

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

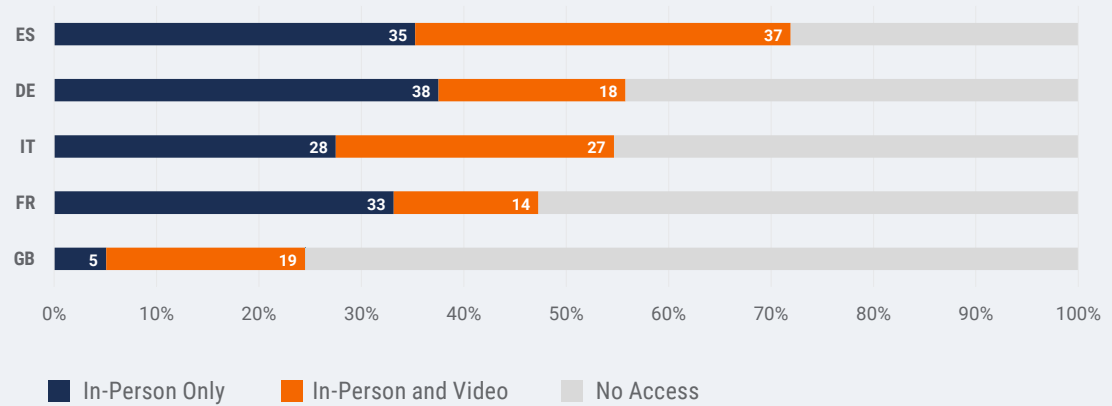
HCP access across EU5 has fallen to pre-pandemic levels, dropping to 53%

The hardest-to-reach specialties are urology and psychiatry

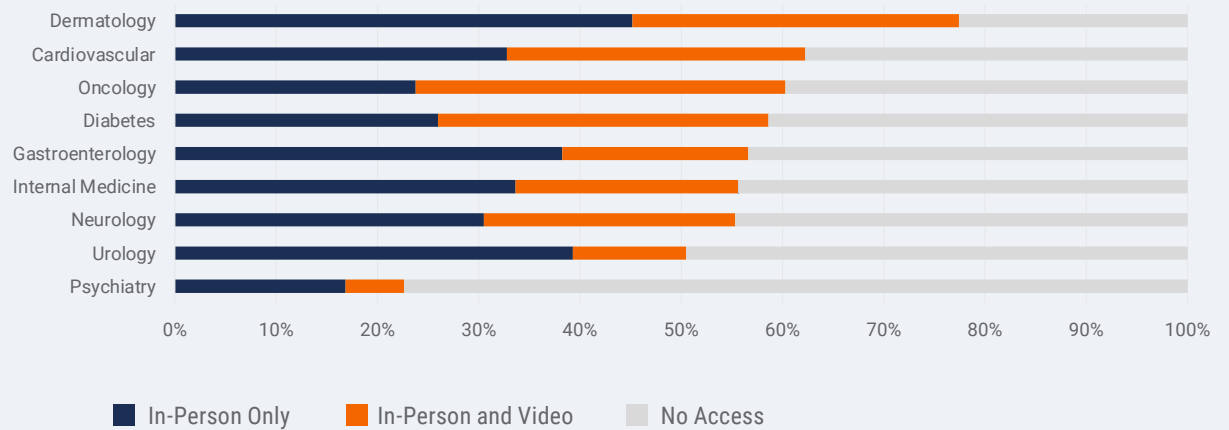
42% of accessible customers across EU5 are open to in-person and video engagements

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.

