



October 2008

Dear Reader,

In the fall of 2007 ACC&D contracted with BN Research to conduct a survey of 200 private practice veterinarians about pet sterilization, including attitudes toward non-surgical sterilization.

The levels of sterilization needed to dramatically reduce euthanasia rates in the U.S. cannot feasibly be provided in our current paradigm. Most pet owners who value and can afford veterinary care have their pets spayed or neutered by their veterinarians. Special spay/neuter programs (high volume clinics, voucher programs, etc.) strive to reach those pets without owners or whose owners cannot afford traditional veterinary care. Unfortunately, these programs are not reaching far enough. The situation in the United States is critical. Around the world, delivery of broad-scale veterinary services is even more difficult, and in some cases nearly impossible. We believe non-surgical sterilants may offer new hope for addressing these dilemmas.

We recognize that the cats and dogs that will benefit most from non-surgical sterilization are generally not clients of private practice veterinarians. However, we do believe that many pet owners will welcome this advance, as expectations of veterinary medicine increasingly parallel the strides made in human contraceptive medicine.

The private practice veterinary community's support plays a pivotal role in the decisions of pharmaceutical companies to advance research and products to the marketplace and in the perceptions of the general public. Therefore, we were concerned, if not too surprised, about the results of this study. From this research, it appears that general practice veterinarians may not lead the charge to advance non-surgical sterilization. As animal welfare advocates—including veterinarians—work to advance this technology, we hope that private practice veterinarians will support these efforts for the impact they can have on animal welfare.

We know it is normal for veterinarians to be uncertain about new medical options until all their questions are answered. This study helped us clarify key questions and concerns from veterinarians. This input will help to both to guide the product research to meet these needs and inform the dialogue we would like to continue on this topic.

We have included a brief summary of research findings below, followed by a full report. You may also be interested in a partner study conducted with 241 shelter veterinarians, available at www.acc-d.org under "Resources".

Sincerely,

A handwritten signature in dark ink, appearing to read "Karen Green".

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Veterinary Study: Conclusions and Key Findings

- Nearly all of veterinarians surveyed (96%) agreed that “unplanned litters contribute significantly to the number of unwanted pets in our community.”
- Of vets surveyed, 61% reported they participate regularly in community programs to control pet population.
- More than half of the vets surveyed, however, “feel pressured to provide more time or low-cost services than [they] are able.”

These are a few of the highlights from the survey conducted by the **Alliance for Contraception in Cats and Dogs (ACC&D)**, the organization that commissioned the spay-neuter study from a leading veterinary research firm.

According to this survey of 200 general practice veterinarians in 2007, there is a fairly low level of perceived need among veterinarians for an alternative to surgical spay and neutering – for use in both the larger community and in their own practice. Surgery was described as sufficient. Low awareness and unknowns about future non-surgical sterilant alternatives created some skepticism. Among those who did see great need, comments like ‘more affordable’, ‘less risk with no anesthesia’ and ‘good for use in pet population campaigns’ were mentioned.

The vast majority of veterinarians included in this study firmly believe that surgical spay/neuter provides clear benefits beyond sterilization – helping to prevent both health problems and behavior problems in cats and dogs of both sexes. (While new products target comparable benefits, this was not stated in the survey and may or may not be the case.) In addition, the majority of veterinarians place at least some importance on the contribution to revenues of these surgical procedures and their role in attracting new clients to the practice (though only a small percentage view these procedures as ‘very profitable’ relative to other procedures).

Due to the low level of perceived need for an alternative and the value placed on a range of benefits associated with spay/neuter surgeries, research concluded that veterinarians will need to be convinced to consider an alternative. However, the data also suggests there is perceived value in some of the benefits that a non-surgical sterilant may be able to provide their clients. For instance, the majority felt it could be a better option for shelters to use and may increase the number of sterilizations performed in the community overall. For their own practice, they recognized the value in offering a non-surgical alternative to clients who are adverse to surgery or who have pets that are not good candidates for surgery. It also is valued as a lower cost option for pet owners with barriers to the price of surgery.

There does appear to be some interest among these veterinarians in the concept of a single treatment female cat contraceptive with a duration of three years, with 52% overall ‘somewhat or very likely to recommend’ and 75% in the Northeast ‘likely to recommend’. The main attraction of this product is the lower cost and the ability to offer clients who are adverse to surgery another option. However, veterinarians are concerned about the need to repeat the treatment – expressing doubt that pet owners would remember to bring their cat in for another treatment every three years.

It is fairly clear that, in order for any sterilant or contraceptive product to be broadly considered by veterinarians as a viable alternative to surgical sterilization (in more than just special circumstances), it will need to deliver many of the same benefits attributed to surgical procedures, preventing both health and behavior problems, providing permanent sterilization and requiring only one treatment.



ACCD Non-Surgical Sterilization Study

Veterinarian Attitude and Awareness Survey

November 2007

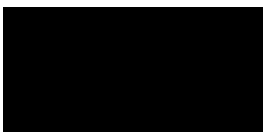


Table of Contents

Background	3
Study Objectives and Methodology	3
Summary of Findings.....	5
Sample Characteristics	4
Participation in Pet-Population Control	7
Importance and Benefits of Spay/Neuter Surgeries	9
Awareness of Non-Surgical Sterilant and Contraceptive Products	11
Need for Non-Surgical Alternative to Surgical Spay/Neuter	13
Perceived Value of Possible Benefits Associated with Non-Surgical Sterilants	18
Reactions to Female Cat Contraceptive Product Concept.....	20
Conclusions and Key Findings.....	25
Appendix	27
Appendix A: Additional Analysis	27
Appendix B: Summary of Colorado Findings	28
Appendix C: Questionnaire	31



Background and Objectives

Non-surgical sterilants may be a viable alternative to the use of surgical spay and neutering in controlling dog and cat populations. The successful introduction and adoption of non-surgical sterilants, however, will hinge on the attitudes of key audiences, including pet owners and persons/groups that feed feral cats, veterinarians and shelters. Attitudes of these audiences are currently unclear and Alliance For Contraception in Cats and Dogs (ACCD) wished to conduct a study among veterinarians to gain better understanding in that channel. The results of the veterinarian study will also help shape communications about non-surgical sterilants to this audience and pharmaceutical manufacturers regarding market potential.

Study Objectives and Methodology

The primary objective of the study was to assess veterinarians' attitudes regarding the potential acceptance of, and potential barriers to, a non-surgical, chemical sterilant as an alternative to surgical spay and neuter in cats and dogs. In addition, the study gauged the veterinarian's perceptions of a specific female contraceptive product concept. It measured opinions of veterinarians regarding product features and attributes associated with a chemical sterilant in both dogs and cats. The study also assessed attitudes veterinarians have toward surgical spay and neuter procedures in terms of impact on their practice and perceived benefits of these procedures to both the practice and the animal.

Methodology

In order to meet the objectives of this study, BNRResearch conducted telephone surveys among a randomly selected sample of 200 small animal veterinarians across the U.S. As requested by the client, we over-sampled veterinarians in the state of Colorado – conducting a total of 50 interviews in this state. The data was weighted to reflect the distribution of Veterinary practices across census regions. The maximum standard error for a sample of 200 is 6.9% at the 95% level of confidence.



The survey consisted of a series of topics to assess:

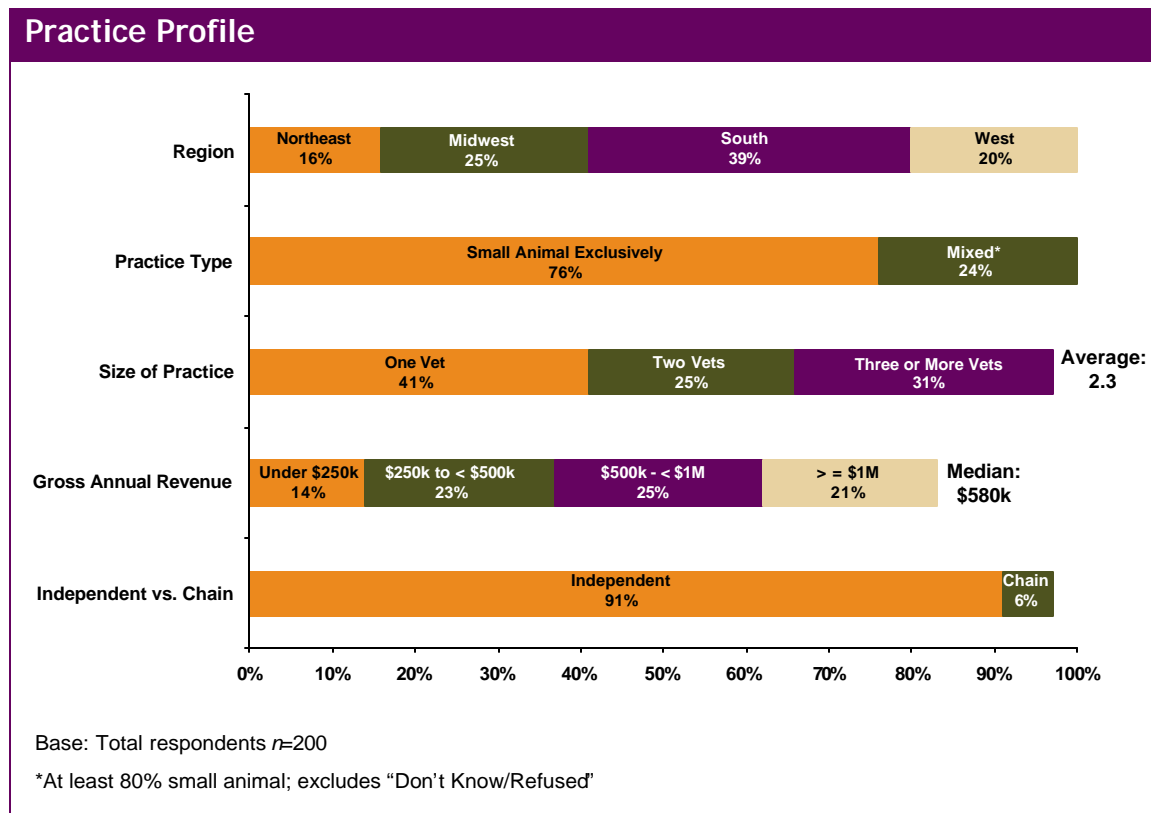
- Attitudes related to pet over-population and level of involvement in pet population control programs
- Importance of spay/neuter surgeries in terms of gross annual revenue and ability to attract new customers
- Perceived profitability of spay/neuter surgeries
- Perceived benefits of spay/neuter surgeries
- Awareness of non-surgical sterilants and contraceptives
- Perceived need for a non-surgical alternative to spay/neuter procedures
- Perceived value of possible benefits associated with non-surgical sterilants
- Perceived importance of non-surgical sterilant product attributes
- Likelihood of recommending cat contraceptive product concept



Summary of Findings

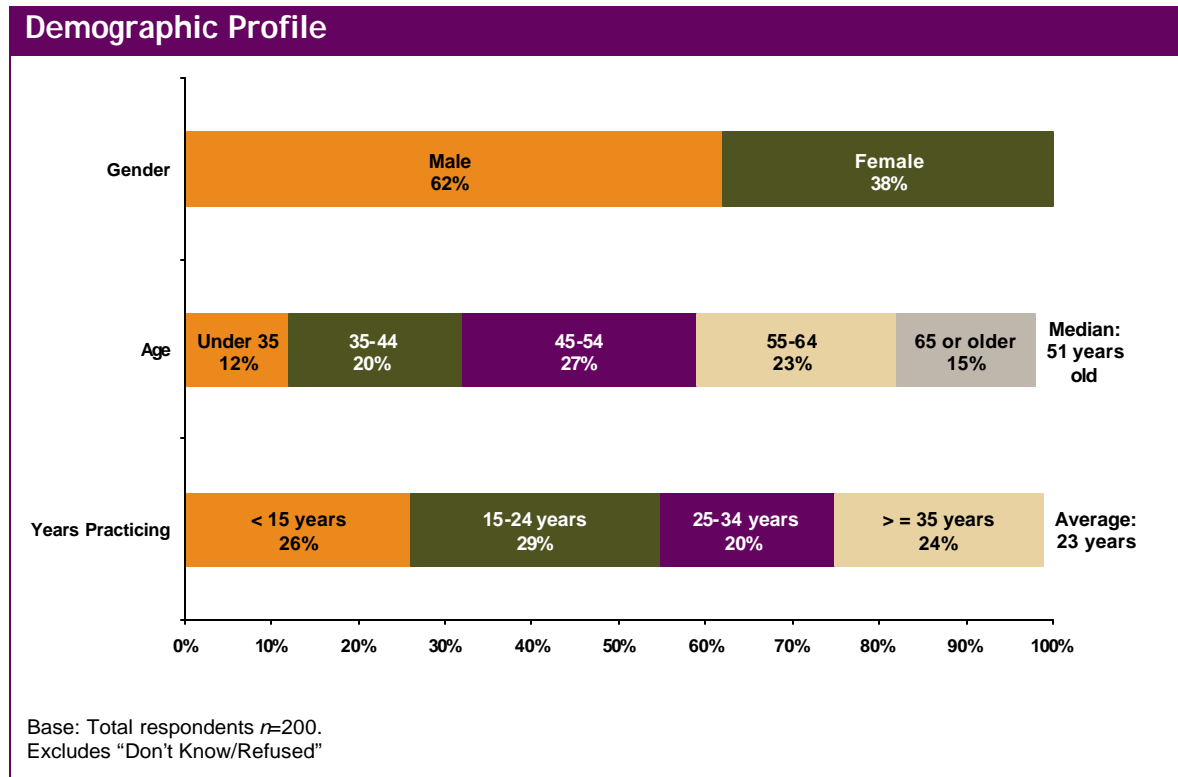
Sample Characteristics

Three-quarters of the veterinarians surveyed report that their practices are exclusively small animal while a quarter see a mix of small and large animals¹. The average practice size is 2.3 veterinarians and median gross annual revenue is \$580,000. Nearly all of those surveyed (91%) are associated with independent practices – only 6% work for a chain.



