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Methods of Pet Population Control



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Lessons from the field: Market acceptance

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Lessons from the Field: Market Acceptance

Suprelorin® for temporary fertility control in dogs

- 6- and 12-month GnRH agonist (deslorelin) implants
- Trends in acceptance and use in Europe

Zeuterin™ (aka Neutersol®, Esterilsol™) for permanent sterility in dogs

- Intratesticular injectable solution of zinc gluconate and L-arginine that causes testicular degeneration
- Approved in the US but no longer marketed
- Lessons learned from unsuccessful introductions in the United States



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Overview of Suprelorin Use and Awareness Trends in Europe



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A Well Known Product

- “For the induction of temporary infertility in healthy, entire, sexually mature male dogs”
- Among practitioners: 100% awareness
 - Most practitioners have used Suprelorin for 5 to 10 years
 - Practitioners generally suggest the Suprelorin alternative to their clients
- Among owners: > 50% awareness
 - Clients are typically interested in trying Suprelorin as a test prior to surgical castration
- 80% Suprelorin implants used are 4.7 mg (6-month control)



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About Castration

> 50% male dogs are left intact

25% male dogs are surgically castrated

20% dogs are treated with Suprelorin

Reasons to recommend Suprelorin vs. surgical castration

- Risky surgery (age, condition)
- Owner reluctance to permanent castration
- As a test-run prior to surgical castration
- To avoid reproduction related risks
- To treat BPH & perianal gland tumours
- Male & female dogs living together temporarily
- To manage inappropriate behaviour



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Positive vs. Negative Feedback

Positive opinion

- “The perfect test prior to surgical castration”
- “Very relevant alternative to surgery”
- “Very effective, complete regulation of sexual hormones”

Negative opinion

- “Stress when the implant is done (pain)”
- “Costly treatment: implant +re-implant is as expensive as surgery”
- “First 2-3 weeks post-implant can be difficult”
- “Duration of effectiveness a bit variable”



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Test-Run, a Primary Use

It is very common to use Suprelorin as a test-run for male dog owners considering permanent sterilization

Further to test-run, in this particular survey

- 60% owners choose surgical castration
- 20% owners choose to re-implant
- 20% owners let the dog return to how he was prior to hormonal down regulation



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Why Do Owners Choose to Re-Implant?

- To maintain fertility suppression
- To maintain improvement of behaviour
- Emotionally scared by surgery
- Dislike surgery in their healthy dog
- Maintain effect on prostate (BPH)
- Maintain effect on coat (alopecia)



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A Variety of “Off-Label” Uses

Used for other species/gender/purposes

- Treatment of Benign Prostate Hypertrophy
- Downregulation of breeding toms
- Oestrus suppression in breeding bitches
- Oestrus induction in breeding bitches
- Treatment of urinary incontinence in breeding bitches
- To reduce urine marking in neutered toms



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Key Takeaways

The concept of suppression of fertility in male dogs is still unfamiliar:

- There is some reluctance to castration of privately-owned dogs
- In unowned dogs, management of population requires either long-term control or permanent castration
- Suprelorin is primarily used as a test-run prior to surgical castration
- Implant + re-implant for ongoing control is as costly as surgical castration



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What about Suprelorin in the United States?



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Market for Permanent Approach It's Not One Market – It's Two

	Private Practice: Individual, small-group, corporate, and academic veterinary hospitals and clinics	Nonprofit: Shelters, municipalities, animal welfare organizations, NGOs, and organizations sponsoring “spay/neuter” events in target communities
Market Type	<p>“Value” Market</p> <ul style="list-style-type: none"> Similar to companion animal market Veterinarian sets the price based on business competition and client-base demographics Permanent and temporary approaches may both be attractive 	<p>“Volume” Market</p> <ul style="list-style-type: none"> Similar to production animal market Funding-dependent “Neuter as cheaply as we can in sometimes rather difficult circumstances.” Temporary approach unlikely to be attractive
Objectives	Safe, effective, profitable, client satisfied	Safe, effective, cost effective, neuter as many dogs as possible, owners/guardians/ community satisfied



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Market for Permanent Approach, con't.

	Private Practice	Nonprofit
Who Needs Convincing?	<ul style="list-style-type: none"> ▪ KOLs ▪ Key professional groups ▪ Veterinarians ▪ Technicians and other staff ▪ Veterinary schools ▪ Clients 	<ul style="list-style-type: none"> ▪ KOLs ▪ Key nonprofit organizations ▪ Key organizations that provide grants ▪ Local community leaders and governments ▪ Local veterinarians ▪ Dog owners and guardians ▪ Local media
Formulation (storage requirements)	Flexible storage options with consistent availability of utilities and transportation	Storage conditions may be “suboptimal” in certain remote, mass market, and/or extreme weather situations
Packaging	Single-use common	Multi-dose preferred



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Zinc Gluconate Intratesticular Injection

- One-and-Done product (effects are permanent following a single use)
- Potential market sectors are inherently different in ways that affect commercialization
- May be considered a potential “game changer” in a challenging market:
 - A “gold standard” exists
 - Users are generally satisfied
 - Adoption of a new technology requires fundamental changes in thinking and human behavior
- Game changer or not, it’s been unable to change the game . . .



