

Veeva Pulse Field Trends Report

HCP Access
Europe, 2024



Largest and Most Complete View Field Engagement Activities



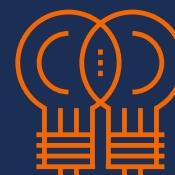
Global Standard Metrics



80%+
Industry Census Data



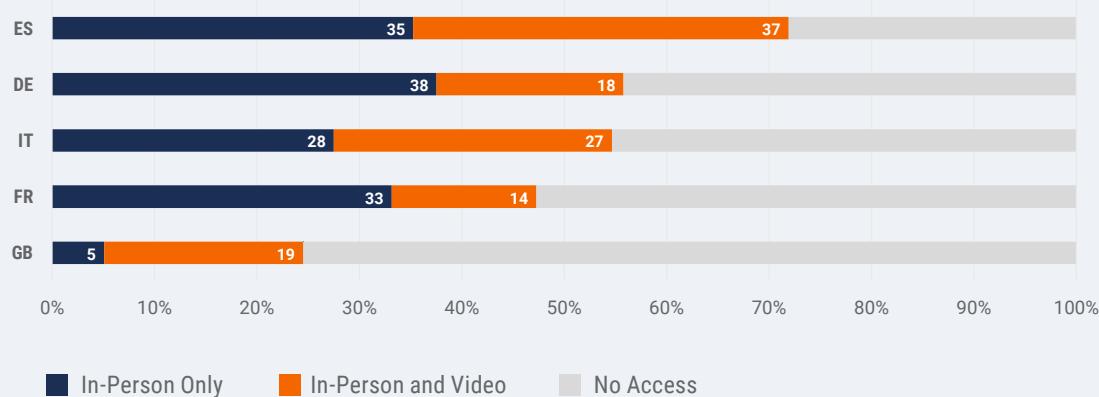
~600M
Field Activities



Actionable Insights

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

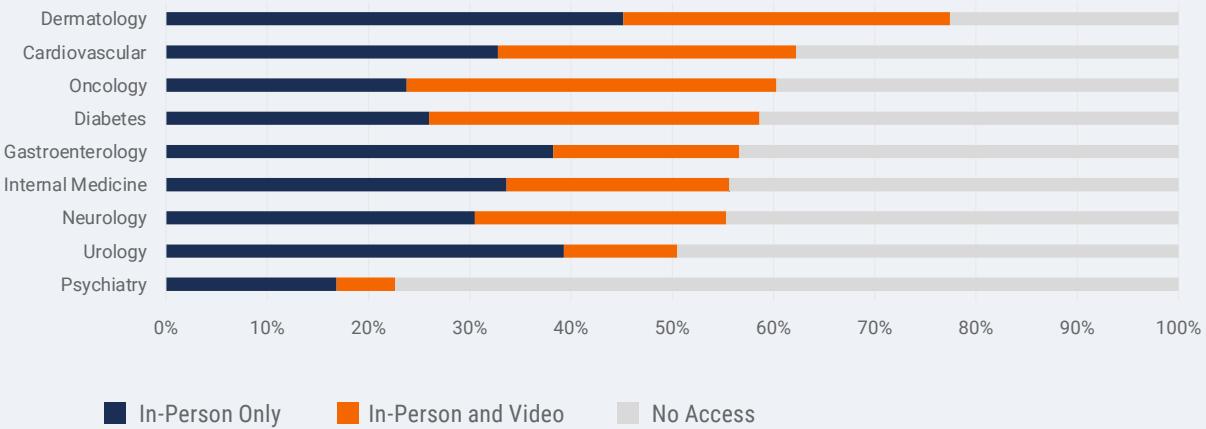
HCP Access, EU5 2023¹



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 Channel¹