HCP Access, EU5 2023¹

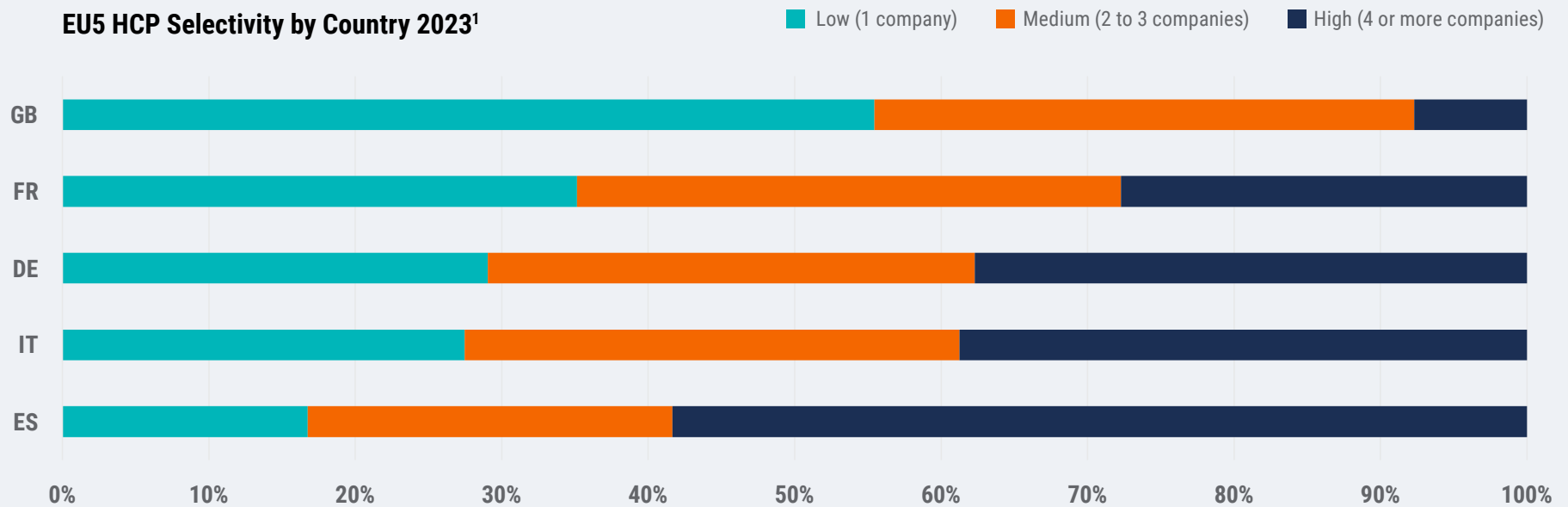


HCP Access EU5 2023 by Specialty and Channel¹



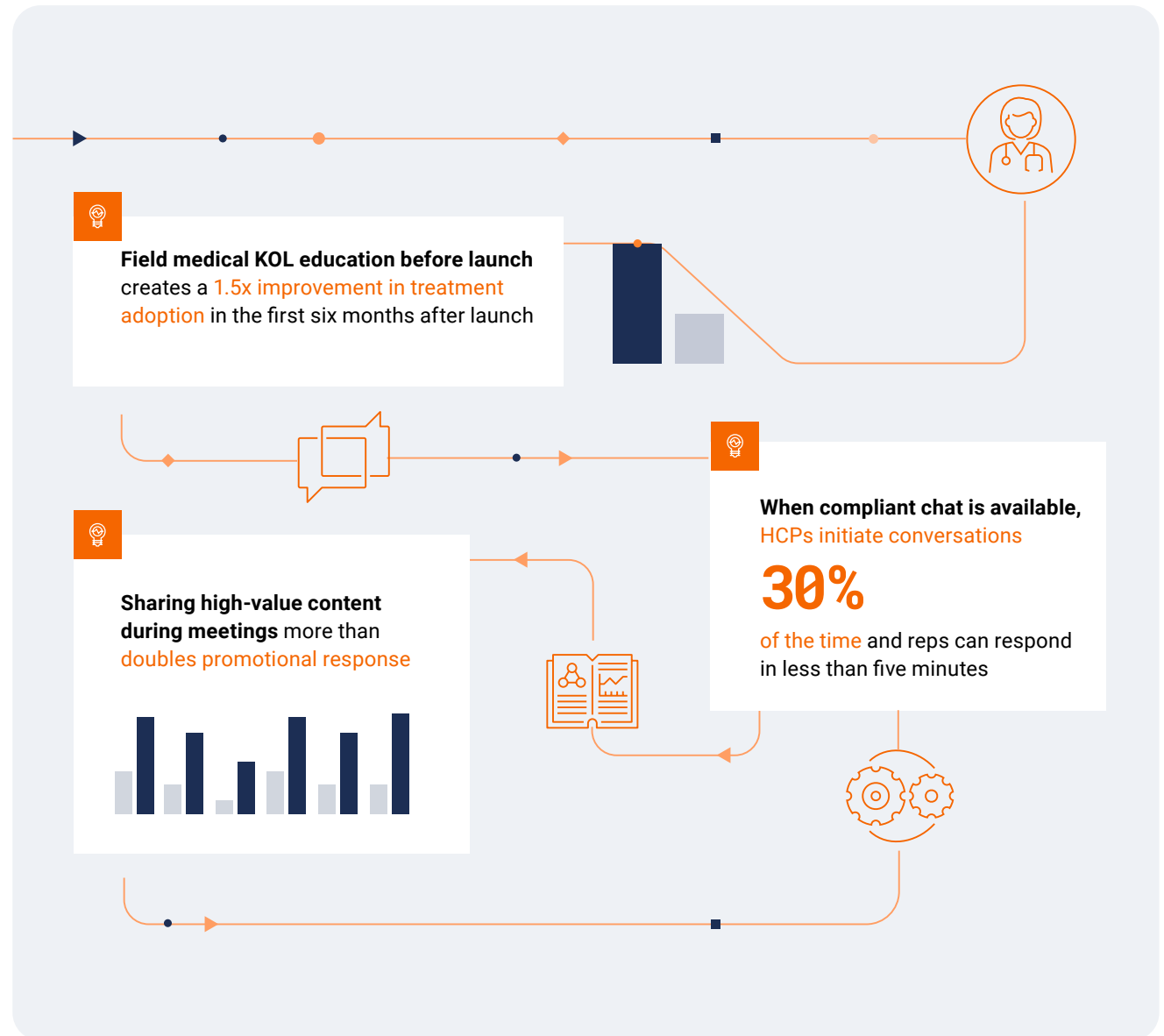
62% of accessible HCPs only meet with three or fewer companies

