

# 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

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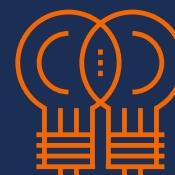
80%+  
Industry Census Data

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~600M  
Field Activities

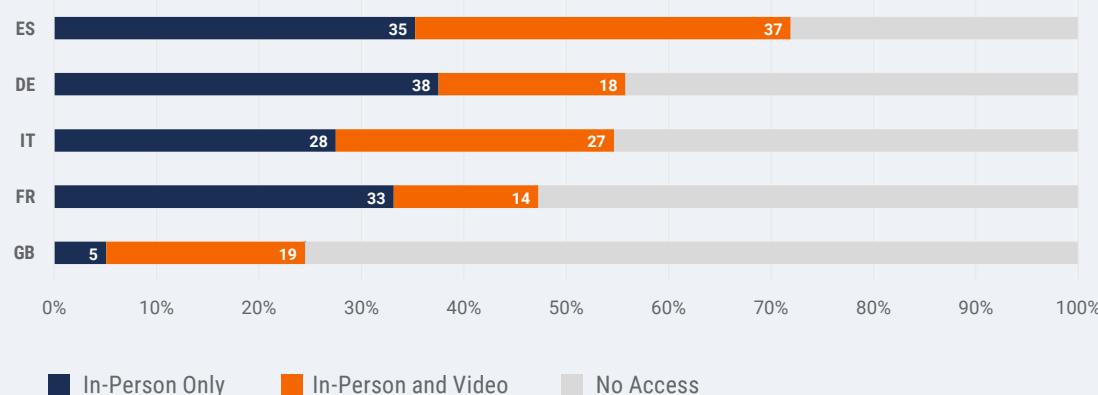
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Actionable Insights

