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

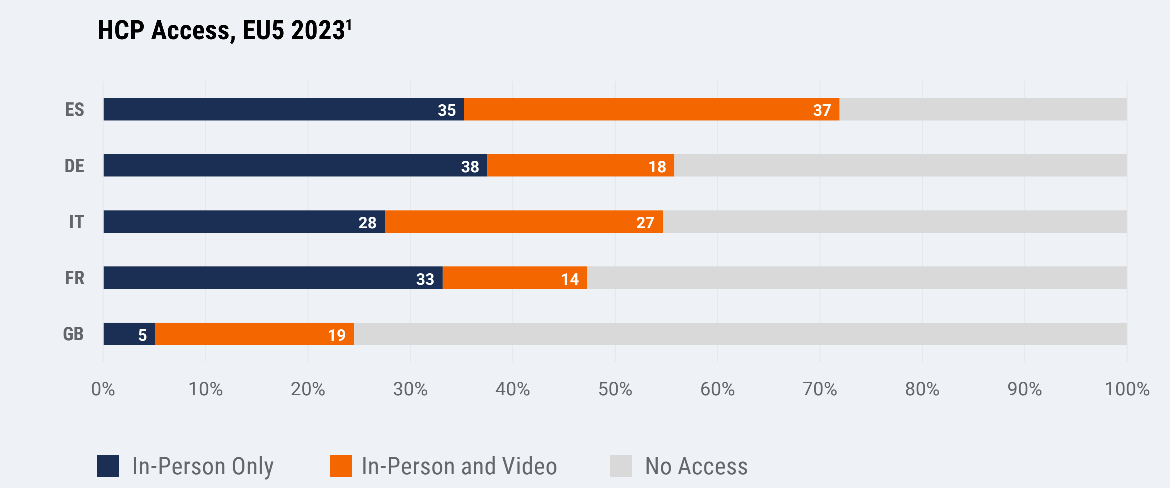
Actionable Insights

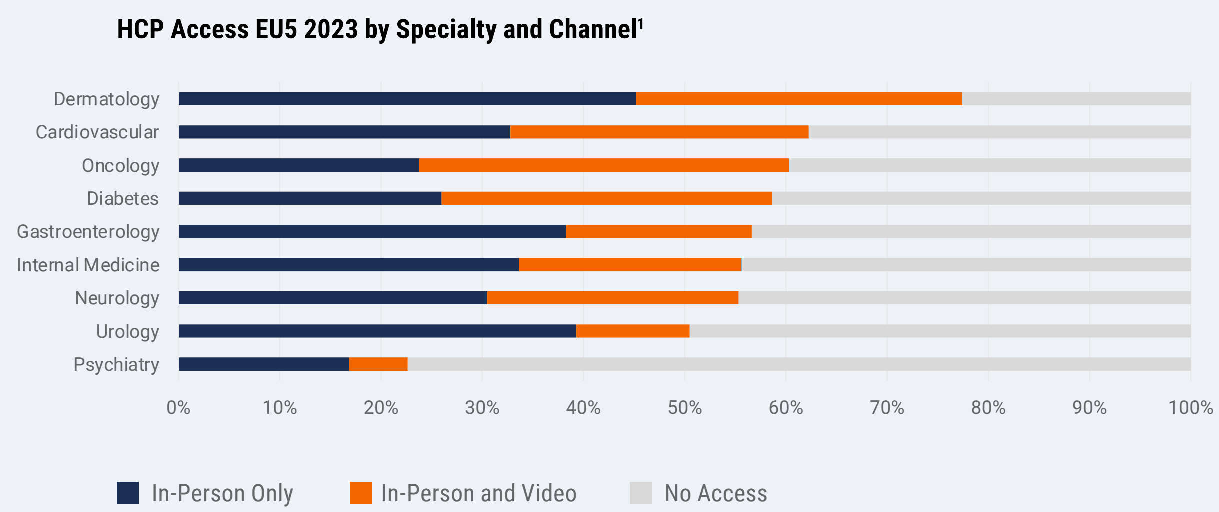
HCP access across EU5 has fallen to pre-pandemic levels, dropping to 53%