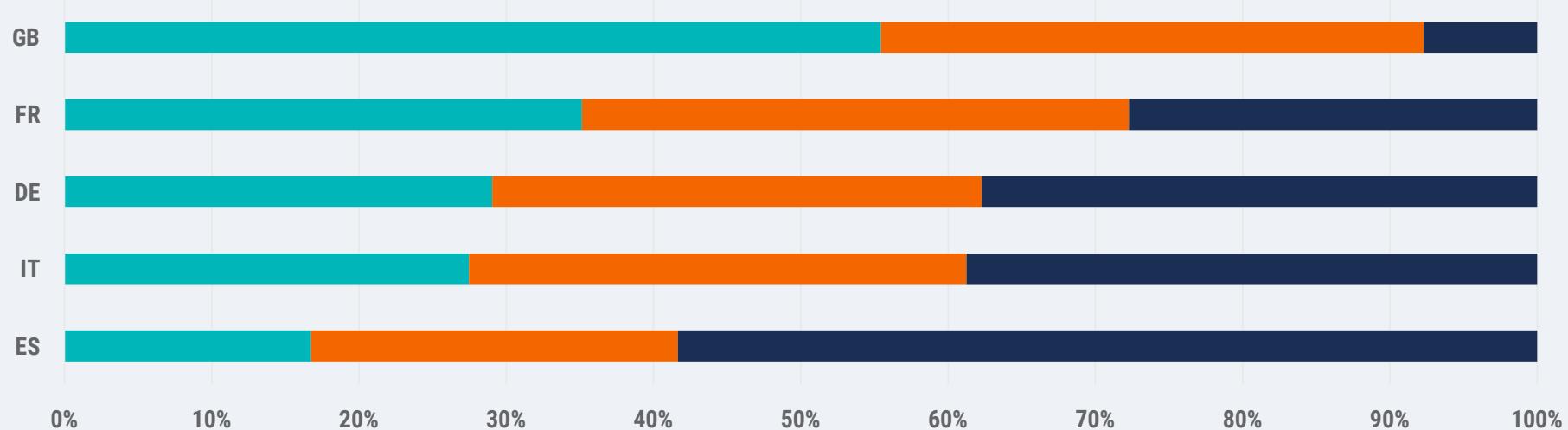


¹ HCP access determined leveraging Veeva Pulse and Veeva Open data activity records. Access threshold defined as HCP with at least 1 monthly interaction from <1 company over 12 months.

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

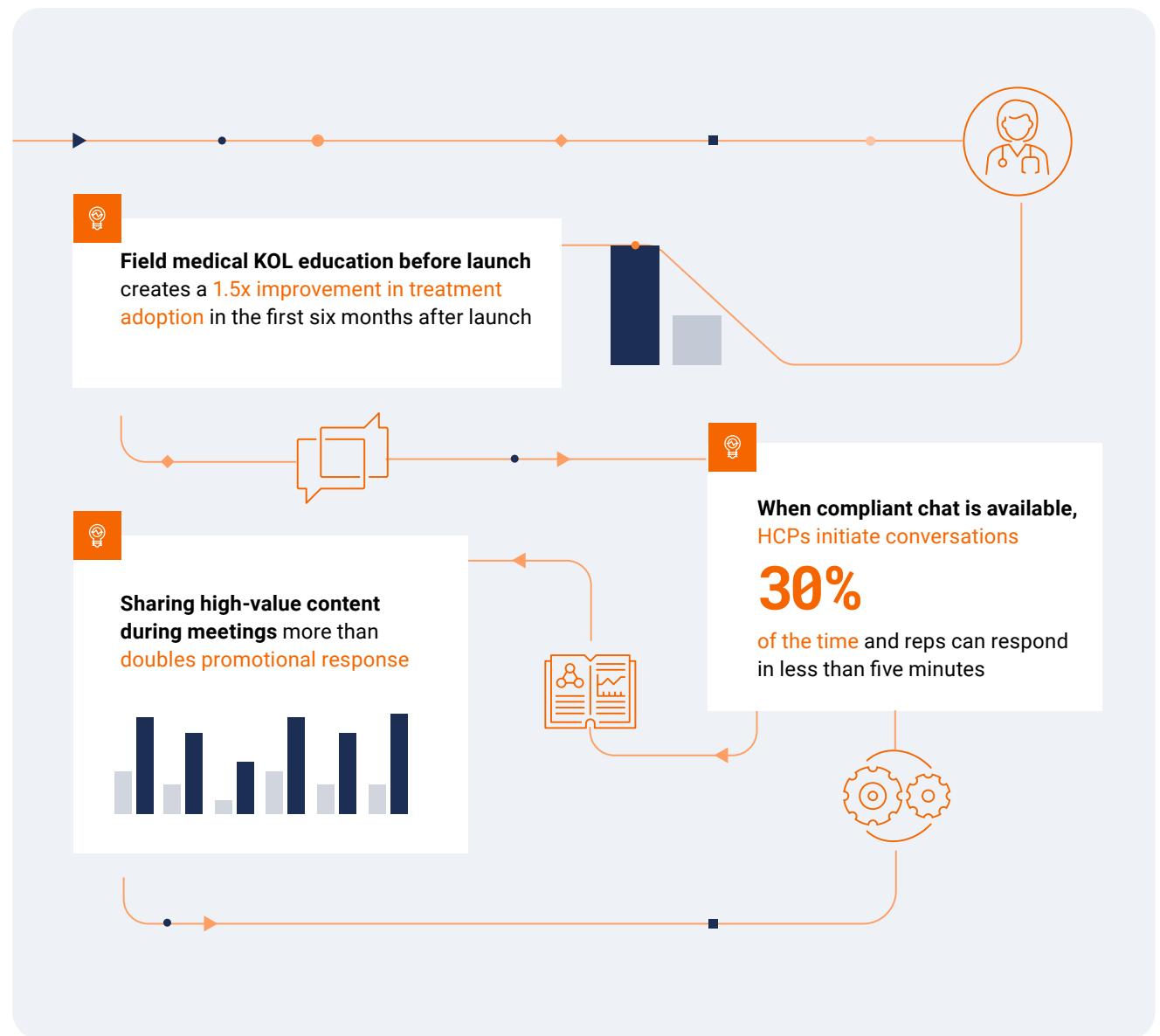
EU5 HCP Selectivity by Country 2023¹

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



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.