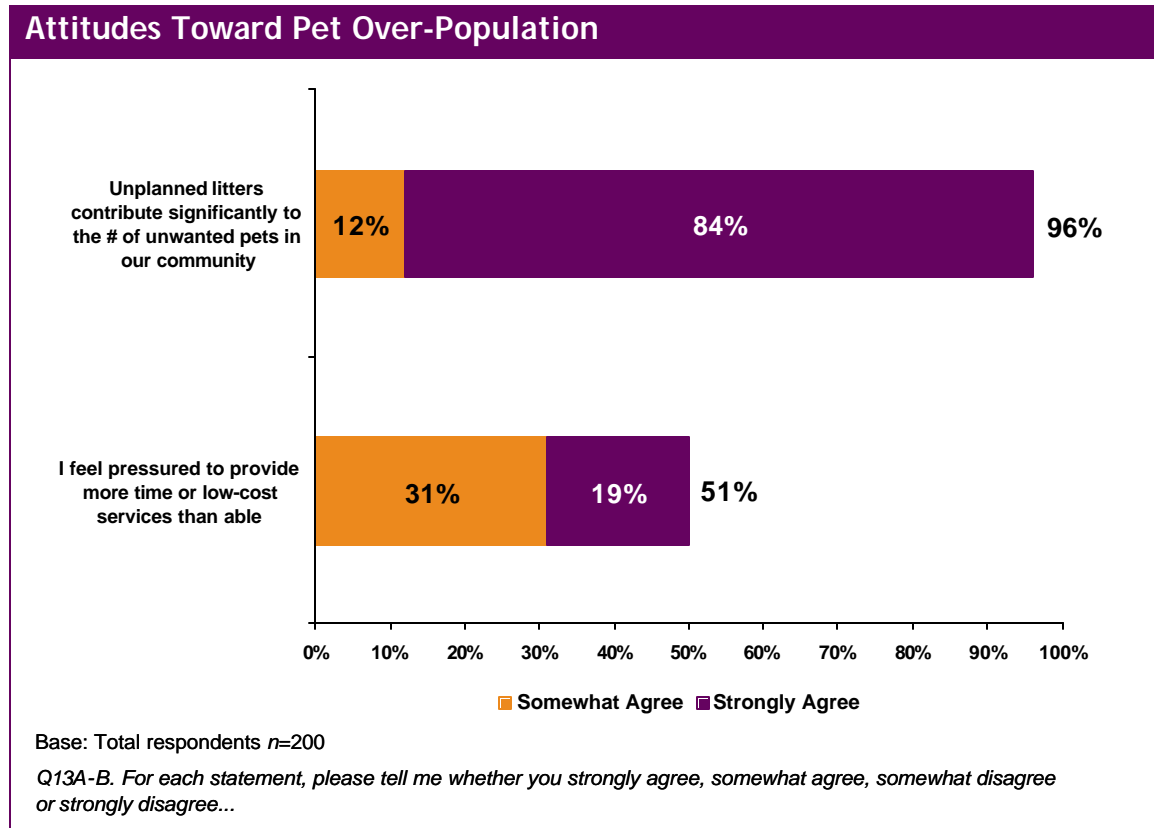
¹ For this study, only those veterinarians whose practices are at least 80% small animal were surveyed.

As shown below, the sample is comprised of a majority of male veterinarians (62%). The median age is 51 and average number of years in practice is 23.

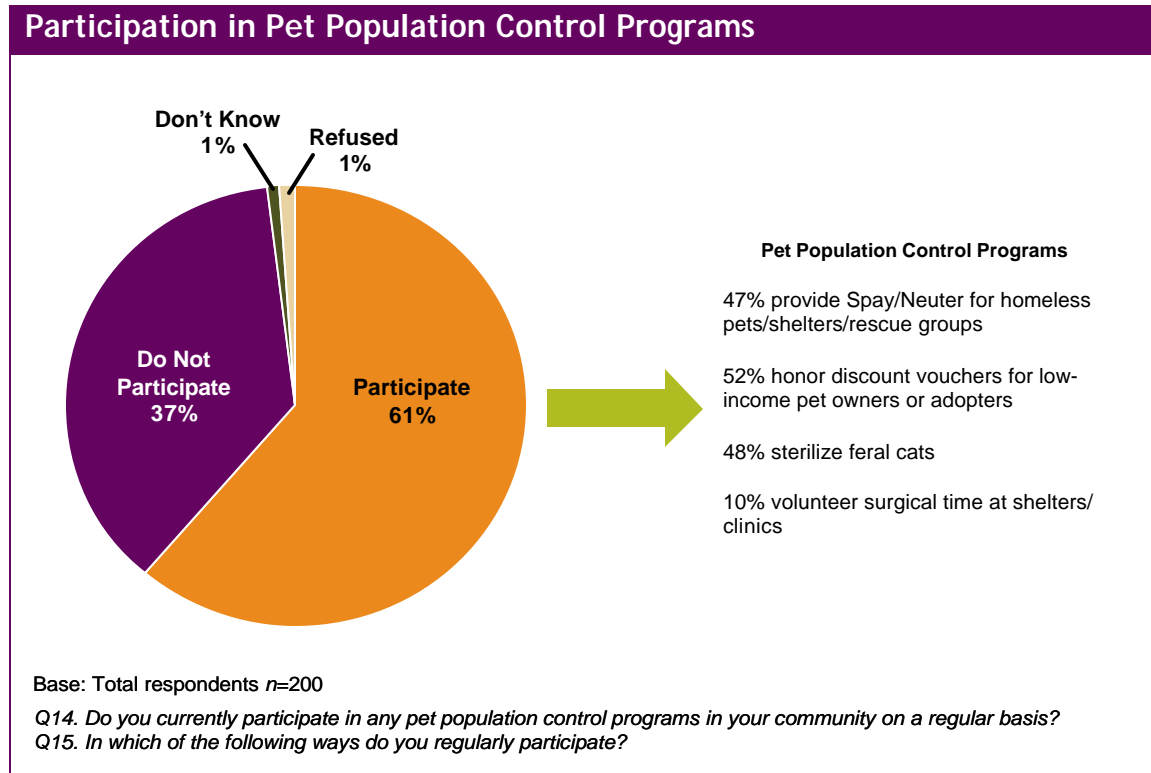


Participation in Pet-Population Control

The vast majority of veterinarians surveyed acknowledge the impact that the number of unplanned litters have on the pet over-population problem. Only about half of the respondents surveyed indicate that they feel pressured to support efforts to reduce the number of unwanted pets in their community – either in terms of volunteer time or providing low-cost services to animal welfare groups.

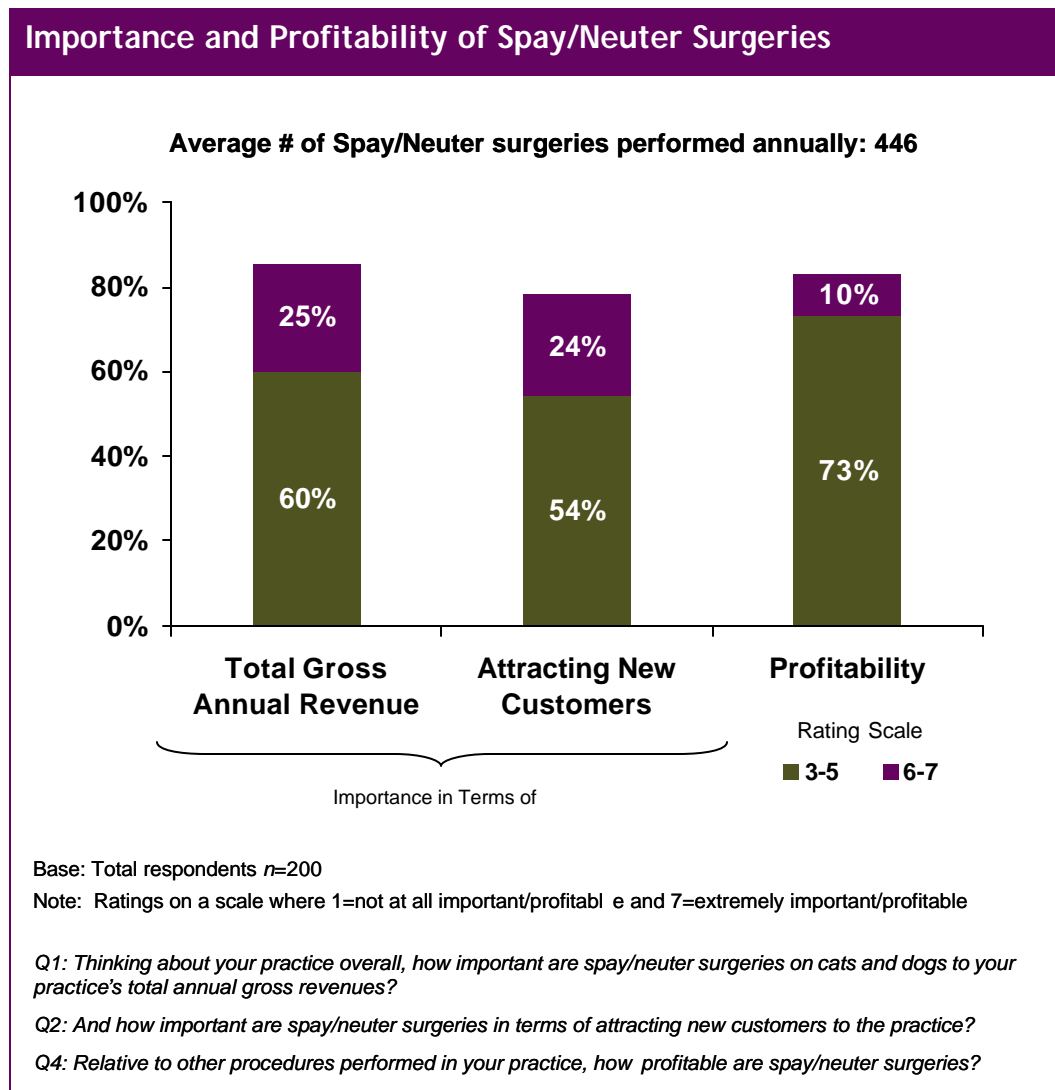


Six in ten veterinarians surveyed (61%) report that they currently participate in pet population control programs in their communities on a regular basis. Forms of participation include providing spay/neuter for shelters or rescue groups (47%), honoring discount vouchers (52%), sterilizing feral cats (48%) and volunteering surgical time at shelters or clinics (10%).

