



PHARMA

TV TRANSPARENCY REPORT



AD-FIRST INSIGHTS FOR RX BRANDS

Ad-Centric Pharma Insights

Pharmaceutical advertising has become a staple in TV advertising over the last decade.

In 2024, prescription pharma advertisers accounted for over \$5.15 billion in linear TV ad spending—claiming 11.6% of the total ad dollars flowing to national broadcast and cable networks..

That money generated over 413 billion ad impressions and 1.58 million minutes of advertising across 271 brands. **But all of that airtime made up just 5.8% of the overall reach of TV.** In other words, the collective industry didn't just go big on spending—it chose to invest in premium moments on TV.

And as audiences migrate into streaming environments, leading brands are embracing a cross-platform strategy for broad reach awareness and more targeted dynamic advertising afforded by digital delivery.

The following report provides a cross-platform analysis of how pharma brands are investing in both linear and streaming TV plus the creative strategies being deployed to reach and persuade potential customers. You'll also find a partner spotlight on Moira McKenna, Head of Data and Identity at IQVIA Digital, the world's leading healthcare data organization.

This is the most transparent look at pharma video advertising you'll find anywhere—and it's just a glimpse of how iSpot's creative, audience and outcome measurement across linear and streaming helps brands boost equity and drive revenue. Get in touch with us today for more.

Contact Us

2024 Prescription Pharma TV Advertising

\$5.15
Billion



11.6%

Est. National Linear
TV Ad Spend

Share of Total TV
Ad Spend

413.28
Billion



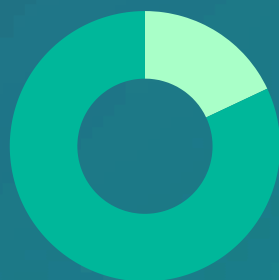
5.8%

Household TV
Ad Impressions

Share of Total HH
TV Ad Impressions

Key Pharma Audience Trends

Pharma Share During Sports Programming



17.6%

of Rx national linear TV ad spend is attributable to sports programming.
(5.8% of TV ad impressions)

Pharma Share During News & Info Programming



22.3%

of Rx national linear TV ad spend is attributable to news & info programs.
(24.2% of TV ad impressions)



Weight-Loss Drugs Blitz TV

Diabetes & Blood disorder prescription brands (which includes weight-loss drugs like Wegovy, Ozempic, Mounjaro, Zepbound and others) were some of the most-seen pharma advertisers on TV, leaning on live news and sports programming. But those brands also appeared across streaming, with some—like Zepbound—utilizing streaming as a first foray into TV before diving into linear as well to grow ad messaging reach.



Pharma Loves Football

Prescription drug brands aired 12% more ads during NFL games in 2024 vs. 2023, while the league accounted for 8.7% of pharma est. national linear TV ad spend on its own (No. 1 across programs). Pfizer had the highest share of pharma TV ad reach during NFL games in 2024, accounting for over 14% of ad impressions—five percentage points higher than the No. 2 brand, Skyrizi.




Prescription for Premium Programming

ABC, CBS, Fox, ESPN and NBC combined to account for over 35.8% of prescription drug brands' household TV ad impressions—and 52.8% of national linear ad dollars spent by those brands. The emphasis on the Big 4 and the country's top sports network underline the industry's keen focus on live news and sports to reach broad audiences with drug messaging.

Top 10 Rx Brands By Streaming SOV

Competitive ad intel across linear and streaming—like the ranking below—helps marketers optimize spend allocation, refine media weights, and spot white space opportunities. Drilling down further into relevant Rx categories keeps brands ahead of competitors and emerging players.

Rank	Brand	Rx Category	2024 Streaming SOV	2024 Linear SOV (& Ranking)
1		Bladder & Gastrointestinal	4.13%	3.76% (#2)
2		Psoriasis, Shingles, Skin & Nails	3.69%	3.23% (#4)
3		Psoriasis, Shingles, Skin & Nails	3.57%	2.56% (#7)
4		Psoriasis, Shingles, Skin & Nails	3.32%	2.04% (#16)
5		Psoriasis, Shingles, Skin & Nails	3.29%	4.32% (#1)
6		Psoriasis, Shingles, Skin & Nails	2.84%	0.87% (#40)
7		Migraine	2.64%	1.69% (#23)
8		Asthma & COPD	2.58%	3.13% (#5)
9		Diabetes & Blood Disorders	2.43%	3.51% (#3)
10		Diabetes & Blood Disorders	2.21%	2.22% (#13)

Key Pharma Creative Trends

Most Likeable Pharma Rx TV Ads From 2024

KISQALI, Pfizer, and AIRSUPRA secured top spots for likeable Rx (and parent company) ads using creative approaches ranging from cause-driven messaging to musically-charged explorations of scientific innovation.



Jordan



Here's to Science



Dino



Corporate Messaging Momentum

Parent companies like Pfizer, GSK and others have shifted TV ad strategies to present themselves as leaders in health breakthroughs and scientific progress. With ads that aim to inspire and impact audience opinions, some of these brands—like Pfizer with its “Here’s to Science” spot, the second most likeable ad in 2024—are bucking trends with creative that spark positive emotions while speaking to core values around progress and achievement.



