

Veeva Pulse Field Trends Report



HCP Access
Europe, 2024



Largest and Most Complete View Field Engagement Activities



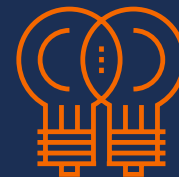
Global
Standard
Metrics



80%+
Industry
Census Data



~600M
Field Activities



Actionable
Insights

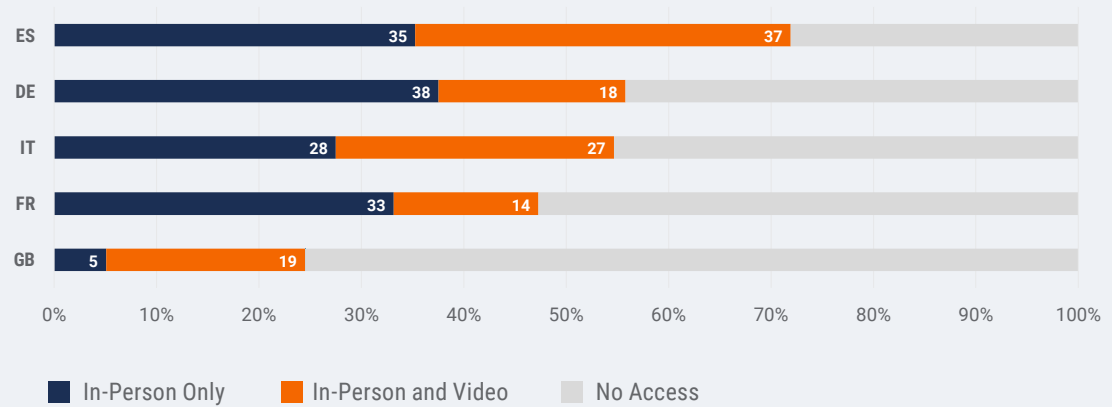
HCP access across EU5 has fallen to pre-pandemic levels, dropping to **53%**

The hardest-to-reach specialties are urology and psychiatry

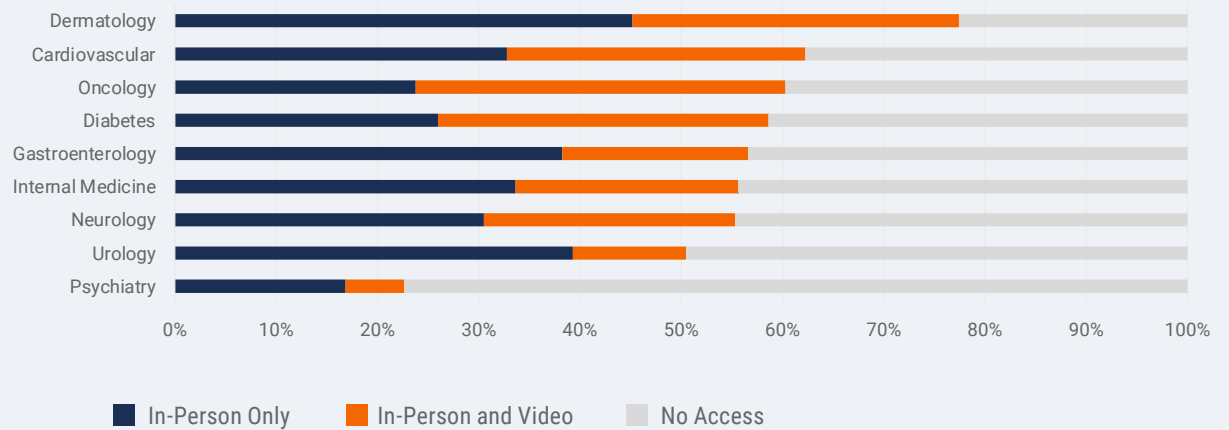
42% of accessible customers across EU5 are open to in-person and video engagements

¹ HCP access determined leveraging Veeva Pulse and Veeva Open data activity records. Access threshold defined as HCP with at least 1 monthly interaction from <1 company over 12 months.

