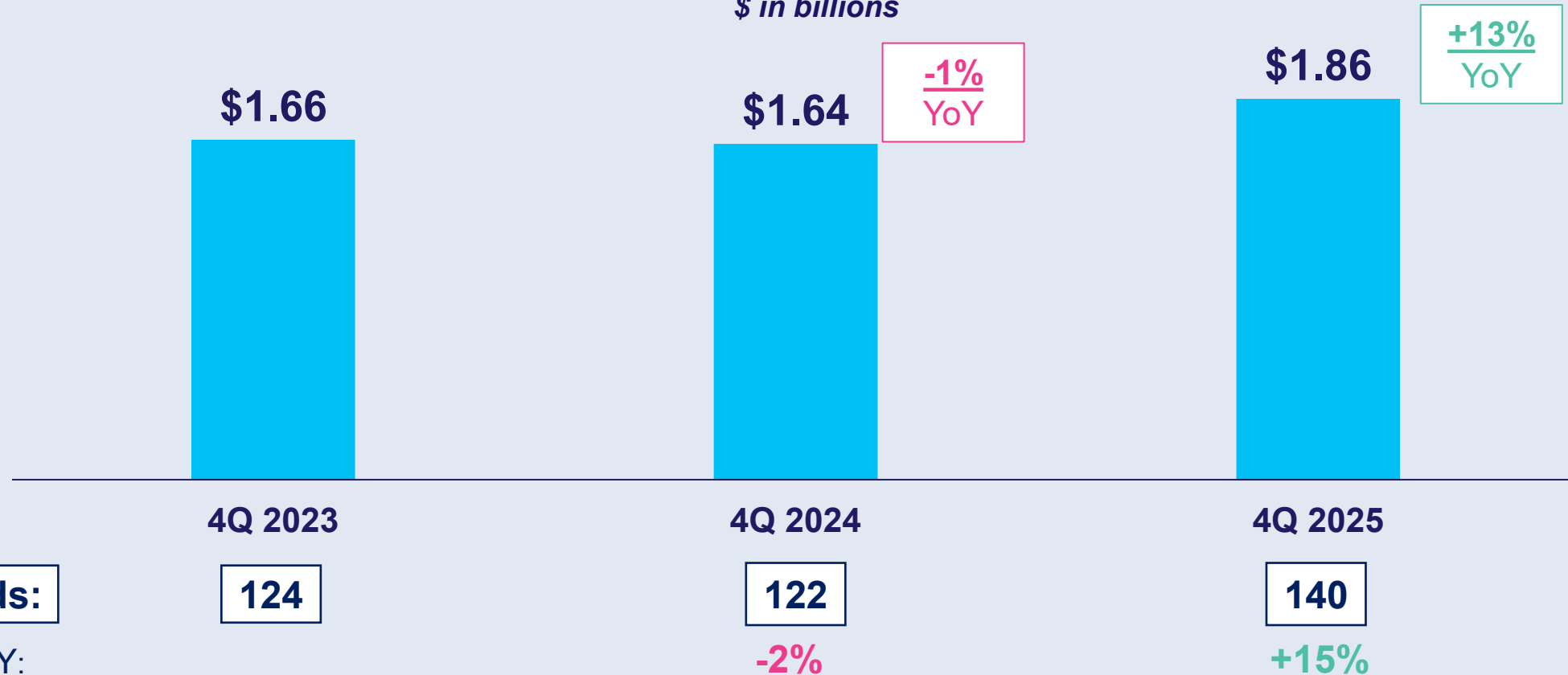
Source: VAB analysis of data from www.fda.gov as of 9/12/25. *Untitled letters are used for violations that do not meet the threshold of regulatory significance for a warning letter. Unlike a warning letter, an untitled letter does not include a statement that warns the individual or firm that failure to promptly correct the violation may result in enforcement action.

The clarity provided by the FDA's actions in September 2025 spurred increased investment across multiscreen TV platforms



4Q 2025 pharma ad spend in multiscreen TV was up over \$400MM (+13%) vs. 4Q 2024 and the number of Rx advertisers increased to 140

Pharma Rx TV Spend: By 4Q
\$ in billions










Source: VAB analysis of Nielsen AdIntel, January 2023 – March 2026; TV Media: Cable TV, Network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV, Streaming. Sub-group category: Pharmaceutical Houses, GP (includes Rx product categories). \$\$\$ exclude promos and PSAs. # of Brands = active TV advertisers during the time period.

In fact, seven pharma Rx brands launched their first multiscreen TV ad campaign in 4Q '25, with a collective TV ad spend of over \$200 MM

First-Time Pharma Rx Multiscreen TV Advertisers (between Sept '25 – Dec '25)

Spending based on September '25 – March '26, \$\$\$ (000)

