

Veeva Pulse Field Trends Report

HCP Access
Europe, 2024

An abstract graphic on the right side of the page. It features several overlapping, wavy, mountain-like shapes in shades of orange, yellow, and dark blue. A light blue grid pattern is visible in the background, particularly in the upper right quadrant.

Largest and Most Complete View Field Engagement Activities



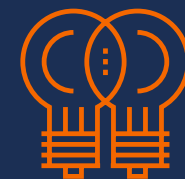
Global
Standard
Metrics



80%+
Industry
Census Data



~600M
Field Activities



Actionable
Insights

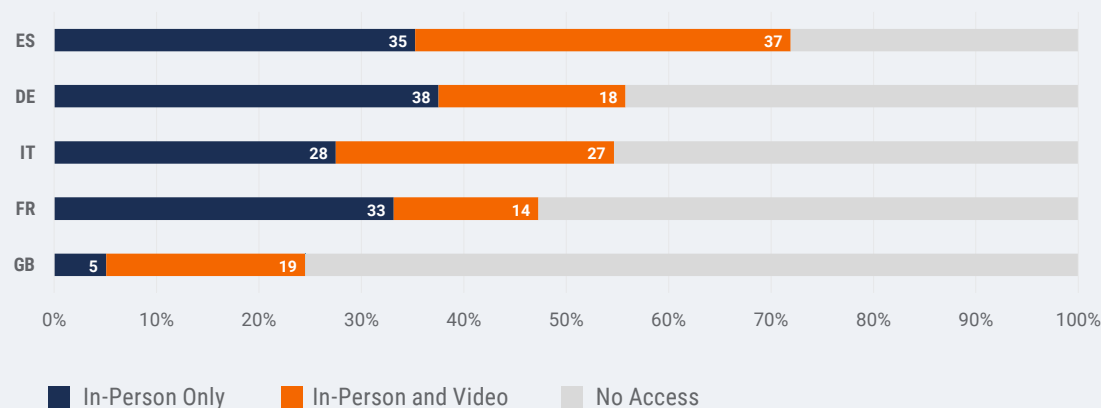
HCP access across EU5 has fallen to pre-pandemic levels, dropping to **53%**

The hardest-to-reach specialties are urology and psychiatry

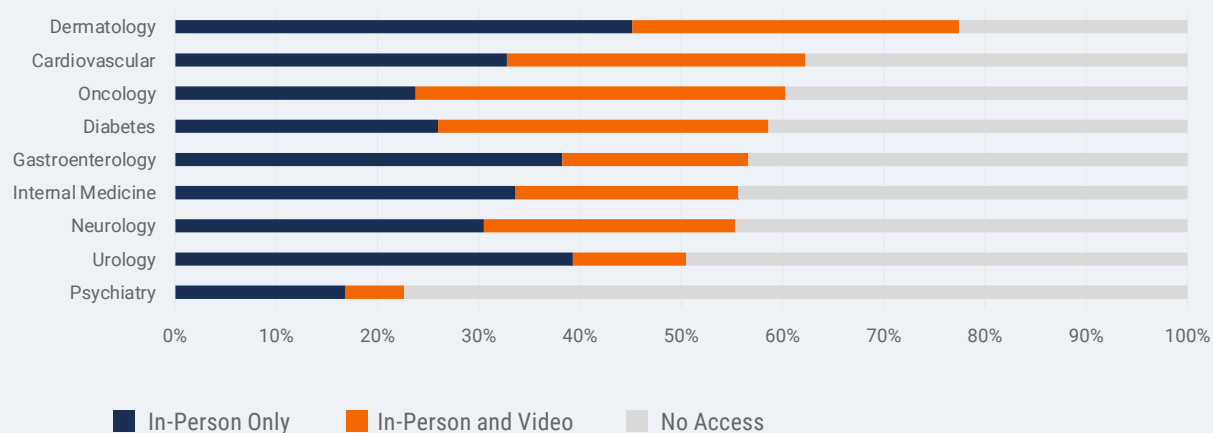
42% of accessible customers across EU5 are open to in-person and video engagements

