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MEDIA GROUP

Measuring Media's Success for Pharma Brands in International Markets

REPORT

ROUNDTABLE

Measuring Media's Success for Pharma Brands in International Markets

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INTRODUCTION

Measuring media’s success for pharma brands in international markets has long been a complex challenge. While other industries widely accept that media can significantly impact brand performance - evidenced by the billions spent annually by leading advertisers - accurately quantifying the meaningful impact of paid media within pharma in international markets has remained elusive.

Significant structural and regulatory challenges within international markets make this task even more daunting. These include difficulties targeting individual Healthcare Professionals (HCPs), an historic inability to link media investments to measurable business outcomes and navigating stringent data privacy limitations across multiple markets.

As a result, media’s role within the omnichannel marketing mix in international pharma has often been marginalized, despite representing a significant investment in many marketing budgets. Paid media is frequently relegated to a subservient role compared to other cost centers, which are traditionally seen as more significant drivers of growth.

In today’s fast-paced, digitally native, and predominantly ad-funded media landscape, the role of media has never been more important. Addressing these challenges is essential for the industry to move forward positively and maximize the potential of media within international pharma.

When executed effectively in collaboration with the broader health marketing infrastructure, media can drive customer education, improve access to medications, and ultimately lead to better patient outcomes.

solli, in collaboration with CMI Media Group, has brought together leading experts from brands, agencies, and publishers, creating an open forum to share perspectives, ideas, frustrations, and aspirations on this topic.

solli’s mission is to elevate the practice of media within the pharma industry, and this roundtable aligns perfectly with that vision by fostering collective approaches to address industry challenges.

A special thank you to CMI Media Group for its dedication to this topic and for making this roundtable possible.

1. CONFIDENCE & LONG-TERM VIEW: BUILD CONFIDENCE IN YOUR MEDIA METRICS WITH A FOCUS ON LONG-TERM IMPACT

Building confidence in media metrics was a central theme of the roundtable discussion, with participants emphasizing the importance of moving beyond surface-level measurements. Traditional metrics, often focused on short-term outcomes like clicks or impressions, were seen as insufficient to capture the multifaceted and long-term value that media can bring to pharma brands.

The Danger of Superficial Metrics

Several participants highlighted the risks of over-reliance on simplistic metrics, noting how a fixation on engagement rates or benchmarks can lead to misaligned campaign goals.

“**There’s a danger in metrics**”

– Stephen Glynn, Global Expert Lead, Channels, Haleon

Metrics like clicks are easy to measure but often fail to reflect the true impact of a campaign, particularly when the focus is on awareness or behavior change. Instead,

the group underscored the need for metrics that align with the campaign’s strategic objectives, accepting that initial measures might not immediately tie back to sales, recommendations or prescriptions.

The Role of Leading and Lagging Indicators

The conversation also centered on the importance of distinguishing between **leading and lagging indicators** when evaluating media performance. Leading indicators, such as media engagement metrics, provide early signals of campaign effectiveness, while lagging indicators, like prescribing data or long-term brand loyalty, reflect the ultimate impact. As Glynn explained, **“We have confidence that the attribution will come because we know we’ve got the right lead metrics that will drive that.”**

This dual approach requires patience and a willingness to look beyond immediate results. The group acknowledged that behavior change—whether in prescribing habits or patient engagement—is a gradual process, emphasizing the importance of tracking progress over extended periods and, with that, trusting partners and campaigns over an extended period of time.



“**Behavior change is something that happens over a very long time**”

– Oliver Beard, Brand Manager, Gideon Richter



2. FROM PLANNING TO EXECUTION: EMBEDDING MEDIA EARLY TO DRIVE PERFORMANCE AND STREAMLINED MEASUREMENT

One of the key themes from the roundtable discussion was the importance of embedding media planning early in the campaign development process. Participants highlighted that when media is integrated from the outset, it enables better targeting, clearer objectives and more effective measurement, ensuring campaigns are strategically aligned and impactful.

Collaborative Planning as a Foundation

Participants underscored the need for a collaborative approach between brands and their agency partners. Historically, media planning in global markets has often been transactional, with brands dictating purchases and agencies simply executing orders.

Starting with Targeting

Effective media measurement begins with precision in targeting. As Justin Freid observed, **“The targeting upfront is just not as advanced as it is in the U.S., and that’s where we see a significant opportunity.”** Many international campaigns for pharma brands rely on broad specialty-level targeting, such as addressing all oncologists or general physicians. This approach, while functional, often misses the nuances required for effective segmentation and messaging.

