

# Veeva Pulse Field Trends Report



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HCP Access  
**Europe, 2024**

# Largest and Most Complete View Field Engagement Activities

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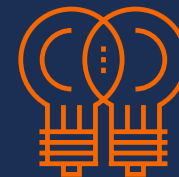
Global  
Standard  
Metrics



**80%+**  
Industry  
Census Data



**~600M**  
Field Activities



Actionable  
Insights

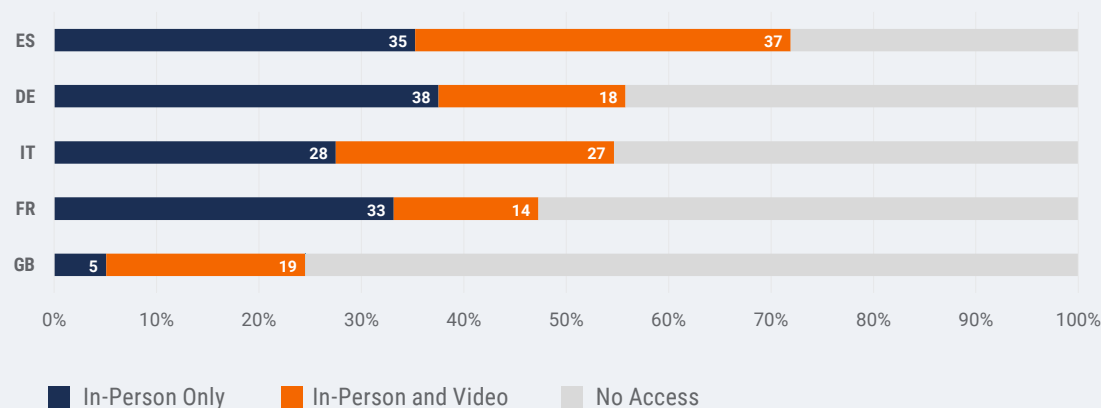
HCP access across EU5 has fallen to pre-pandemic levels, dropping to **53%**

## The hardest-to-reach specialties are urology and psychiatry

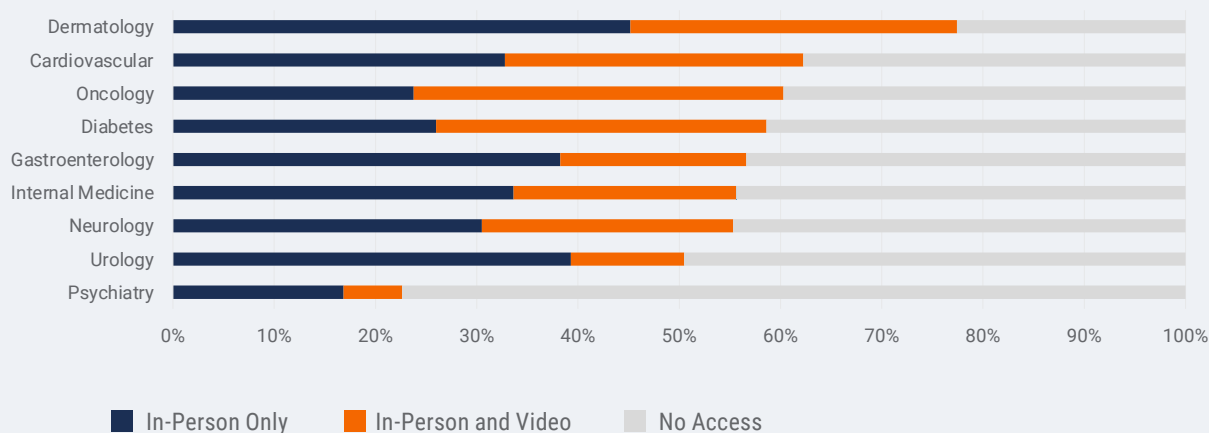
42% of accessible customers across EU5 are open to in-person and video engagements

<sup>1</sup> 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 2023<sup>1</sup>

