

MULTI-CLIENT STUDIES

Market Segment Studies

Veterinary Practice Home Delivery (May 2022)

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 from 1,400 companion animal veterinarians for Brakke's biannual Sales Force Effectiveness Study, the report contains key information about companion animal veterinarians' approach to providing the convenience in purchasing veterinary products demanded by their clients.

Equine Market Mega Study (coming August 2022)

Project manager: Lynn Fondon

A comprehensive study of horse owner buying and decision-making behavior. The research includes more than 450 brands in 20 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 5th edition of this popular report. Excellent data for marketing, advertising & sales planning, as well as market share & competitive analysis.

Cancer in Dogs and Cats (coming fall 2022)

Project manager: Lynn Fondon

The 2022 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 300 general veterinary practitioners, as well as a survey of 500 pet owners about cancer treatment for their pet. 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.

Pain Management Products in Dogs and Cats (April 2022)

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 over 350 veterinarians. The report also discusses use of joint supplements, therapeutic diets, and complementary therapies. Dispensing data on pain products is also included in the report. 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.

US Flea Control and Heartworm Markets (December 2021)

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.

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

Sales Force Effectiveness Study (May 2021)

Project manager: Bob Jones

Published biannually

Biannual survey of approximately 1,400 companion animal practitioners about their interaction and ratings of field sales representatives of the 15 largest manufacturers and top 5 distributors that call on companion animal practices. Respondents rate companies for company level attributes and field sales rep attributes shown to be important to veterinarians, including questions around support during the COVID pandemic and video-based sales calls. 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.

Field Sales & Veterinary Teams of Leading Animal Health Co's (Spring 2021)

Project manager: John Volk

Published annually

An annual census of field sales reps, inside sales reps, sales management, professional service veterinarians and management and other field specialists for 11 animal health and diagnostic

companies. Companies covered in the report include: Boehringer Ingelheim Animal Health, Ceva, Dechra, Elanco Animal Health, Heska, IDEXX, Merck Animal Health, Virbac, Vetoquinol and Zoetis.

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.

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

COVID-19: Impact on Pet Care (May-August 2020)

Project manager: Lynn Fondon

The coronavirus pandemic disrupted life in many ways and pet care is no exception. A new study from Brakke Consulting documented significant changes in veterinary care and pet product purchasing. *COVID-19: Impact on Pet Care* is a nationally representative survey of 1,000 pet owners conducted in 3 waves in the summer of 2020. The study offers significant detail on pet product purchases, especially the largest categories of pet food and parasiticides, purchase channels, veterinary care, use of telemedicine and a host of other topics.

Pet Health Products: Changing Channels (January 2020)

Project manager: John Volk

This report measures and characterizes the most dynamic changes taking place in the marketing of pet products – the emergence of new channels and the changing purchasing behaviors of pet owners, especially as it relates to products traditionally purchased at the veterinary clinic. The report is based on two national, representative studies: one of over 1,000 pet owners, the other of over 550 companion animal veterinarians. The data from these surveys are compared to data from previous Brakke studies in these areas to highlight trends.

The Companion Animal Veterinary Telehealth Landscape (October 2018)

Project manager: Lynn Fondon

Telehealth and telemedicine are one of the hottest topics in human medicine, and it's now making inroads in veterinary medicine. This report provides an overview of the evolution of veterinary telehealth; a review of the regulations governing veterinary telehealth; profiles of veterinary telehealth providers; and surveys of 450 veterinarians and 500 pet owners probing their awareness and use of veterinary telehealth, and likelihood of using telehealth in the future.

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

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If you wish to purchase multiple studies in a single transaction, contact Dr. Lynn Fondon at (336) 396-3916 for discount information.