Participants emphasized the importance of moving toward more refined segmentation, identifying subsets of HCPs based on their relative value to the brand, and tailoring messages accordingly. By doing so, teams can optimize their investment and gather more actionable insights on audience reactions.

“When we first dipped our toe into global, it was, ‘Here you go, buy this.’ There was no strategic conversation

– Justin Freid, Chief Media & Innovation Officer, CMI Media Group

Today, the paradigm is shifting. Agencies are becoming consultative partners, working closely with brand teams to develop insights-driven strategies that align media tactics with overarching business goals. This shift enables deeper audience understanding, more sophisticated segmentation, and a stronger foundation for measurement.

Reclaiming Media’s Strategic Role

“Channel is always the first to be blamed,” observed Susan Dorfman, pointing to the need for better alignment between media objectives and broader business goals.

The group stressed that confidence in media metrics enables teams to advocate for media’s role within organizations. Establishing clear objectives and aligning metrics with those goals helps ensure that media is not just seen as a cost but as an investment in long-term brand health and patient outcomes.

A Healthier Long-Term Perspective

There was an appreciation for the long-term thinking in media measurement, with Richard Springham capturing this

sentiment, saying, **“It is so healthy that brand marketers here are talking about the long-term output of media.”**

By framing media as a contributor to sustained growth rather than immediate returns, participants highlighted the need for metrics that reflect cumulative brand equity, stakeholder trust and patient loyalty.

Summary

Participants underscored the importance of confidence in media metrics and the value of a long-term perspective. By embracing leading and lagging indicators, aligning metrics with strategic objectives, and reframing media as a driver of growth, pharma brands can better navigate the complexities of media measurement. The participants emphasized that these approaches are essential not only for justifying media investments but also for delivering meaningful outcomes for healthcare providers, patients, and the industry at large.

“
**What is the underlying audience?
 How do we segment the relative value
 to the brand? How do we pull through
 messaging in whichever market those
 HCPs are practicing in, so we can
 realise that benefit?**

– Jose Ferreira, EVP, Product Strategy & Transformation, CMI Media Group



Building Benchmarks from Day One

Embedding media early also allows for the creation of benchmarks tied directly to campaign objectives. Having media into the omnichannel planning process from day one allows an alignment on goals and ability to set the right benchmarks before launching anything. This alignment ensures that metrics are meaningful and actionable, reducing the reliance on proxy measurements like clicks or impressions, which may not reflect true campaign performance.

Participants highlighted the need to consider the experience of the HCP audience throughout the planning and execution stages. Tailoring media

strategies to address specific needs and expectations ensures campaigns are both effective and relevant, laying the groundwork for better engagement and more accurate measurement.

“
**What is the
 experience we want
 this HCP to have?**

– Irene Jiménez Jáimez, Senior Marketing Specialist, MSD

Strategic Execution and Iteration

Another critical insight was the necessity of treating media as a dynamic process, with continuous adjustments based on performance data and evolving market conditions. This iterative approach requires ongoing collaboration between agencies, brand teams and partners to ensure campaigns remain responsive and impactful.

By embedding media early, pharma brands can achieve a level of strategic clarity that extends throughout the campaign lifecycle. This proactive approach not only improves the effectiveness of individual campaigns but also enhances the ability to measure their

long-term impact on brand growth and patient outcomes.

Summary

The roundtable reinforced the critical importance of embedding media planning early in the campaign development process. From refining targeting strategies to fostering consultative partnerships and establishing meaningful benchmarks, this approach ensures that media is not an afterthought but a core component of strategic planning. By prioritizing collaboration and early integration, pharma brands can drive performance and unlock the full potential of their media investments.

3. CONNECTIONS ARE KEY: CONNECT DATA ACROSS MARKETS, CLIENTS AND PARTNERS FOR MAXIMUM IMPACT

There was a clear focus on the importance of connecting data across markets, clients and partners to unlock the full potential of media strategies. Participants highlighted that while data is abundant, its true value lies in integrating and applying it effectively to inform targeting, messaging and measurement. A connected approach bridges gaps between global and local strategies and enhances the ability to deliver impactful, personalized campaigns.

This fragmentation can be as granular as inconsistencies in data entry. **“We found 13 different spellings of the word gynecologist in our global dataset,”** one participant remarked, underscoring the need for standardized taxonomies to unlock the full potential of first-party data.

Breaking Down Silos to Unleash Insights

A recurring theme was the challenge of fragmented data within organizations. Participants acknowledged that while vast datasets exist, they are often underutilized or siloed, hindering the ability to develop a cohesive media strategy.



