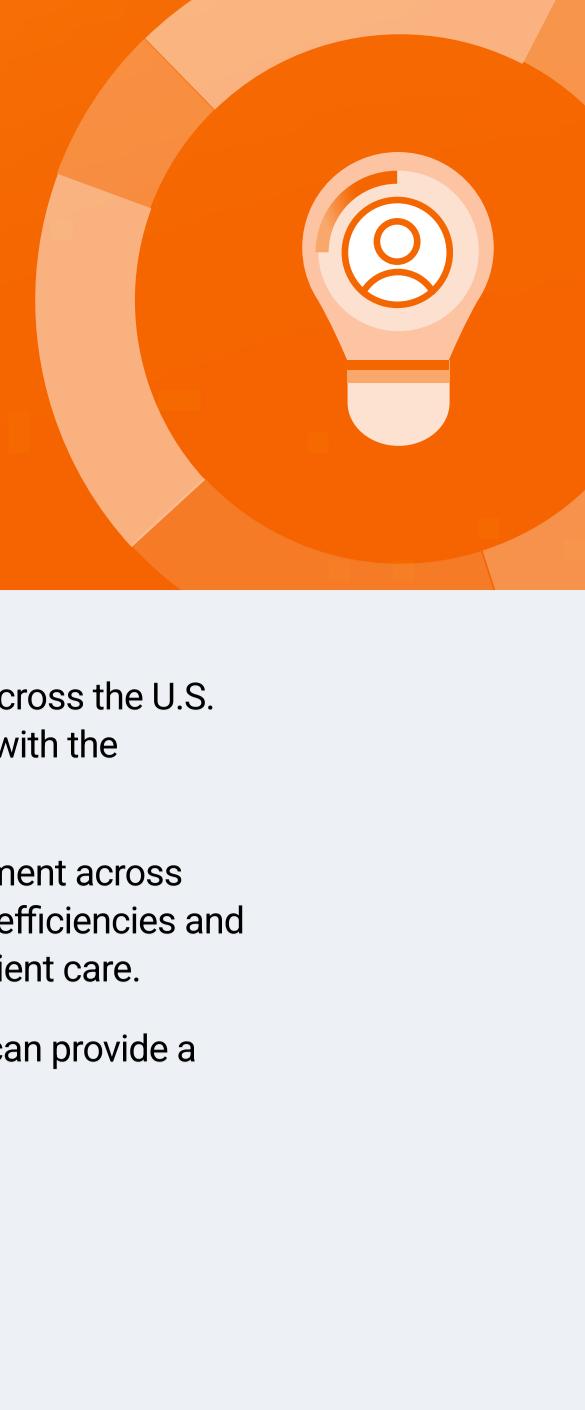


2024 KOL SATISFACTION REPORT



Veeva surveyed more than 100 key opinion leaders (KOLs) across the U.S. and Europe to understand their satisfaction when engaging with the biopharma industry, specifically with field medical teams.

Although KOLs are satisfied overall, they often see misalignment across biopharma functions. This lack of coordination can cause inefficiencies and a suboptimal customer experience, ultimately impacting patient care.

KOLs also highly value scientific exchange with MSLs, who can provide a deeper level of expertise.

Key Findings

94%

say scientific exchange between clinical experts and pharmaceutical companies is becoming more important*

TOP REASONS WHY

- There is an increased volume of scientific data
- Healthcare challenges require deeper collaboration between clinical and scientific experts and industry
- The value of scientific exchange with companies is increasing

KOL Engagement Across Biopharma Functions**

56%

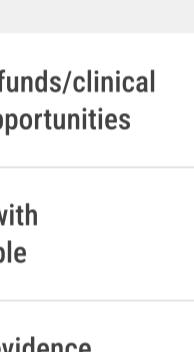
interact with clinical, medical, and sales field teams

72%

interact with medical and sales field teams

18%

interact with all functions (including headquarters)



KOL Satisfaction with Biopharma Engagement**

86%

are satisfied or very satisfied with pharma engagement

32%

say satisfaction with engagement varies substantially across companies

44%

see a lack of coordination and/or alignment across functions



Field Medical Teams Highly Valued

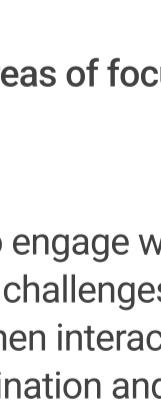
With their scientific background and deep knowledge of evidence, MSLs are the most critical company representatives with whom KOLs interact.

88%

say MSLs bring relevant information to meetings**



MSLs are the second highest valued information source offered by the pharmaceutical industry (in rank order).*



KOLs see many benefits from interacting with MSLs. The most important being opportunities to work on trials, scientific exchange and dialogue, and access to relevant data and evidence.*

Which source of information offered by the pharmaceutical industry gives you the highest value?

| | |
|---|----------------------------------|
| 1 | Medical education events |
| 2 | Engagement with MSLs |
| 3 | Advisory boards |
| 4 | Company symposia |
| 5 | Printed materials |
| 6 | Company emails/digital materials |
| 7 | Engagement with commercial reps |
| 8 | Company websites |

What is the most important benefit you get from interacting with MSLs (in rank order)?

| | |
|---|---|
| 1 | Access to research funds/clinical trial participation opportunities |
| 2 | Scientific dialogue with knowledgeable people |
| 3 | Access to relevant evidence (publications, posters, etc.) |
| 4 | Opportunities to exchange with peers (advisory boards, scientific meetings) |
| 5 | Access to relevant product information |
| 6 | Speaking opportunities |
| 7 | Invitation to congress, symposium |

*Survey 1: 100 Oncology KOLs (50 US/50 EU), May-August 2024

**Survey 2: 50 KOLs (31 US/19 EU), 10 UK, 4 DE, 2 ES, 2 IT), September-November 2024

KOLs are qualified by participating in at least three activities: Publishing in scientific journals, involvement in clinical trials, speaking at conferences, and contributing to guidelines.

*Specialty:

- Oncology (68%)

- Cardiology (15%)

- Neurology (4%)

- Immunology (2%)

- Endocrinology (2%)

Average KOL patient care: 78%

Less No Change More

In-person Virtual

Emails Text/Online chat