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

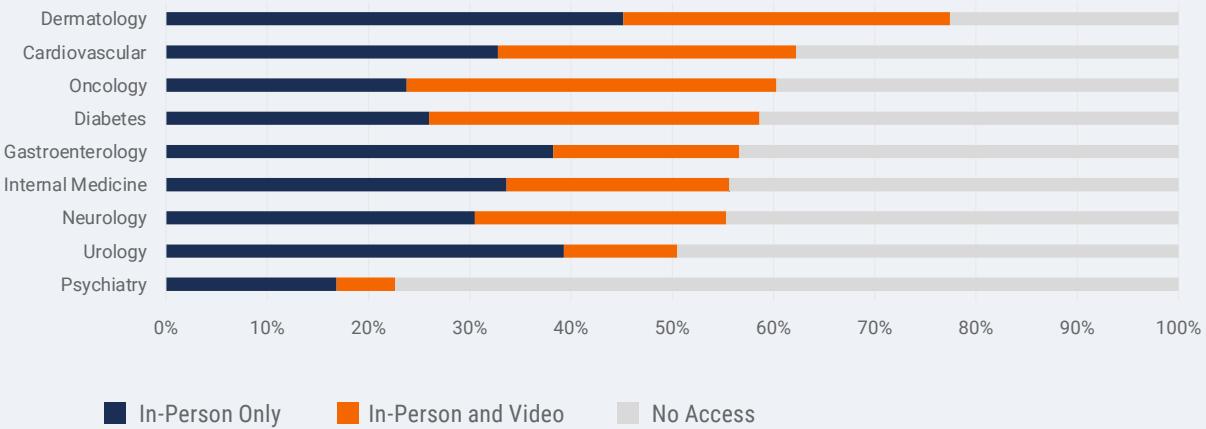
#### HCP Access, EU5 2023<sup>1</sup>



The hardest-to-reach specialties are urology and psychiatry

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

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

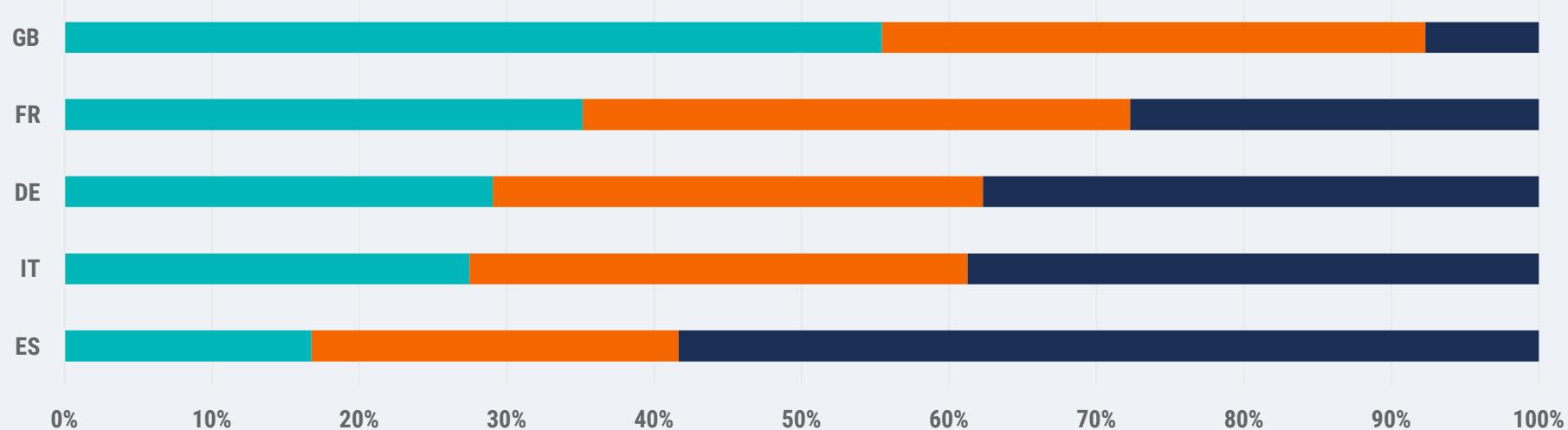


<sup>1</sup> HCP access determined leveraging Veeva Pulse and Veeva Open data activity records. Access threshold defined as HCP with at least 1 monthly interaction from <1 company over 12 months.

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

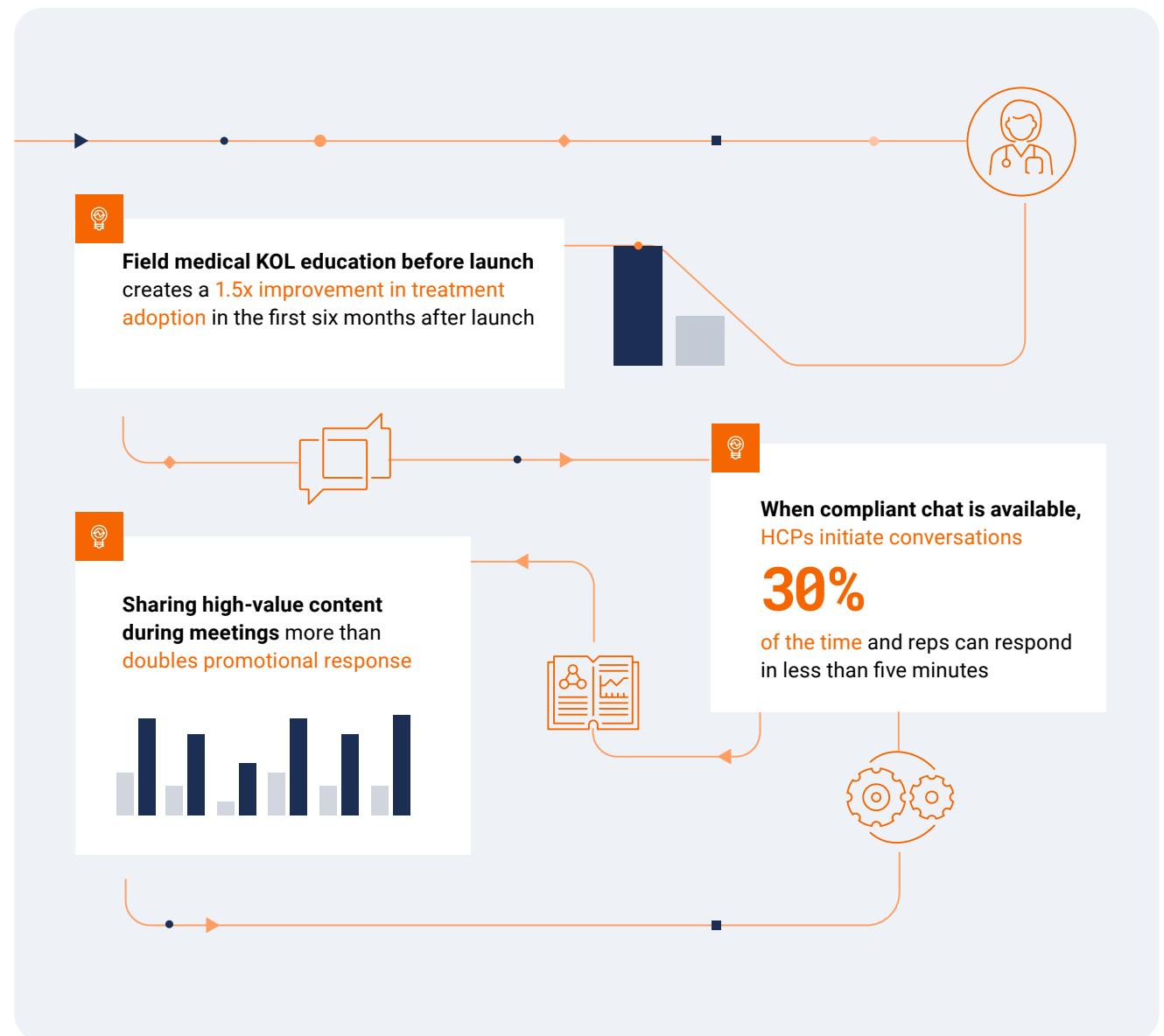
### EU5 HCP Selectivity by Country 2023<sup>1</sup>

■ Low (1 company) ■ Medium (2 to 3 companies) ■ High (4 or more companies)



<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.

