New Veterinary Product of 2012

Spontaneously Chosen by 343 Small Animal Vets in the UK

January, 2013
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Methodology and sample profile
Introduction

• Few new products go through as complex and lengthy development processes as those recommended and prescribed by vets. Some of them are improved formats, more convenient options or ingenious solutions, others are truly ground-breaking innovations.

• Vets dedicate a lot of time and energy to keep abreast of new product developments so that they are able to confidently recommend the best. Their peers’ opinion is always helpful and often more trusted than the glossy launch brochures and presentations by manufacturers.

• For manufacturers, a new product launch is an exciting and nerve-racking period. Will the investment be worthwhile? Will this new launch set them apart from the competition?

• To help vets clearly see what other vets perceive as the best new product of 2012 and also for manufacturers to evaluate their products impact, CM Research asked 343 UK based small animal vets to state which veterinary product launched in 2012 they believed was the best new product.
Methodology

- 343 vets working in small animal clinics in the UK were interviewed
- Self-completion online interviews
- Fieldwork period: 23\textsuperscript{rd} November 2012 to 23\textsuperscript{rd} January 2013
- Respondents were asked to write in the veterinary product they considered to be the best new product of 2012
- The question was unprompted
- Vets had to mention just one product/service

Now think of all the new products that you have seen this year, be them new pharmaceuticals, foods, services, or other products you use in your practice, which one do you think has been, in your opinion, the best new product of 2012?

Please give us the name of the product and the manufacturer (if possible).
Question answered by vets

Now think of all the new products that you have seen this year, be them new pharmaceuticals, foods, services, or other products you use in your practice, which one do you think has been, in your opinion, the best new product of 2012?

Please give us the name of the product and the manufacturer (if possible).

For help or comments: contact@vetspanel.com
Sample profile

Q: Are you a/an: owner/partner veterinary surgeon, employed veterinary surgeon, veterinary nurse, practice manager, other
Base: 343 vets

Q: Including yourself, how many vets work in your practice?
Base: 343 vets
Q. Which do you consider to be your speciality area?
Base: 343 vets

Speciality

- Veterinary Surgeon: 52%
- No speciality: 28%
- Internal Medicine: 10%
- Other: 4%
- Dermatology: 3%
- Radiology: 1%
- Dentistry: 1%
- Alternative Medicine: 1%
- Anaesthesiology: 1%
- Neurology: 0%
- Ophthalmology: 0%
- Parasitology: 0%
New Veterinary Product of 2012
New Veterinary Product of 2012

• ‘Hill’s y/d’ - an iodine restrictive hyperthyroid management food from Hill’s Pet Nutrition - won by an overwhelming lead (31% of vets). Over three times as many vets suggested it over the second most popular product ‘Cardalis’.

• ‘Cardalis’ by CEVA - a tablet combining an ACE inhibitor and spirolactone for heart failure in dogs – achieved 9.6% of all mentions.

• Bayer’s ‘Seresto’, a collar offering 8 month of protection against fleas and ticks, came third with 6% of vets writing it down.

• Other unprompted choices varied from MSD’s ‘Caninsulin Vetpen’, Docsinnovent’s small animal airway management device ‘V-gel’, ‘Yumuve’ joint supplement and even a large animal product ‘Zuprevo’ for Bovine Respiratory Disease.

• Time will tell whether the initial excitement generated by the launches will lead to a long and happy product life or if it will be overshadowed by something even better and more effective. Let’s hope that 2013 again brings us many exceptional innovations.
Q. Now think of all the new products that you have seen this year, be them new pharmaceuticals, foods, services, or other products you use in your practice, which one do you think has been, in your opinion, the best new product of 2012? Please give us the name of the product and the manufacturer (if possible).

Base: 343 small animal vets UK

Source: Online survey conducted by CM Research using its community of vets for research purposes Vetspanel

Hill's y/d 31%
Cardalis 10%
Seresto Collar 6%
Caninsulin Vetpen 4%
Atopica Cat 3%
Comfortis 2%
Nobivac Myxo-RHD 2%
Cimalgex 2%
Activyl 2%
RevitaCAM 2%
Metacam for cats 2%
Zuprevo 2%
Others (less than 1.5%) 31%
Don’t know 4%
### New Veterinary Product of the Year