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Let's Go to the ACC&D Website

3rd International Symposium (2006)

- Key Requirements
 - Long-term capitalization
 - Education
 - Technique
 - Understanding risk/benefit profile of sterilization
 - Pros/cons of surgical versus nonsurgical sterilization
 - Pricing that “reflects advantages” over surgery



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Drivers of Market Acceptance

- Understanding and leveraging the characteristics of users and their audiences
- Clear, consistent positioning and support for a product or approach, whether it's intended for the for-profit market, nonprofit market or both
- Communicating with key audiences
- Identifying, acknowledging and addressing challenges



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Drivers of Market Acceptance

Driver	Both Markets
Stakeholder ID	<ul style="list-style-type: none"> Develop and demonstrate understanding of target-sector providers and their clients/customers/stakeholders Identify and involve acknowledged thought leaders in target sectors
Positioning	<ul style="list-style-type: none"> Recognize history Ascertain which business or service model(s) may be appropriate Relate to specific product attributes and how they apply to each stakeholder Specific approach versus other choices
Product support	<ul style="list-style-type: none"> Comprehensive training system for veterinarians and technicians Technical, semi-technical, and lay-level communications via targeted media Solicit and act on feedback on training, communications, and performance
Planning and Outreach	<ul style="list-style-type: none"> Multifaceted program to reach out to vets in both sectors and get them involved Reach out to veterinarians and technicians prior to launch Understand veterinarian attitudes and customize approaches to veterinarians based on attitudes and demographics Work with veterinary schools; have a program for veterinary students Provide targeted communications tools for sectors to use with owners/guardians
Challenges	<ul style="list-style-type: none"> Significance and complexity of trying to change human behavior Don't expect a product to sell itself – it won't



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Sector-Specific Drivers of Market Acceptance

Private Practice	Nonprofit
<ul style="list-style-type: none">▪ Embrace and be responsive to veterinary professionals and their clients at a level of service commensurate with what the private practice provides▪ Understand and communicate the economics, including profitability, of a given nonsurgical approach versus surgery▪ Co-promotion programs	<ul style="list-style-type: none">▪ Recognize differences among nonprofits▪ Understand and be able to demonstrate the suitability and economics of use in a variety of large-volume settings▪ Develop “for the greater good” partnerships with target nonprofits▪ Reach out to nonprofits to prior to deployment to understand what's relevant and what to expect in a given community



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Is It Possible to Serve the Nonprofit
and For-Profit Sectors?

If so, how? If not, why not?



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Serving Both Sectors

- Traditional small company model
 - Unlikely to be practical unless funding is not an issue
- Possibly in a large company with a portfolio
 - In-house resources to launch and manage a nonsurgical product
 - Deterrents to large company adoption
 - Veterinarian and client satisfaction with the “gold standard”
 - “Is there a need?”
 - Some nonprofit organizations would embrace a permanent product
 - Issue of affordability (nonprofit customers) versus profitability (acceptable ROI)



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Could alternative, appropriately funded, innovative business models allow a company to serve both markets, manage costs, and be profitable?



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Alternative Business Models?

Could alternative, appropriately funded, innovative business models allow a company to serve both markets, manage costs, and be profitable?

- Purpose-built nonprofit organizations
- Public Private Partnerships
- Low-profit limited liability companies (L3C)
- High-volume limited service model (wellness/vaccination/fertility control)
- Vertical integration strategy



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Food for Thought

- “You need a variety of end-user advisors around the company table. Consider their input. Don’t neglect that. Crafting a strategy internally and imposing it on the industry is unlikely to produce results.”
- “When you’re trying to make a sustainable business there [are] challenges; some can be internal.”
- “A company has to listen to the people in the field – people talk to us about their animals”
- “Companies can’t be at arms’ length from providers. We needed to be partners in treating the dogs.”
- “Evidence, not evangelism”
- “Studies and publications can help people get ready.”
- “It’s just too bad that reproduction is so hard to stop.”
- “Taking out gonads is a tool for now, it’s not a tool for the future. So how do we get to the future?”



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Questions? Comments?



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Reminder: For More on Issues Likely to Affect Markets

Session	Day and Time	Location
Assessing the risk/benefit profile of surgical sterilization	Today at 2:15 pm	Theater
Lessons learned: field studies with cats and dogs	Today at 4:05 pm	Theater
Lessons learned: field studies with cats and dogs, continued	Tuesday at 10:45 am	Library
Intratesticular approaches: going forward	Tuesday at 9:20 am	Library
Embracing (facing?) the future: industry implications for the next sterilant product	Tuesday at 4:30 pm	Theater



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“But my offspring would be just as adorable as I am!”