“
There’s ample opportunity
to move from agencies
being execution partners
to truly strategic partners
that help get patients the
medicine they need

– Justin Freid, Chief Media & Innovation Officer, CMI Media Group



“
We’re sitting on millions of records of
data, but we’ve only recently started
to explore how to make it truly
available to everyone

– Liisa Caliendo, Senior Vice President, Medscape Global

Leveraging Data to Inform Targeting

Participants agreed that effective targeting starts with a deep understanding of available data. The discussion highlighted the importance of leveraging internal resources, such as rep target lists and bric-level data, to identify priority segments and tailor messaging.

“When you understand what you have, you can identify your most prosperous segments, and create strategies that resonate with them”

– Susan Dorfman
CEO, CMI Media Group

“There hasn’t been a lot of focus on collecting and managing first-party data, or if it’s been collected it’s not being applied in meaningful ways”

– Jose Ferreira, EVP, Product Strategy & Transformation,
CMI Media Group

This approach allows brands to move beyond broad specialty-level targeting and embrace more refined segmentation. For example, mapping HCPs’ behaviors and preferences across regions enables brands to identify similarities and differences, creating tailored yet scalable strategies.

“How are oncologists in Spain reacting differently than those in Germany? Building a bigger picture globally helps inform decisions at every level”

– Matt Durham, Vice President,
Global Engagement Strategy,
CMI Media Group

Connecting Local and Global Strategies

Another key insight was the need to bridge the gap between global and local strategies. Participants discussed the importance of ensuring alignment while tailoring approaches to regional nuances. **“There are similarities in how oncologists across Europe act as a whole, but there are also critical differences,”** Matt Durham explained. By understanding these dynamics, brands can create connected campaigns that are both globally consistent and locally relevant.

Participants also emphasized the importance of creating a feedback loop between global and local teams. Building connective tissue between global and local campaigns, so both teams understand what physicians are being exposed to will bring an alignment that fosters better personalization

and ensures that campaigns reflect the realities of local markets.

Turning Insights Into Action

Participants stressed that connected data is most valuable when used to guide actionable strategies. For example, understanding the **media consumption behaviors** of HCPs—such as where they seek dosing information or engage in continuing education—enables brands to choose the right channels and formats for their messages.

There is a wealth of insight about HCPs’ attitudes and behaviors available in disparate and disconnected buckets. It is essential now to knit these together to fully understand more about what’s holding them back or driving them forward. This holistic view allows for more precise and impactful campaigns that resonate with target audiences.





Summary

The roundtable underscored that connecting data across markets, clients, and partners is essential for optimizing media strategies. By breaking down silos, standardizing data and integrating insights across global and local levels, pharma brands can better understand their audiences and deliver meaningful campaigns. As Matt Durham concluded, **“The more data we build up, both locally and globally, the more informed our decisions become.”** This connected approach ensures that media strategies are impactful and adaptable to the evolving needs of HCPs and patients.

4. POWERFUL PARTNERSHIPS: AMPLIFYING RESULTS WITH MEDIA AND REP COLLABORATION

Collaboration between media teams and sales representatives in pharma campaigns is critical, and even more so today. By aligning efforts and sharing insights, these teams can deliver cohesive, impactful messaging that resonates with HCPs and support patients alike. Participants agreed that when media and reps work in tandem, the result is greater engagement, trust, and ultimately, better outcomes. One challenge is understanding the success of the media when the outcome is improving the reps’ engagement with HCPs.

Turning Challenges into Opportunities

A key insight shared during the discussion was how the COVID-19 pandemic exposed and amplified the need for stronger collaboration between media and reps. **“When all their doors shut, globally, everyone started to panic,”** Susan Dorfman noted, referring to the sudden lack of access for reps during the height of the pandemic. This created an urgent need to leverage alternative channels like media to maintain HCP engagement. However, the shift also revealed gaps in resource allocation and strategy alignment.

Bridging the Gap Between Media and Reps

The discussion underscored the importance of ensuring that reps are

informed about media campaigns and their objectives. Participants noted that a lack of alignment often results in missed opportunities. Adam Aruede explained that historically, their reps “had no idea what messaging we were putting out there”, where they were running, or when they would stop. However, once they understood that, they now work in collaboration with the rep teams to deliver meaningful, informed conversations with HCPs.

The group emphasized the need for proactive communication and shared understanding. **“It’s not just about handing the sales team a detail aid and hoping they do a great job,”** Stephen Glynn explained. Instead, teams should approach campaigns as integrated efforts, ensuring that both media and reps are aligned on messaging, timing and strategic goals.