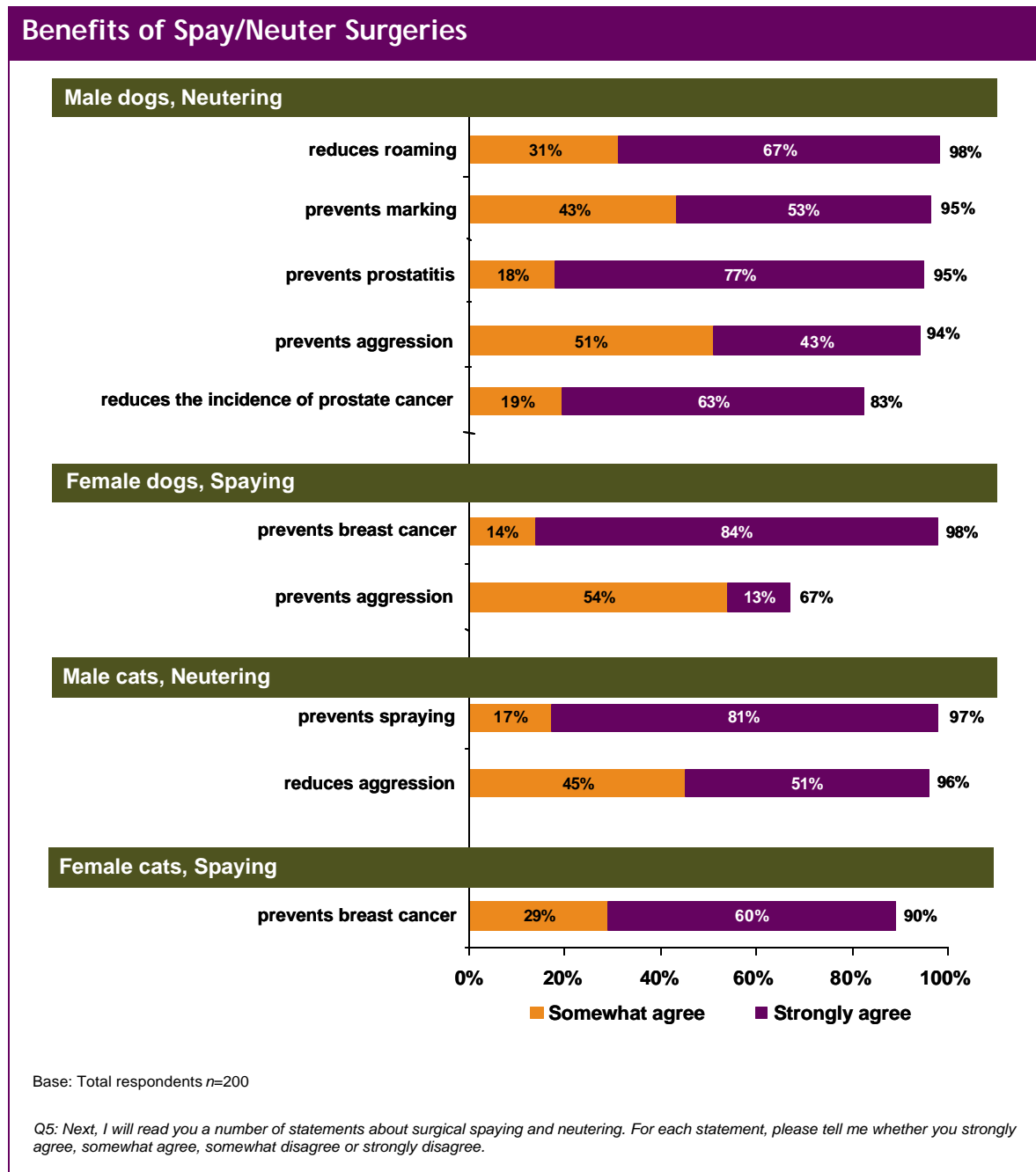


Importance and Benefits of Spay/Neuter Surgeries

Spay/Neuter surgeries are viewed, by the majority of respondents, as at least somewhat important in terms of their impact on a practice's gross annual revenues and their role in attracting new customers to the practice. A quarter (25%) of the veterinarians surveyed indicate that these procedures are very important (a 6 or 7 on a 7-point rating scale) to their annual revenues and a quarter (24%) also indicate that they are very important in terms of attracting new clientele. Only 10% of respondents indicated that spay /neuter procedures are very profitable relative to other procedures, while 73% indicate they are moderately profitable (a 3-5 rating). Overall, the reported average number of spay/neuter surgeries performed in a year is 446.

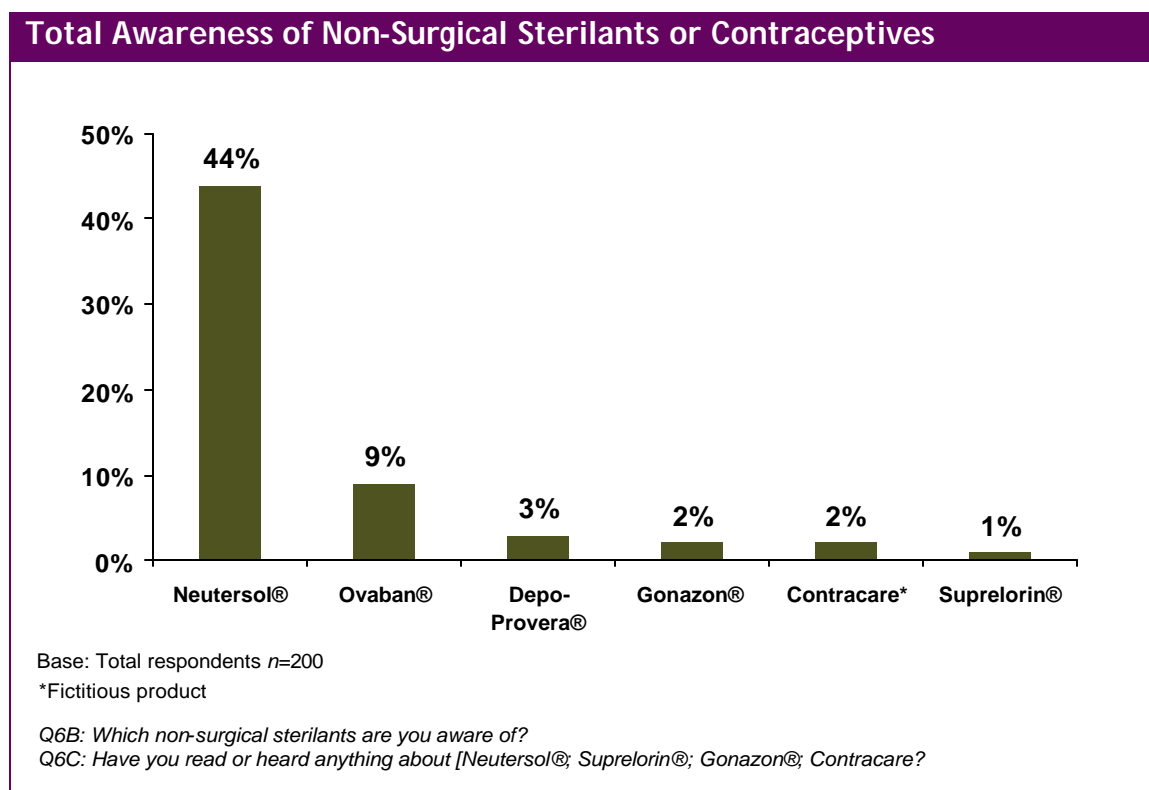


The study revealed a very strong belief among the respondents in the benefits associated with spay/neuter surgeries. As the following figure shows, the vast majority of respondents agree that surgical spay/neuter provides benefits beyond sterilization – helping to prevent both health problems and behavior problems in cats and dogs of both sexes. This finding is important to understand when interpreting veterinarian responses to the need for an alternative.