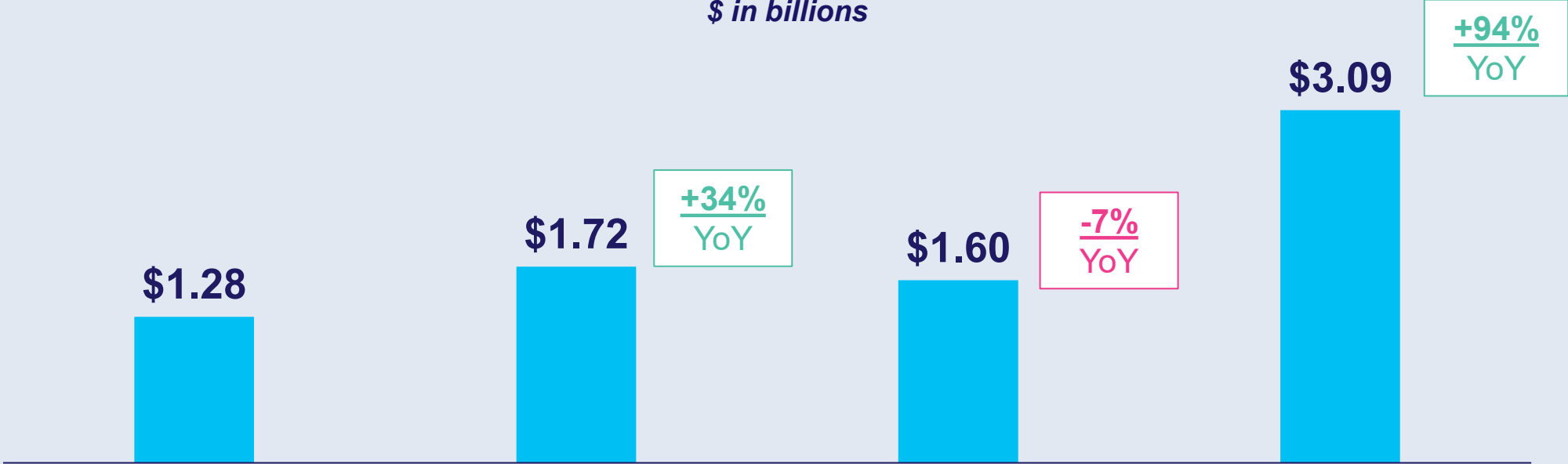
	<u>Brand Name</u>	<u>Drug Category</u>	<u>Received FDA Approval</u>	<u>TV Launch Month</u>	<u>Total Multiscreen TV Spend</u>
 COBENFY [®] (xanomeline and trospium chloride) capsules 50mg/20mg, 100mg/20mg, 125mg/30mg	Cobenfy Rx	Schizophrenia	September 2024	September 2025	\$106,781.1
 Auvelity [®] (dextromethorphan HBr and bupropion HCl) extended-release tablets 45mg/105mg	Auvelity Rx	Depression	August 2022	September 2025	\$40,292.5
 Brukinsa [®] zanubrutinib 80mg capsules 160mg tablets	Brukinsa Rx	B-cell malignancies (i.e., lymphoma, leukemia)	November 2019	November 2025	\$19,205.9
 OCREVUS [®] ocrelizumab	Ocrevus Rx	Multiple Sclerosis	March 2017	November 2025	\$18,064.1
 LEQEMBI [®] (lecanemab-irmb)	LEQEMBI Rx	Early Alzheimer's	January 2023	September 2025	\$16,677.6
 ELAHERE [®] mirvetuximab soravictin-pyru injection 100 mg	Elahere Rx	Ovarian Cancer	November 2022	November 2025	\$6,013.7
 ENHERTU [®] fam-trastuzumab deruxtecan-nxki 20 mg/mL INJECTION FOR INTRAVENOUS USE	ENHERTU Rx	Various cancers (i.e., breast, lung, stomach)	December 2019	September 2025	\$613.5

Total Spend: \$207,648.3

Source: VAB analysis of Nielsen Ad Intel data as of 4/9/26, 8/1/25 – 3/31/26. TV Spend includes national cable TV, broadcast TV, Spanish language cable TV, Spanish language broadcast TV, spot TV, syndicated TV and streaming TV.

Pharma Rx multiscreen TV spend also accelerated in 1Q 2026 as total investment almost doubled during the period vs. previous years

Pharma Rx TV Spend: By 1Q
\$ in billions



of Brands:

114

112

120

132

YOY:

-2%

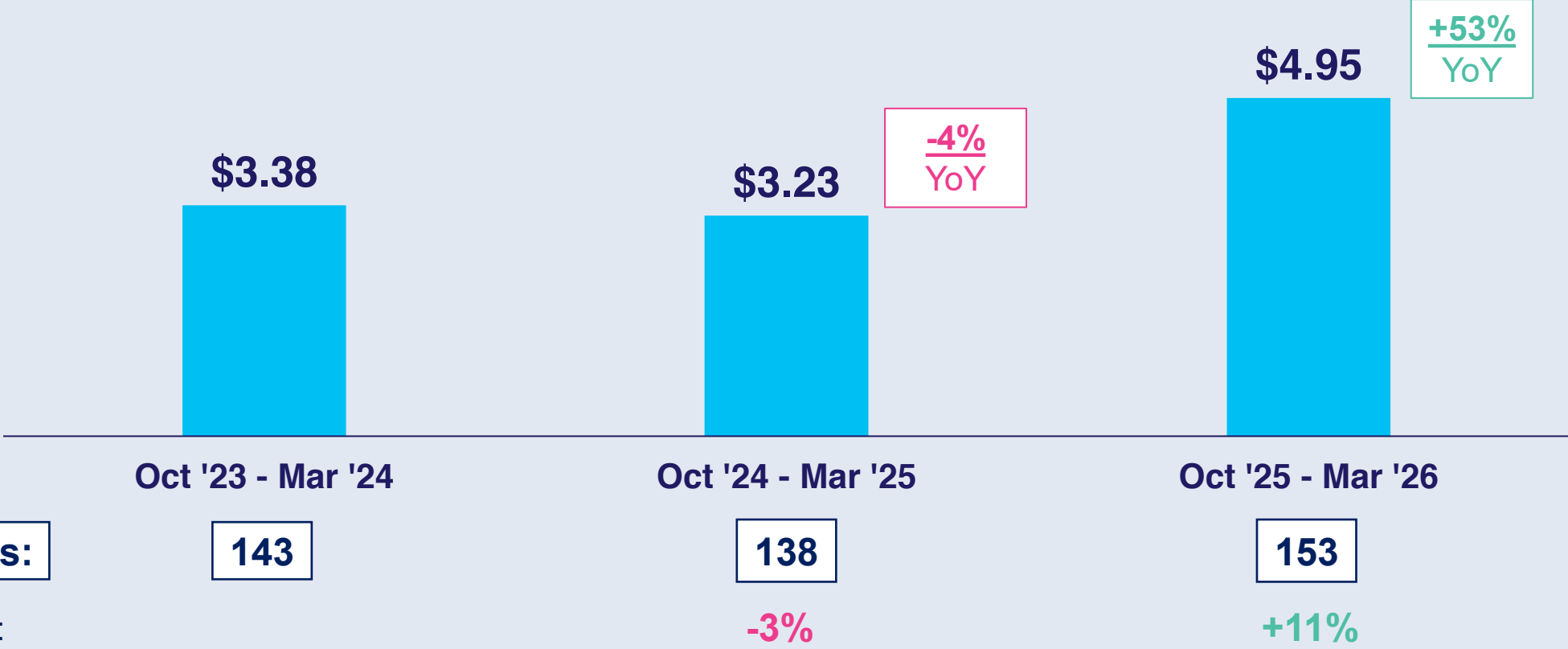
+7%

+10%

Source: VAB analysis of Nielsen AdIntel, January 2023 – March 2026; TV Media: Cable TV, Network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV, Streaming. Sub-group category: Pharmaceutical Houses, GP (includes Rx product categories). \$\$\$ exclude promos and PSAs. # of Brands = active TV advertisers during the time period.

Overall, multiscreen TV investment by pharma Rx brands was up 53% in the two quarters after the FDA crackdown on deceptive drug advertising

Pharma Rx TV Spend: Comparative Six-Month Period
\$ in billions



Source: VAB analysis of Nielsen AdIntel, January 2023 – March 2026; TV Media: Cable TV, Network TV, Spanish Language Cable TV, Spanish Language Network TV, Spot TV, Syndication TV, Streaming. Sub-group category: Pharmaceutical Houses, GP (includes Rx product categories). \$\$\$ exclude promos and PSAs. # of Brands = active TV advertisers during the time period.



Rx brands are being more mindful of **proactively adhering** to pharma advertising rules and regulations across multiscreen TV platforms...

...one quantitative way of verifying these proactive adjustments is to analyze changes in TV ad unit durations

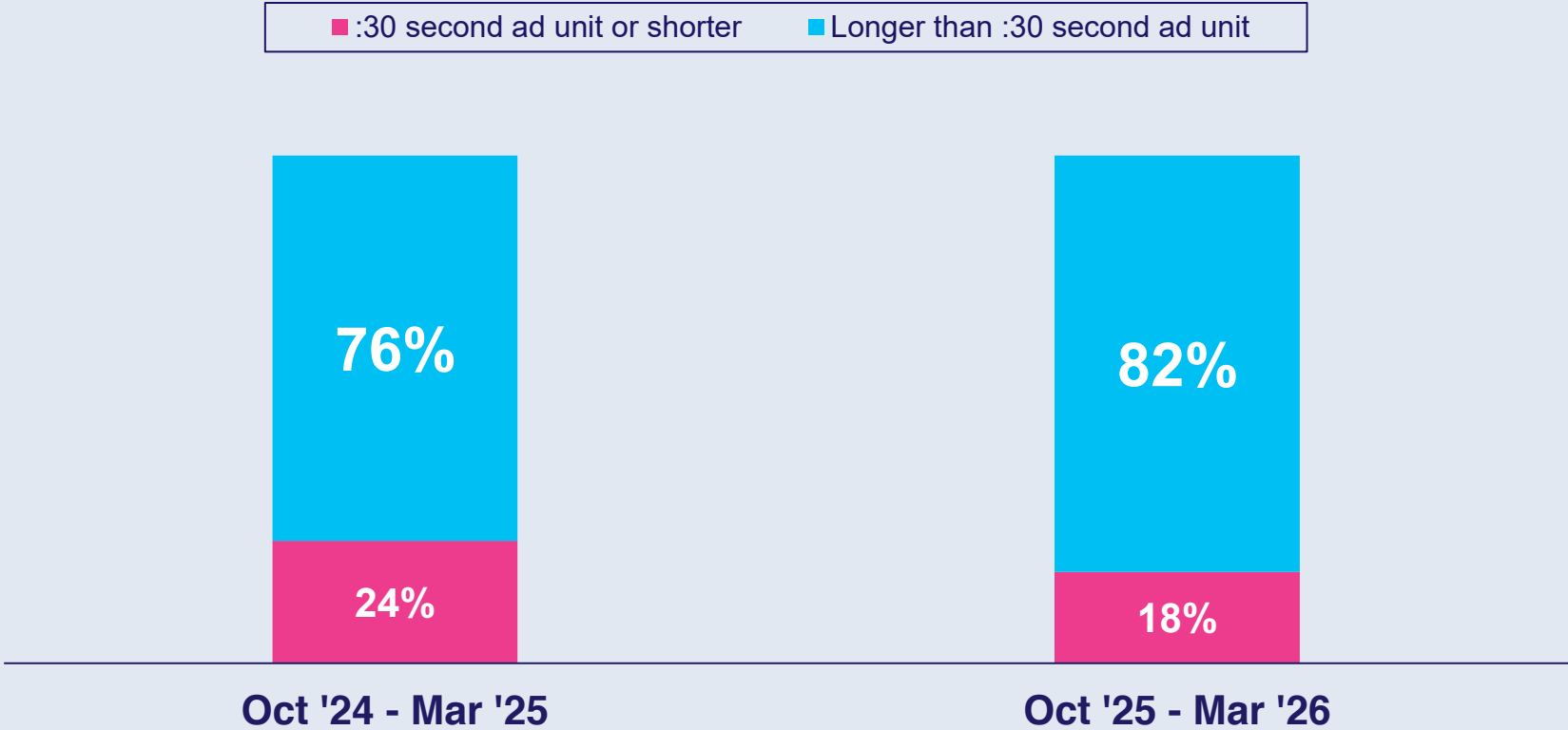
Pharma Rx Category:

National TV Commercial Unit & Time Distribution % Share by Ad Duration

Total Measured National TV & Streaming

In the two quarters after the FDA crackdown, there has been a noticeable shift towards longer pharma Rx ad unit durations compared to prior year

Pharma Category: National TV Commercial Unit % Share by Ad Duration



Source: Nielsen Ad intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP (Rx product categories only), which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; Based on six-month average for Oct '24 – Mar '25 & Oct '25 – Mar '26. Percentages are rounded off.

Between 1Q 2024 and Q1 2026, the share of pharma Rx ad units longer than 30 seconds in the first quarter **increased from 74% to 82%**

Pharma Category: National TV Commercial Unit & Time Distribution % Share by Ad Duration

Ad Duration (in seconds)	% of Units																											
	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	66%	63%	63%	58%	59%	60%	60%	57%	63%	62%	59%	55%	58%	57%	55%	57%	55%	54%	57%	56%	59%	61%	65%	64%	68%	63%	63%	60%
:30	23%	25%	23%	24%	23%	21%	23%	28%	23%	23%	24%	18%	16%	17%	21%	19%	20%	16%	15%	15%	15%	16%	13%	14%	12%	16%	17%	19%
:45	6%	6%	6%	5%	4%	3%	4%	4%	3%	6%	7%	8%	9%	9%	8%	8%	9%	12%	13%	13%	14%	14%	14%	15%	14%	13%	12%	9%
:15	2%	2%	4%	7%	10%	10%	6%	5%	4%	4%	3%	7%	4%	4%	4%	3%	3%	3%	5%	5%	4%	4%	5%	3%	2%	3%	4%	4%
:75	1%	2%	2%	3%	2%	2%	1%	1%	0%	0%	1%	4%	6%	6%	6%	7%	7%	11%	9%	8%	7%	4%	3%	2%	2%	3%	4%	4%
:90	2%	2%	2%	2%	2%	5%	7%	6%	7%	6%	6%	8%	7%	7%	6%	6%	6%	4%	2%	2%	2%	1%	1%	2%	1%	1%	1%	4%
:35	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Ad Duration (in seconds)	% of Total Commercial Time By Ad Duration																											
	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	76%	73%	74%	70%	72%	71%	69%	67%	71%	70%	67%	62%	64%	63%	62%	63%	61%	59%	64%	63%	66%	70%	73%	72%	76%	72%	72%	68%
:30	13%	14%	14%	15%	14%	13%	13%	17%	13%	13%	14%	10%	9%	10%	12%	11%	11%	9%	8%	9%	8%	9%	7%	8%	7%	9%	10%	11%
:45	6%	5%	5%	5%	4%	3%	3%	3%	3%	5%	6%	7%	8%	8%	6%	7%	7%	10%	11%	11%	12%	12%	12%	13%	11%	11%	10%	8%
:90	4%	4%	3%	3%	3%	8%	12%	11%	11%	11%	11%	13%	11%	11%	10%	9%	10%	7%	4%	4%	3%	2%	2%	3%	2%	2%	1%	6%
:75	1%	2%	2%	5%	4%	2%	1%	1%	0%	0%	2%	6%	8%	9%	8%	9%	10%	14%	12%	11%	10%	6%	4%	3%	3%	5%	5%	6%
:15	0%	1%	1%	2%	3%	3%	2%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
:35	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Nielsen Ad intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP (Rx product categories only), which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; January 2024 – March 2026. Percentages are rounded off. Percentages in the headline based on three-month average for 1Q 2024 & 1Q 2026. Charts are sorted by average percentages by ad duration.



The share of 60-second TV ad units in the pharma Rx category **increased** by seven percentage points (56% → 63%) between August '25 & March '26

Pharma Category: National TV Commercial Unit & Time Distribution % Share by Ad Duration

Ad Duration (in seconds)	% of Units															
	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	58%	57%	55%	57%	55%	54%	57%	56%	59%	61%	65%	64%	68%	63%	63%	59%
:30	16%	17%	21%	19%	20%	16%	15%	15%	15%	16%	13%	14%	12%	16%	17%	16%
:45	9%	9%	8%	8%	9%	12%	13%	13%	14%	14%	14%	15%	14%	13%	12%	12%
:75	6%	6%	6%	7%	7%	11%	9%	8%	7%	4%	3%	2%	2%	3%	4%	6%
:15	4%	4%	4%	3%	3%	3%	5%	5%	4%	4%	5%	3%	2%	3%	4%	4%
:90	7%	7%	6%	6%	6%	4%	2%	2%	2%	1%	1%	2%	1%	1%	1%	3%
:35	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Ad Duration (in seconds)	% of Total Commercial Time By Ad Duration															
	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	64%	63%	62%	63%	61%	59%	64%	63%	66%	70%	73%	72%	76%	72%	72%	67%
:45	8%	8%	6%	7%	7%	10%	11%	11%	12%	12%	12%	13%	11%	11%	10%	10%
:30	9%	10%	12%	11%	11%	9%	8%	9%	8%	9%	7%	8%	7%	9%	10%	9%
:75	8%	9%	8%	9%	10%	14%	12%	11%	10%	6%	4%	3%	3%	5%	5%	8%
:90	11%	11%	10%	9%	10%	7%	4%	4%	3%	2%	2%	3%	2%	2%	1%	5%
:15	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
:35	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Nielsen Ad Intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP (Rx product categories only), which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; January 2025 – March 2026. Percentages are rounded off. Charts are sorted by average percentages by ad duration.