Creating a Unified Campaign Strategy

Participants highlighted the importance of viewing campaigns as unified efforts rather than isolated activities.

It’s about thinking of it as one campaign

– Stephen Glynn, Global Expert Lead, Channels, Haleon



5. SHIFT THE MINDSET: TRANSFORM MEDIA FROM A COST CENTER TO A GROWTH ENGINE

There needs to be a profound mindset shift in how media is perceived within pharma organizations across international markets. Moving beyond the traditional view of media as a cost center, participants advocated for embracing its potential as a growth engine—a strategic tool that drives brand awareness, fosters meaningful engagement, and ultimately contributes to long-term business success.

The conversation also noted that a lack of tangible measurement fuels this misperception. Adam Aruede approached this head on by saying,

For example, during key periods like vaccination season, reps and media teams can tailor their efforts to address the unique needs of HCPs. **Teams are thinking about messaging flight strategies to adjust media messages to complement what reps are discussing at different times of the year.** This alignment ensures that both digital and in-person engagements reinforce the same core messages.

“**The next visit that rep does could be 20 times better because they know the other interaction points you’ve had**”

– Stephen Glynn, Global Expert Lead, Channels, Haleon

“**Media is considered a cost center, not a revenue generator or an access channel - which it is**”

– Susan Dorfman, CEO, CMI Media Group

“**If we’re not able to show that these marketing tactics have a tangible impact on behavior change, it’s easy to see why media is considered a cost**”

– Adam Aruede, Digital Marketing Specialist, MSD

Amplifying Engagement Through Synergy

One of the most compelling insights was the potential for media to enhance the effectiveness of rep interactions. By providing reps with insights into HCPs’ digital behaviors and preferences, brands can make their in-person engagements more targeted and impactful.

Summary

The roundtable underscored the transformative potential of media and rep collaboration. By aligning strategies, sharing insights, and treating campaigns as unified efforts, brands can amplify the impact of their messaging and create more meaningful engagements with HCPs. Focusing on time and care - **making sure everyone understands the campaign holistically, so media and reps can work together to deliver a consistent and powerful message.** This partnership is key to achieving sustainable success in today’s complex pharmaceutical landscape.

Establishing robust metrics that tie media investment to measurable outcomes was seen as critical to reframing its value.

Breaking the Cost Center Perception

Participants highlighted that media for pharma brands within international markets is often treated as an expense to be minimized rather than a critical driver of growth. There was the pointed question of why is a rep considered a profit center, but media - when it achieves the complimentary touchpoint goals - seen as a cost center? This disparity in perception has hindered media’s ability to gain recognition as a core component of the omnichannel strategy.



“
A mindset shift is definitely needed,
away from media being cost as
opposed to an expansion of channel
access

– Oliver Beard, Brand Manager, Gideon Richter



Media as a Strategic Investment

The group agreed that rethinking media as an investment, not an expense, opens up significant opportunities. By adopting this mindset, pharma brands can better justify their media spend, allocating resources to innovative strategies that generate meaningful results.

Participants pointed out that many of the world's most successful companies rely on advertising as a primary revenue driver, illustrating the potential of media to fuel growth when approached with a strategic lens.

“
Billions of people would
have to be wrong about
the value of advertising
for us to undervalue the
effectiveness of media

– Jose Ferreira, EVP, Product Strategy & Transformation, CMI Media Group

Measuring to Prove Impact

To support this shift, participants stressed the importance of linking media efforts

to measurable business outcomes. The group advocated for moving beyond basic KPIs like clicks or conversion rates, which often fail to capture the broader impact of media campaigns. Ensuring a laser-focus on **what metrics are actually communicating, whether it is strong, weak, or driving meaningful behavior change.**

Participants also called for redefining success metrics to reflect media's role as a channel for engagement and education. For example, comparing media touchpoints to those of sales reps can help demonstrate its equivalency in terms of impact and value.

The discussion highlighted that a growth-focused view of media encourages innovation and strategic investment in areas like personalized content, advanced analytics, and creative storytelling. By shifting the narrative, media can take its place as a catalyst for brand growth and audience engagement **moving beyond the immediate costs and looking at media as an enabler of long-term growth.**

Summary

Transforming media from a perceived cost center to a recognized growth engine requires a mindset shift within pharma organizations. By focusing on measurable outcomes, redefining metrics, and embracing media's strategic potential, brands can unlock its ability to drive meaningful results.

