



Pet Owner & Vet Perspectives on Parasite Treatment and Prevention: A Global Survey

2025





Background and objectives

MSD Animal Health commissioned research to explore:

- The gaps in pet owners' knowledge about the threat of fleas/ticks, and the subsequent gaps in preventative care.
- Understand veterinarians' role in flea/tick education.
- Pet owner and veterinarian attitudes, usage, and recommendations of products currently in the market.



Methodology

Respondent Profile



Pet Owners

Respondents who own a cat and/or dog



Veterinarians

Veterinarians who work at least 10 hours per week in their practice and treat both dogs and cats.



Sample

4072 pet owners and 582 veterinarians across all markets, recruited via an online panel.



Markets

Australia, New Zealand, UK, France, Germany, Italy, the U.S., Brazil, Mexico, Peru, China, Japan, Spain, Poland, Canada.



Survey length and fieldwork

Pet Owners

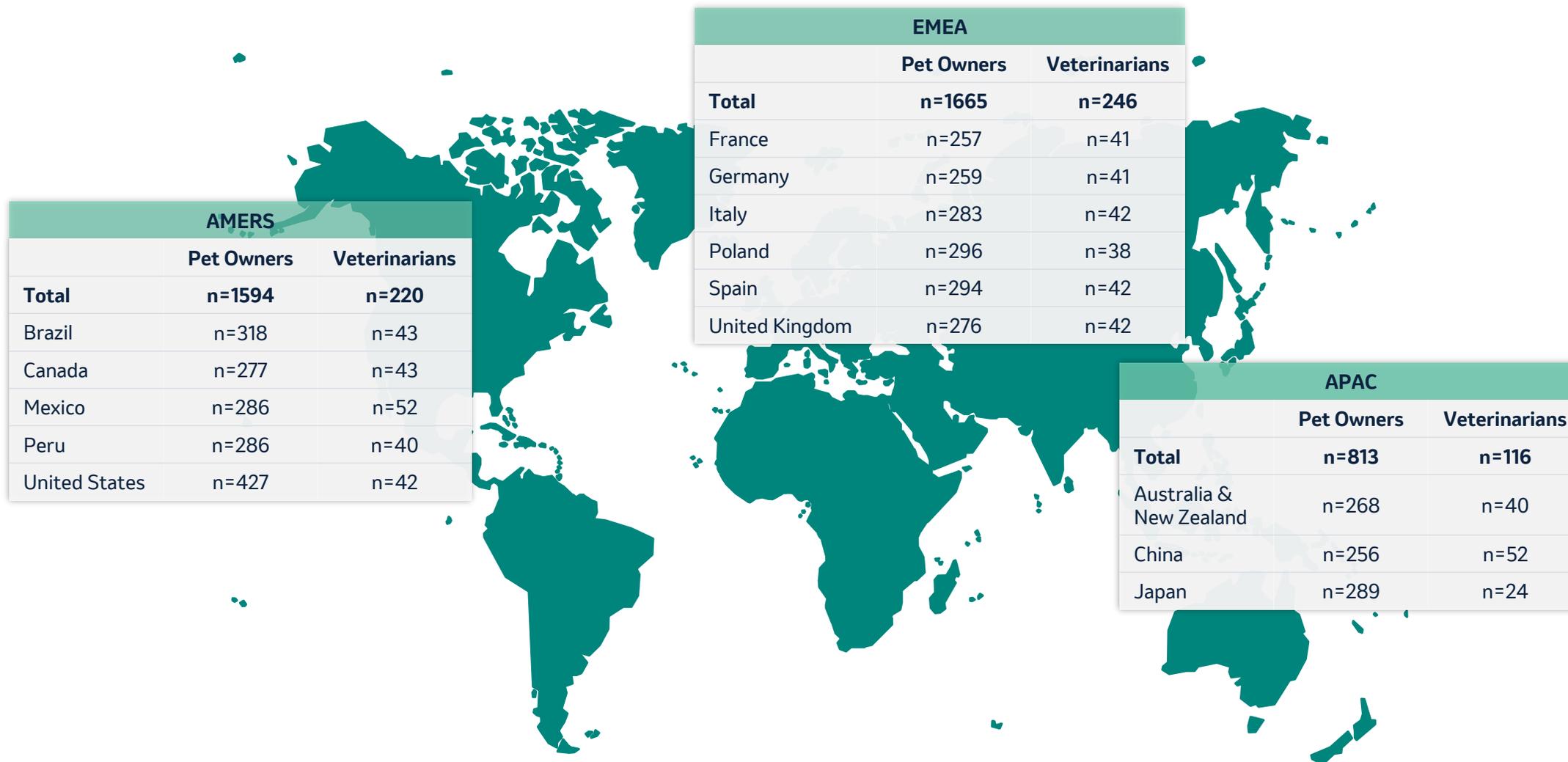
Median: 11 minutes | Dec 23, 2024 - Jan 21, 2025

Veterinarians

Median: 11.5 minutes | Dec 27, 2024 - Jan 28, 2025

Throughout the report, percentages are rounded and may not total exactly 100%.

