



**BRAKKE CONSULTING, INC.**  
THE EXPERTS IN ANIMAL HEALTH

## **BRAKKE MULTI-CLIENT STUDIES**

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### Market Segment Studies

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#### **Pain Management Products in Dogs and Cats (April 2018)**

*Project manager: Lynn Fondon*

**Published annually in April**

An annual overview of the US market for small animal analgesics, including product sales and pricing, products in development, and a survey of veterinarians. The report also discusses use of joint supplements, therapeutic diets, and complementary therapies. A must-have report for companies in the pain management market, offering insights into market trends, product pipelines, and veterinary usage, perceptions, and future needs.

#### **Equine Market Mega Study (January 2018)**

*Project manager: John Volk*

A comprehensive study of horse owner buying and decision-making behavior. The research includes more than 400 brands in 17 product categories. It examines what brands were purchased, how often they were purchased, where they were purchased, amount of money spent, and who most influenced the selection of brands. The study also gathers detailed information on horse owner demographics, reading habits, Internet and social media usage, involvement in equine events, and a host of other data. This is the 4<sup>th</sup> edition of this popular report. Excellent data for marketing, advertising & sales planning, as well as market share & competitive analysis.

#### **US Flea Control and Heartworm Markets (December 2017)**

*Project manager: Lynn Fondon*

**Published annually in December**

An in-depth look at the flea, tick and heartworm markets, including product sales and pricing, advertising expenditures, products in development, and surveys of veterinarians and pet owners. Produced annually for the past 20 years, this report is the authoritative source for competitive data and user perceptions for the largest segment in the companion animal market.

#### **Cancer in Dogs and Cats (September 2017)**

*Project manager: Lynn Fondon*

The 2017 Cancer Study includes information on the incidence, diagnosis, and treatment of the common veterinary cancers, including treatment cost estimates. The study includes a survey of 350 general veterinary practitioners as well as interviews with veterinary oncologists. A survey of 500 pet owners about cancer treatment for their pet is also included. Reviews of new and developing veterinary cancer chemotherapeutics are included in the report as well. The report is a valuable overview of a high-interest segment of the veterinary market.

#### **US Veterinary Generic Drugs Market (October 2016)**

*Project manager: Lynn Fondon*

The report is an overview of small package generic pharmaceuticals for animal health. The report includes the origin and evolution of animal health generics, estimates of the market size, generics use in large vs. small animals, growth of small animal generics, and profiles of leading generic drug manufacturers. If your company competes in or is considering entering the veterinary generic drugs market, this report is an excellent source of information to assist in your strategic planning efforts.

### **Pet Dental Market Study (December 2014)**

*Project manager: John Volk*

This report quantifies pet owners' awareness of the need for pet dental care, as well as their purchases of dental products and services in both the professional and OTC channels. The study also analyzes the role of dental care products and services in veterinary practice. The 116-page study is based on nationally representative surveys of both pet owners and veterinarians. An authoritative report on the US pet dental market and opportunities for dental product companies.

### **Veterinary Drug Compounding (March 2013)**

*Project manager: Lynn Fondon*

The study answers questions such as: how big is the veterinary compounding market? What drugs do veterinary compounders offer? What types of companies are offering compounding services, and how many are there? How frequently are veterinarians using compounding services? Are there differences in veterinary usage between equine and small animal practitioners? The information in the report is based on interviews with industry participants and experts, as well as surveys of small animal and equine veterinarians.

## **Benchmarking Studies**

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### **Sales Force Effectiveness Study (coming December 2018)**

*Project manager: Bob Jones*

#### **Published biannually**

Biannual survey of approximately 1,000 companion animal practitioners about their interaction and ratings of field sales representatives of the 20 largest manufacturers that call on companion animal practices. Respondents rate companies for company level attributes, field sales rep attributes, and inside sales rep attributes shown to be important to veterinarians. Regression analyses used to identify drivers of *High Overall Performance* rating and *Higher Purchase Levels*. Each subscriber's customized report presents their company's ratings compared to mean ratings of all companies nationally and for 5 geographic regions. Differences between corporate and independent practices are analyzed as well. Both small and large companies use these reports to identify performance strengths and identify areas to focus on for sales force effectiveness improvement.