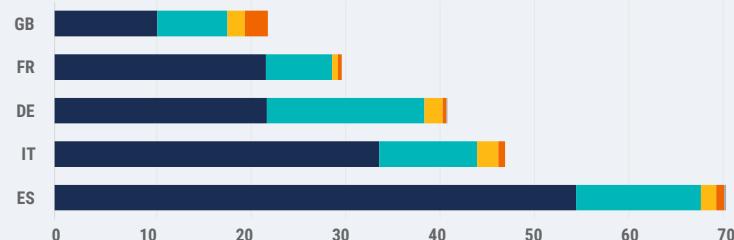
## Connected engagement models strengthen HCP relationships<sup>1</sup>



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

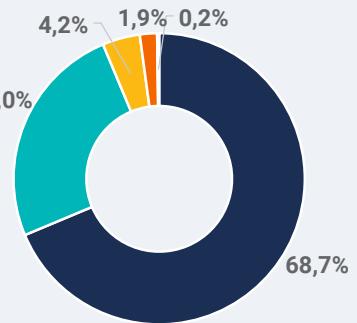
## Field activity and channel mix varies across EU5 markets

Channel Activity per Rep by Country



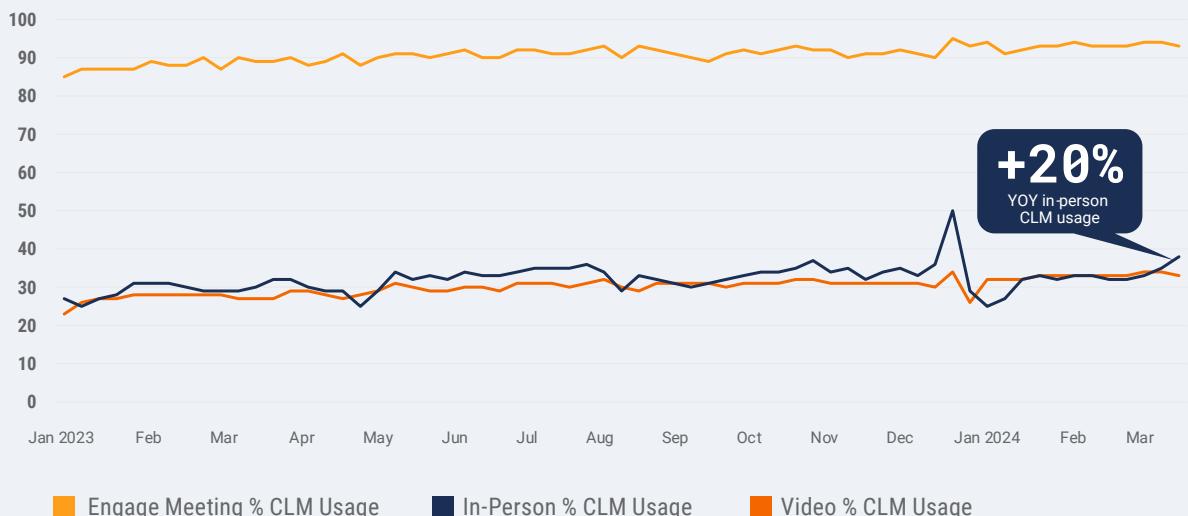
■ In-Person ■ Email ■ Phone ■ Video ■ Chat / Text