Pharma Rx Category:

National TV Commercial Unit & Time Distribution % Share by Ad Duration

TV Prime Time Daypart

(15-month period: January '25 – March '26)

The share split of pharma Rx TV ad unit lengths during prime time aligns very closely with the overall share splits across all dayparts

▶ The share of 60-second TV ad units in the Pharma Rx category **increased by seven percentage points (56% → 63%)** between August '25 & March '26

Pharma Category: National TV (Prime Time Daypart) Commercial Unit & Time Distribution % Share by Ad Duration

Ad Duration (in seconds)	% of Units															
	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	58%	57%	55%	57%	54%	54%	56%	56%	58%	61%	64%	64%	67%	63%	63%	59%
:30	16%	17%	21%	19%	20%	16%	16%	16%	16%	16%	13%	12%	13%	16%	18%	17%
:45	8%	8%	7%	8%	9%	12%	13%	13%	14%	14%	15%	17%	14%	14%	13%	12%
:75	7%	7%	6%	7%	8%	11%	9%	9%	7%	5%	3%	2%	3%	3%	4%	6%
:90	7%	7%	6%	5%	6%	5%	2%	2%	2%	2%	2%	2%	2%	2%	1%	3%
:15	4%	3%	4%	3%	3%	2%	4%	4%	3%	3%	3%	2%	2%	3%	2%	3%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
:35	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Ad Duration (in seconds)	% of Total Commercial Time By Ad Duration															
	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	63%	62%	61%	63%	59%	58%	62%	63%	65%	69%	72%	72%	74%	71%	71%	66%
:45	7%	7%	6%	7%	8%	10%	11%	11%	12%	12%	13%	14%	12%	12%	11%	10%
:30	9%	10%	12%	11%	11%	9%	9%	9%	9%	9%	7%	7%	7%	9%	10%	9%
:75	9%	9%	9%	10%	11%	15%	12%	13%	10%	6%	4%	3%	4%	5%	5%	8%
:90	12%	11%	11%	9%	10%	8%	4%	4%	3%	3%	3%	3%	3%	3%	1%	6%
:15	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	0%	1%	1%	1%	1%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
:35	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Nielsen Ad intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP (Rx product categories only), which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; January 2025 – March 2026. Daypart: TV Prime Time. Percentages are rounded off. Charts are sorted by average percentages by ad duration.

Pharma Rx Category:

National TV Commercial Unit & Time Distribution % Share by Ad Duration

Sports Event, News & Entertainment TV Program Genres

(15-month period: January '25 – March '26)

In the first quarter, the year-over-year share of pharma Rx ad units longer than 30 seconds in **live sports** increased from **77% to 86%**

Pharma Category: National TV (Live Sports Events) Commercial Unit & Time Distribution % Share by Ad Duration

Ad Duration (in seconds)	% of Units															
	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	57%	57%	50%	57%	52%	52%	54%	40%	44%	53%	52%	44%	65%	62%	63%	54%
:30	10%	9%	7%	8%	10%	4%	11%	20%	19%	19%	16%	19%	9%	11%	10%	12%
:45	5%	5%	5%	4%	5%	6%	9%	10%	10%	13%	22%	31%	17%	14%	12%	12%
:75	8%	5%	6%	18%	17%	24%	16%	18%	16%	12%	7%	3%	5%	10%	10%	12%
:15	11%	10%	20%	8%	11%	9%	8%	9%	8%	2%	1%	2%	2%	0%	3%	7%
:90	9%	14%	11%	6%	5%	5%	3%	3%	2%	1%	1%	1%	1%	2%	1%	4%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Ad Duration (in seconds)	% of Total Commercial Time By Ad Duration															
	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	62%	60%	58%	59%	56%	53%	59%	47%	51%	59%	60%	54%	71%	66%	67%	59%
:75	10%	7%	9%	23%	23%	31%	22%	25%	23%	17%	10%	4%	7%	14%	13%	16%
:45	4%	4%	4%	3%	4%	5%	7%	9%	9%	10%	19%	28%	14%	11%	10%	10%
:30	6%	5%	4%	4%	5%	2%	6%	12%	11%	11%	9%	12%	5%	6%	5%	7%
:90	15%	22%	20%	9%	9%	8%	4%	5%	4%	2%	1%	1%	2%	3%	2%	7%
:15	3%	3%	6%	2%	3%	2%	2%	3%	2%	1%	0%	1%	0%	0%	1%	2%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Nielsen Ad intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP (Rx product categories only), which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; January 2025 – March 2026. Program Genre: Sports Event (All). Percentages are rounded off. Charts are sorted by average percentages by ad duration.