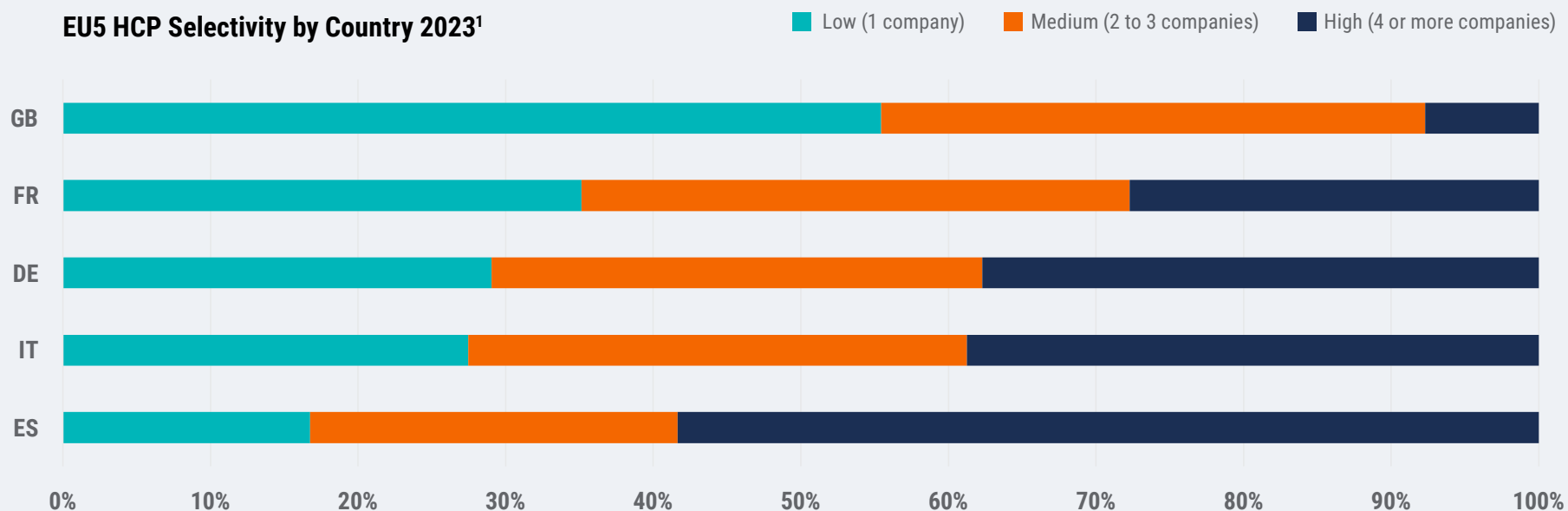


HCP Access EU5 2023 by Specialty and Channel<sup>1</sup>



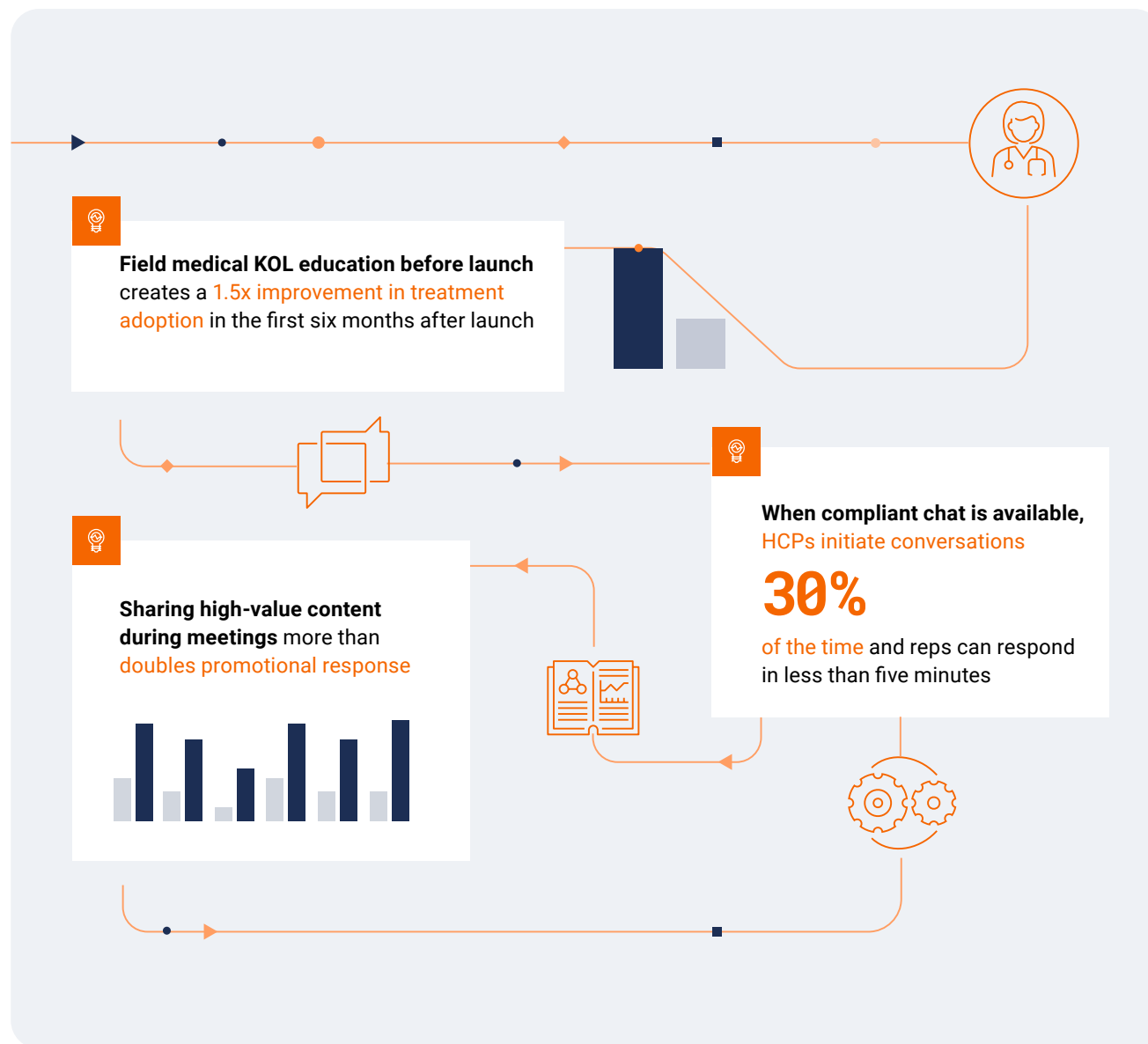
**62% of accessible HCPs only meet with three or fewer companies**

**EU5 HCP Selectivity by Country 2023<sup>1</sup>**



<sup>1</sup> 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.

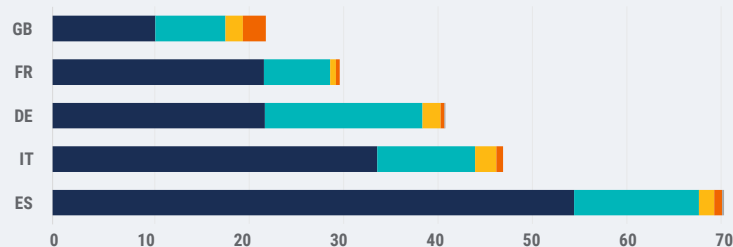
## Connected engagement models strengthen HCP relationships<sup>1</sup>