HCP Access, EU5 2023¹

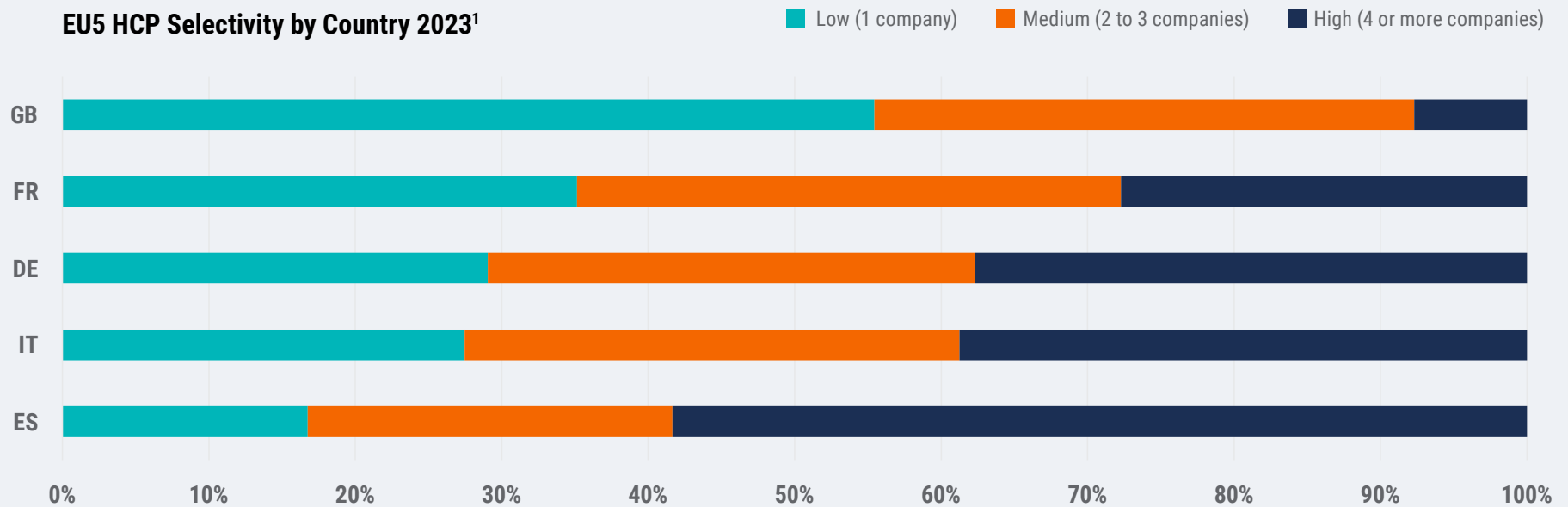


HCP Access EU5 2023 by Specialty and Channel¹



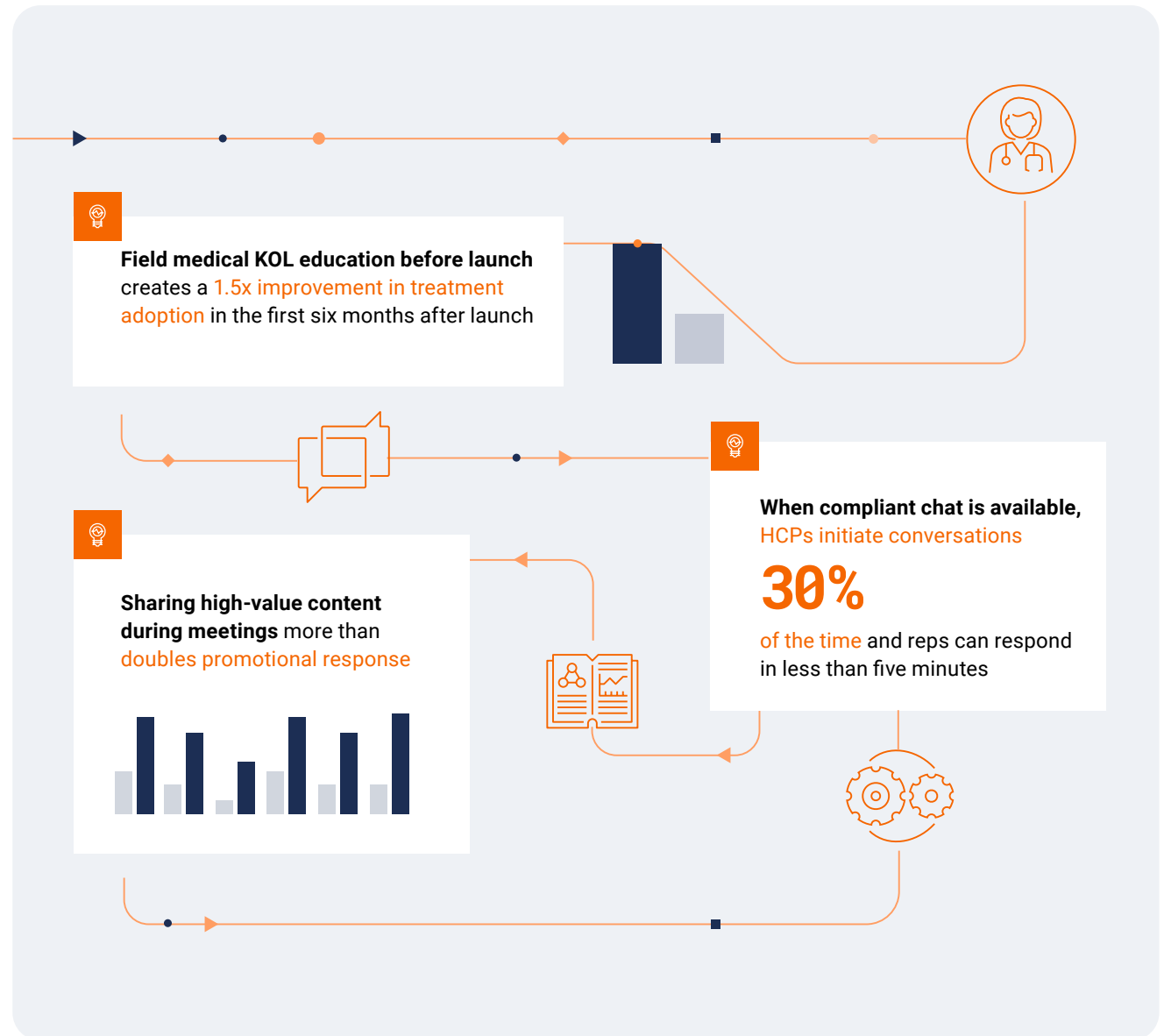
62% of accessible HCPs only meet with three or fewer companies

EU5 HCP Selectivity by Country 2023¹



¹HCP access determined leveraging Veeva Pulse and Veeva Open data activity records. Access threshold defined as HCP with at least 1 monthly interaction from <1 company over 12 months.

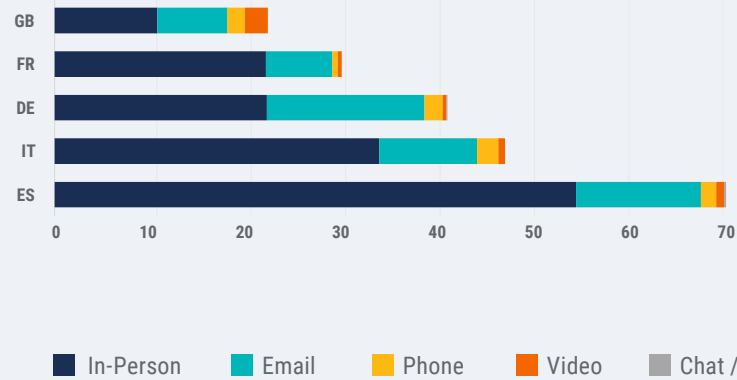
Connected engagement models strengthen HCP relationships¹