Methodology: Sample by Country



DUE TO LIMITED POPULATION SIZES, RESULTS FOR AUSTRALIA AND NEW ZEALAND ARE REPORTED AS A COMBINED REGION.

Methodology: Key subgroups of interest

Throughout the report, we have included callouts to indicate where specific groups of pet owners and veterinarians respond statistically significantly different than their peers. Results were tested at a 95% confidence level.

Below are the specific groups we explored:

Pet Owner Groups of Interest

Experience with flea/ticks

Ever experienced	n=1968	Never	n=2104
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How define flea/tick season

Year-round	n=408	Not year-round	n=3664
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Pet ownership experience

1 st time owner	n=1039	Experienced owner	n=2999
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Veterinarian Groups of Interest

Gender

Male	n=211	Female	n=370
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Years in practice

10 or less years	n=272	Greater than 10 years	n=310
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View Rx as more effective than OTC treatments

Rx more effective	n=414	Do not view Rx as more effective	n=166
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Executive summary

01

Parasite prevention is commonly discussed during routine check-ups.

Routine check-ups often include discussions and treatments for flea/tick prevention – most often initiated by the veterinarian. EMEA veterinarians are more likely to offer these treatments as part of the routine check-up.

02

The large majority of pet owners see fleas/ticks as a threat to their pet and themselves/family.

82% see fleas/ticks as a threat to their pet and 75% see as a threat to themselves/family, yet vets report a gap where large portions of concerned pet owners are not complying with treatment, saying over half do not administer year-round.

03

Only a minority of pet owners treat for ticks/fleas year-round.

Prescription (Rx) treatments are generally trusted more than over-the-counter, though this is less pronounced in APAC. Oral medications and collars are the most popular solutions among owners, and most recommended among vets.

04

Whilst most pet owners feel confident administering flea/tick treatments, veterinarians doubt pet-owner compliance in doing so.

While most pet owners view flea/tick treatment as essential, many admit to difficulties and inconsistencies in following treatment instructions. This validates vet concerns about pet owner consistency and accuracy when administering treatments.

05

Preference for an annual preventative injection is high among pet owners and vets.

More than three-quarters would prefer a vet administered treatment and the same number would be open to a treatment requiring less frequent administration and place trust in yearly injections. And, length of effect is one of the top considerations when picking a treatment.

06

There is openness among pet owners for vet-administered or less frequent treatment options.

Veterinarians prioritize ease of use, minimal side effects, and efficacy in their recommendations. Two-thirds of vets are on board to recommend annual injections if minimal side effects and efficacy can be proven. Those unlikely to recommend a yearly injection worry about side effects.