EU5 HCP Selectivity by Country 2023¹



¹HCP 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.

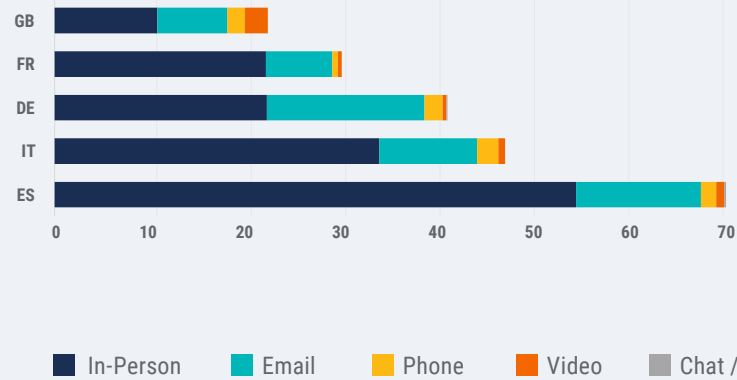
Connected engagement models strengthen HCP relationships¹



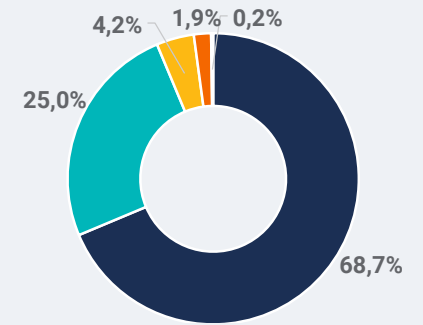
¹ Veeva Pulse data, U.S

Field activity and channel mix varies across EU5 markets

Channel Activity per Rep by Country

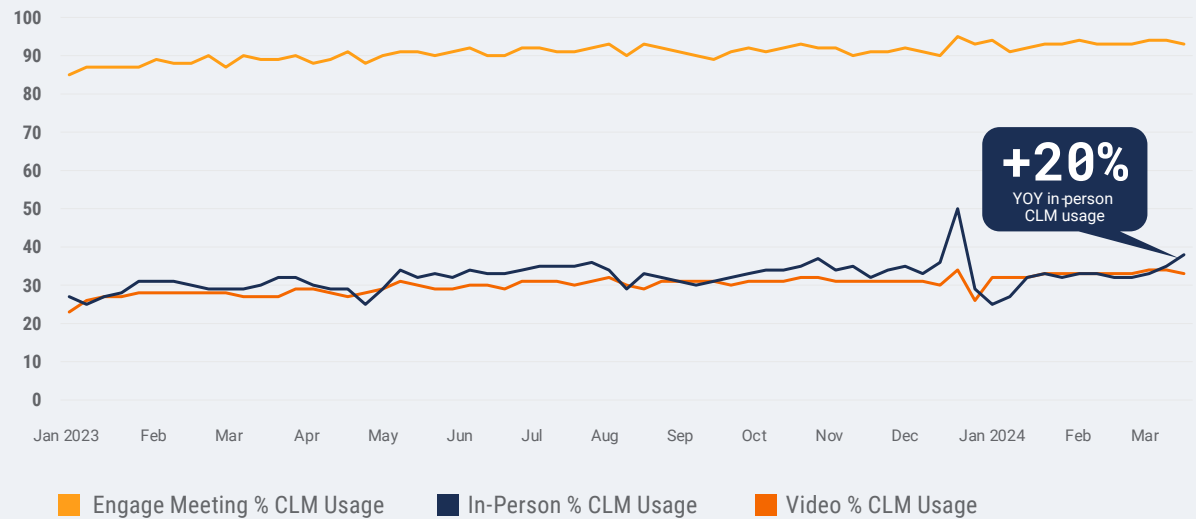


EU Channel Mix



Content usage is steadily rising across the EU

% CLM Use January 2023 to March 2024 EU5



Spain Analysis



Veeva
Pulse Field Trends Report

Q1 2024



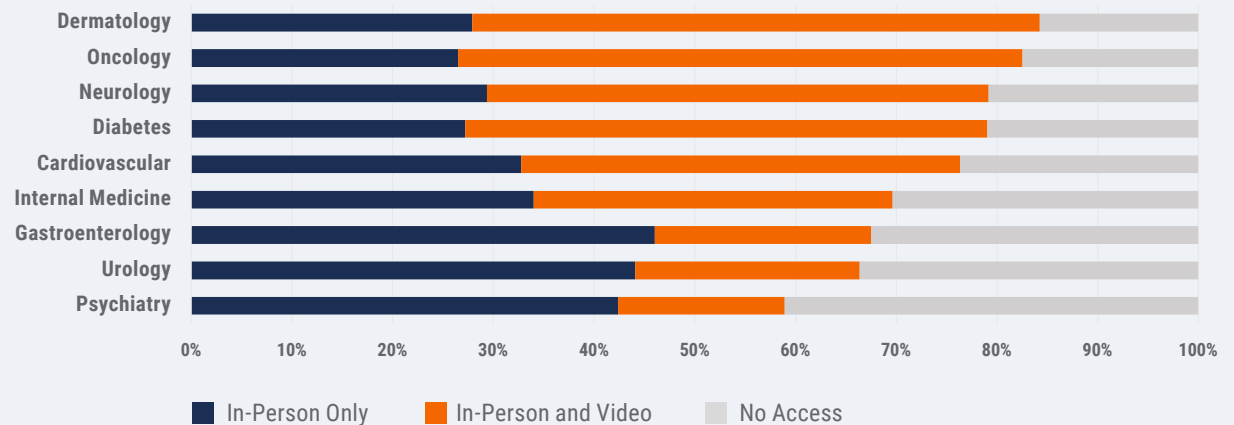
The hardest-to-reach specialties are internal medicine and psychiatry

