

VEEVA PULSE FIELD TRENDS REPORT

As Access Declines, Connected Engagement Creates an Edge

Eighteen months ago, 60% of HCPs were accessible to biopharmas — today, it sits at 45%. Now we know that the higher level of access the industry saw in 2022 was a post-pandemic overcorrection, and the pendulum is swinging back. HCPs are also just as selective, with about half limiting access to three or fewer biopharmas.

Despite this, biopharmas are finding new ways to make the most of their time with HCPs. Increasingly, we're seeing new models that prioritize relevance and timeliness over traditional measures like reach and frequency. Personalization, real-time communication channels, and relevant content are giving HCPs what they need, when they need it. And showing up as one connected company across sales, marketing, and medical is building high-quality, trusted relationships between field teams and HCPs.

As Dr. Vital Hevia, a urologist at Hospital Ramón y Cajal, reminds us:

"We need three things from the industry to get the right patient outcome: trustworthy, high-quality product information, scientific education for us as physicians, and research insights. Physicians must be continuously educated. Every interaction should inform the next communication."

Read Veeva Business Consulting's in-depth analysis to learn how a more connected approach across sales, marketing, and medical can extend HCP relationships and deliver medicines to patients who need them.

Thank you,



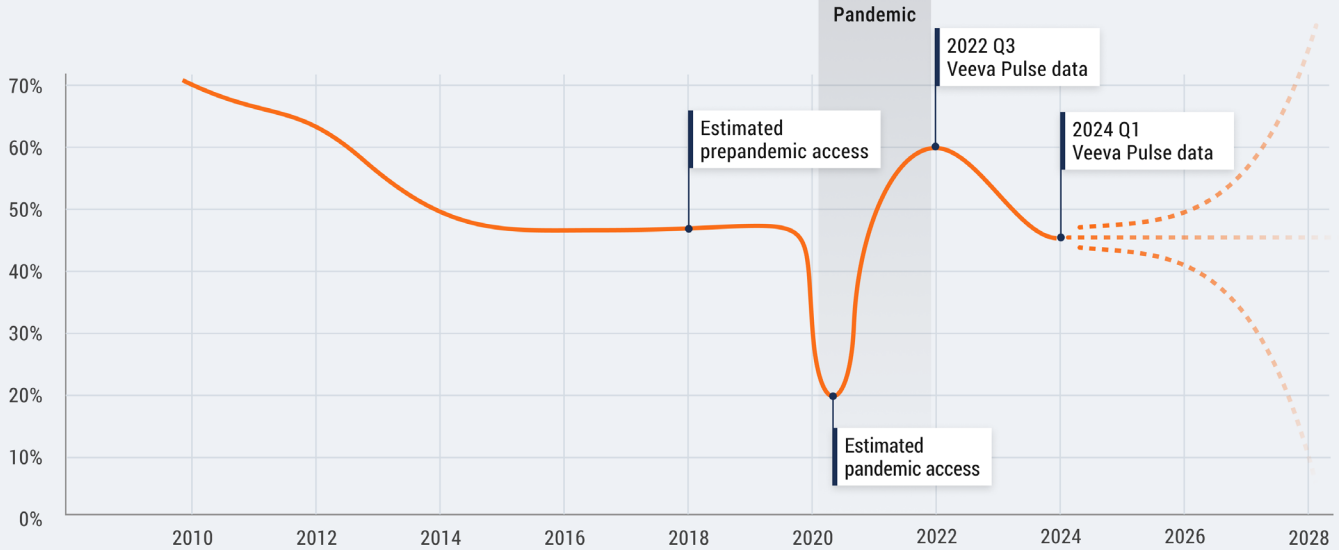
Dan Rizzo
Global Head of Veeva Business Consulting



HCP access declined from 60% to 45%

HCP access in the U.S. is back to pre-pandemic levels, dropping from 60% in 2022 to 45% in 2024. A number of underlying factors continue to influence decreasing HCP access — including increased market consolidation, health system restrictions, growing patient loads, and the diversity and complexity of modern medicine.