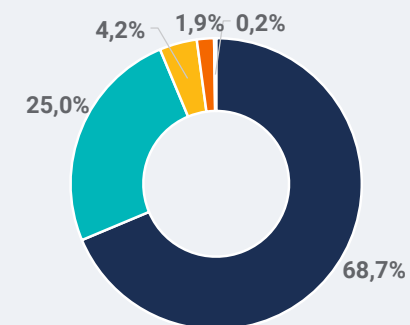
<sup>1</sup> Veeva Pulse data, U.S

## Field activity and channel mix varies across EU5 markets

Channel Activity per Rep by Country



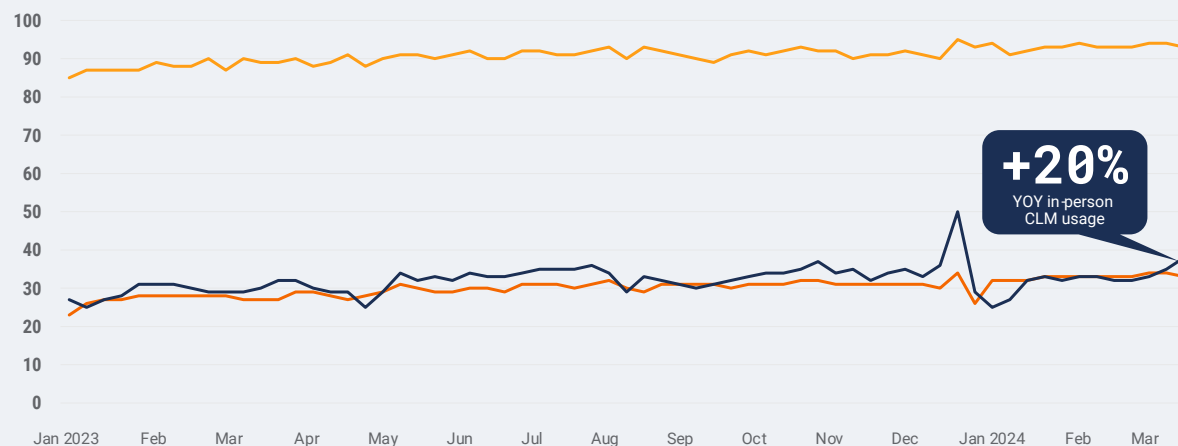
EU Channel Mix



■ In-Person ■ Email ■ Phone ■ Video ■ Chat / Text

## Content usage is steadily rising across the EU

% CLM Use January 2023 to March 2024 EU5



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

# Spain Analysis



Veeva  
Pulse Field Trends Report

**Q1 2024**



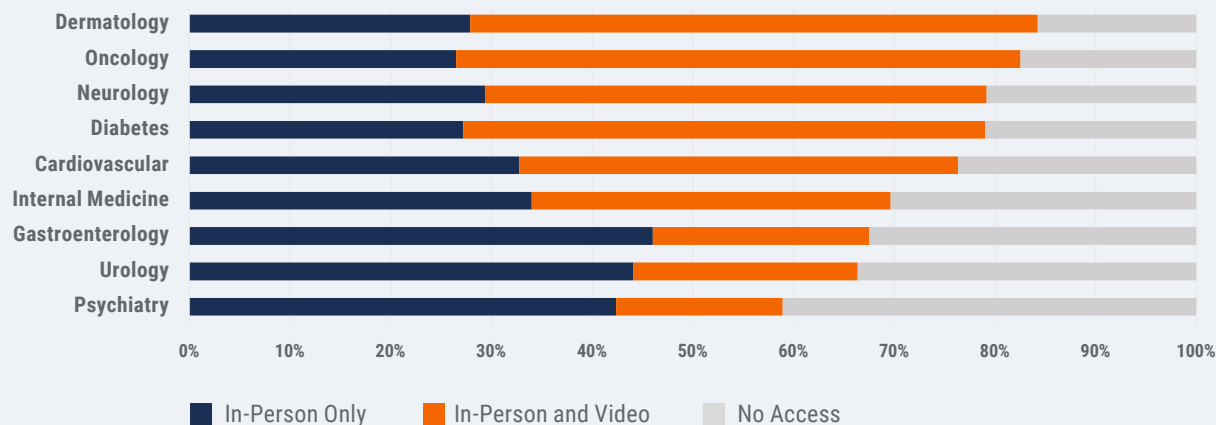
## The hardest-to-reach specialties are internal medicine and psychiatry