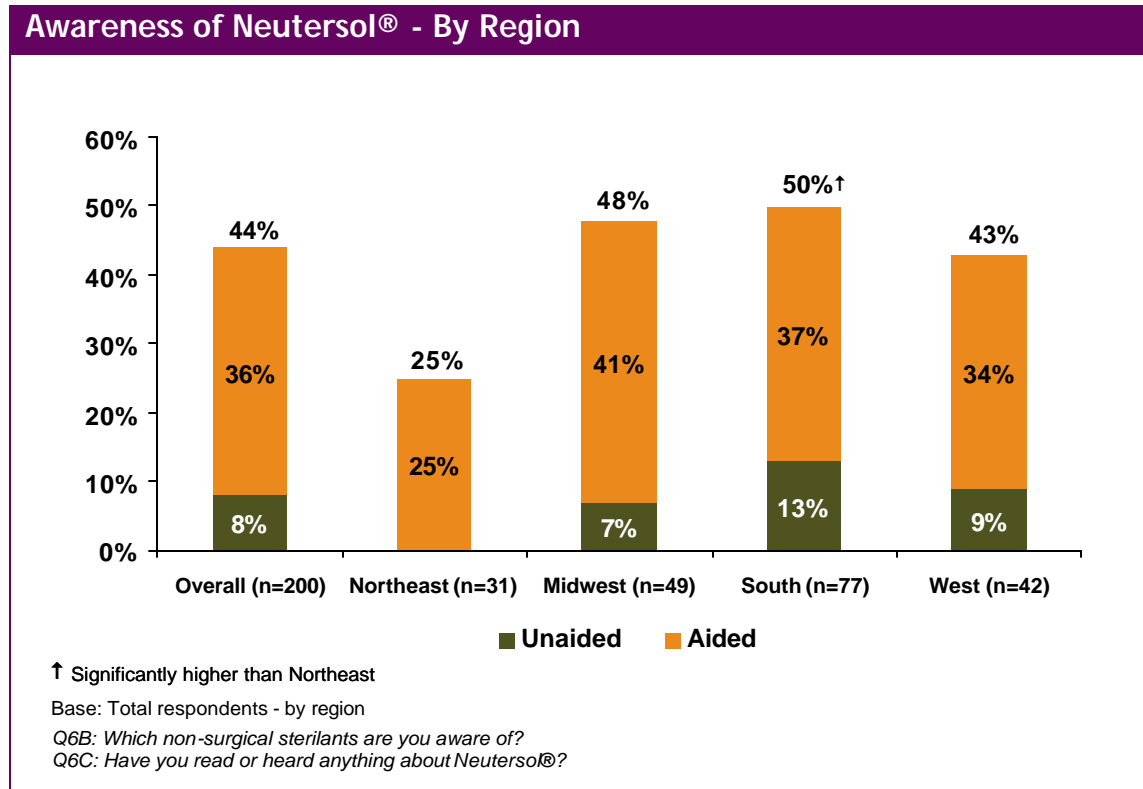


Awareness of Non-Surgical Sterilant and Contraceptive Products

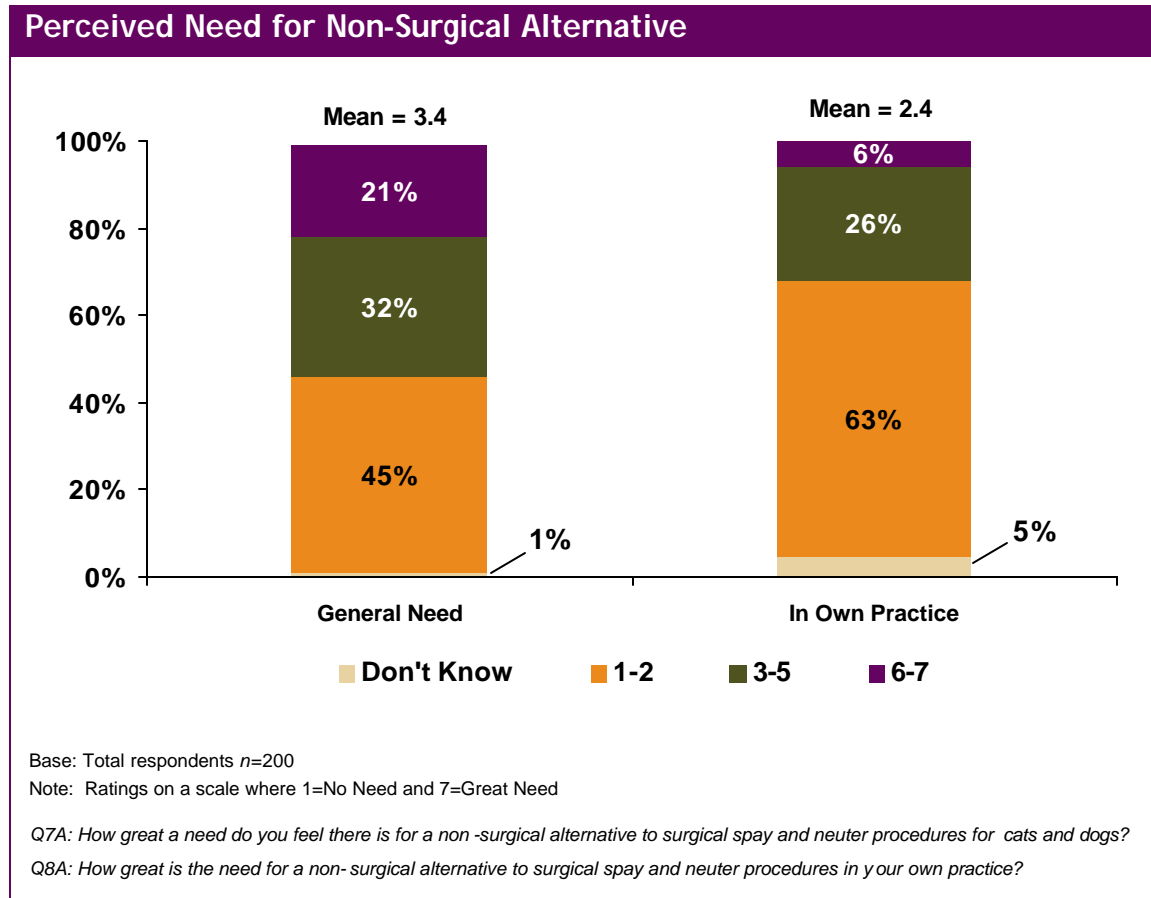
Respondents were asked if they were aware of any non-surgical sterilants or contraceptives for cats or dogs that are currently under development or that have been on the market in the US or in other countries. As shown in the figure below, Neutersol® is the most commonly known sterilant or contraceptive (44% aware), followed by Ovaban® (9%), Depo-Provera® (3%), Gonazon® (2%) and Suprelorin® (1%). To gauge approximate level of accurate recall, a fictitious product was included in the list of products for which aided awareness was measured. As the figure shows, 2% of respondents claimed to have heard of the fictitious Contracare.



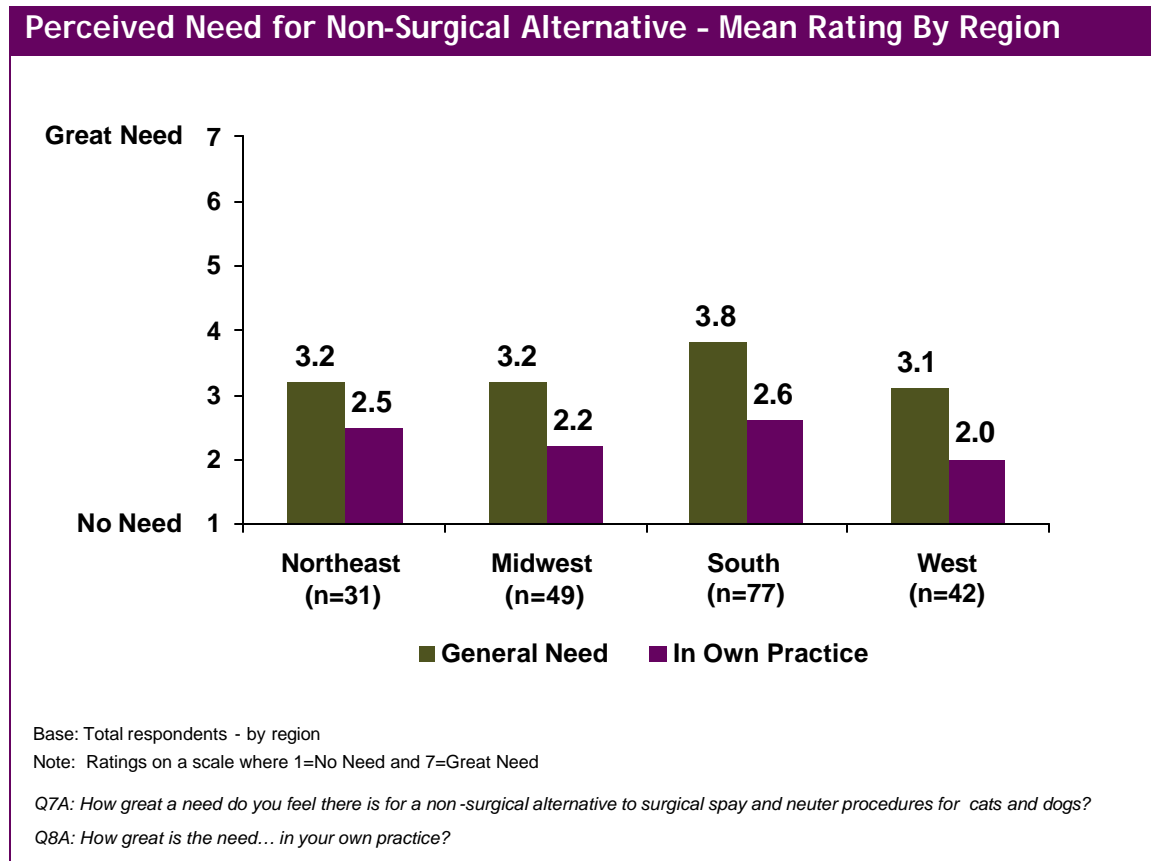
Overall, total awareness of Neutersol® is 44% (8% unaided and 36% aided). Awareness is highest in the Southern region (50%) and lowest in the Northeast (25%).



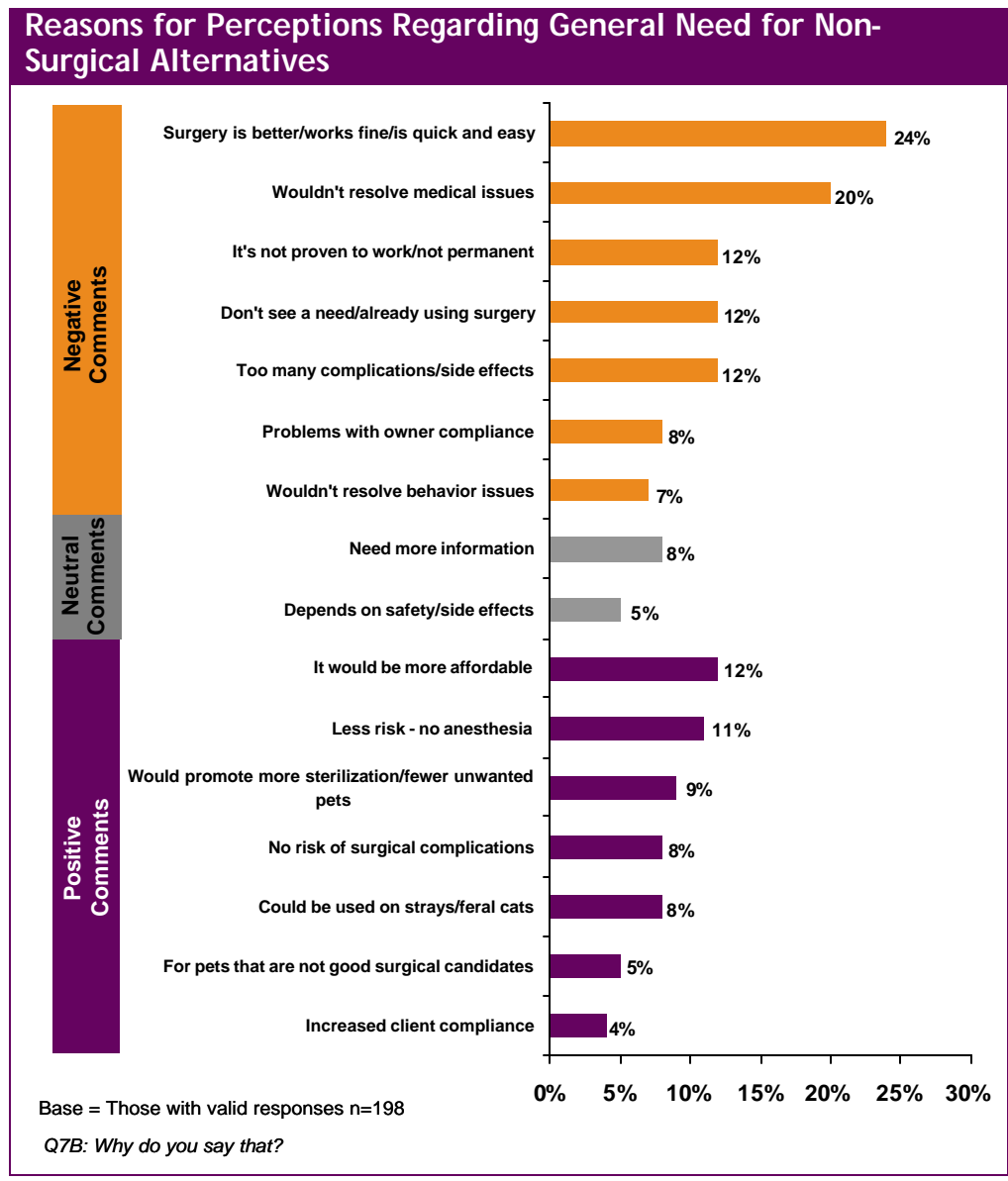
Respondents were asked about the need for a non-surgical alternative to spay/neuter procedures – both in general and in their own practice. As shown in the following figure, there is a low level of perceived need on both measures. Only two in ten respondents (21%) indicate that there is a great need, in general, for a non-surgical alternative, while nearly half (45%) indicate there is no need. For their own practice, only 6% indicate that there is a great need for an alternative while nearly two-thirds (63%) indicate that there is no need.



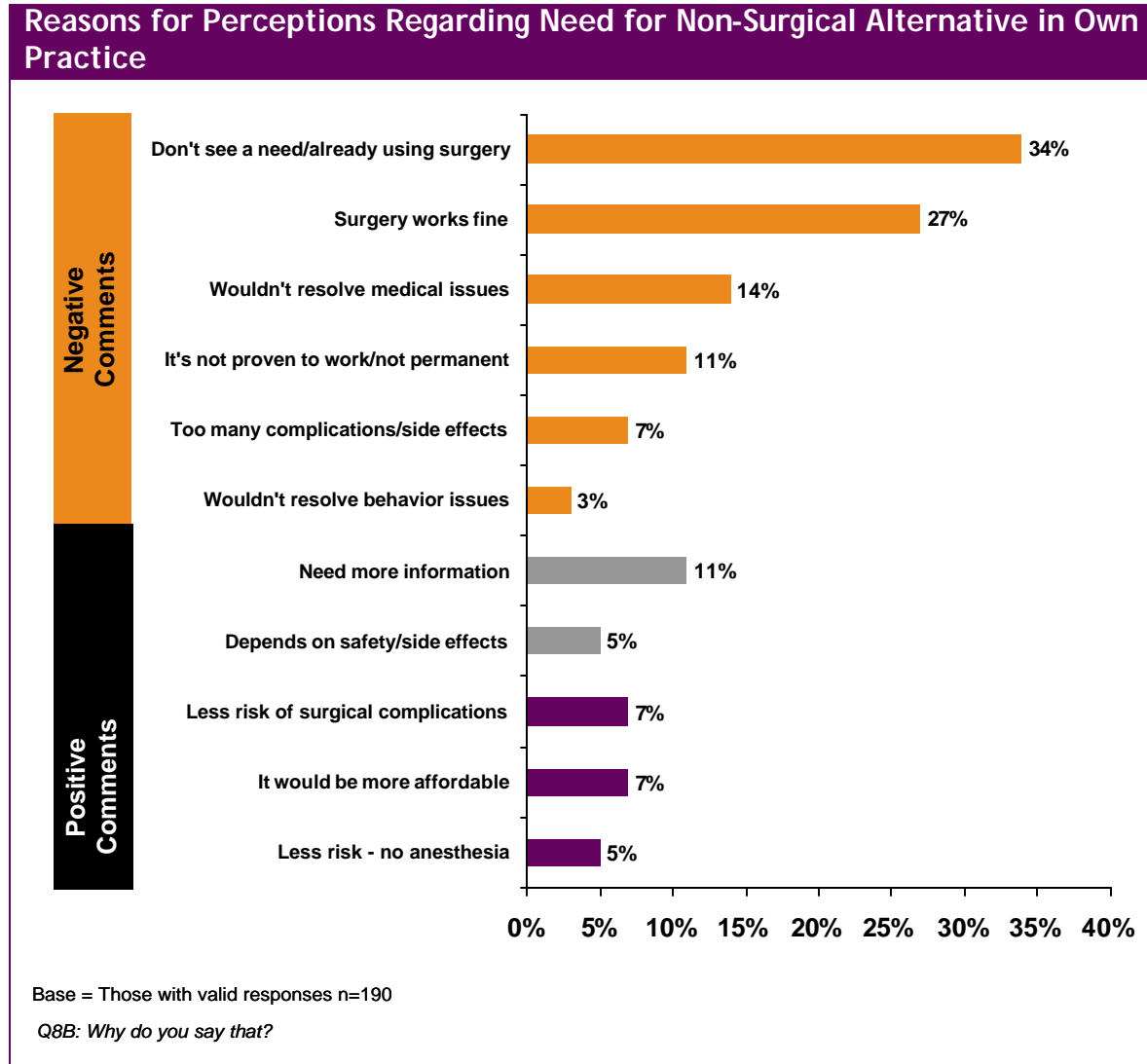
The level of perceived need for an alternative is slightly higher in the South than in other regions (though the difference is not statistically significant).