EU Channel Mix



## Content usage is steadily rising across the EU

% CLM Use January 2023 to March 2024 EU5



# Spain Analysis

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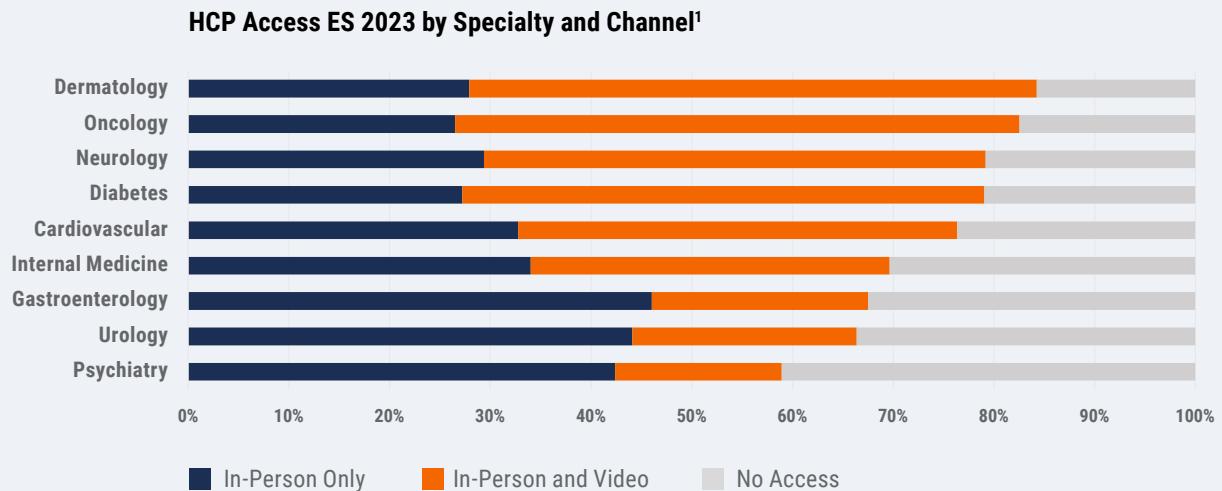
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**Q1 2024**



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

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



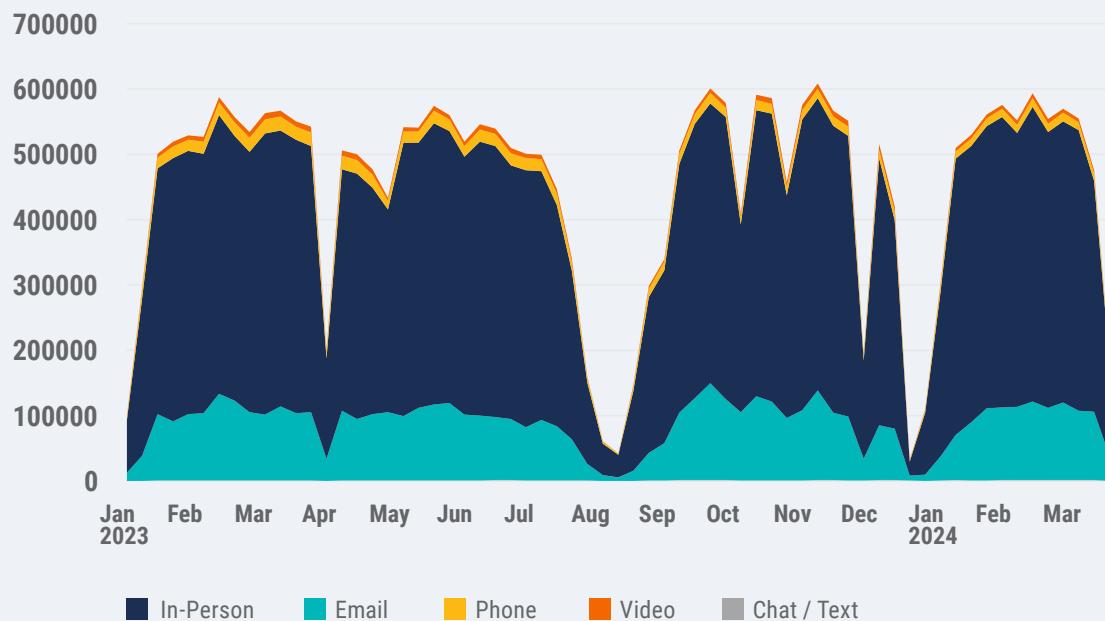
42% of accessible HCPs meet with three or fewer companies, being the least selective across EU5

<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.

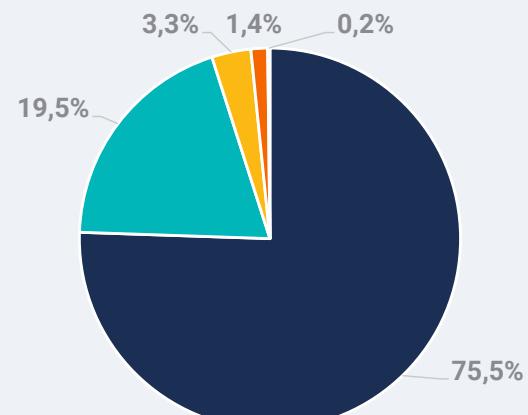


In-person meetings represent the most frequent channel of interaction in Spain

Channel Mix Evolution ES



ES Channel Mix



Content usage is steadily rising in Spain

% CLM Use January 2023 to March 2024 ES

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





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