51% of accessible customers are open to in-person and video engagements

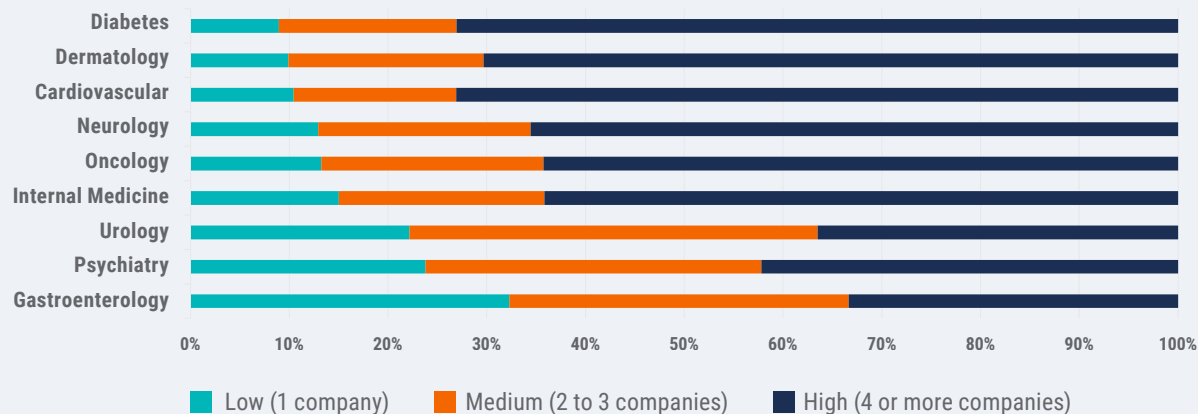
**42%** of accessible HCPs meet with three or fewer companies, being the least selective across EU5

<sup>1</sup> 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 ES 2023 by Specialty and Channel<sup>1</sup>