The hardest-to-reach specialties are urology and psychiatry

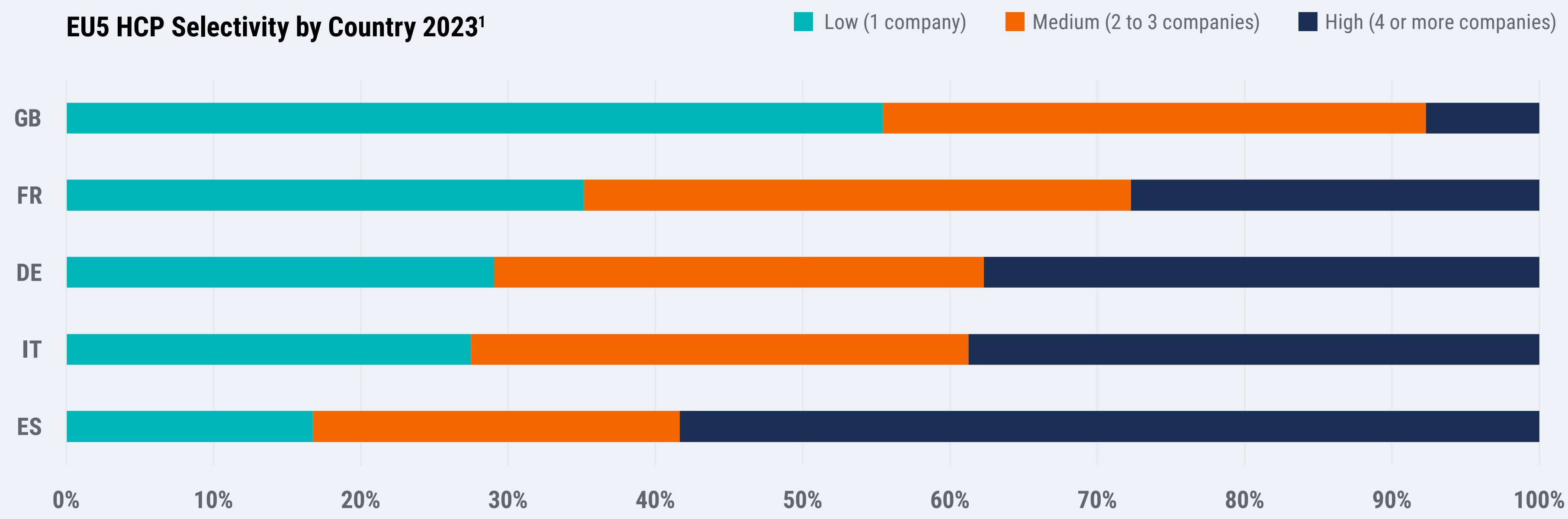
42% of accessible customers across EU5 are open to in-person and video engagements

[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.





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



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Connected engagement models strengthen HCP relationships[1]

Field medical KOL education before launch creates a 1.5x improvement in treatment adoption in the first six months after launch

When compliant chat is available, HCPs initiate conversations

30%

of the time and reps can respond in less than five minutes

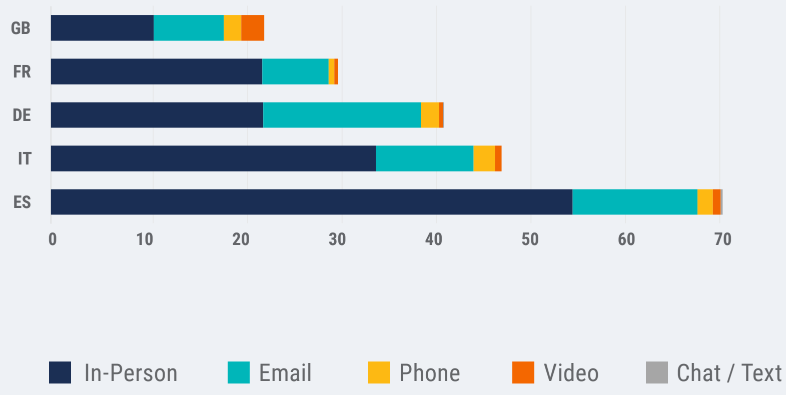
Sharing high-value content during meetings more than doubles promotional response

