

Survey Results



Industry Perspectives on NSAIDs _____



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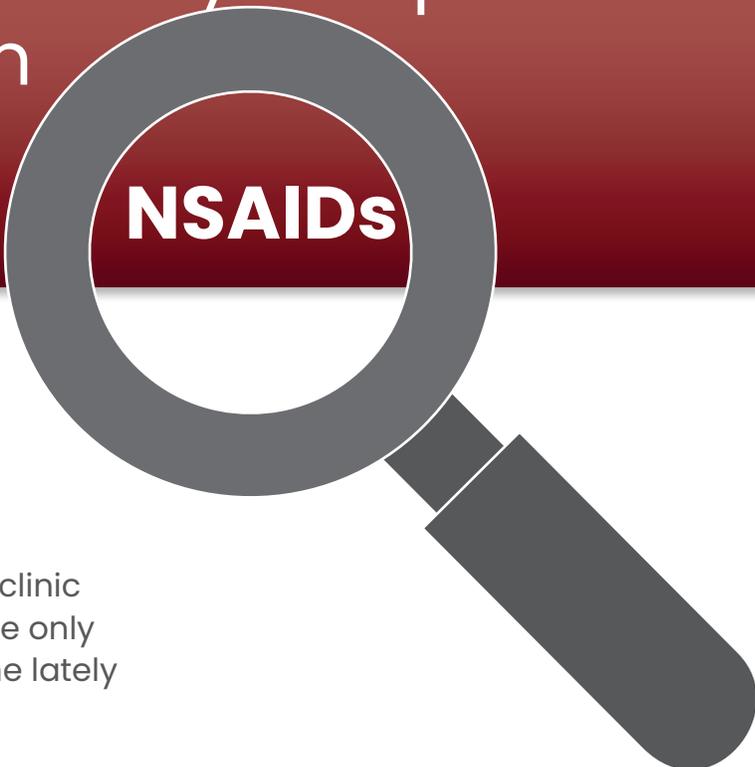
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Survey Findings

Industry Perspectives on



NSAIDs

Pet owner demographics and clinic needs are changing. In fact, the only constant in veterinary medicine lately has been change.

Companion surveyed the industry to find out how pain management preferences have evolved.

We received an overwhelming 600+ responses. This eBook contains a summary of our findings and key market data points.



Clinical Preferences

100%

of veterinarians prefer to start with a side effect-free treatment for pain if efficacy is the same.



Top pain management treatments

1. NSAIDs (95%)
2. Gabapentin (93%)
3. Laser Therapy (70%)
4. Opioids (62%)
5. Corticosteroids (59%)
6. COX-2 Inhibitors (54%)
7. Herbal Supplements (28%)
8. Acupuncture (26%)
9. Platelet Rich Plasma (12%)
10. Shockwave (4%)

Laser Therapy was one of the top 3 pain management treatments used by 70% of responding veterinarians.



Veterinarians were asked to rank the order in which they use pharmaceuticals, nutraceuticals, targeted non-invasive treatments, and other supplements for pain management



#1 Pharmaceuticals



#2 Nutraceuticals Including Glucosamine, and Chondroitin



#3 Targeted Non-Invasive Treatments



#4 Other Supplements or Herbs



100% of respondents preferred a side effect-free treatment as a first-line treatment for pain management, but targeted non-invasive treatments are typically the **third** tool in pain management protocols.



of veterinarians **have either added**, or are **considering targeted**, drug-free pain management services to reduce reliance on pharmacological treatments. _____



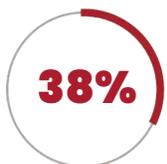
Targeted Pain Management

Top pain management tools for clinics using targeted therapies:



#1

Laser Therapy



#2

Acupuncture



#3

Physiotherapy



#4

Platelet Rich Plasma (PRP) Therapy



#5

Stem Cell Therapy

#1

Laser Therapy

63%

#2

Acupuncture

23%

#3

Physiotherapy

19%

#4

Platelet Rich Plasma (PRP) Therapy

18%

#5

Stem Cell Therapy

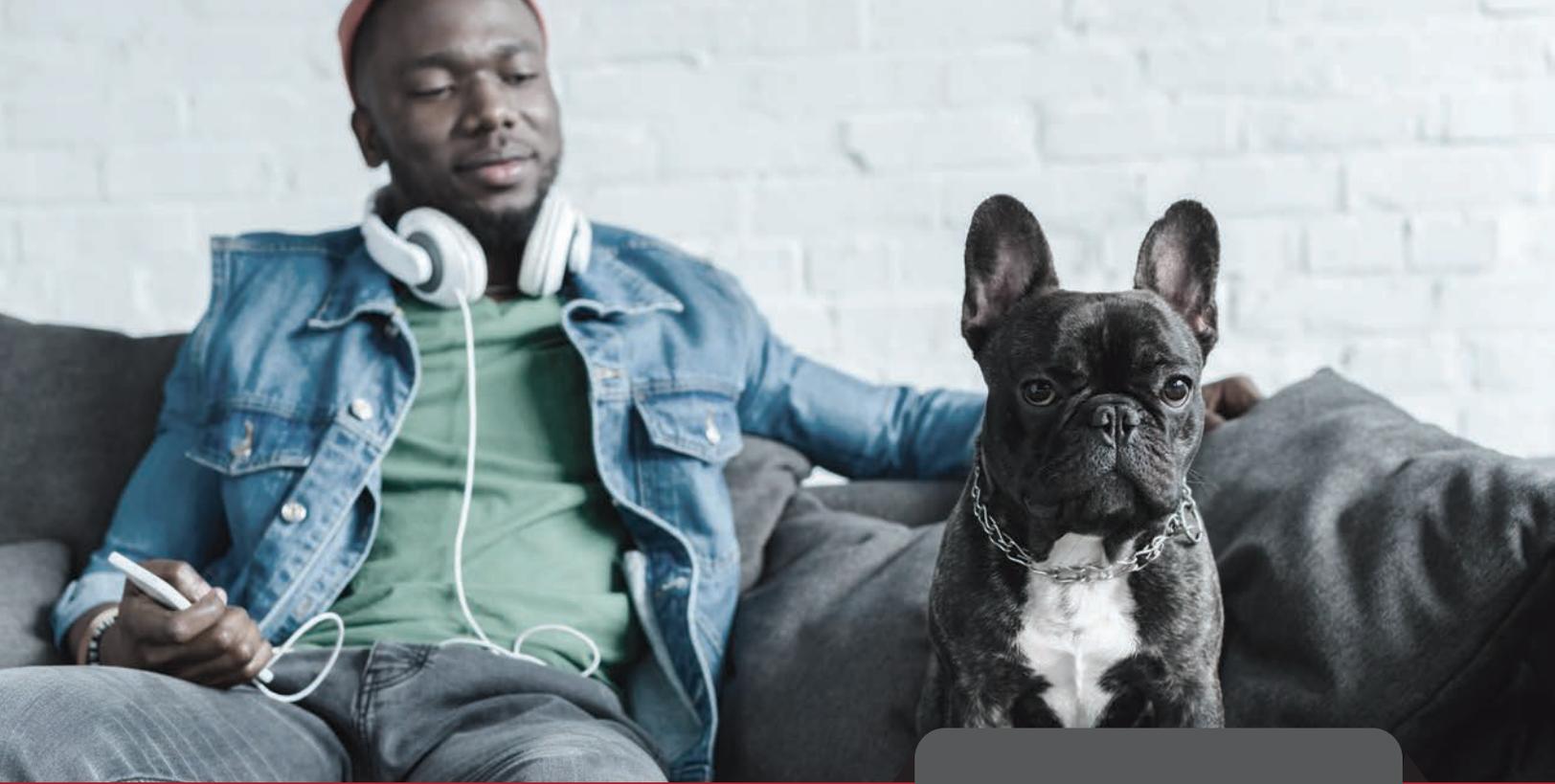
13%

Top pain management tools under consideration for veterinarians not currently using targeted treatments



The 2021 Brakke Report notes that sales lost to online retailers accelerated in 2020, causing many veterinarians to evaluate service-based pain management solutions.





Pet Owner Attitudes

Survey respondents share their most prevalent pet owner demographics



#1 Generation X



#2 Millennials



#3 Baby Boomers



of veterinarians report **average compliance** with at-home treatments. When pet owners see results, they stop administering medication.



32% of veterinarians report that pet owners trust their recommendations, but prefer a drug-free approach to care first.

63% of veterinarians report that clients don't mind administering medications and will follow through with whatever treatment their veterinarian recommends, which puts the responsibility for starting care on the veterinarian.





69%

of veterinary clinics are interested in prescribing less pain medication

Drug-Free Approaches



Top drug-free approaches for pain management used by veterinarians

#1

Laser Therapy

82%

#2

Acupuncture

39%

#3

Physiotherapy

32%

#4

Platelet Rich Plasma (PRP)

13%

#5

Stem Cell Therapy

6%



Veterinarians reported the following changes in their pharmacy business over the past 3 years:

40%

increased

33%

stayed the same

24%

decreased

The State of Your Business

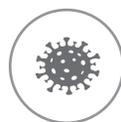
The Top 3 factors that have lead to pharmacy revenue growth for those who reported an increase



#1 We've driven enough value in our clinic to not lose sales to online retailers



#2 Distributor pharmacy programs have made prices more competitive with large veterinary chains and online retailers, allowing us to be more price competitive



#3 COVID



Online retail and large retail stores are the #1 concern about in-clinic pharmacy moving forward



of survey respondents reported that revenue made up from NSAIDs was either **1-10%** or they **weren't sure** how NSAIDs were contributing to revenue. _____

Clinics ranked the most profitable services in their clinic:

#1

Problem Visits & Related Services (Laser Therapy, Exam Fees, Diagnostics, etc.)

#2

Wellness Exams & Related Services (Vaccines, Exam Fees, etc.)

#3

Surgical Procedures

#4

Diagnostic Tests & Services (Routine Labs, X-Ray, etc.)

#5

In-Clinic Pharmacy

Challenges & Innovations

In the 2020 Brakke Report Chewy® was cited as the biggest threat to veterinarians with the rise of eCommerce as a condition for success.

Since COVID...



40% of clinics report increased pharmacy-related calls



39% of clinics report an increase in transferring prescriptions to Chewy and Amazon®

Challenges

- Stress
- Staffing / Hiring
- Too Much Work
- Online Pharmacies
- Supply Chain / Product Availability
- Profitability
- Challenging Clients



Innovations veterinarians are excited about

- Telemedicine
- Laser Therapy
- Non-Pharmaceutical Options
- Regenerative Medicine
- Feline Pain Solutions
- Cancer Therapies
- Long-Acting Injectable Pain Relief
- Monoclonal Antibody Therapy
- New Drugs





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