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

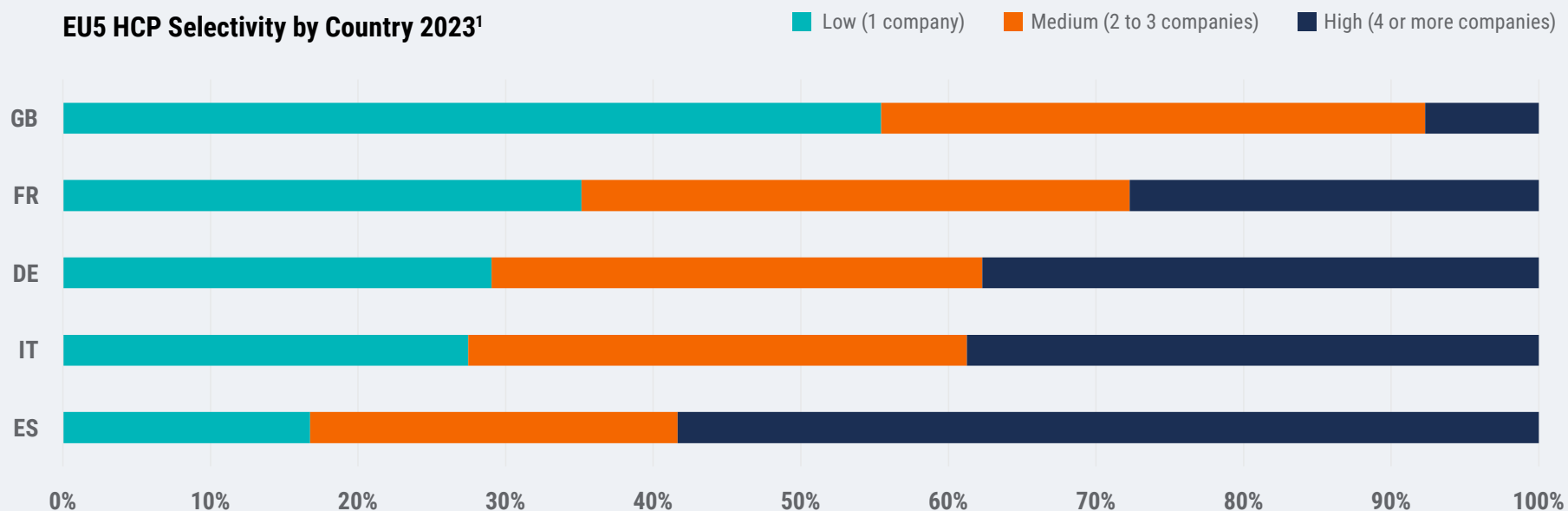


HCP Access EU5 2023 by Specialty and Channel¹



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

EU5 HCP Selectivity by Country 2023¹



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.

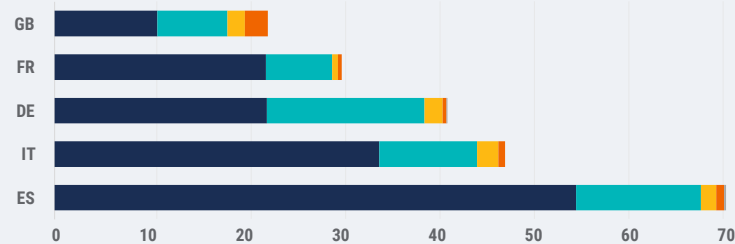
Connected engagement models strengthen HCP relationships¹