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

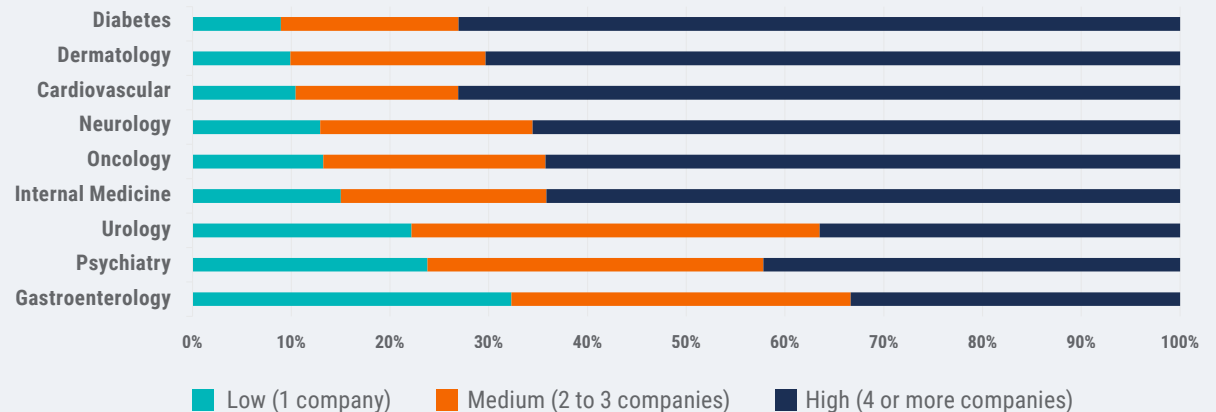
42% of accessible HCPs meet with three or fewer companies, being the least selective across EU5

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 ES 2023 by Specialty and Channel¹