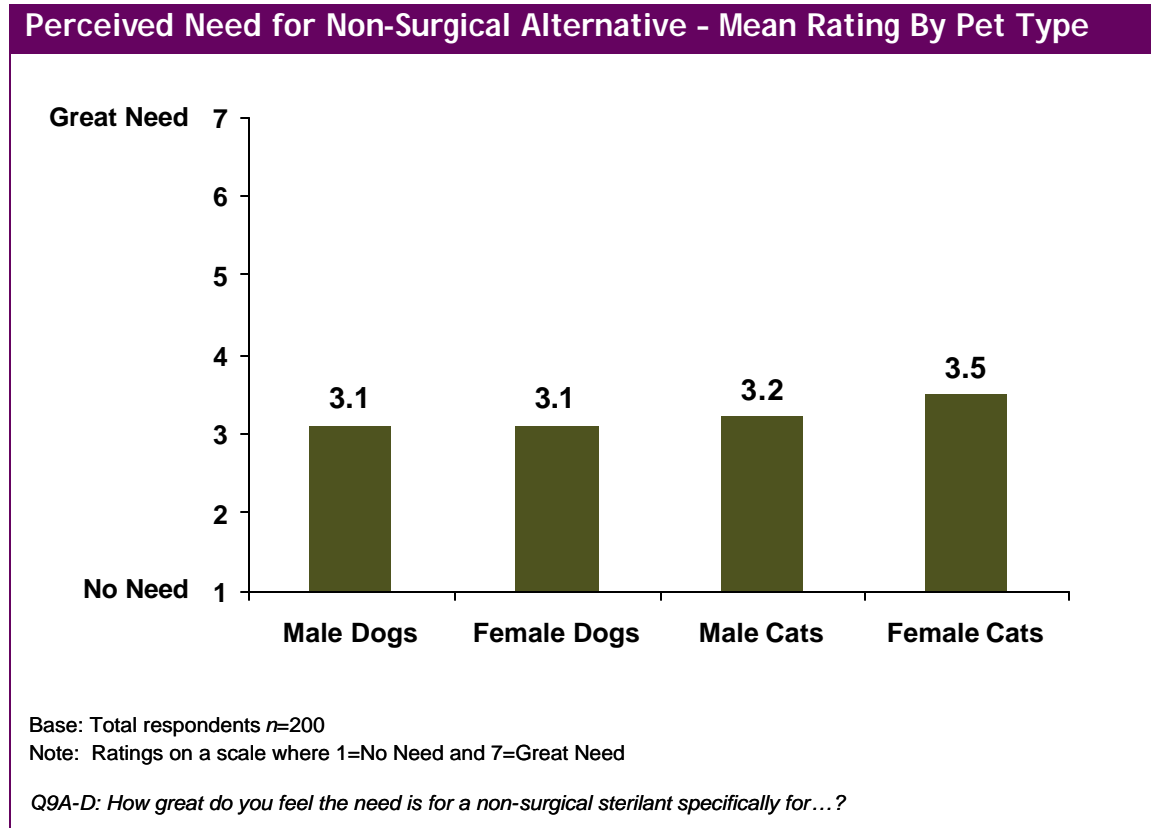
Respondents were asked in an open-ended question to explain their perceptions about the need for an alternative to surgical sterilization. (Responses are summarized in the following two figures.) The most commonly cited reasons for *not seeing a need* for an alternative (both in general and in their own practice) are related to the ease and effectiveness of spay/neuter in general, doubts about the effectiveness of a non-surgical method in terms of resolving medical and behavioral problems, and complaints that non-surgical alternatives would not provide permanent sterilization. The most commonly cited reasons for *seeing a need* for an alternative to surgical spay/neuter were related to affordability, reduced risk to the animal, increasing the number of sterilizations performed overall and its possible use for feral cats.



Compared to the respondent's perceptions of the general need for a non-surgical alternative, their response to the need for an alternative in their own practice was slightly more negative; 34% said current methods of surgery are preferred.

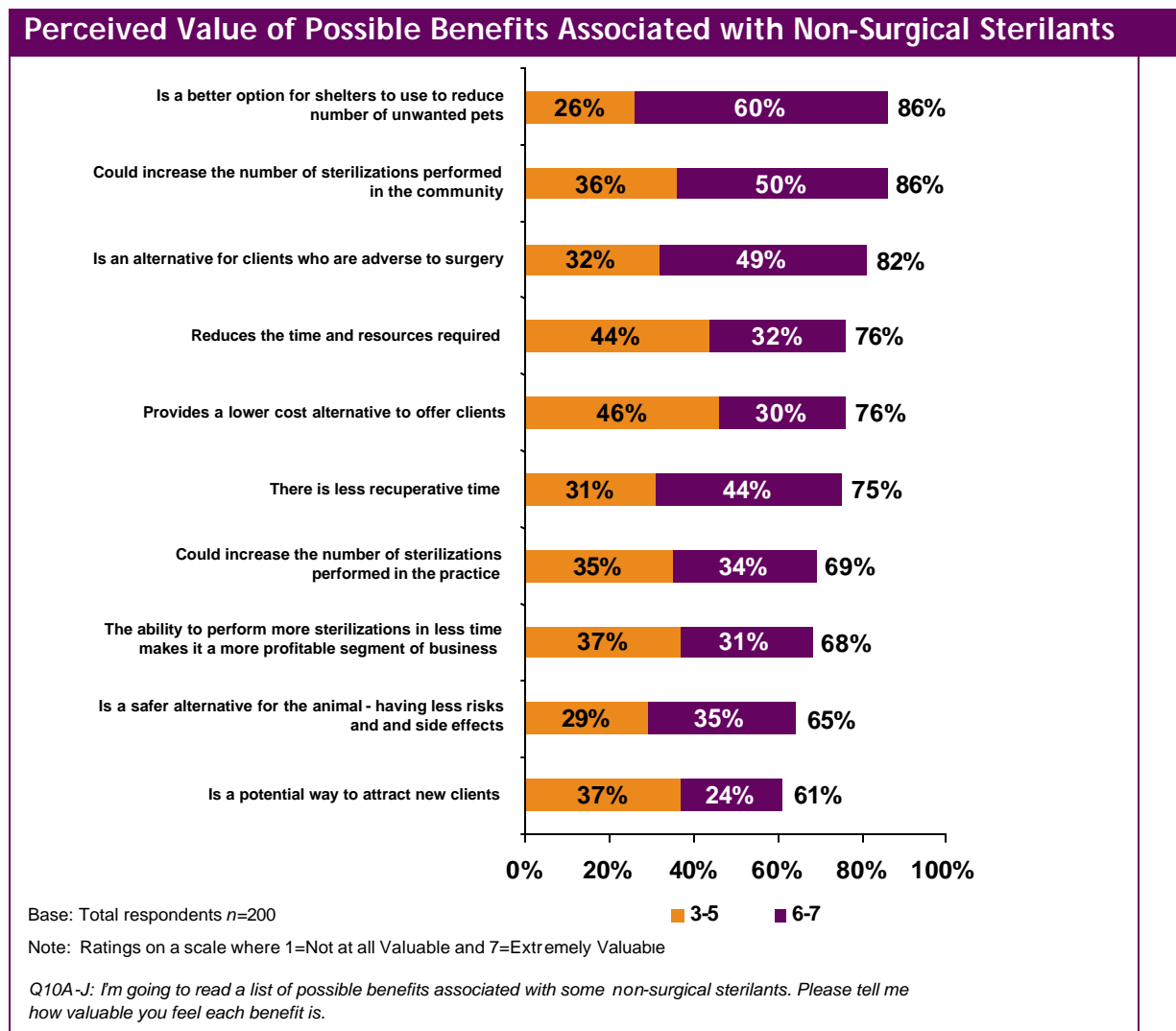


As shown below, there is a slightly higher perceived level of need for a non-surgical alternative to spay/neuter procedures for female cats (3.5) than for male cats or dogs of either sex. However, levels are still only moderate across all pet types.

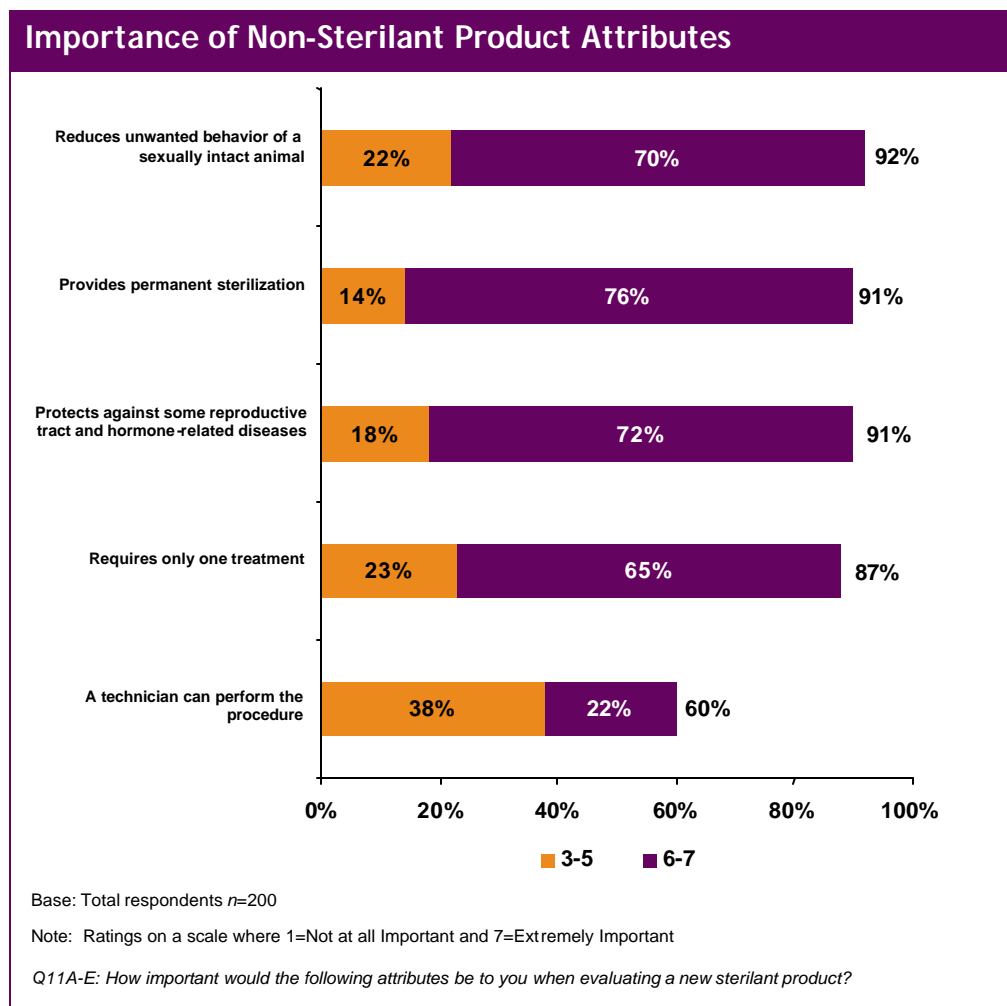


Perceived Value of Possible Benefits Associated with Non-Surgical Sterilants

While the level of perceived need for an alternative to surgical spay/neuter procedures is fairly low, veterinarians do indicate that they value some of the benefits that a non-surgical sterilant may be able to provide. However, as shown in the table below, those benefits that are perceived as most valuable tend to be related more to the pet over-population problem and less to their own practice. Still, 49% of those surveyed indicate that the ability to offer an alternative to clients who are adverse to surgery would be very valuable (a 6 or 7 rating on a 7-point rating scale). Reducing the time and resources required for surgical spay/neuters, the ability to offer a lower cost alternative to clients, and the fact that a non-surgical method would reduce recuperation time are all viewed as relatively valuable benefits by at least three quarters of the veterinarians surveyed.