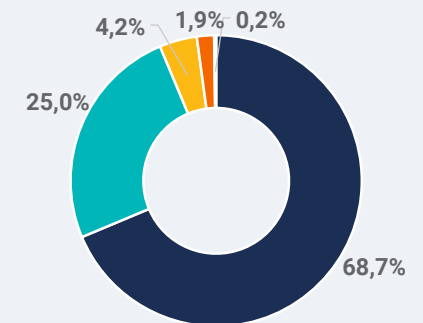
¹ Veeva Pulse data, U.S

Field activity and channel mix varies across EU5 markets

Channel Activity per Rep by Country



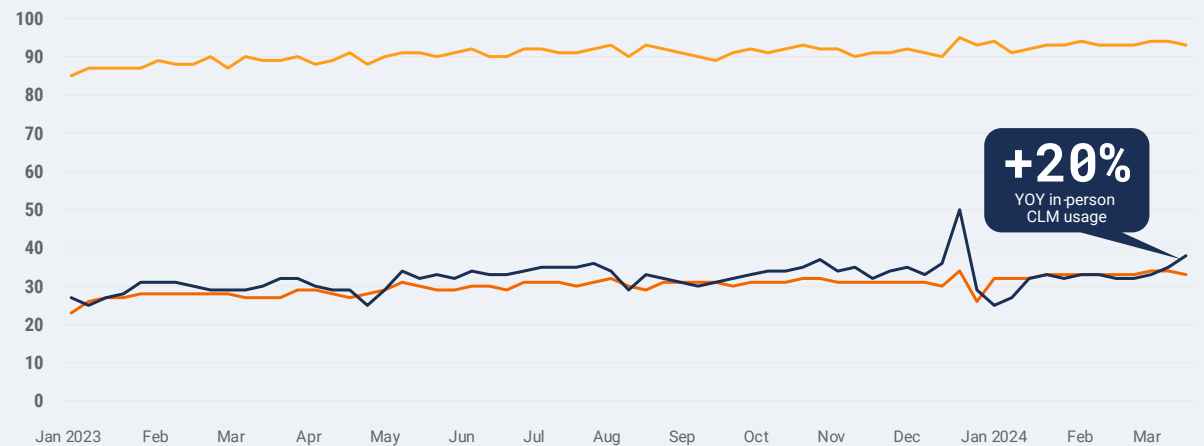
EU Channel Mix



■ 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

Italy Analysis



Veeva
Pulse Field Trends Report

Q1 2024



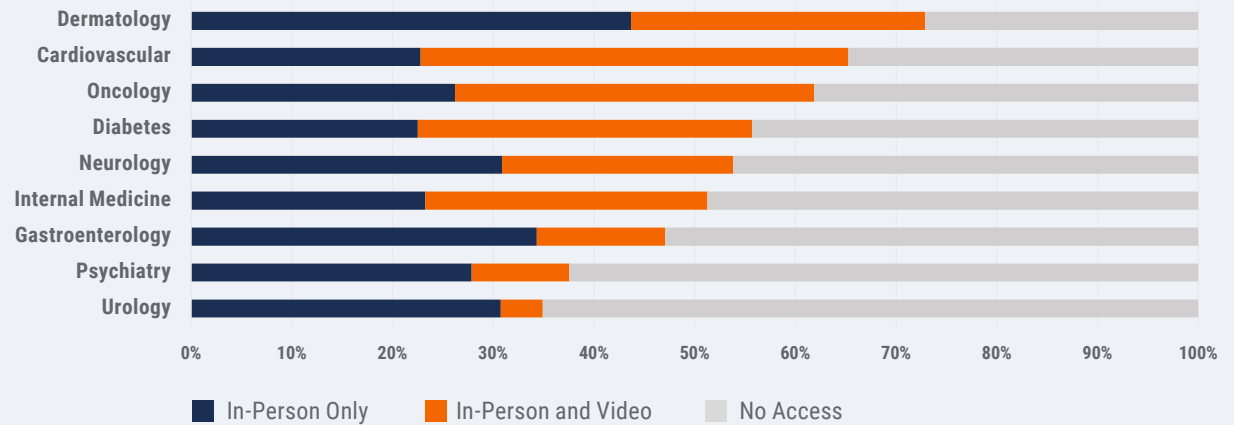
The hardest-to-reach specialties are psychiatry and urology