### **US Companion Animal Veterinary Technical Services (March 2018)**

*Project manager: Cary Christensen*

#### **Published biannually**

A comprehensive evaluation of the veterinary services teams of the major U.S. animal health, pet nutrition, and diagnostic companies. Based on interviews with more than 600 practicing veterinarians, the survey evaluated each team's effectiveness in providing product support, technical education, and adverse event management. The study identified where each company excelled, as well as the most productive opportunities for improvement. This "first of its kind" study revealed what practicing veterinarians value in terms of companion animal technical support and education as well as the attributes that they feel are most important in a technical support person. Subscribers found this information useful in comparing their teams across the industry as well as areas for improvement within their own team. The 2018 study, to be conducted in late 2017, will provide a first opportunity for measuring improvement against the 2016 results.

### **Distributor Effectiveness Study (December 2017)**

*Project manager: Bob Jones, Lynn Fondon*

#### **Published biannually**

Biannual report is based on survey of approximately 1,000 companion animal practitioners about purchasing decisions and performance of distributors that serve their market areas. Examples of report topics include: performance ratings of distributors against 30 company level, field sales representative and inside sales representative attributes veterinarians consider important, inferred market share by region, drivers of higher purchases, field sales representative and company overall performance ratings. Report serves as a valuable management tool for both distributors and manufacturers to compare ratings and identify opportunities to improve future results.

### **Food Animal Sales Team Study (July 2015)**

*Project manager: John Volk*

A comprehensive survey of producers, veterinarians and nutritionists on the effectiveness of sales forces of companies selling pharmaceuticals and biologicals for beef, dairy, swine and poultry. Respondents rate companies' attributes shown to be important to customers, and they rate field sales representative performance on 14 key attributes. Regression analyses used to identify drivers of High Overall Performance rating and Higher Purchase Levels. Each subscriber receives a customized report, complete with scorecard, that is an excellent resource for sales planning, sales training and competitive sales analysis. The Food Animal Sales Team Study also measures level of contact and customer satisfaction with technical service personnel.

## **Current Issue Studies**

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### **Veterinary Practice Home Delivery (May 2018)**

*Project manager: Lynn Fondon*

Pharmacy sales represent an important component of a veterinary clinic's revenues. In today's competitive environment, veterinarians increasingly need to offer innovative, convenient solutions to successfully compete with online pet pharmacies and retail sources. Developed from the data collected for Brakke's biannual Distributor Effectiveness Study, the report contains key information about companion animal veterinarians' approach to providing the convenience in purchasing veterinary products demanded by their clients.

### **New Strategies for US Livestock and Poultry Production (January 2017)**

*Project manager: John Volk*

This new study from Brakke Consulting examines what changes producers are and will be making due to the loss of shared use antibiotics for growth promotion and the new Veterinary Feed Directive (VFD) effective Jan. 1, 2017. The study examines: changes in production systems; new approaches, technologies and products producers are adopting; new feed additives they are considering; who and what most influence decision-making; quality of information and support from supplier companies; how producers will measure results of changes; and much more.

**Changing Pet Ownership Study (April 2016) .....**

*Project manager: Ron Brakke*

A comprehensive review of the generational differences in pet ownership, life-style-based behavior and attitudes, pet-drug purchasing trends, and future desires for the delivery of pet care. In addition, the study examines why non-pet owners don't own pets, their future intent to own pets, and what could prompt pet ownership in the future. The study also investigates the differences in the behaviors and attitudes of Hispanic pet owners, the types of pets owned, who influences their decisions, and where they seek information on pet health and pet products.

**Pet Pharmaceuticals Market Shift Study (April 2015) .....**

*Project manager: Ron Brakke*

A comprehensive review of the ongoing trends in the pet pharmaceutical marketplace. The study provides an analysis of input expressed by pet owners, companion animal practitioners, and major human drug pharmacies. The report outlines the potential implications of these trends for animal health industry. The report provides a series of possible future scenarios with the potential outcomes and implications for industry, the marketplace, and the veterinary profession.

**FOR MORE INFORMATION OR TO ORDER A STUDY**

**Contact the study's project manager at the following number or email address:**

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**If you wish to purchase multiple studies in a single transaction, contact Dr. Lynn Fondon at (972) 243-4033 for discount information.**