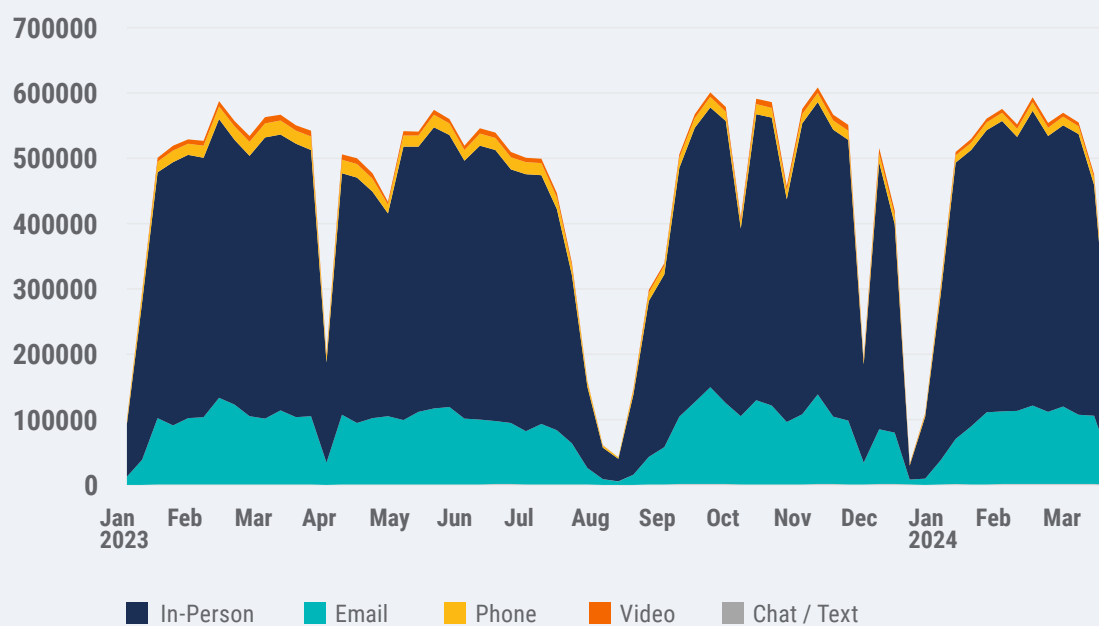
ES HCP Selectivity by Specialty 2023



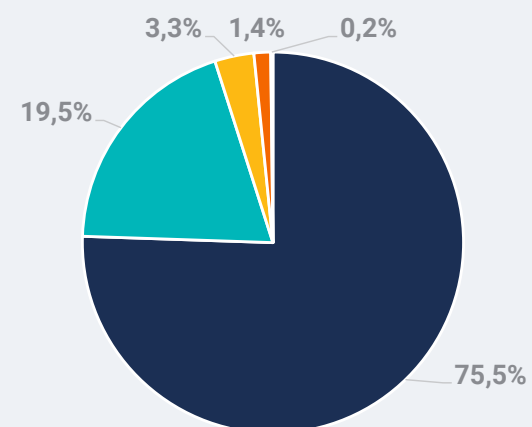


In-person meetings represent the most frequent channel of interaction in Spain

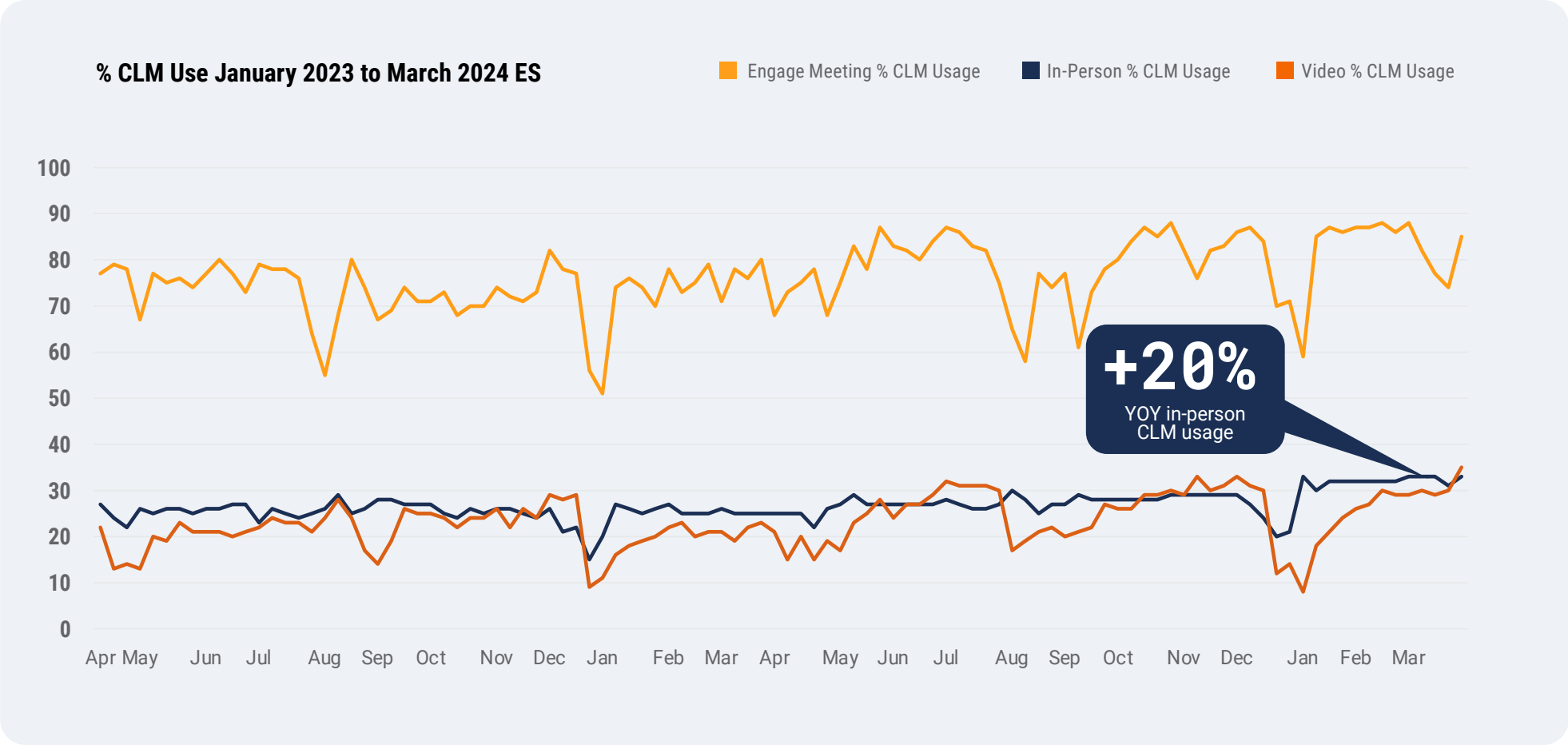
Channel Mix Evolution ES



ES Channel Mix



Content usage is steadily rising in Spain





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