Finding the Right Balance

Shorter Fair Balance Messages (FBMs) keep viewers engaged, while longer ones—especially in 60-second spots—lead to drop-off. An analysis of Keytruda ads showed FBMs made up 35-45% of total ad length, typically starting just before the midpoint. Among 60-second ads, shorter FBMs outperformed longer ones. Pharma brands can dig deeper into FBM effectiveness using second-by-second resonance data from the iSpot Creative Assessment dashboard.



Emotional Impact Breaks Through

Despite legal constraints like the Fair Balance Message (FBM) that can disrupt engagement, the most likeable pharma ads made an emotional impact through heartfelt storytelling and curiosity-piquing narratives. Heartfelt and Inspiring emotions were only sparked among the top 15 most likeable ads, helping set them apart from the rest of the category.

PARTNER PROFILE

Moira McKenna
Head of Identity and
Media Partnerships



What is IQVIA Digital?

IQVIA Digital is a newly named business unit of IQVIA corporate, a decades-old, 85,000 person-plus traditional healthcare data consultancy. We like to talk about bringing solutions “from molecule to market,” so the core business has always been focused on things like drug development and clinical trials. Our newly formed unit, IQVIA Digital, is just about five years old and focuses on using some of that core data knowledge and expertise and translating it for media and advertising.

Why did you decide to work with iSpot?

iSpot has been a leader in the television planning and measurement space for a long time. In conversations with some of our largest partners, we realized there’s quite a bit of crossover between our customer base and theirs. IQVIA really has a focus on customer centricity—meeting customers where they are and providing solutions that drive their business forward with them at the center. Through those conversations, we were asked a lot about iSpot, and we decided it was something we needed to pursue. It’s been a wonderful relationship so far, and we’re really excited about what we do next with them.

How do pharma brands work with IQVIA Digital?

If you’re a pharma brand, there are a ton of ways you can work with IQVIA Digital—and you’re probably already working with IQVIA. From a digital perspective, we have two main focuses: HCP (healthcare professionals) and DTC (direct-to-consumer). So, depending on whether you’re trying to target those who prescribe treatments or those who potentially suffer from a condition, we have products that can work for you. On the other side, it’s really about activation and measurement. Are you looking to target and reach those audiences with new messaging? Or are you looking to measure the efficacy of the media dollars you’re spending across the ecosystem?

How does IQVIA Digital support partners?

At the heart of IQVIA, we are a data company. We work closely with our partners to meet them where they are in terms of their media and measurement buys and programs. When we think about that, we focus on allowing our partners to work with us wherever and however they want, utilizing the IQVIA data asset. So we work with our friends at the DSPs, the SSPs, and with some brands directly, where through email programs, programmatic buys, television measurement—you name it, you can utilize IQVIA digital.

Conclusion

While the future of pharma TV advertising in 2025 remains uncertain, recent trends reveal what these brands aim to achieve. As audiences continue to shift, pharma's momentum won't falter—major brands are already ramping up streaming efforts to launch new drug labels and expand reach for existing ones. Streaming also unlocks creative opportunities, encouraging consumers to engage further through QR codes or shoppable website visits.

Amid all this uncertainty, iSpot's ad-first measurement gives pharma marketers the clarity and precision they need to tackle big challenges. It brings together creative, audience, and outcomes to reveal the full picture of campaign performance. Then, advertisers can truly see what's really working—and what's not.

Glossary

Household TV Ad Impressions: TV ad exposures captured across 52 million smart TVs and set-top boxes which are extrapolated and balanced with census data for an accurate representation of US households.

TV Ad Impression Share of Voice (SOV): The percentage of impressions generated by a brand or ad compared to the total impressions generated by the selected criteria.

Est. National TV Ad Spend: The estimated amount spent on TV ad airings (how much it costs).

Streaming SOV: A given brands' portion of their industry's streaming impressions

Creative Assessment Methodology: Each nationally-breaking TV and video ad is rapidly surveyed by 500+ US consumers (demographically balanced to the census), providing a pure assessment of creative effectiveness. Quantitative and qualitative insights reveal what consumers think and how they feel about an ad.

Likeability Score: Measures the extent to which survey respondents like an ad.

About iSpot

iSpot helps advertisers drive ad effectiveness with unified TV and video measurement, from creative to audience to outcomes. Our fast, accurate and actionable measurement solutions enable advertisers to assess creative effectiveness, improve media plans and drive business outcomes from TV and streaming advertising. Only iSpot is purpose-built to measure the performance of every ad on TV with digital-like precision and granularity.

Empowered with always-on cross-platform performance insights, advertisers can take quick and confident action to cut wasted ad spend. With currency-grade measurement, large-scale verified insights, and deep competitive intelligence, iSpot gives advertisers control and confidence amid the chaos of the new media landscape.



Data Footprint

- 68K brands
- 2.5 million creatives
- 177 TV networks
- 210 Media Markets
- 500+ streaming platforms and DSPs
- 83 million smart TVs and set-top boxes
- Trillions of impressions & millions conversions attributed to millions of creatives
- 160,000+ video ads with creative assessment data

Data Quality

- Patented ad detection processes and software
- 40 around-the-clock human editors
- Best-in-class data science, processing and modeling
- Rigorous quality assurance and data integrity for survey-based creative assessment

Corporate Facts

- Founded in 2012
- Over 750 customers across brands, TV networks and movie studios, including 85% of the top 100 advertisers.
- Over 450 employees