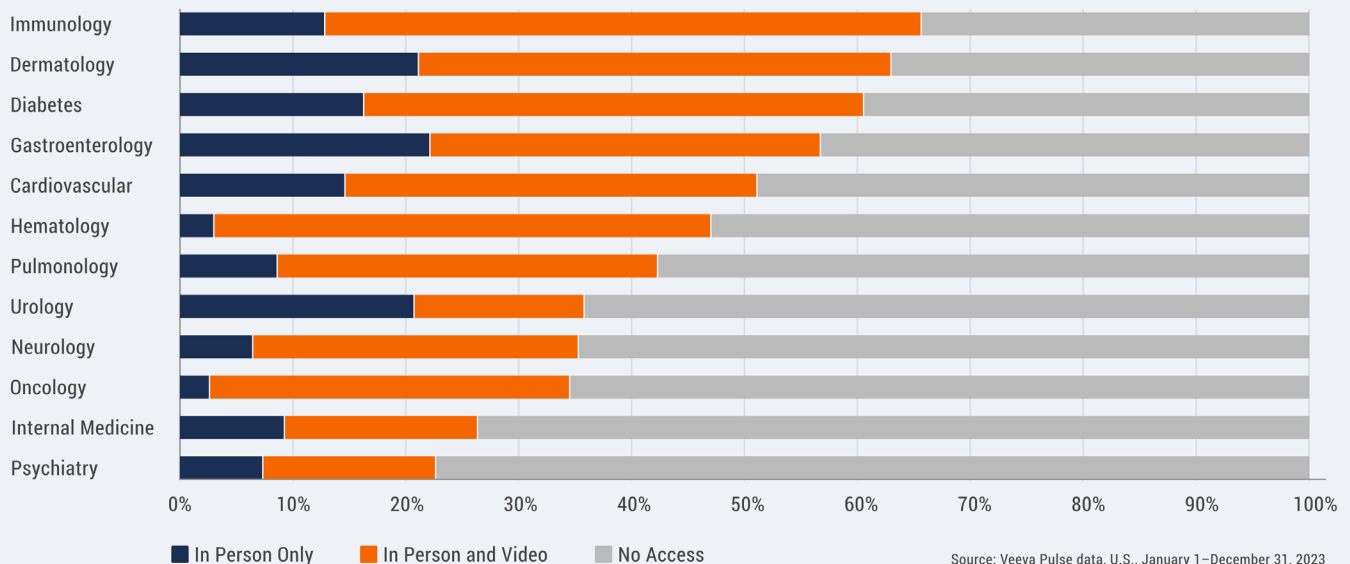
U.S. HCP Access, 2010–2024



Source: Veeva Pulse data, 2022–2024

Access also varies greatly by specialty and channel, as seen in the figure below. The hardest-to-reach specialties are oncology, internal medicine, and psychiatry. HCPs who are accessible via both in-person and video represent an increasing share of overall access compared to prior years.

U.S. HCP Access by Top Specialty and Channel

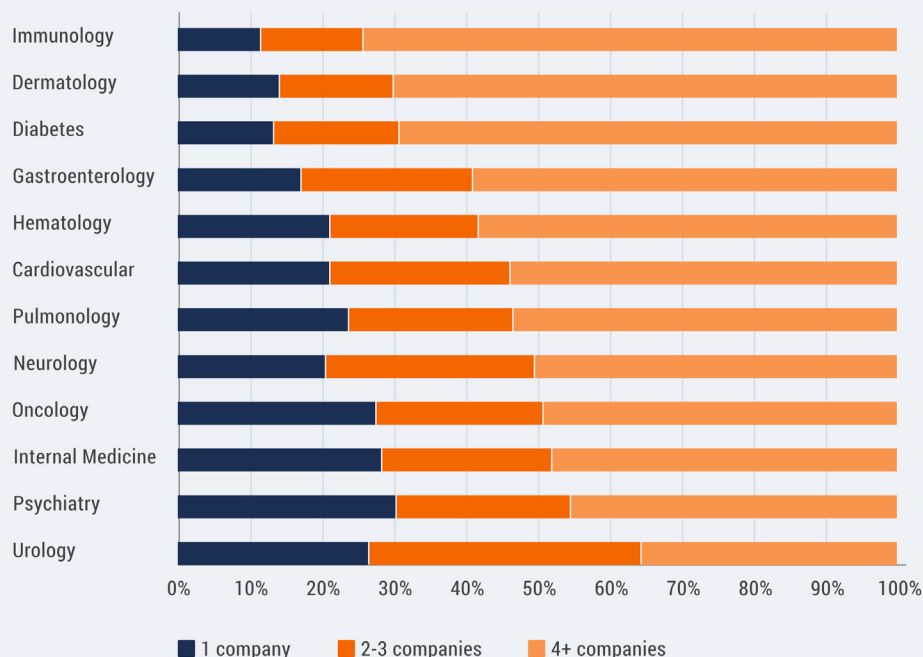


Source: Veeva Pulse data, U.S., January 1–December 31, 2023

Half of accessible HCPs meet with three or fewer companies

HCPs remain highly selective when it comes to engagement with biopharmas — half of accessible HCPs meet with three or fewer companies. HCP access also varies greatly by specialty. Internal medicine, oncology, psychiatry, and urology remain the most restrictive specialties, with nearly 30% of HCPs restricting access to just one company.