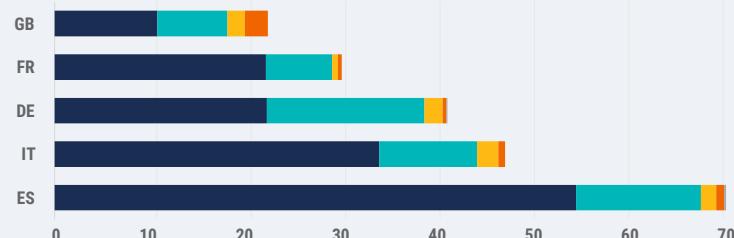
Connected engagement models strengthen HCP relationships¹



¹ Veeva Pulse data, U.S.

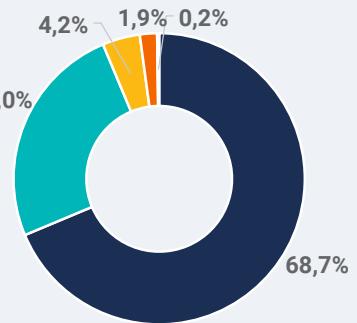
Field activity and channel mix varies across EU5 markets

Channel Activity per Rep by Country



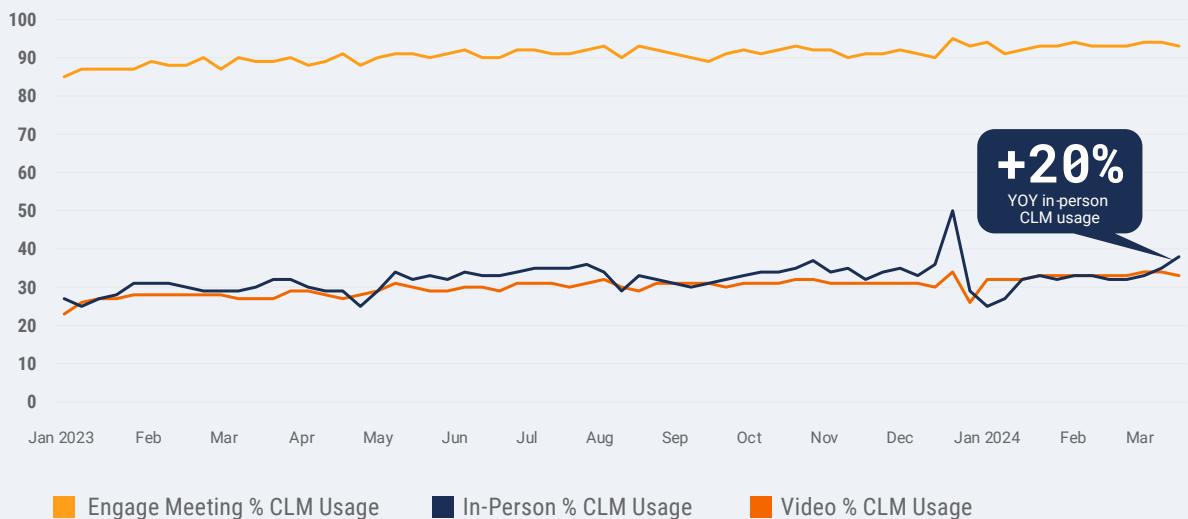
■ In-Person ■ Email ■ Phone ■ Video ■ Chat / Text