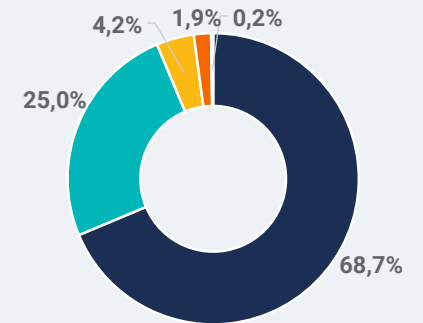
¹ Veeva Pulse data, U.S

Field activity and channel mix varies across EU5 markets

Channel Activity per Rep by Country

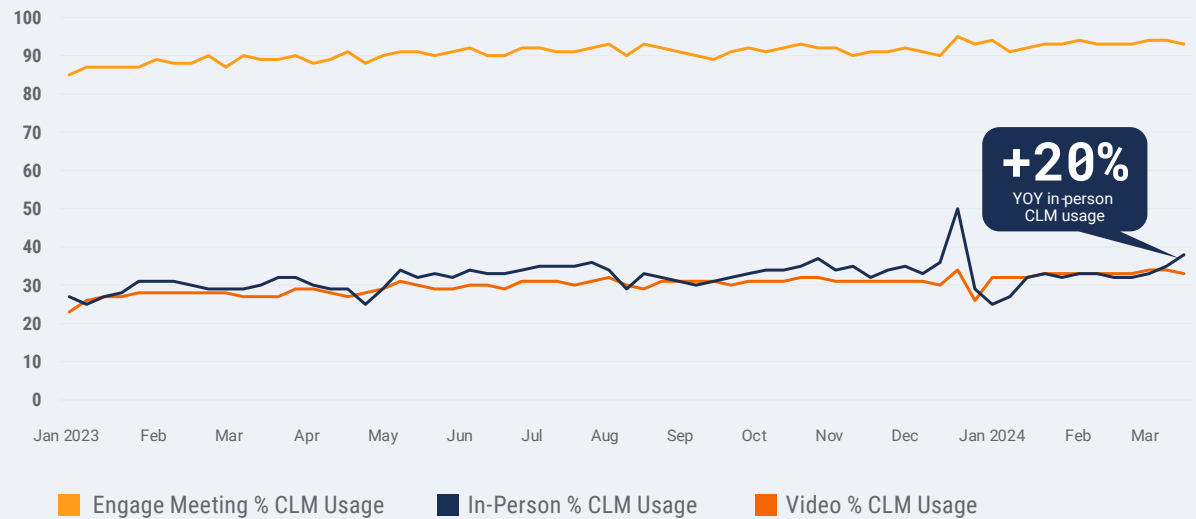


EU Channel Mix



Content usage is steadily rising across the EU

% CLM Use January 2023 to March 2024 EU5



Germany Analysis



Veeva
Pulse Field Trends Report

Q1 2024



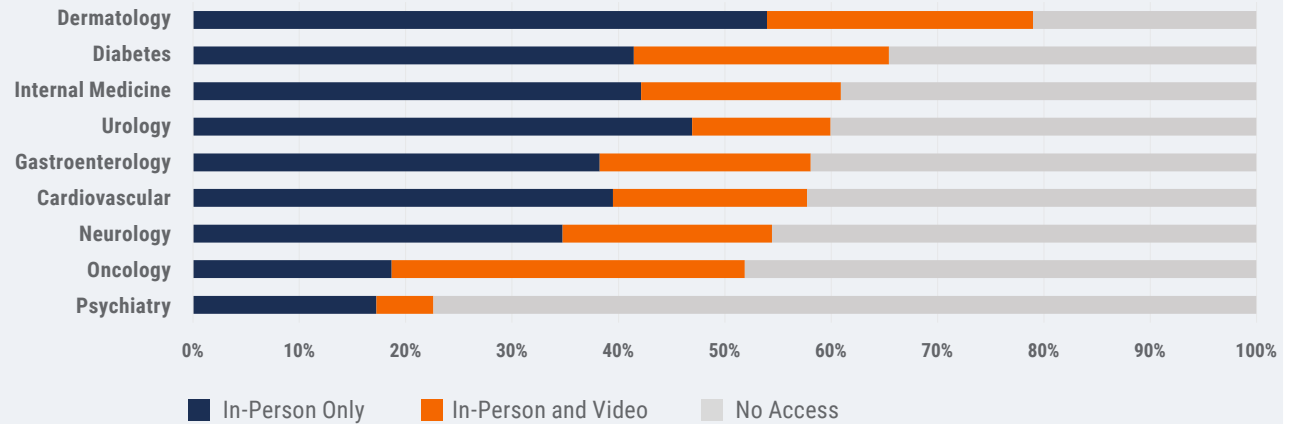
The hardest-to-reach specialties are psychiatry and oncology