U.S. HCP Selectivity by Top Specialty



Half of accessible HCPs meet with three or fewer biopharmas.



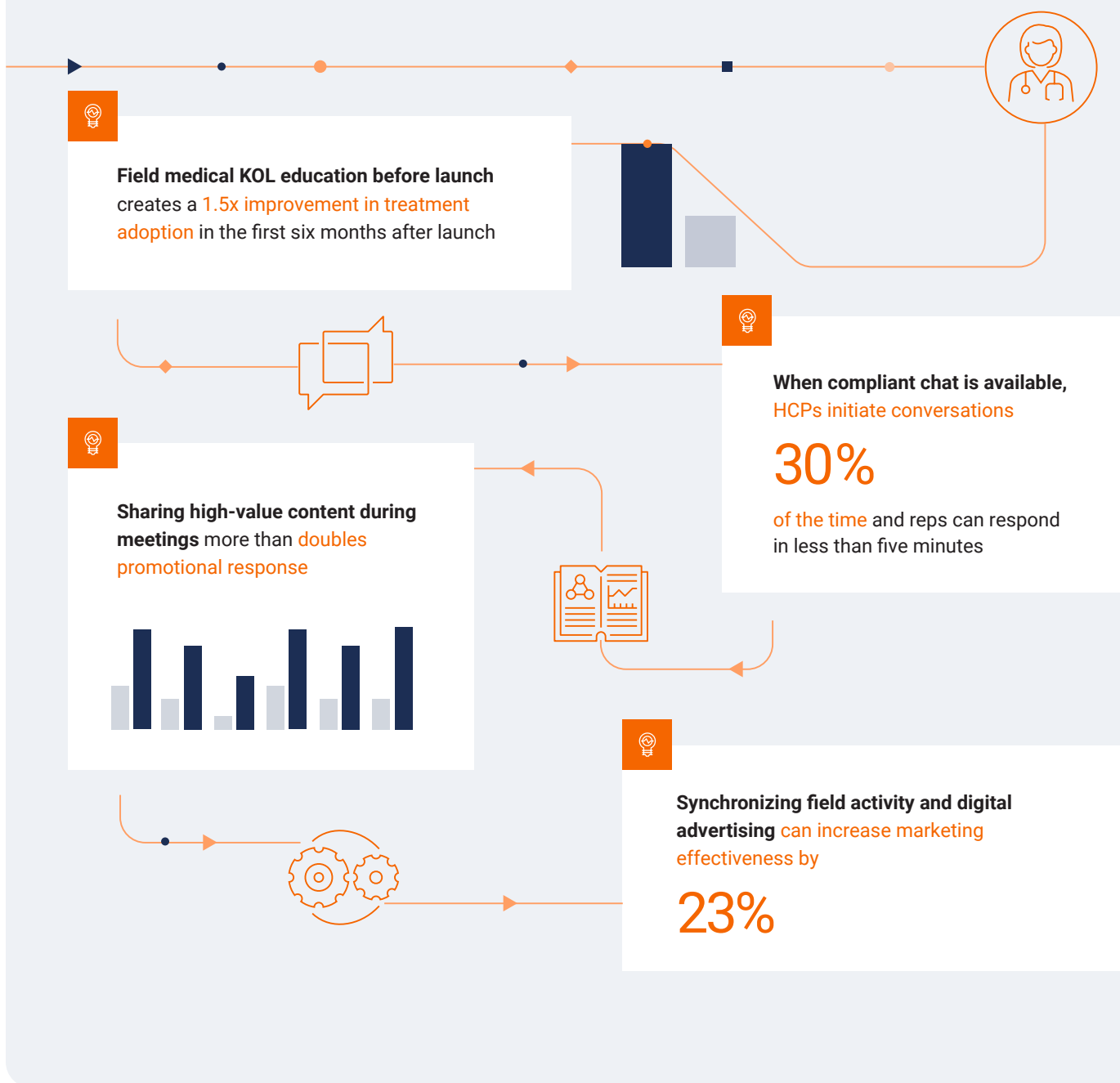
Source: Veeva Pulse data, U.S., January 1–December 31, 2023

Connected engagement models strengthen HCP relationships

Although access has declined back to pre-pandemic levels, the way biopharmas engage HCPs has evolved significantly during this time. Connected engagement models — where sales, marketing, and medical work together seamlessly — are extending conversations with customers, responding more quickly to HCPs' needs, and improving treatment adoption.

Now, there are early signs the industry is engaging HCPs in a more connected way. Here's how a connected engagement model improves outcomes and delivers a better customer experience.

Connected HCP Engagement



Reach out to **Veeva Business Consulting** to find out how you can use Veeva Pulse data to create a coordinated approach across sales, marketing, and medical.