In the first quarter, the year-over-year share of pharma Rx ad units longer than 30 seconds in news programs increased slightly from 77% to 79%

Pharma Category: National TV (News) Commercial Unit & Time Distribution % Share by Ad Duration

Ad Duration (in seconds)	% of Units															
	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	57%	55%	51%	59%	56%	54%	61%	59%	59%	60%	66%	70%	69%	62%	62%	60%
:30	14%	15%	22%	17%	17%	15%	13%	15%	16%	16%	13%	8%	11%	15%	15%	15%
:45	9%	9%	10%	8%	8%	9%	8%	7%	8%	11%	10%	12%	9%	9%	8%	9%
:75	6%	7%	6%	7%	8%	12%	10%	10%	9%	4%	3%	2%	3%	5%	6%	7%
:15	7%	6%	5%	4%	4%	4%	5%	5%	6%	6%	6%	6%	6%	8%	8%	6%
:90	7%	8%	7%	5%	6%	5%	3%	4%	3%	2%	2%	2%	2%	1%	0%	4%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Ad Duration (in seconds)	% of Total Commercial Time By Ad Duration															
	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	63%	60%	59%	65%	62%	59%	66%	65%	66%	70%	75%	78%	77%	71%	72%	67%
:75	9%	9%	8%	9%	11%	16%	13%	13%	12%	6%	5%	3%	4%	7%	9%	9%
:30	8%	8%	13%	10%	9%	8%	7%	8%	9%	9%	7%	4%	6%	8%	9%	8%
:45	8%	8%	8%	6%	7%	7%	7%	6%	7%	10%	9%	10%	8%	8%	7%	8%
:90	11%	13%	11%	8%	10%	9%	5%	6%	5%	4%	3%	3%	3%	2%	0%	6%
:15	2%	2%	1%	1%	1%	1%	1%	2%	2%	2%	2%	2%	2%	2%	2%	2%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Nielsen Ad intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP, which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; January 2025 – March 2026. Program Genre: News. Percentages are rounded off. Charts are sorted by average percentages by ad duration.

In the first quarter, the year-over-year share of pharma Rx ad units longer than 30 seconds in **entertainment programming** increased from 78% to 82%

Pharma Category: National TV (Entertainment) Commercial Unit & Time Distribution % Share by Ad Duration

Ad Duration (in seconds)	% of Units															
	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	58%	57%	56%	57%	54%	53%	56%	56%	59%	62%	65%	64%	68%	63%	63%	59%
:30	16%	18%	22%	20%	21%	17%	15%	15%	15%	15%	12%	14%	12%	17%	17%	16%
:45	10%	9%	8%	9%	9%	13%	14%	14%	15%	14%	14%	15%	14%	13%	12%	12%
:75	6%	6%	6%	6%	7%	10%	8%	8%	6%	4%	2%	2%	2%	3%	3%	5%
:15	4%	3%	3%	3%	3%	2%	5%	5%	3%	4%	5%	2%	2%	3%	3%	3%
:90	7%	6%	6%	6%	6%	4%	2%	2%	2%	1%	1%	2%	1%	1%	1%	3%
:35	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Ad Duration (in seconds)	% of Total Commercial Time By Ad Duration															
	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25	Jul '25	Aug '25	Sep '25	Oct '25	Nov '25	Dec '25	Jan '26	Feb '26	Mar '26	Average
:60	64%	63%	62%	63%	60%	58%	63%	63%	66%	71%	74%	72%	76%	72%	73%	67%
:45	8%	8%	6%	7%	8%	11%	12%	12%	13%	12%	12%	13%	12%	11%	10%	10%
:30	9%	10%	12%	11%	12%	9%	8%	9%	8%	9%	7%	8%	7%	10%	10%	9%
:75	8%	9%	8%	9%	10%	14%	12%	11%	9%	5%	3%	3%	3%	4%	4%	7%
:90	11%	10%	10%	9%	10%	7%	3%	3%	3%	2%	2%	3%	2%	2%	1%	5%
:15	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
:120	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
:35	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Nielsen Ad Intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP, which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; January 2025 – March 2026. Program Genre: Various entertainment genres including dramas, comedies, documentaries, feature films, excludes live sports, sports-related programming, children's programs and news. Charts are sorted by average percentages by ad duration.



Pharma Rx Category:

National TV Commercial Unit & Time Distribution % Share by Ad Duration

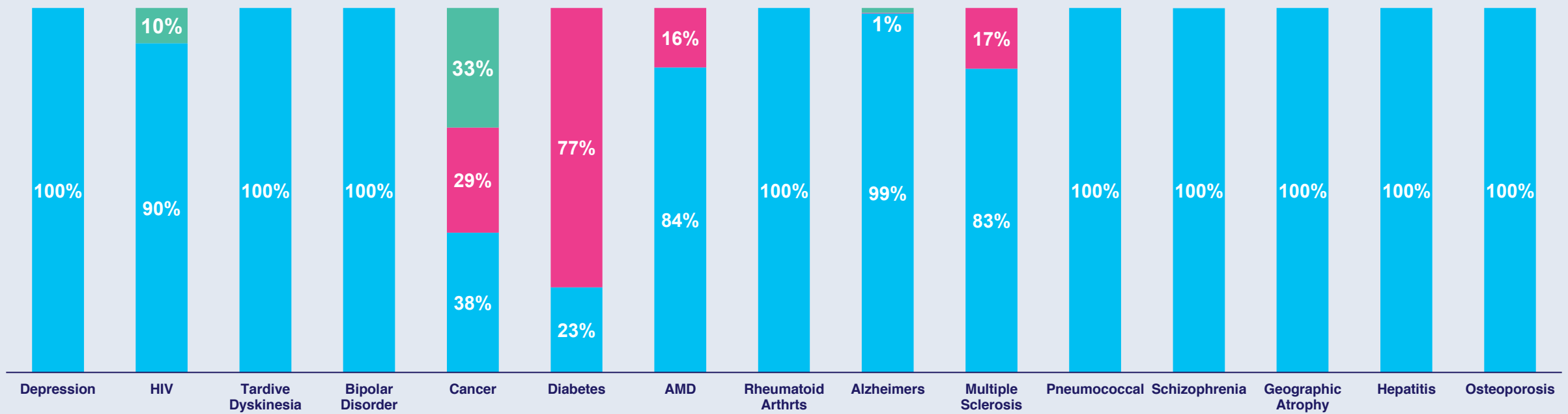
Pharma Rx Product Categories

(3-month period: January '26 – March '26)