33% of accessible customers are open to in-person and video engagements

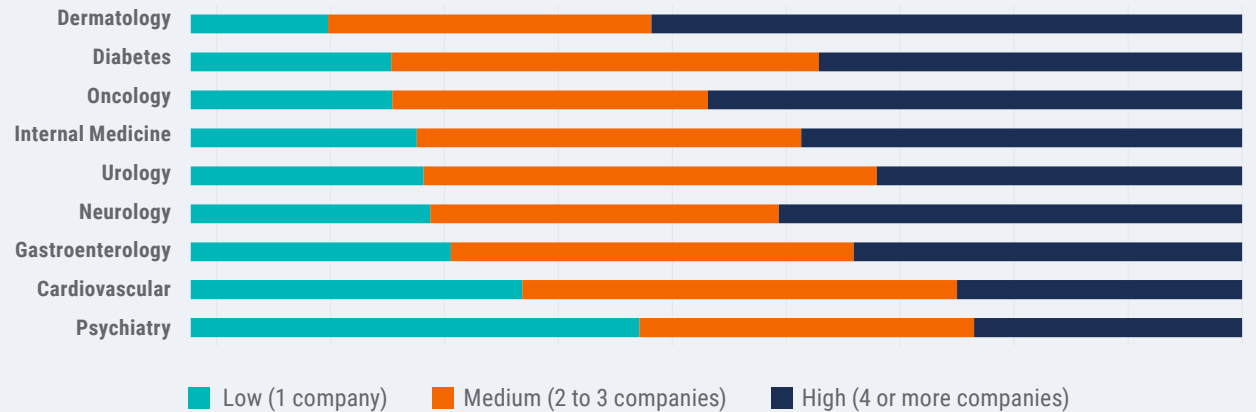
62% of accessible¹ HCPs only meet with three or fewer companies in Germany, in line with the EU5 average of **62%**

¹ HCP access determined leveraging Veeva Pulse and Veeva Open data activity records. Access threshold defined as HCP with at least 1 monthly interaction from <1 company over 12 months.