[1] Veeva Pulse data, U.S

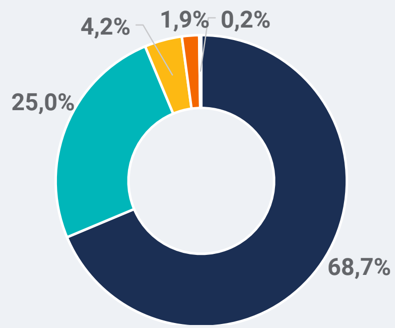
Field activity and channel mix varies across EU5 markets

Content usage is steadily rising across the EU

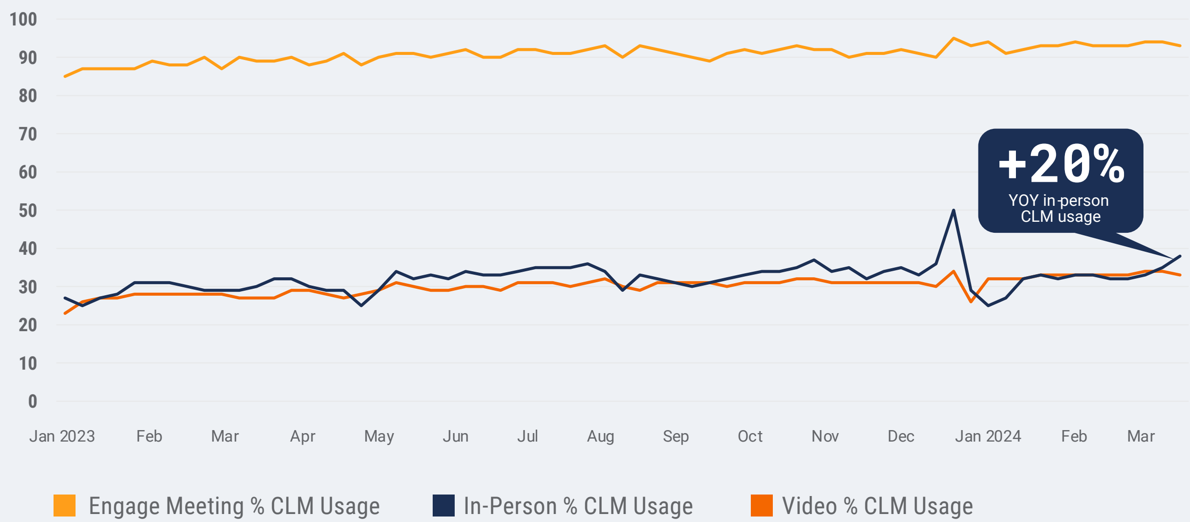
Channel Activity per Rep by Country



EU Channel Mix



% 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 accessible[1] HCPs only meet with three or fewer companies in Germany, in line with the EU5 average of 62%