<table>
<thead>
<tr>
<th>Product Name</th>
<th>Manufacturer</th>
<th># of mentions</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hill's y/d</td>
<td>Hill's</td>
<td>107</td>
<td>31.2</td>
</tr>
<tr>
<td>Cardalis</td>
<td>Ceva</td>
<td>33</td>
<td>9.6</td>
</tr>
<tr>
<td>Seresto Collar</td>
<td>Bayer</td>
<td>21</td>
<td>6.1</td>
</tr>
<tr>
<td>Caninsulin Vetpen</td>
<td>MSD</td>
<td>12</td>
<td>3.5</td>
</tr>
<tr>
<td>Atopica Cat</td>
<td>Novartis</td>
<td>10</td>
<td>2.9</td>
</tr>
<tr>
<td>Comfortis</td>
<td>Elanco</td>
<td>8</td>
<td>2.3</td>
</tr>
<tr>
<td>Nobivac Myxo RHD</td>
<td>MSD</td>
<td>7</td>
<td>2.0</td>
</tr>
<tr>
<td>Cimalgex</td>
<td>VétoquinoL</td>
<td>6</td>
<td>1.7</td>
</tr>
<tr>
<td>Activyl</td>
<td>MSD</td>
<td>6</td>
<td>1.7</td>
</tr>
<tr>
<td>RevitaCAM</td>
<td>Abbott</td>
<td>5</td>
<td>1.5</td>
</tr>
<tr>
<td>Metacam for cats</td>
<td>Boehringer Ingelheim</td>
<td>5</td>
<td>1.5</td>
</tr>
<tr>
<td>Zuprevo</td>
<td>MSD</td>
<td>5</td>
<td>1.5</td>
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<tr>
<td>Onsior</td>
<td>Novartis</td>
<td>4</td>
<td>1.2</td>
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<tr>
<td>Certifect</td>
<td>Merial</td>
<td>4</td>
<td>1.2</td>
</tr>
<tr>
<td>V-Gel</td>
<td>Docsinovent</td>
<td>4</td>
<td>1.2</td>
</tr>
<tr>
<td>Calmex</td>
<td>VetPlus</td>
<td>4</td>
<td>1.2</td>
</tr>
<tr>
<td>Comfortan</td>
<td>Dechra</td>
<td>4</td>
<td>1.2</td>
</tr>
<tr>
<td>Hill's Vet Essentials</td>
<td>Hill's</td>
<td>3</td>
<td>0.9</td>
</tr>
<tr>
<td>Trocoxil</td>
<td>Pfizer</td>
<td>3</td>
<td>0.9</td>
</tr>
<tr>
<td>Veraflox</td>
<td>Bayer</td>
<td>3</td>
<td>0.9</td>
</tr>
<tr>
<td>Yumove</td>
<td>Lintbells</td>
<td>3</td>
<td>0.9</td>
</tr>
<tr>
<td>Others (1 to 2 mentions)</td>
<td></td>
<td>72</td>
<td>21.0</td>
</tr>
<tr>
<td>Don’t know</td>
<td></td>
<td>14</td>
<td>4.1</td>
</tr>
</tbody>
</table>

Q. Now think of all the new products that you have seen this year, be them new pharmaceuticals, foods, services, or other products you use in your practice, which one do you think has been, in your opinion, the best **new** product of 2012?

Base: 343 vets
Our credentials
CM Research

- Founded in 2009 with a view to specialise in the vet and pet owner sector
- As we only carry out research amongst pet owners and veterinary professionals we have a deep, and unique, understanding of the sector.
- Over the past years we can carried out dozens of international projects amongst vets and pet owners.
- We have two panels:
  - Vetspanel, with 13,000+ veterinary professionals
  - Petspanel, with 30,000+ pet owners
- Save significantly on costs
- Much quicker turnaround
We are primarily a full service online quant agency

**In particular we can:**

- Help define the market research problem
- Recommend an adequate research methodology
- Design, script and host online questionnaires
- Deliver data in most formats, from ASCII, to Excel tables or SPSS files
- Create reports where the research objectives are fully answered in easy to understand presentations.

**Statistical Expertise:**

- Multiple regression
- Cluster and Factor analysis
- Correspondence Analysis
- Multidimensional Scaling
- Targeted Bootstrapping
- Conjoint and DC analysis
- Modeling (what if scenarios)
- Volume estimation

**Extensive experience in:**

- New product development, from early idea generation all the way through to volume estimation, and even post-launch evaluation
- Segmentation and positioning studies
- Customer satisfaction
- Brand equity trackers
- Advertising evaluations
- Online qual, with Text based focus groups and discussion boards.

We will not drown you with data!
We are unique

Common set-up for a market research company

Brand/manufacturer → Market research agency → Panel provider/field agency

What we offer

Brand/manufacturer → Market research agency

Benefits:
• Cut out the middleman, saving significantly on costs
• Much quicker turnaround
• As we only do research within the animal health sector we have built a thorough understanding of our panellists.

We have capabilities to provide full service. We can also offer sample for external projects.
Vetspanel is the largest community of veterinary professionals for market research purposes.