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

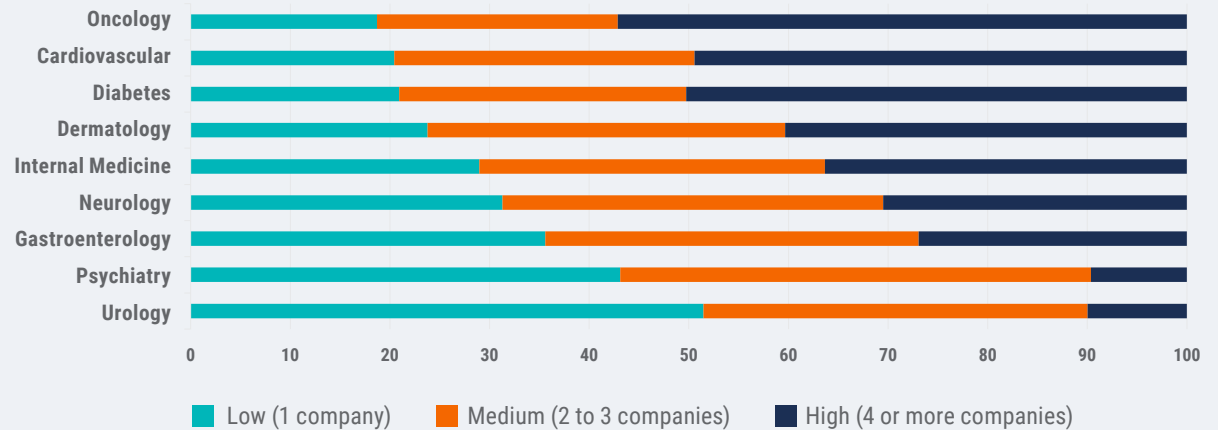
61% of accessible HCPs meet with three or fewer companies in Italy, in line with the EU5 average of **62%**

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 IT 2023 by Specialty and Channel¹