Findings suggest that in order for a non-surgical sterilant to be accepted by veterinarians, it must provide the same benefits in terms of permanent sterilization and reducing health problems and unwanted behavior in animals that surgical sterilization is believed to provide. As shown in the figure below, three-quarters (76%) of the respondents surveyed indicate that providing permanent sterilization is a very important attribute of any non-surgical sterilant product. Approximately 7 in 10 indicate it is very important that the product reduces unwanted behavior of a sexually intact animal and protects against reproductive tract and hormone-related diseases. A majority (65%) also indicate that it is very important that the product only requires one treatment. Less important is the ability of a technician to perform the procedure (only 22% rated this as very important).

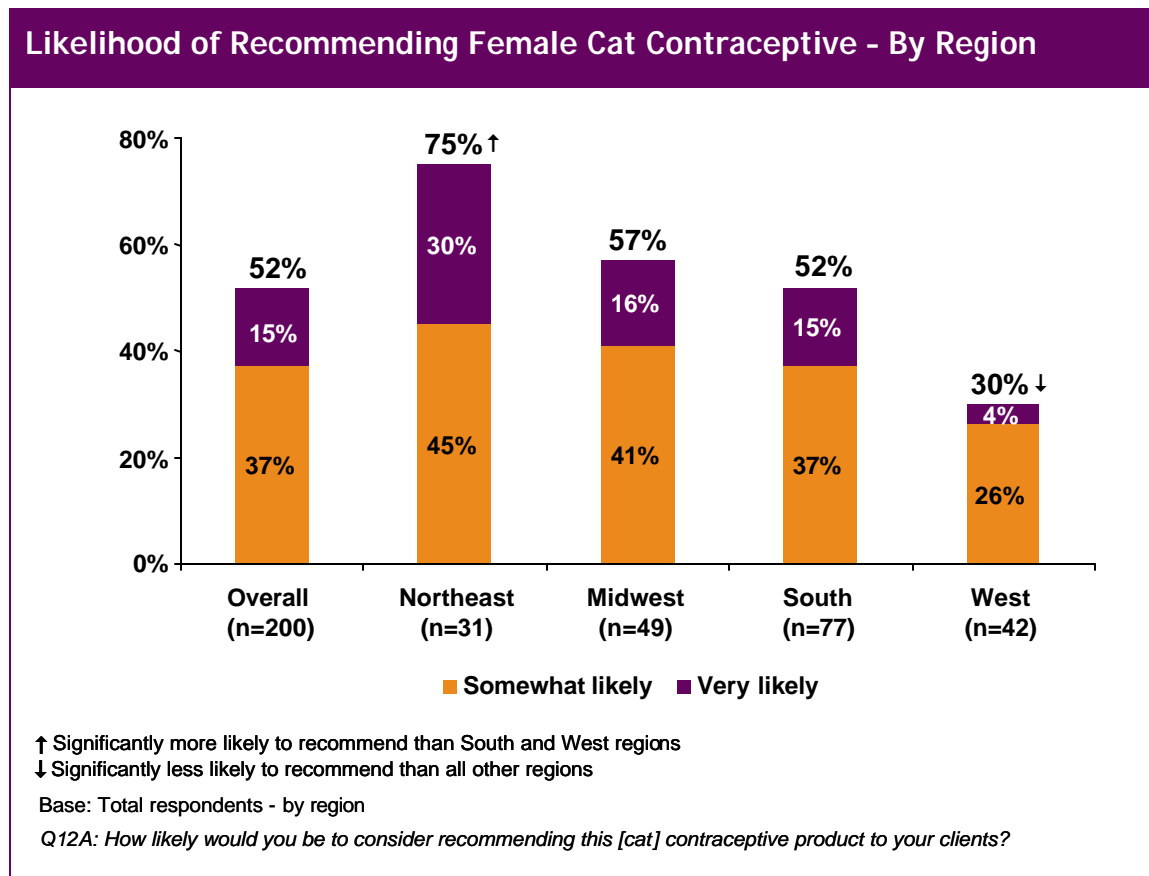


Reactions to Female Cat Contraceptive Product Concept

Respondents were read the following description of a new product for female cats and were asked how likely they would be to recommend the new product to their clients:

This product will provide contraception for a female cat with a single injection. It blocks the hormones producing heat behavior and renders female cats infertile for three years at which point cats can be retreated. The product is approved as safe and effective by the FDA. Pricing is estimated to be \$15-\$20 to the veterinarian.

Overall, just over half (52%) of the veterinarians surveyed indicate that they would be likely to recommend the female cat contraceptive product concept to their clients (37% somewhat likely and 15% very likely). Propensity to endorse the new product varies significantly by region; Veterinarians in the Northeast are significantly more likely to say that they will recommend the product than are their counterparts in the South or West. Western region veterinarians are the least likely to say they would recommend the new product to their clients.



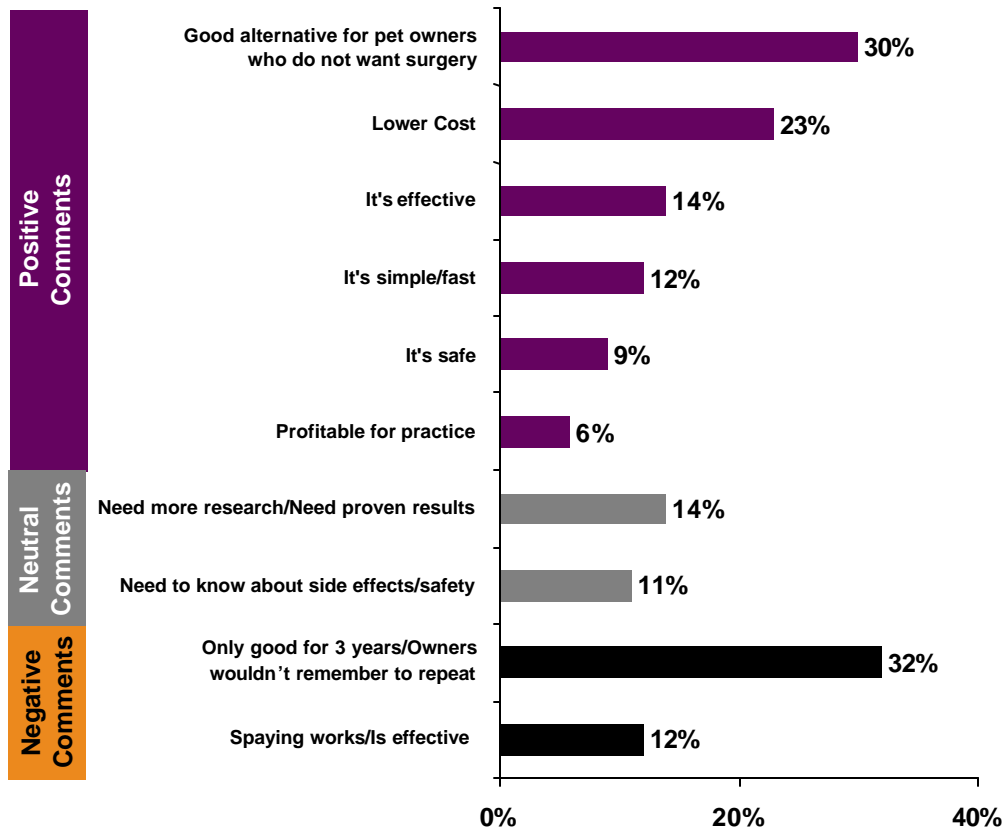
Veterinarians who fall into any of the following segments are more likely to say they would be likely to recommend the product:

- over age 65/have been in practice for 35 years or longer
- male
- perceive a need for a non-surgical alternative to spay/neuter
- complete 800 or more spay/neuter procedures a year
- feel pressured to provide more support than they are able to pet population control efforts
- are unaware of Neutersol®.

The main benefits of the contraceptive product concept appear to be the ability to offer an alternative to clients who are adverse to surgery and the possible cost savings associated with this product when compared to the cost of spay surgeries. However, even among those veterinarians who are open to the idea of recommending this product, there is a concern that owners would not remember to repeat the treatment in three years.



Reasons Veterinarians Would be Likely to Recommend Contraceptive



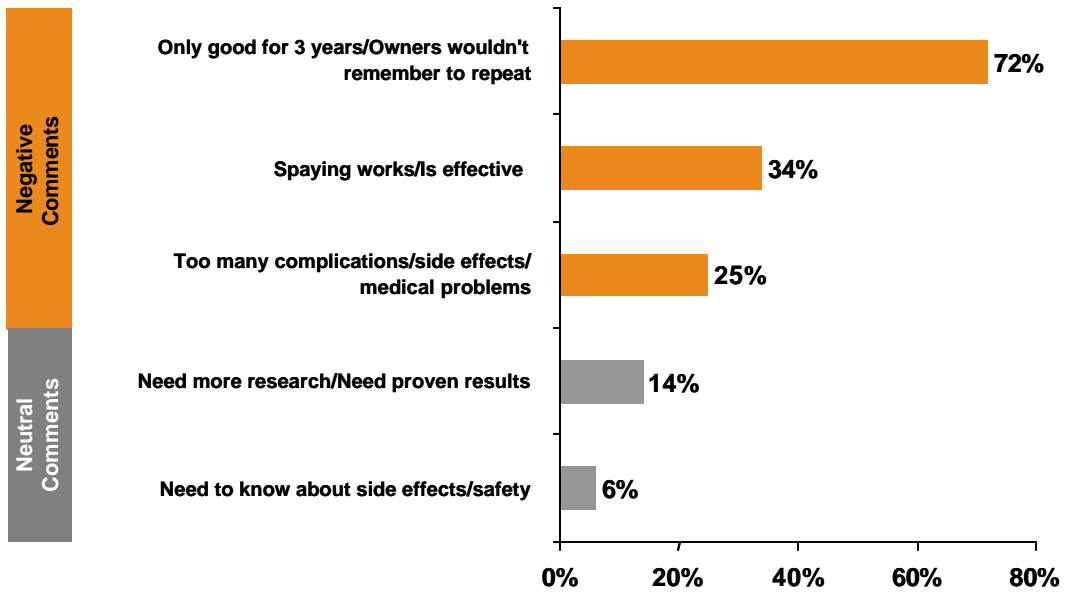
Base = Those respondents who say they would be somewhat or very likely to recommend contraceptive (n=104)

Q12B: Why would you be likely/unlikely to consider offering this product?

The main drawbacks of the contraceptive product concept appear to be the fact that it is only effective for three years and the concern that owners would forget to repeat the treatment. There is also a belief that spaying is simply more effective and that there may be too many side effects or other medical problems associated with the contraceptive product.