Pet owner and veterinarian profiles



Pet owner profile

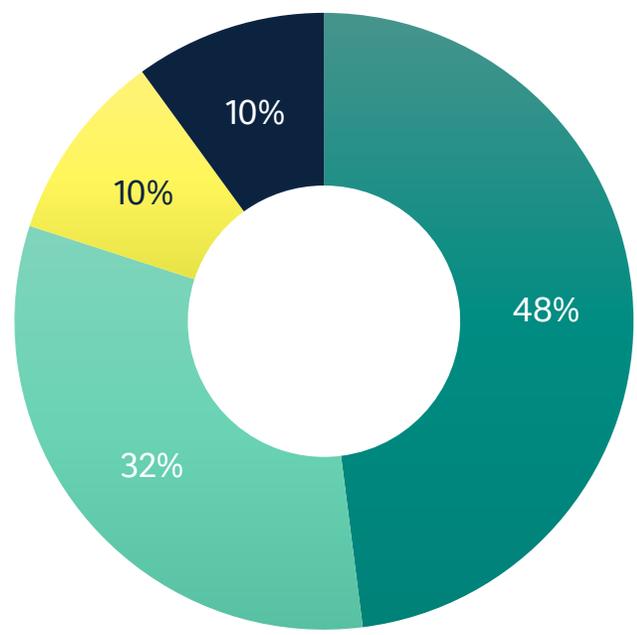
Gender



Dog and cat ownership



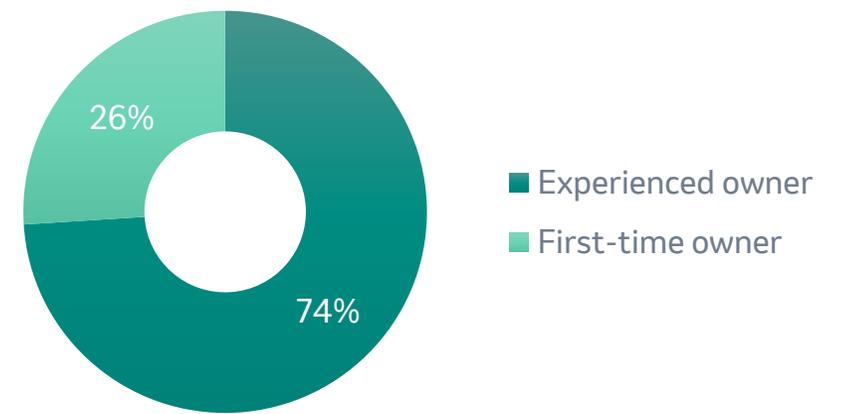
Number of pets in the household



■ 1 ■ 2 ■ 3 ■ 4 or more

Base: Pet owners (n=4072)