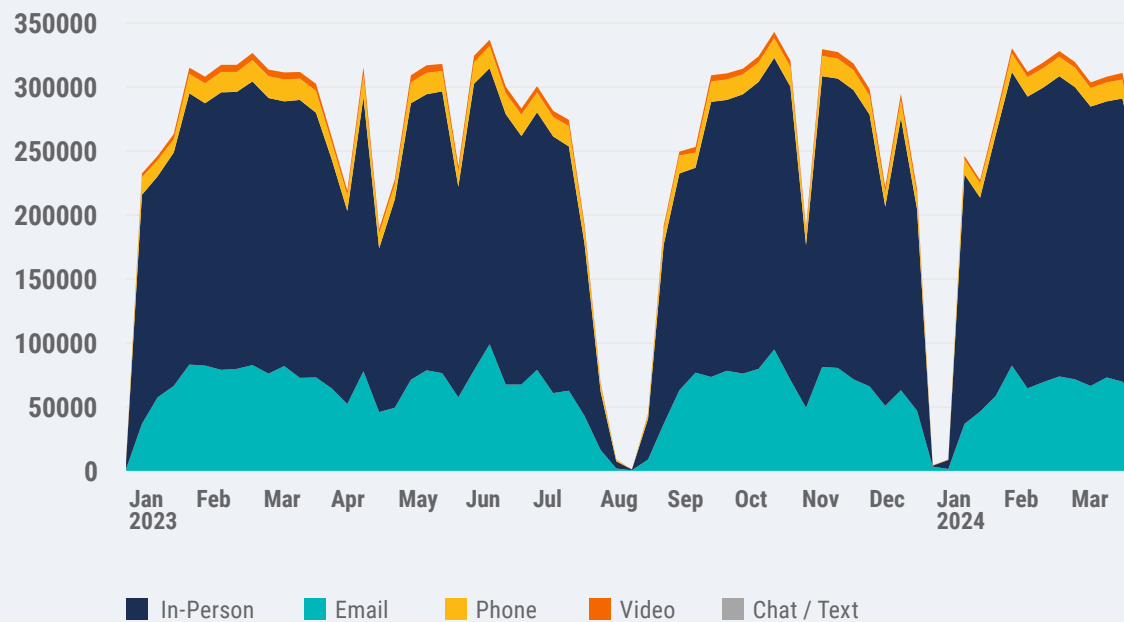


IT HCP Selectivity by Specialty 2023

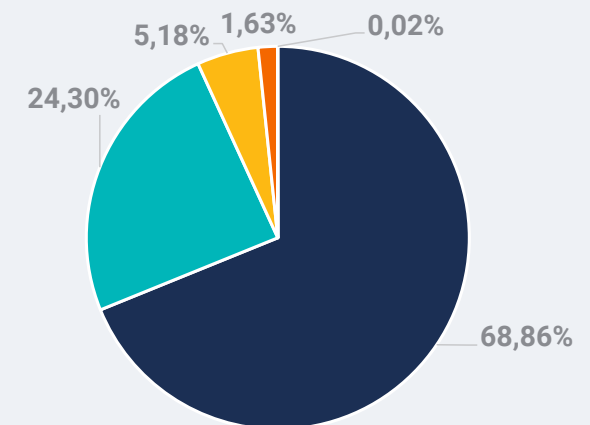


In-person meetings and emails represent the most frequent channels of communication

Channel Mix Evolution IT



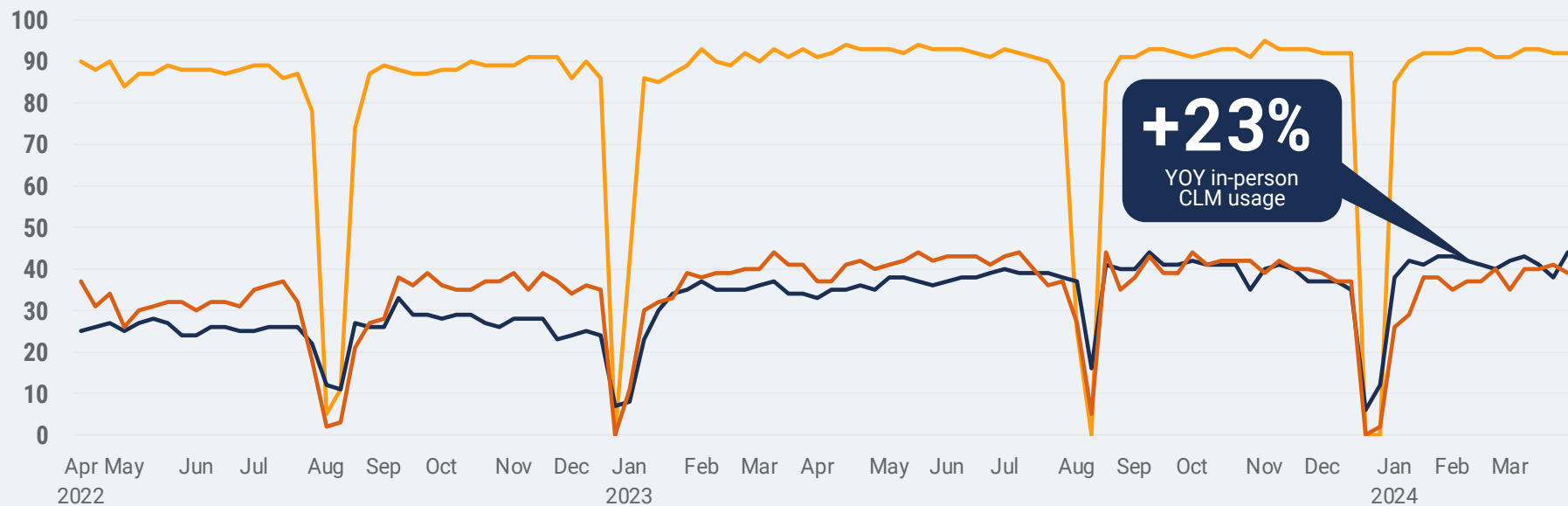
IT Channel Mix



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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