Reasons Veterinarians Would be Unlikely to Recommend Contraceptive

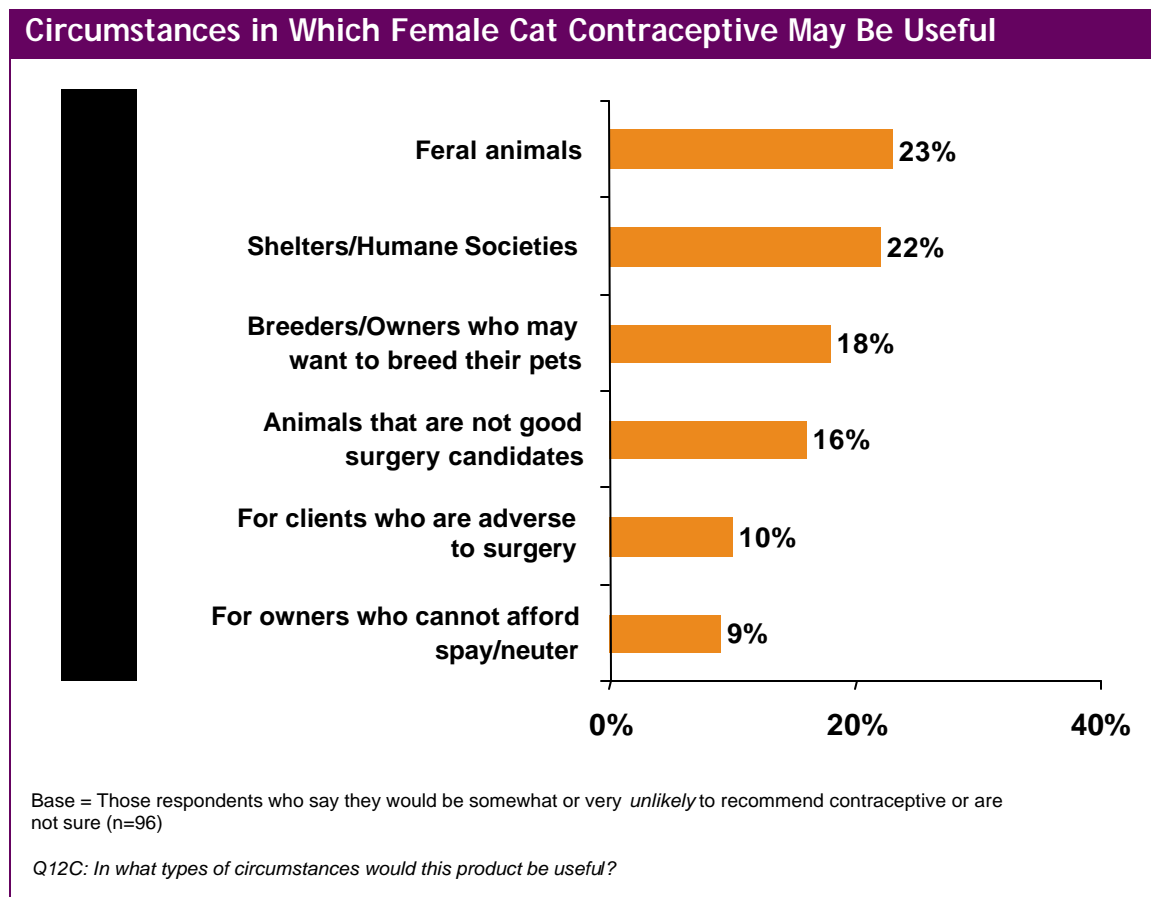


Base = Those respondents who say they would be somewhat or very *unlikely* to recommend contraceptive (n=92)

Q12B: *Why would you be likely/unlikely to consider offering this product?*



Those veterinarians who would be unlikely to recommend the product to their clients were asked if there were any circumstances in which they felt the product may be useful. As shown below, about a quarter indicate that it may be appropriate for feral cat populations and for use by shelters and Humane Societies. In addition, 18% mentioned it may be useful to breeders who want to breed their animals and do not want them permanently sterilized. Clients who are adverse to surgery or who have pets that are not good surgical candidates are also possible applications for this product.



Conclusions and Key Findings

Findings of this study demonstrate that there is a fairly low level of perceived need among veterinarians for an alternative to surgical spay and neutering – for use in both the larger community and in their own practice. Indeed, the vast majority of veterinarians included in this study firmly believe that surgical spay/neuter provides clear benefits beyond sterilization – helping to prevent both health problems and behavior problems in cats and dogs of both sexes. In addition, the majority of veterinarians place at least some importance on these surgical procedures in terms of their contribution to revenues and their role in attracting new clients to the practice (despite the fact that only a small percentage view these procedures as very profitable relative to other procedures).

Due to the low level of perceived need for an alternative and the value placed on the benefits associated with spay/neuter surgeries, it will be challenging to convince veterinarians to consider an alternative. However, the data suggest there is value in some of the benefits that a non-surgical sterilant may be able to provide. For instance, the majority do feel it could be a better option for shelters to use and may increase the number of sterilizations performed in the community overall. For their own practice, they do see value in offering a non-surgical alternative to clients who are adverse to surgery or have pets who are not good candidates for surgery. It also is valued as a lower cost option for pet owners who may be sensitive to the price of the surgical procedure.

There does appear to be some interest among these veterinarians in a female cat contraceptive (particularly in the Northeast). The main attraction of this product is the lower cost and the ability to offer clients who are adverse to surgery another option. However, veterinarians are concerned about the need to repeat the treatment – expressing doubt that pet owners would remember to bring their cat in for another treatment every 3 years.

It is fairly clear that, in order for any sterilant or contraceptive product to be broadly considered by veterinarians as a viable alternative to surgical sterilization (in more than just special circumstances), it will need to deliver some of the same benefits attributed to surgical



procedures; preventing both health and behavior problems, providing permanent sterilization and requiring only one treatment.

Appendix A

Additional Analysis

Relationship Between Attitudes/Involvement in Pet Population Control Programs and Perceived Need/Likelihood to Recommend Cat Contraceptive

- Overall, 51% of vets surveyed indicate that they feel pressured to provide more volunteer time or low-cost services to community animal welfare groups than they are able. Among those who feel pressure (n=101), 28% report that there is a great need for an alternative (compared to 21% overall). And, nearly two-thirds (65%) would be likely to recommend the cat contraceptive product (versus 52% overall).
- Those vets who perceive a great need for an alternative to surgical spay/neuter are much more likely than those who do not, to indicate that they feel pressured to provide more time/services than they are able (66% vs. 46%, respectively).
- Those vets who indicate that they are likely to recommend the female cat contraceptive are more likely than those unlikely to recommend it to indicate that they feel pressured to provide more time/services than they are able (63% vs. 37%, respectively).
- Overall, 61% of vets surveyed report that they currently participate in pet population control programs in their community on a regular basis. Among those who participate (n=121), 19% perceive a need for an alternative (versus 21% overall). And, 59% are likely to recommend the cat contraceptive product (versus 52% overall).
- There is no statistically valid relationship between participation in these programs and perceived need for a non-surgical alternative to spay/neuter.
- Those vets who indicate that they are unlikely to recommend the female cat contraceptive are significantly less likely to be involved in these programs than those vets who indicate a willingness to try the product (45% of vets unlikely to recommend do not participate versus only 28% of vets likely to recommend.)



Appendix B

Summary of Colorado Findings

At the client's request, we over-sampled veterinarians in Colorado in order to provide an adequate number of cases to analyze responses for this specific segment of veterinarians. Fifty of the 200 interviews were conducted among veterinarians in Colorado. These 50 cases were included in the total sample (and in the Western region segment) but were weighted to reflect the correct proportion of Colorado veterinarians. The margin of error for a sample of 50 is +/- 13.9% at the 95% level of confidence.

Participation in Pet-Population Control

As with the larger sample of veterinarians, the vast majority of Colorado veterinarians surveyed acknowledge the impact that the number of unplanned litters have on the pet over-population problem. Ninety-six percent agree (91% strongly and 5% somewhat) that unplanned litters contribute significantly to the number of unwanted pets in the community. Similar to the larger population of veterinarians, only half of the Colorado respondents surveyed indicate that they feel pressured to provide more volunteer time or low cost services to community animal welfare groups than they are able.

Half of the Colorado veterinarians surveyed (compared to 61% of the total) report that they currently participate in pet population control programs in their communities on a regular basis. Forms of participation include providing spay/neuter for shelters or rescue groups (40%), honoring discount vouchers (42%), sterilizing feral cats (32%) and volunteering surgical time at shelters or clinics (14%).

Importance and Benefits of Spay/Neuter Surgeries

Similar to other regions, Spay/Neuter surgeries are viewed by the majority of Colorado respondents as at least somewhat important in terms of their impact on a practice's gross annual revenues and their role in attracting new customers to the practice. However, a significantly larger proportion of Colorado vets (30% vs. 13% overall) indicate that these procedures are not important to their practice's total annual gross revenues. Eighteen percent of the Colorado



veterinarians surveyed indicate that these procedures are very important (a 6 or 7 on a 7-point rating scale) and 52% indicate they are somewhat important (a 3-5 rating) to their annual revenues. Two in ten (20%) also indicate that they are very important and 46% somewhat important in terms of attracting new clientele. Only 8% of Colorado respondents indicated that spay /neuter procedures are very profitable relative to other procedures, while 74% indicate they are moderately profitable (a 3-5 rating). Colorado veterinarians perform an average of 277 spay/neuter surgeries a year –compared to an average of 446 for the larger sample of 200.

The study revealed a very strong belief among the respondents in the benefits associated with spay/neuter surgeries. Similar to the larger sample of veterinarians, the vast majority of Colorado respondents agree that surgical spay/neuter provides benefits beyond sterilization – helping to prevent both health problems and behavior problems in cats and dogs of both sexes.

Awareness of Neutersol®

Respondents were asked if they were aware of any non-surgical sterilants or contraceptives for cats or dogs that are currently under development or that have been on the market in the US or in other countries. Total awareness of Neutersol® (unaided and aided) was higher among Colorado veterinarians than among the total sample (60% versus 44% respectively).

29

Need for Non-Surgical Alternative to Surgical Spay/Neuter

Respondents were asked about the need for a non-surgical alternative to spay/neuter procedures – both in general and in their own practice. Overall, there is a low level of perceived need among Colorado veterinarians on both measures. Just under a quarter (24%) of the Colorado respondents indicate that there is a great need, in general, for a non-surgical alternative, while nearly half (42%) indicate there is no need. For their own practice, only 10% indicate that there is a great need for an alternative while two-thirds (66%) indicate that there is no need. (These results do not differ significantly from the total sample.)

Perceived Value of Possible Benefits Associated with Non-Surgical Sterilants

While the level of perceived need for an alternative to surgical spay/neuter procedures is fairly low, Colorado veterinarians do indicate that they value some of the benefits that a non-surgical sterilant may be able to provide. Six in ten respondents (60%) indicate that there is significant



value (a 6 or 7 rating on a 7-point rating scale) in offering this option to shelters to reduce the number of unwanted pets in the community. Half (50%) of those surveyed indicate that the ability to offer an alternative to clients who are adverse to surgery would be very valuable and four in ten (40%) indicate that reducing the time and resources required for surgical spay/neuters and the ability to offer a lower cost alternative to clients are very valuable benefits.

As with the larger population of veterinarians, these findings suggest that in order for a non-surgical sterilant to be accepted by Colorado veterinarians, it must provide the same benefits in terms of permanent sterilization and reducing health problems and unwanted behavior in animals that surgical sterilization is believed to provide. Over three-quarters (78%) of the Colorado respondents surveyed indicate that providing permanent sterilization is a very important attribute of any non-surgical sterilant product. Approximately 7 in 10 indicate it is very important that the product reduces unwanted behavior of a sexually intact animal (72%) and protects against reproductive tract and hormone-related diseases (70%). Just over half (56%) also indicate that it is very important that the product only requires one treatment. Less important is the ability of a technician to perform the procedure (only 16% rated this as very important).

Reactions to Female Cat Contraceptive Product Concept

Respondents were read the following description of a new product for female cats and were asked how likely they would be to recommend the new product to their clients:

This product will provide contraception for a female cat with a single injection. It blocks the hormones producing heat behavior and renders female cats infertile for three years at which point cats can be retreated. The product is approved as safe and effective by the FDA. Pricing is estimated to be \$15-\$20 to the veterinarian.

Just under half (46%) of the Colorado veterinarians surveyed indicate that they would be likely to recommend the female cat contraceptive product concept to their clients (40% somewhat likely and 6% very likely). This is slightly lower than average – 52 % of total respondents surveyed indicated that they would be likely to recommend the product ((37% somewhat likely and 15% very likely).



Appendix C

Questionnaire

Veterinarian Spay and Neuter Survey BN07-105

Interview Information

Date:	
Day of week:	
Interviewer ID:	
Begin time:	
Time zone:	
Elapsed interview time:	
Call-result:	

Respondent Information

Sample number:	
Respondent name:	
Business name:	
Telephone number:	
E-mail address (optional):	

31

Interviewer comments:	
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INTRODUCTION

Receptionist/Respondent Intro:

Hi, I was hoping to speak with Dr. **(NAME FROM SAMPLE)**. Hello! This is _____ with BNRResearch, a national opinion research firm. Today we're conducting a survey with veterinarians like yourself to explore attitudes towards spaying and neutering in cats and dogs and we'd like to include your opinions. I promise you that I'm not selling anything, and all your



responses are strictly confidential. And if you complete the survey, we can email you a summary of the results of the research.