6. LOOKING AHEAD: THE TRANSFORMATIVE FUTURE OF MEDIA AND MEASUREMENT

The future of media and measurement in the pharmaceutical industry is set to be defined by rapid advancements in technology, enabling brands to engage with HCPs and patients in more personalized, efficient and impactful ways. During the roundtable discussion, participants shared their optimism about the transformative potential of artificial intelligence (AI), machine learning and predictive analytics to revolutionize media and measurement.

The Power of Technology-Driven Insights

Participants agreed that AI and data integration will be game changers in delivering the right message at the right time to the right audience.



We're going to see our own digital twins leveraging AI, machine technology, and big data to guide where to invest and how to optimize channel combinations to deliver value to HCPs and create hope for patients

– Susan Dorfman, CEO, CMI Media Group

These advancements are expected to redefine how brands manage their marketing efforts, making technology a strategic peer in the decision-making process.



AI's ability to process vast amounts of data in real-time is poised to elevate media strategies. **The belief is that AI and real-time data will take media measurement to the next level, allowing visibility of the impact and adjustment of strategies in real-time.** This capability enables brands to make data-informed decisions on the fly, enhancing campaign responsiveness and impact.

Personalization at Scale

A key theme was the potential for hyper-personalization enabled by technology. Participants highlighted the importance of tailoring content and messaging to the individual needs of HCPs. Personalisation is about already understanding the needs and wants of the audience, and give them what they want and receiving feedback if the brand gets it wrong.

The ability to segment and understand HCPs' behaviors across diverse markets will further enhance personalization. By leveraging integrated data sources, brands can create content that not only resonates but also aligns with local market nuances.

Marketing orchestration at a grand scale across many different markets

– Jose Ferreira, EVP, Product Strategy & Transformation, CMI Media Group

The Role of Feedback Loops in Continuous Improvement

Feedback loops, driven by advanced analytics, will be instrumental in refining media and measurement strategies. Participants emphasized the importance of learning from both positive and negative responses to campaigns, emphasizing the importance of understanding what content doesn't work as a tool for optimization. This iterative process ensures that media strategies remain dynamic and effective.

“The thumbs down is more valuable than the thumbs up”

– Stephen Glynn, Global Expert Lead, Channels, Haleon



Collaboration and Integration

The roundtable also discussed the potential for deeper collaboration between public health systems and private entities. **“I’d love to see data integration systems with public health authorities, like NHS apps, fully integrated with private companies for the benefit of patients,”** shared Irene Jiménez Jáimez. This kind of partnership could pave the way for transformative changes in how media impacts healthcare outcomes, creating a unified ecosystem that benefits all stakeholders.

Optimism for the Future

The conversation concluded with a sense of collective optimism about what lies ahead. **“We wouldn’t be investing in this if we didn’t believe there’s ample opportunity to do better and make a**

difference,” shared Justin Freid. The sentiment echoed across the group: the intersection of technology, data, and collaboration is unlocking opportunities that were previously unimaginable. **“It’s just a matter of time until we get it right.”**

Summary

The future of media in the pharma industry will be shaped by technology’s ability to transform engagement and measurement. AI, machine learning, and integrated data systems will enable brands to deliver highly personalized, impactful campaigns that adapt in real-time. Collaboration across sectors and a commitment to innovation will ensure that media evolves into a powerful tool for improving healthcare outcomes and creating meaningful connections with HCPs and patients. The roundtable’s optimism reflects the industry’s readiness to embrace this transformative journey.



● SUMMARY

Measuring media's success for pharma brands in international markets has long been fraught with challenges, from structural and regulatory barriers to difficulties in aligning media investment with measurable business outcomes. However, as this report demonstrates, the industry is poised for transformation. Through innovation, collaboration, and a renewed focus on strategic integration, media can transcend its traditional role and emerge as a key driver of brand growth, HCP engagement and improved patient outcomes.

The roundtable discussion identified six pivotal themes: the importance of building confidence in media metrics with a long-term perspective, embedding media early in campaign planning, breaking down silos through connected data, amplifying results through media and rep collaboration, shifting the perception of media from a cost center to a growth engine, and leveraging transformative technologies to shape the future of media and measurement. These topics collectively reflect a growing recognition of media's potential to drive meaningful change in international pharma markets.

As the conversation highlighted, the road ahead requires a shared commitment to collaboration and community. By working together - brands, agencies, publishers, and health systems - stakeholders can harness the power of media to create a more connected, impactful, and patient-centric future. This future must clearly define what constitutes media success and focus on amplifying strategies that deliver measurable impact.

The foundation is already being laid; now is the time to build on it and unlock media's full potential in transforming healthcare on a global scale.

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Brands in International Markets**