The product categories with the highest share of longer-length TV ads in 1Q '26 include depression, HIV, tardive dyskinesia, bipolar, cancer, diabetes

Pharma Rx Product Categories: National TV Commercial Unit % Share by Ad Duration
 (Top 15 product categories: based on share of :60-second or longer ad units & sorted by total # of national TV units)
 1Q '26

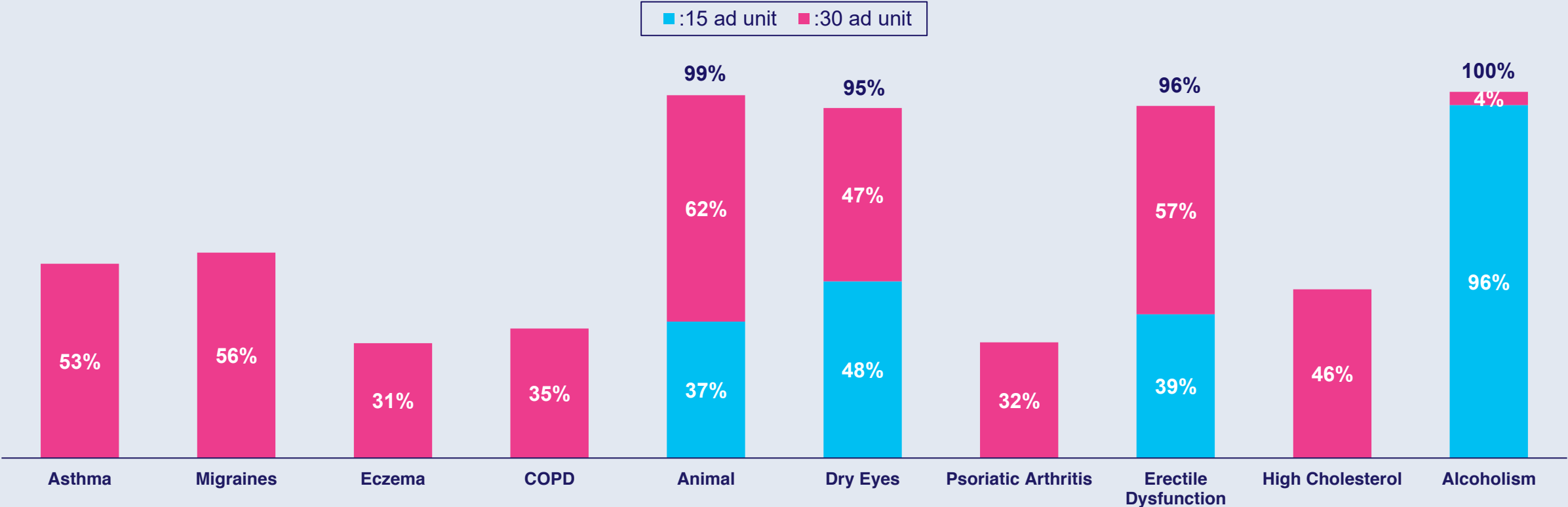
■ :60 ad unit ■ :75 ad unit ■ :90 ad unit



Source: Nielsen Ad intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP (Rx product categories only), which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; January 2026 – March 2026. Percentages are rounded off. AMD = Age-related macular degeneration.

The product categories with the highest share of shorter-length TV ads in 1Q '26 include asthma, migraines, animal, dry eyes, ED and alcoholism

Pharma Rx Product Categories: National TV Commercial Unit % Share by Ad Duration
 (Top 10 product categories: based on share of :30-second or shorter ad units & sorted by total # of national TV units)
 1Q '26



Source: Nielsen Ad intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP (Rx product categories only), which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; January 2026 – March 2026. Percentages are rounded off. COPD = Chronic Obstructive Pulmonary Disease.

Full List: Share of TV ad units by length across the top 50 pharma Rx product categories, sorted based on the # of national TV units in 1Q '26...

Pharma Rx Product Categories: National TV Commercial Unit & Time Distribution by Ad Duration
(product categories sorted by total # of national TV units)