HCP Access DE 2023 by Specialty and Channel¹

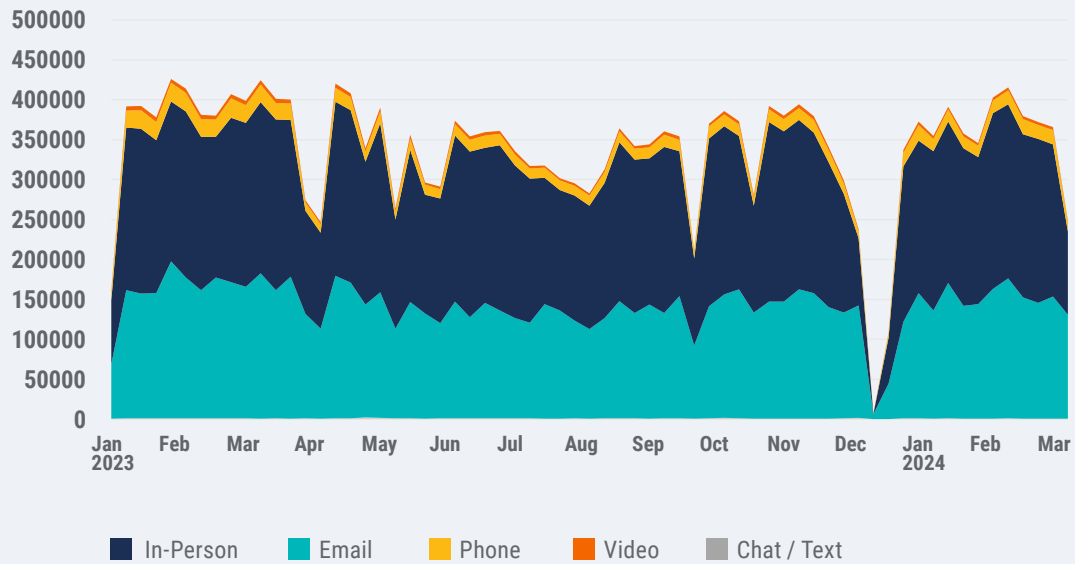


DE HCP Selectivity by Specialty 2023

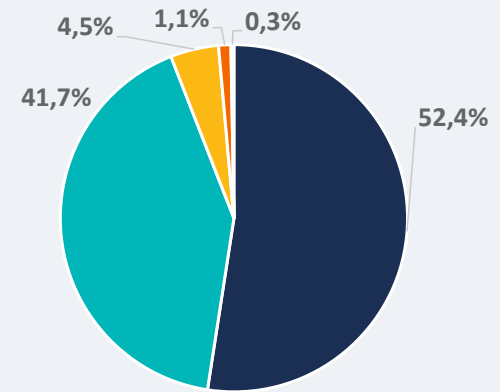


**In-person meetings and email
are the most used channels of
communication in Germany**

Channel Mix Evolution DE



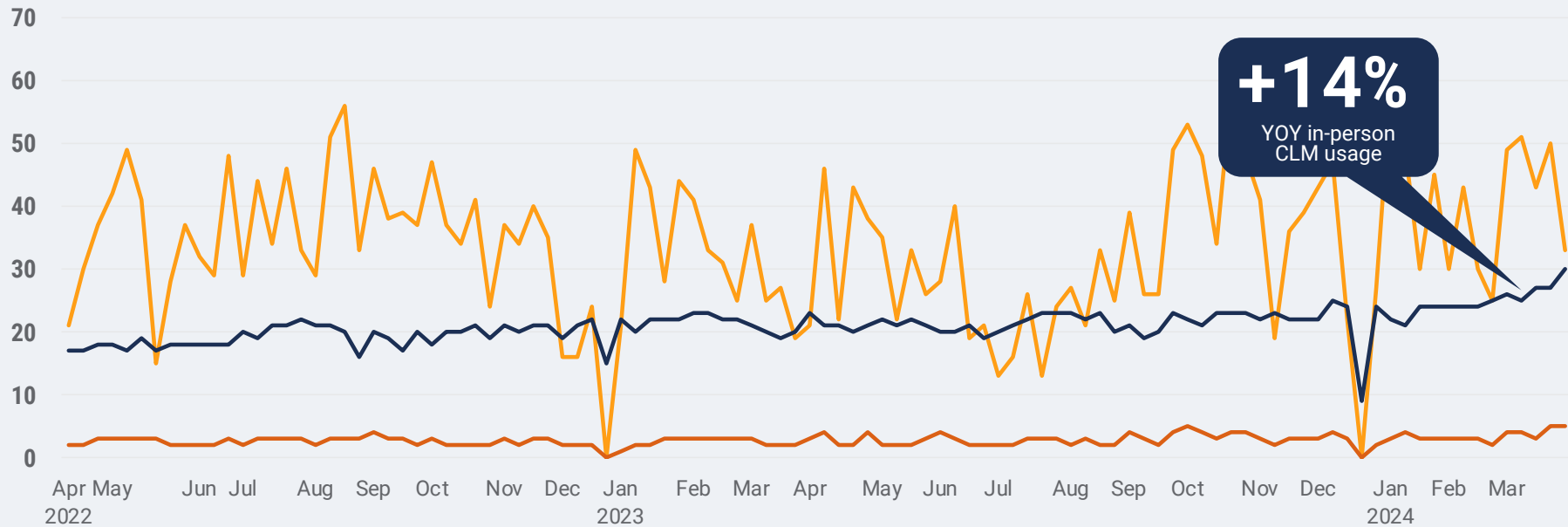
DE Channel Mix



Content usage is steadily rising in Germany

% CLM Use January 2023 to March 2024 DE

Engage Meeting % CLM Usage In-Person % CLM Usage Video % CLM Usage





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