More than 13,000+ active members across 13 European countries and now also the USA.

All our veterinary professions have been carefully screened and their details checked.

- National coverage
- Small and large practices
- Rural and urban practices
- Most of our panellists are small animal vets

- Solid Recruitment
- High response rates
- High completion rates
- Rewards
## Our recent experience in the sector

These are just a few examples of projects we’ve worked on recently:

<table>
<thead>
<tr>
<th>Project</th>
<th>Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market sizing in Germany for established drug</td>
<td>Pet industry</td>
</tr>
<tr>
<td>Barriers to product usage</td>
<td></td>
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<tr>
<td>Pan-Europe vet channel driver analysis</td>
<td></td>
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<tr>
<td>Pet owners evaluation of new products</td>
<td></td>
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<tr>
<td>Flea control in Spain and France</td>
<td></td>
</tr>
<tr>
<td>Multi-product evaluation and importance determination</td>
<td></td>
</tr>
<tr>
<td>Use of NSAIDS amongst older dogs</td>
<td></td>
</tr>
<tr>
<td>In depth evaluation of pets perceptions and evaluation of their vets</td>
<td></td>
</tr>
<tr>
<td>In depth evaluation of vets perceptions and evaluation of veterinary sales reps</td>
<td></td>
</tr>
<tr>
<td>Media awareness and brand recall for pet brands</td>
<td></td>
</tr>
</tbody>
</table>
Carlos Michelsen
Managing Director

Carlos has over 20 years experience in Market Research gained through working at TNS and Added Value. During that period he worked for companies as diverse as Carlsberg, Colgate-Palmolive, Pfizer, Masterfoods, Hill’s and Bayer. For TNS he was UK head of NPD and in Added Value he was Head of Quant. In 2007 he won the Market Research Society effectiveness award.

Carlos owns a dog, two cats, three fish and a rabbit.

In 2009 he set up CM Research.

Carlos.Michelsen@cm-research.com

Judith Goldstein
Director

Judith began her career in Animal health market research in France in 2000 at m2a, now GfK. She was the Country Manager for GfK Animal Health until 2008 for the UK and Ireland. She was also a committee member for the Veterinary Marketing Association for the same time and served two years as Chairman.

She is American, has a bachelors degree in Business and Marketing and left the states in 1991.

Judith owns two dogs.

Judith.Goldstein@cm-research.com

Vladi Ibberson
Associate Director

Vladi has 12 years experience spanning a large scale of market research areas and client sectors. With specific interests in brand and communication, stakeholder management and new product development, her most recent background is consumer FMCGs research.

Prior to joining CM Research, Vladi worked for TNS and Harris Interactive in the UK and completed a Master in International Marketing in Madrid.

She grew up inspired by Gerald Durrell’s novels and as a child had a cat, terrapin, fish, frogs, hamsters, parakeets and a guinea pig.

Vladi.Ibberson@cm-research.com
"We have been working with CM Research constantly for over two years now, during which time they have become one of our top five insights suppliers globally. As a company we have always been impressed with their approach, attitude, responsiveness and added value, whenever we work with them. Their approach is consistent whether the project is a pan European multi-stage complex project or a simple concept test: they have been able to cope with whatever we have asked for, even when our demands have been exacting. I would have no hesitation in recommending CM Research."

Joe Keating, Head of Consumer, Shopper & Professional Insights, Hill’s Pet Nutrition Europe

"Carlos and Vladi at CM Research have been a pleasure to work with. They have demonstrated a deep understanding of our research needs and of the veterinary industry, and as a result they have provided a valuable piece of work. To summarise the project, I would describe CM Research as responsive, knowledgeable and trusted. Ellie Rothnie, European Brand Manager, Dechra Veterinary Products"

"We have partnered with CM Research many times, for both continuous and ad hoc projects of different scope and focus. We have been benefiting from the managed access panels of the Veterinary Doctors and Nurses representing reliable and cost-effective data source as well as proven research craft and analytical competence. To work with CM Research means high quality design, data, conclusions and recommendations supporting decisions to do your business better. As a research buyer you can sleep well when working with CM Research”

Daniel Prochazka, Consumer & Professional Insight Manager

References

As a full service agency
Association membership and professional relationships

Esomar

The Market research Society

The Veterinary Marketing Association

Exhibitors at:


North American Veterinary conference 2013

Contributors of:

Official market research partners of

Society of practicing veterinary surgeons

Veterinary Practice
Permission to use results
New Veterinary Product of 2012

- Feel free to use the results from the survey.
- We would appreciate to get mentioned and would like to be notified if you intend to use them.
CM Research contact details

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