Product Category	% of Units												% of Total Commercial Time By Ad Duration											
	:5	:10	:15	:20	:30	:35	:45	:50	:60	:75	:90	:120	:5	:10	:15	:20	:30	:35	:45	:50	:60	:75	:90	:120
RX-HUMAN-CROHNS DISEASE					15%		38%		47%								9%		34%		57%			
RX-HUMAN-DEPRESSION									100%												100%			
RX-HUMAN-PSORIASIS					8%		36%		56%								4%		31%		65%			
RX-HUMAN-ASTHMA					53%		10%		37%								37%		10%		52%			
RX-HUMAN-MIGRAINES			0%		56%		17%	0%	27%							0%	41%		18%	0%	40%			
RX-HUMAN-ECZEMA			0%	0%	31%				69%							0%	0%	19%			81%			
RX-HUMAN-HIV									90%		10%										86%		14%	
RX-HUMAN-TARDIVE DYSKINES									100%												100%			
RX-HUMAN-OBESITY			12%		6%				7%	31%	44%									6%	33%	56%		
RX-HUMAN-ULCERATIVE COLTS							56%		44%									49%		51%				
RX-HUMAN-BIPOLAR DISORDER									100%												100%			
RX-HUMAN-CANCER		0%							38%	29%	33%									31%	29%	40%		
RX-HUMAN-DIABETES				0%			0%		23%	77%							0%		0%	20%	80%			
RX-HUMAN-AMD									84%	16%										80%	20%			
RX-HUMAN-COPD					35%				65%											78%				
RX-ANIMAL	0%		37%		62%	1%			0%			0%					0%	23%		76%	1%		0%	
RX-HUMAN-RHEUMATD ARTHRIS									100%												100%			
RX-HUMAN-DRY EYES			48%		47%		4%																	
RX-HUMAN-MYASTHENIA GRAVS		0%	15%	0%					85%												96%			
RX-HUMAN-PSORIATC ARTHRIS					32%		63%		5%												7%			
RX-HUMAN-ALZHEIMERS									99%	0%	1%										98%	0%	2%	
RX-HUMAN-MULTIPLE SCLERSS			0%						83%	17%											80%	20%		
RX-HUMAN-PNEUMOCOCCAL									100%												100%			
RX-HUMAN-SCHIZOPHRENIA		0%							100%												100%			
RX-HUMAN-GEOGRAPHIC ATRPH									100%												100%			

Source: Nielsen Ad intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP (Rx product categories only), which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; January 2026 – March 2026. Percentages are rounded off.



Full List *Cont'd*: Share of TV ad units by length across the top 50 pharma Rx product categories, sorted based on the # of national TV units in 1Q '26

Pharma Rx Product Categories: National TV Commercial Unit & Time Distribution by Ad Duration
(product categories sorted by total # of national TV units)

Product Category	% of Units												% of Total Commercial Time By Ad Duration											
	:5	:10	:15	:20	:30	:35	:45	:50	:60	:75	:90	:120	:5	:10	:15	:20	:30	:35	:45	:50	:60	:75	:90	:120
RX-HUMAN-ERECTILE DYSFNEN			39%		57%				2%			1%			23%		65%				6%			7%
RX-HUMAN-HIGH CHOLESTEROL					46%				54%								30%				70%			
RX-HUMAN-VACCINE					30%				68%	2%							18%				80%	2%		
RX-HUMAN-HEPATITIS									100%												100%			
RX-HUMAN-IRRITBL BWL SNDRM							100%												100%					
RX-HUMAN-OSTEOPOROSIS									100%												100%			
RX-HUMAN-ALCOHOLISM			96%		4%										93%		7%							
RX-HUMAN-WRINKLES					3%				97%								2%				98%			
RX-HUMAN-MENOPAUSE									100%												100%			
RX-HUMAN-RENAL									24%	76%											20%	80%		
RX-HUMAN-CONSTIPATION							13%		87%										10%		90%			
RX-HUMAN-CARDIAC		0%			7%		59%		34%					0%			4%		54%		41%			
RX-HUMAN-DRUG DEPENDENCY									100%												100%			
RX-HUMAN-HCM									76%	19%	6%										70%	22%	8%	
RX-HUMAN-COVID-19									98%	2%											98%	2%		
RX-HUMAN-GERD										100%												100%		
RX-HUMAN-ALLERGIES									100%												100%			
RX-HUMAN-THYROID EYE DISS									100%												100%			
RX-HUMAN		0%	100%		0%									0%	100%		0%							
RX-HUMAN-DEMODEX BLEPHRTS					57%				43%								40%				60%			
RX-HUMAN-DUPUYTREN CNTRC					100%												100%							
RX-HUMAN-EXCSVE SLEEPNSS										100%												100%		
RX-HUMAN-AFIB							100%												100%					
RX-HUMAN-RSV					100%												100%							
RX-HUMAN-ACUTE URTICARIA					100%												100%							
Grand Total	0%	0%	4%	0%	16%	0%	12%	0%	59%	6%	3%	0%	0%	0%	1%	0%	9%	0%	10%	0%	67%	8%	5%	0%

Source: Nielsen Ad intel, National TV Commercial Unit & Time Distribution by Ad Duration; sub-group category: Pharmaceutical Houses, GP (Rx product categories only), which reflects prescription remedies; national broadcast TV, national cable TV, Spanish Language broadcast TV, Spanish Language Cable TV, Streaming; January 2026 – March 2026. Percentages are rounded off.



Key Marketer Takeaways

In the six months after the FDA crackdown, pharma Rx brands increased TV spend by 53%

- ▶ In September 2025, the FDA launched a crackdown on deceptive drug advertising **where 96% of the ‘warning’ letters sent to pharma companies were targeted towards digital platforms, assets and practices**
- ▶ The marketplace clarity provided by the FDA’s actions spurred significantly increased investment across multiscreen TV platforms in the six months immediately following the crackdown, with an **11% increase in Pharma Rx advertisers and 53% increase in total TV spend YoY**
- ▶ Rx brands are being more mindful of **proactively adhering to pharma advertising rules and regulations across multiscreen TV platforms** as they present a fair balance between their product’s risks and benefits and include information regarding major side effects and considerations

Download the reports below to learn more about pharma DTC advertising and how multiscreen TV guides patients on their path to treatment



Dedicated to Your Good Health
How TV Drives Discovery & Encourages Education in the Pharma DTC Category



Why Banning Pharma TV Ads Would Disproportionately Affect Minority Groups



TV Means Business
How Premium Video Drives Sales in the Pharmaceutical Category

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