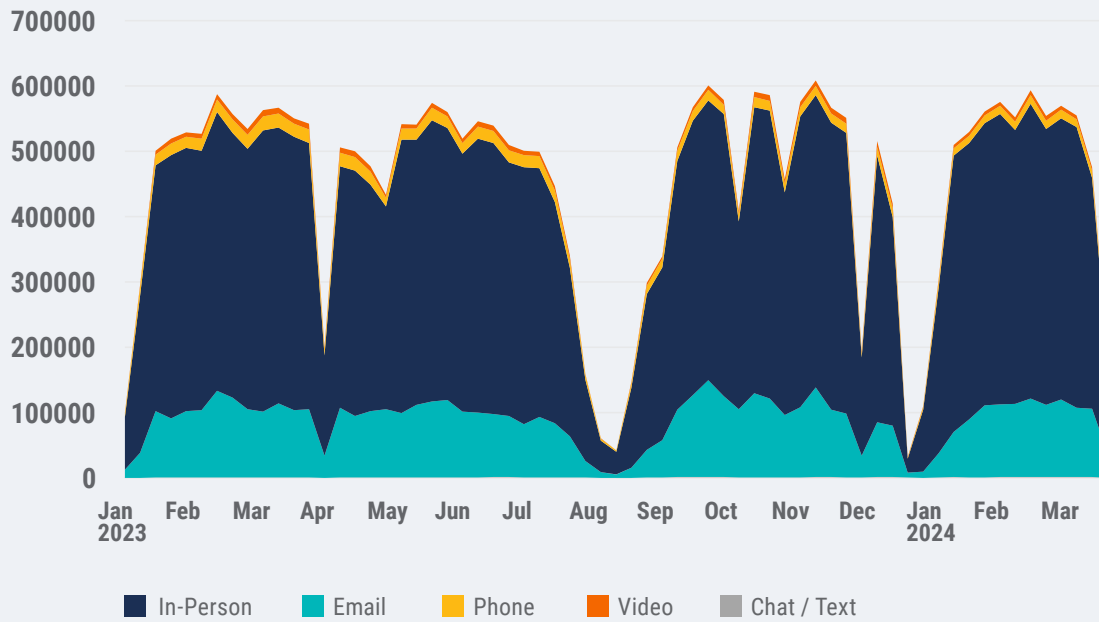


ES HCP Selectivity by Specialty 2023

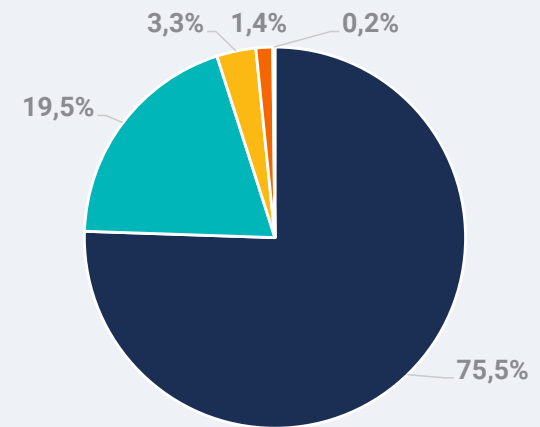


In-person meetings represent the most frequent channel of interaction in Spain

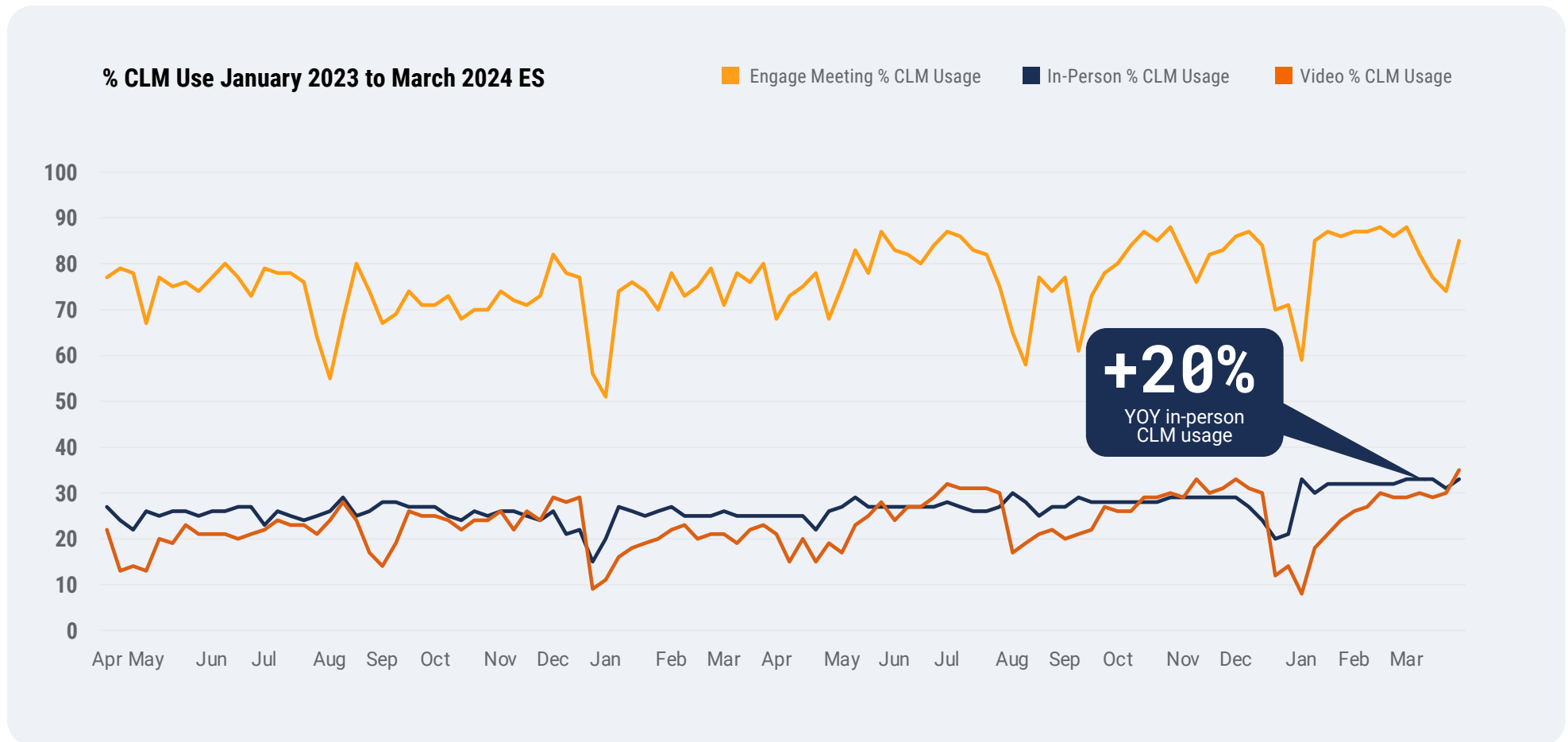
Channel Mix Evolution ES



ES Channel Mix



Content usage is steadily rising in Spain





Veeva is the global leader in cloud software for the life sciences industry. Committed to innovation, product excellence, and customer success, Veeva serves more than 1,100 customers, ranging from the world's largest biopharma companies to emerging biotechs. As a Public Benefit Corporation, Veeva is committed to balancing the interests of all stakeholders, including customers, employees, shareholders, and the industries it serves. For more information, visit www.veeva.com/eu.