EU Channel Mix



Content usage is steadily rising across the EU

% CLM Use January 2023 to March 2024 EU5



Italy Analysis

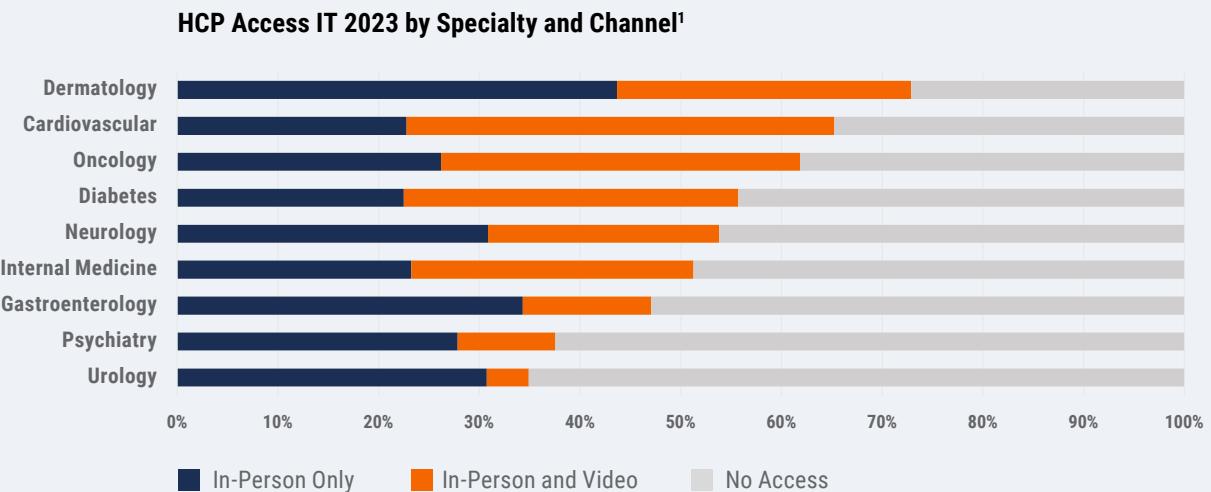
Veeva
Pulse Field Trends Report

Q1 2024



The hardest-to-reach specialties are psychiatry and urology

50% of accessible customers are open to in-person and video engagements



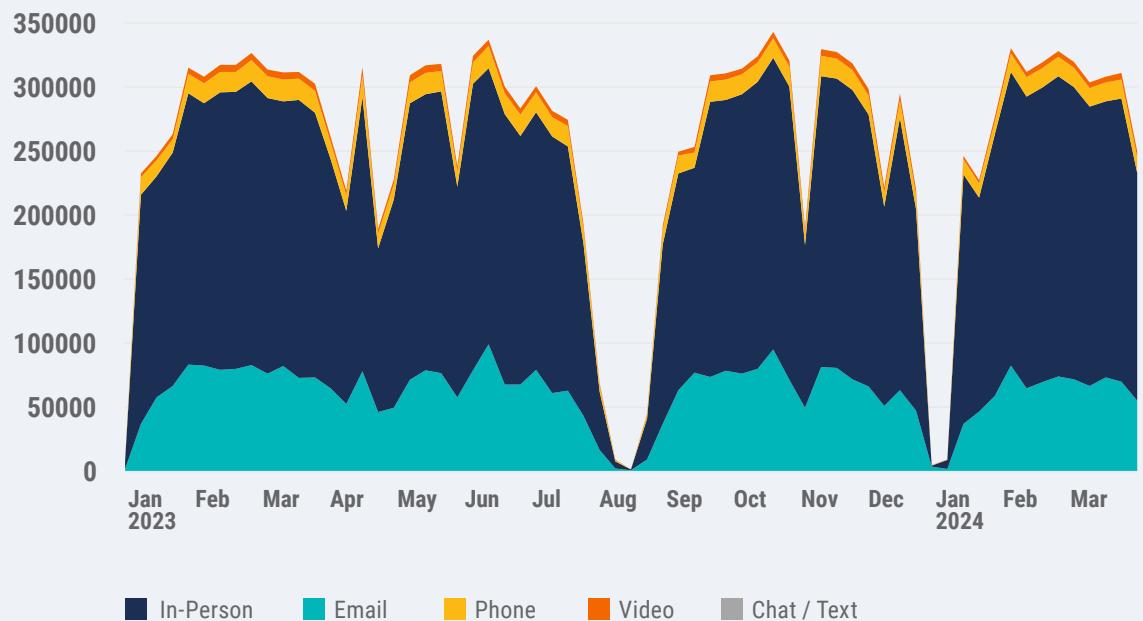
61% of accessible HCPs meet with three or fewer companies in Italy, in line with the EU5 average of 62%

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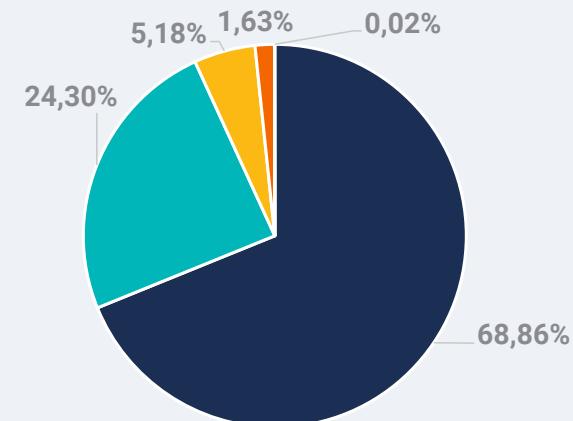


In-person meetings and emails represent the most frequent channels of communication

Channel Mix Evolution IT



IT Channel Mix



Content usage is steadily rising across Italy

% CLM Use January 2023 to March 2024 IT

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





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