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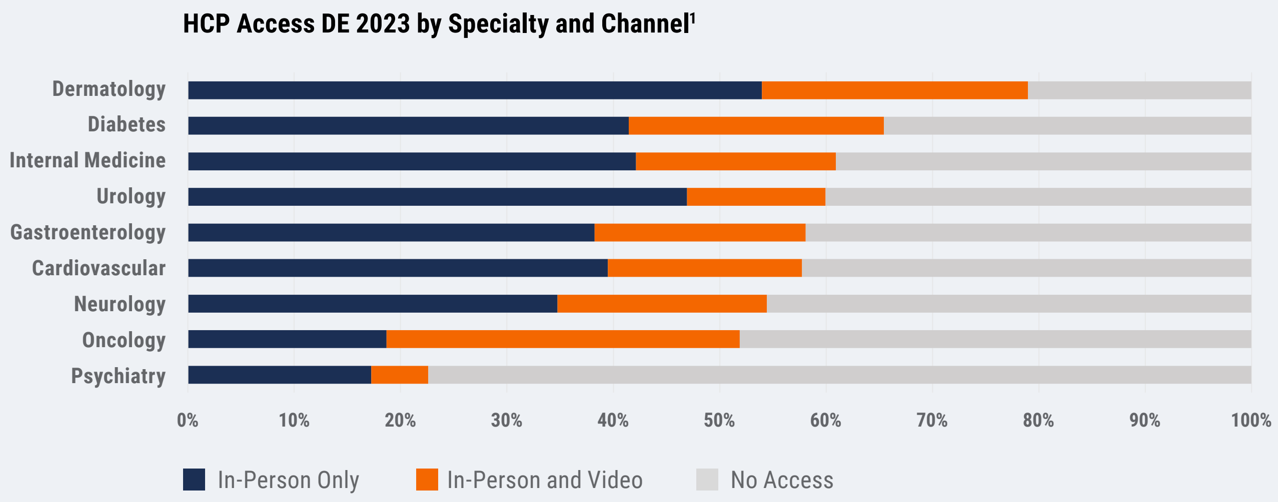
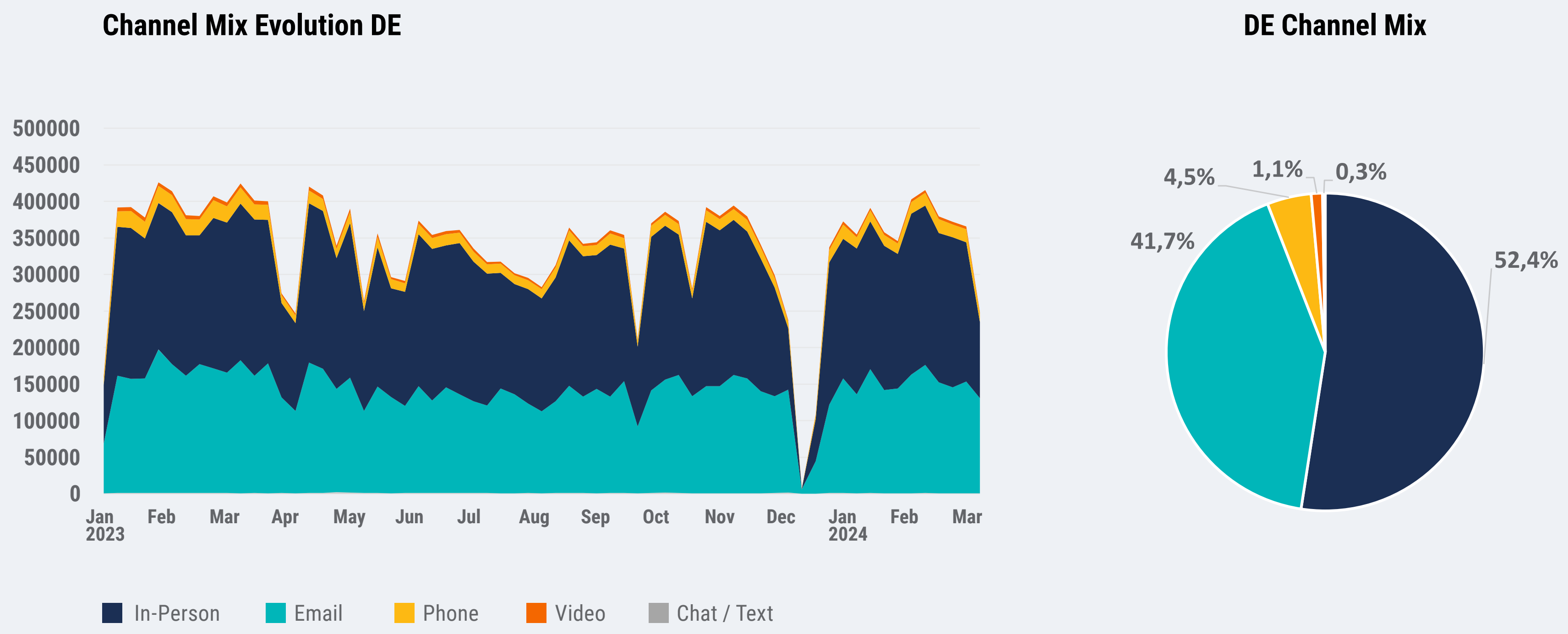
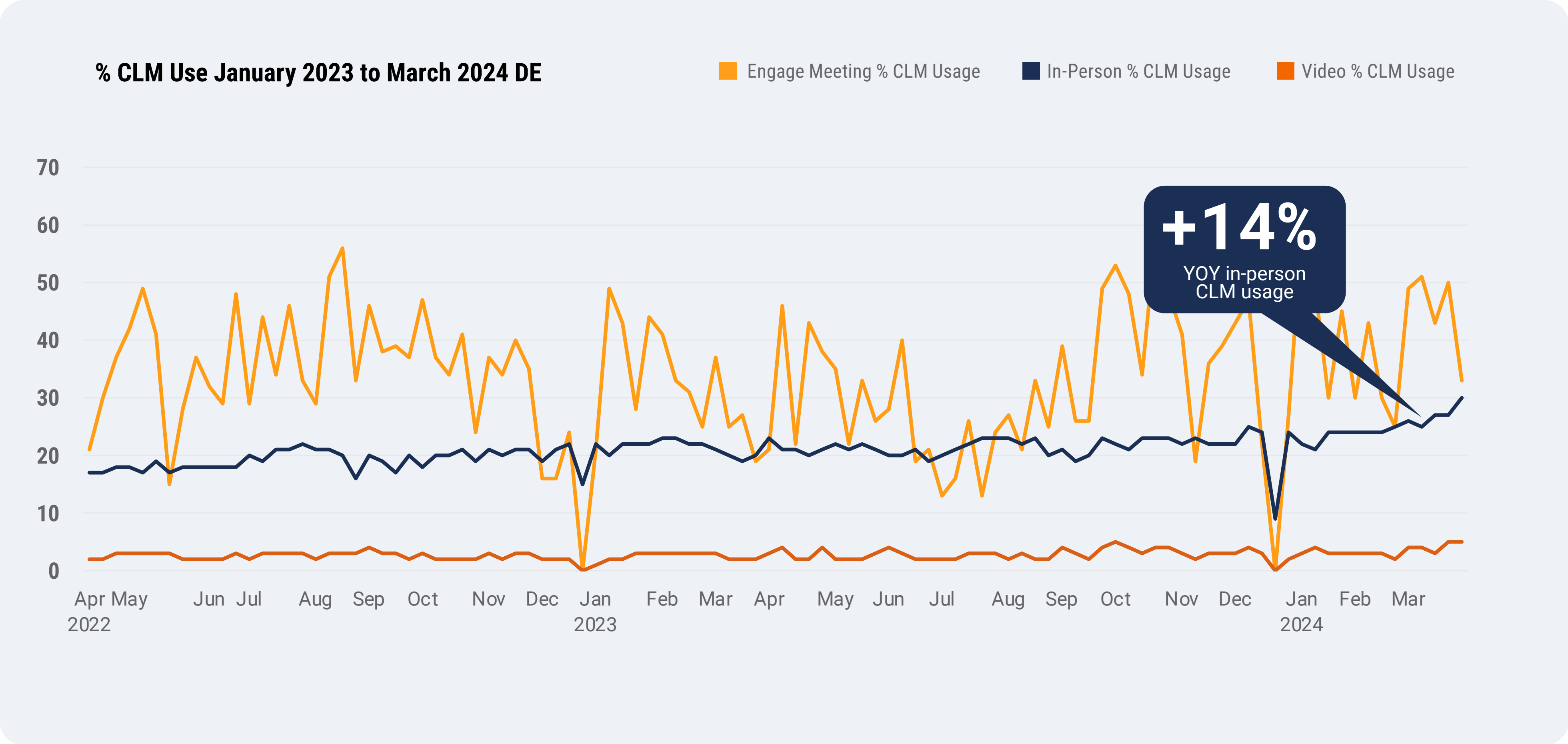


In-person meetings and email are the most used channels of communication in Germany



Content usage is steadily rising in Germany



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