IF DR. NOT AVAILABLE, ASK IF THERE'S ANOTHER DR. AT THE PRACTICE THAT YOU CAN SPEAK WITH. IF THERE ARE MULTIPLE DOCTORS, ALWAYS ASK FOR FEMALE FIRST.

ASK IF THERE IS A MORE CONVENIENT TIME TO CALL. SET DATE/TIME FOR APPOINTMENT. IF CALLING HOME, GET HOME PHONE NUMBER (INCLUDING AREA CODE)

A. Region (**FROM SAMPLE. DO NOT ASK**)

- 1 Northeast (TBD)
- 2 Midwest (TBD)
- 3 South (TBD)
- 4 West (TBD)
5. Colorado (**50**)

B. Gender (**DO NOT ASK**)

- 1 Male
- 2 Female

QS1. First, can I confirm that you are currently a practicing veterinarian?
(DO NOT READ LIST)

- 1 Yes
- 2 No, not a practicing doctor (**ASK FOR REFERRAL IN PRACTICE. IF NONE, THANK & TERMINATE**)
- 3 Retired (**ASK FOR REFERRAL IN PRACTICE. IF NONE, THANK & TERMINATE**)

QS2. Is your practice ... ? (**READ LIST**)

- 1 Small Animal exclusively
- 2 Large Animal exclusively (**THANK & TERMINATE**)
- 3 Mixed, with at least 80% small animal
- 4 Mixed, but less than 80% small animal (**THANK & TERMINATE**)

MUST BE AT LEAST 80% SMALL ANIMAL TO CONTINUE (CODE 1 OR 3)



Q1 Thinking about your practice overall, how important are spay/neuter surgeries on cats and dogs to your practice's total annual gross revenues? Please use a 7-point scale where 1 = not at all important and 7 = extremely important.

Not at all [1]						Extrem- ely Impt [7]	DK	REF
1	2	3	4	5	6	7	8	9

Q2 And how important are spay/neuter surgeries in terms of attracting new customers to the practice? Would you say 1, not at all important, 7, very important or some number in between?

Not at all [1]						Extrem. Impt [7]	DK	REF
1	2	3	4	5	6	7	8	9

Q3 About how many spay and neuter surgeries on cats and dogs are performed in your practice in an average year?

RECORD NUMBER	
88	DON'T READ: Don't know
99	DON'T READ: Refused

33

(IF NEEDED: Just your best guess is fine)

Q4 Relative to other procedures performed in your practice, would you say spay/neuter surgeries are 1 not at all profitable, 7 very profitable or some number in between?

Not at all [1]						Extrem. profit. [7]	DK	REF
1	2	3	4	5	6	7	8	9

Q5 Next, I will read you a number of statements about surgical spaying and neutering. For each statement, please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree.

		Strongly Disagree [1]	SW Disagree [2]	SW Agree [3]	Strongly Agree [4]	DK	REF
	For male dogs, neutering, in the majority of cases, will help to (READ 1-5)						
A.	reduce the incidence of prostate cancer	1	2	3	4	8	9
B.	prevent prostatitis	1	2	3	4	8	9
C.	reduce roaming	1	2	3	4	8	9
D.	prevent marking	1	2	3	4	8	9
E.	prevent aggression	1	2	3	4	8	9
	For female dogs, spaying, in the majority of cases, will help to (READ 1-2)						
F.	prevent breast cancer	1	2	3	4	8	9
G.	prevent aggression	1	2	3	4	8	9
	For male cats, neutering, in the majority of cases, will help to (READ 1-2)						
H.	prevent spraying	1	2	3	4	8	9
I.	reduce aggression	1	2	3	4	8	9
J.	For female cats, spaying helps prevent breast cancer in the majority of cases	1	2	3	4	8	9

PROGRAMMER: ROTATE IN BLOCKS (A-E; F,G; H,I; J)



Q6A Are you aware of any non-surgical sterilants or contraceptives for cats or dogs that are currently in development or that have been on the market in the US or in other countries?

- | | | |
|-------|------------|--------------------|
| 1 | Yes | ASK Q6B |
| 2 | No | SKIP TO Q6C |
| <hr/> | | |
| 8 | Don't know | SKIP TO Q6C |
| 9 | Refused | SKIP TO Q6C |

Q6B **IF YES:** Which ones?

88	DON'T READ: Don't know
99	DON'T READ: Refused

PROGRAMMER: IF MENTIONS "NEUTERSOL" SKIP TO Q7. IF NOT, ASK Q6C

35

Q6C Have you read or heard anything about (**READ 1-4**)?

Neutersol®
Suprelorin®
Gonazon®
Contracare

PROGRAMMER: ROTATE 1-4



Q7A In general, how great a need do you think there is for a non-surgical sterilant as an alternative to surgical spay and neuter procedures for cats and dogs? Please use a 7-point scale where 1 means there is no need at all and 7 means there is a very great need.

No Need [1]						Great Need [7]		DK	REF
1	2	3	4	5	6	7	8	9	

PROGRAMMER: IF 8 or 9, SKIP TO Q8A

Q7B **ASK IF Q7A=1-7:** Why do you say that?

88	DON'T READ: Don't know
99	DON'T READ: Refused

Q8A How great is the need for a non-surgical sterilant as an alternative to spay/neuter surgeries in your own practice? Use the same 7-point scale where 1 means there is no need and 7 means there is a very great need.

36

No Need [1]						Great Need [7]		DK	REF
1	2	3	4	5	6	7	8	9	

PROGRAMMER: IF 8 or 9, SKIP TO Q9

Q8B **ASK IF Q8A=1-7:** Why do you say that?

88	DON'T READ: Don't know
99	DON'T READ: Refused



Q9 How great do you feel the need is for a non-surgical sterilant specifically for (READ 1-4)

AFTER FIRST STATEMENT: Would you say -1 there is no need, 7 - a very great need, or some number in between?

	No Need [1]						Great Need [7]	DK	REF
	1	2	3	4	5	6	7	8	9
A. Male dogs	1	2	3	4	5	6	7	8	9
B. Female dogs	1	2	3	4	5	6	7	8	9
C. Male cats	1	2	3	4	5	6	7	8	9
D. Female cats	1	2	3	4	5	6	7	8	9



Q10

I'm going to read a list of possible benefits associated with some non-surgical sterilants. Please tell me how valuable you feel each benefit is. Please use a 7-point scale where 1 = not at all valuable and 7 = extremely valuable. **(READ A-O)**

(READ FIRST STATEMENT AND THEN ASK, Would you say 1 - not at all valuable, 7 - extremely valuable or some number in between?)

	Not at All Valuable [1]						Extrem. Val. [7]	DK	REF
A. Provides a lower cost alternative to offer clients	1	2	3	4	5	6	7	8	9
B. Reduces the time and resources required for the vet and the practice	1	2	3	4	5	6	7	8	9
C. Is an alternative for clients who are averse to surgery	1	2	3	4	5	6	7	8	9
D. Could increase the number of sterilizations performed in the practice	1	2	3	4	5	6	7	8	9
E. Could increase the number of sterilizations performed in the community	1	2	3	4	5	6	7	8	9
F. Is a safer alternative for the animal – having less risks and side effects than surgical spay/neuters.	1	2	3	4	5	6	7	8	9
G. There is less recuperative time	1	2	3	4	5	6	7	8	9
H. The ability to perform more sterilizations in less time makes it a more profitable segment of business for the practice	1	2	3	4	5	6	7	8	9
I. Is a better option for shelters to use to reduce number of unwanted pets	1	2	3	4	5	6	7	8	9
J. Is a potential way to attract new clients	1	2	3	4	5	6	7	8	9

PROGRAMMER: ROTATE A-J



Q11 How important would the following attributes be to you when evaluating a new sterilant product **(READ A-E)**

(READ FIRST STATEMENT AND THEN ASK, "would you say 1 - not at all important, 7 - extremely important or some number in between?)

	Not at All Impt. [1]						Extrem. Impt.. [7]		DK	REF
A. A technician can perform the procedure	1	2	3	4	5	6	7	8	9	
B. Requires only one treatment	1	2	3	4	5	6	7	8	9	
C. Provides permanent sterilization	1	2	3	4	5	6	7	8	9	
D. Reduces unwanted behavior of a sexually intact animal	1	2	3	4	5	6	7	8	9	
E. Protects against some reproductive tract and hormone-related diseases	1	2	3	4	5	6	7	8	9	

PROGRAMMER: ROTATE A-E



Q12A Now I'd like to read you a description of a product specifically for female cats. This product will provide contraception for a female cat with a single injection. It blocks the hormones producing heat behavior and renders female cats infertile for three years at which point cats can be retreated. The product is approved as safe and effective by the FDA. Pricing is estimated to be \$15-\$20 to the veterinarian.

Based on this description, how likely would you be to consider recommending this product to your clients? Would you be **(READ 1-4)**

- 4 Very Likely
 - 3 Somewhat Likely
 - 2 Somewhat Unlikely
 - 1 Not at all Likely
-
- 8 Don't know/Depends **SKIP TO Q12C**
 - 9 Refused **SKIP TO Q13**

Q12B Why would you be likely/unlikely to consider offering this product?

88	DON'T READ: Don't know
99	DON'T READ: Refused

40

Q12C IF UNLIKELY/NOT SURE (Q12A = 1, 2 or 8): In what types of circumstances would this product be useful?

88	DON'T READ: Don't know
89	DON'T READ: Refused



Q13

Next, I will read you two statements about pet overpopulation. For each statement, please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree.

	Strongly Disagree [1]	SW Disagree [2]	SW Agree [3]	Strongly Agree [4]	DK	REF
A. Unplanned litters contribute significantly to the number of unwanted pets in our community.	1	2	3	4	8	9
B. I feel pressured to provide more volunteer time or low cost services to community animal welfare groups than I am able.	1	2	3	4	8	9

Q14 Do you currently participate in any pet population control programs in your community on a regular basis?

- 1 Yes **ASK Q15**
 - 2 No **SKIP TO Q16**
-
- 8 Don't know **SKIP TO Q16**
 - 9 Refused **SKIP TO Q16**

41

Q15 In which of the following ways do you regularly participate? Do you **(READ 1-4)**

	Yes [1]	No [2]	DK	REF
A. Provide spay neuter for homeless pets for a shelter or rescue group?	1	2	3	4
B. Honor Discount vouchers for pet adopters or low income pet owners?	1	2	3	4
C. Sterilize feral cats?	1	2	3	4
D. Volunteer surgical time at a local shelter or clinic ?	1	2	3	4



Q16

Finally, I'm going to ask you some questions about yourself and your practice so we can tabulate results by different types of veterinarians. Of course, all information is strictly confidential.

How long have you been practicing veterinary medicine?

_____ years (2 DIGITS. 0 = Less than a year)	
88	DON'T READ: Don't know
99	DON'T READ: Refused

Q17 Including yourself, how many veterinarians are in your practice?

_____ RECORD NUMBER	
88	DON'T READ: Don't know
99	DON'T READ: Refused

42

Q18 I'm going to read some broad revenue groups. Please stop me when I come to the one which best represents your practice's total annual gross revenues before taxes and expenses. (**READ 1-6**)

- 1 Under \$250,000
 - 2 \$250,000 to just under \$500,000
 - 3 \$500,000 to just under \$750,000
 - 4 \$750,000 to just under \$1 million
 - 5 \$1 million to \$2 million
 - 6 More than \$2 million
-
- 8 Don't know
 - 9 Refused



Q19 Is your practice an independent practice or affiliated with a region or national chain?

- 1 Independent
 - 2 National or regional chain
-

- 8 Don't know
- 9 Refused

Q20 Now I'm going to read some broad age groups. Please stop me when I come to the one in which you fall. (**READ 1-6**).

- 1 Under 25
 - 2 25-34
 - 3 35-44
 - 4 45-54
 - 5 55-64
 - 6 65 or older
-

- 8 Don't know
- 9 Refused

Those are all the questions I have. Thank you very much for your time!