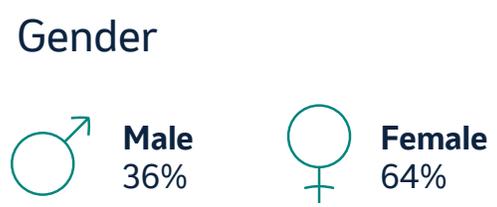
Experience with pets



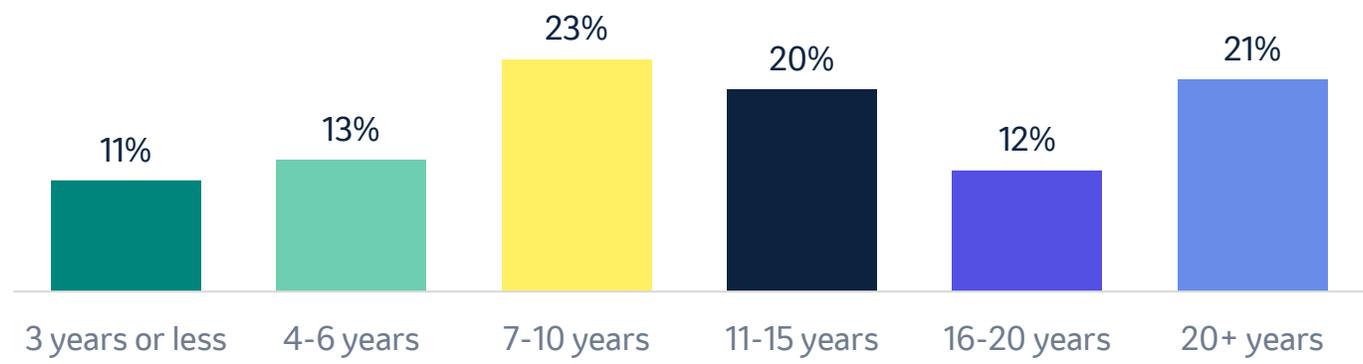
Experience with fleas and ticks



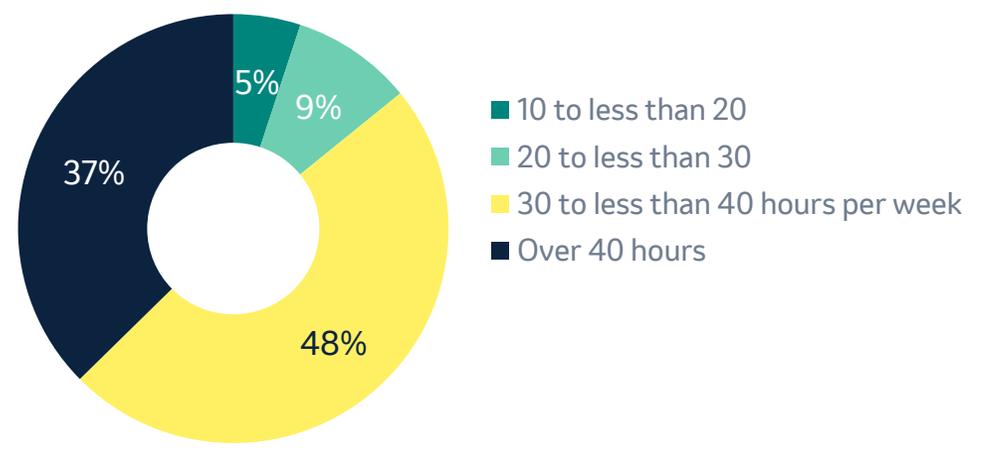
Veterinarian profile



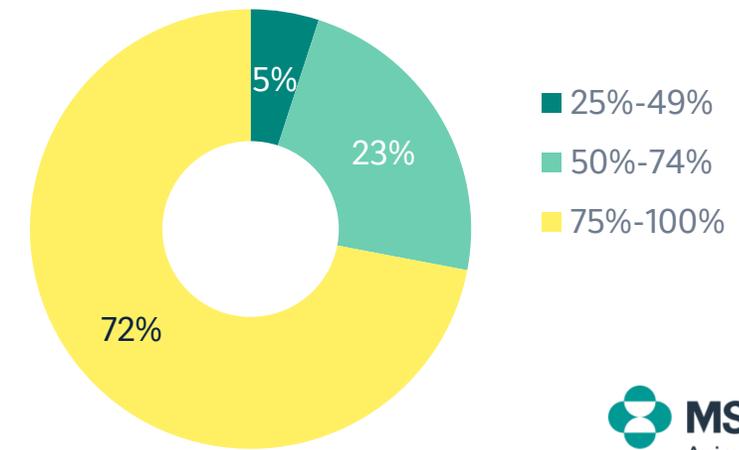
Length of time in practice



Hours worked per week



% of time spent treating cats/dogs



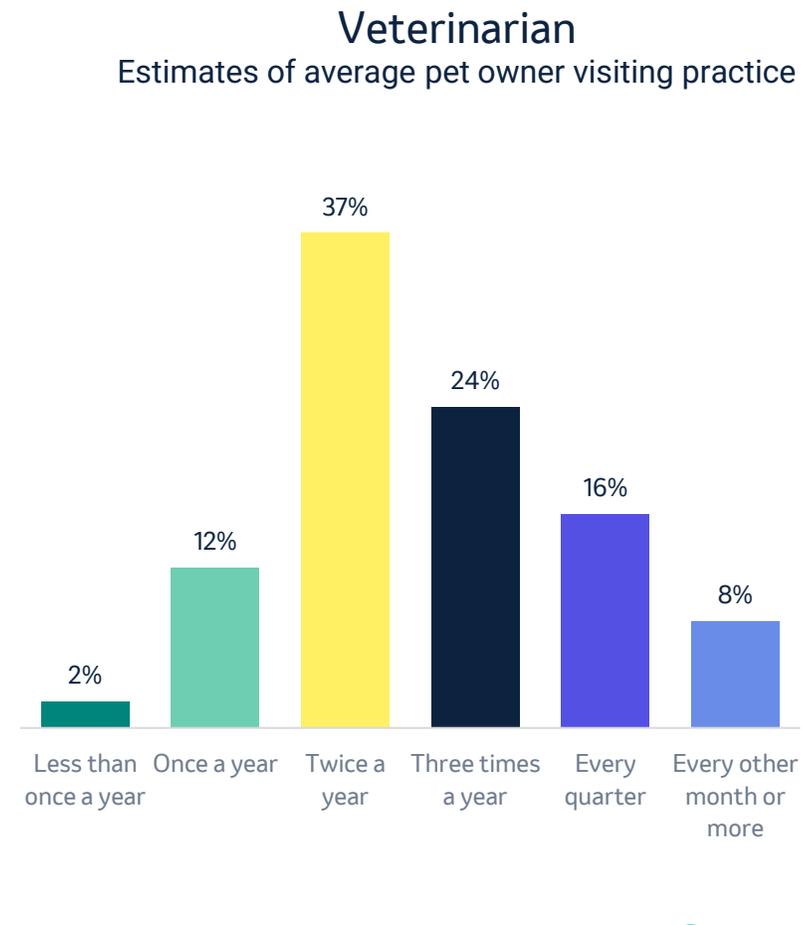
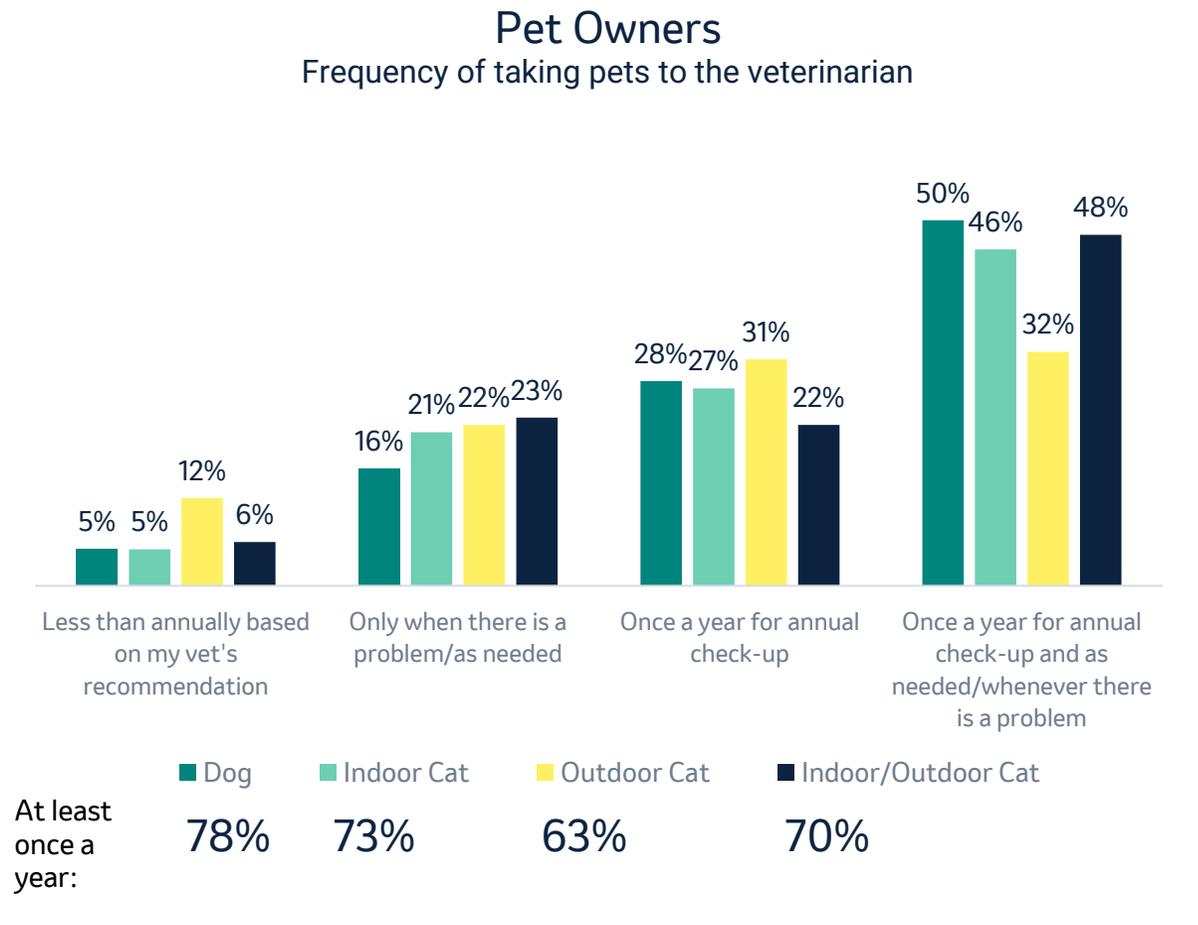
Current pet care practices



Most pet owners are attending the vet at least annually

Pet owners who are more likely to go more than annually:

- Experienced pet owners [Dog and indoor cat owners only]
- Define flea/tick season as year-round [Dog owners only]



Q8. HOW OFTEN DOES THE AVERAGE CAT AND/OR DOG OWNER VISIT YOUR PRACTICE?
 BASE: VETERINARIANS (N=582)
 Q21. HOW OFTEN, IF AT ALL, DO YOU TAKE YOUR [CAT/ DOG/PETS] TO THE VETERINARIAN?
 BASE: DOG OWNERS (N=3145), INDOOR CAT OWNERS (N=1159), OUTDOOR CAT OWNERS (N=65), INDOOR/OUTDOOR CAT OWNERS (N=1068)

Vets estimate a quarter of their clients do not bring their pet annually, most commonly due to financial constraints

Vets with higher average proportion not visiting annually:

- Fewer years in practice
- Do not view Rx as more effective

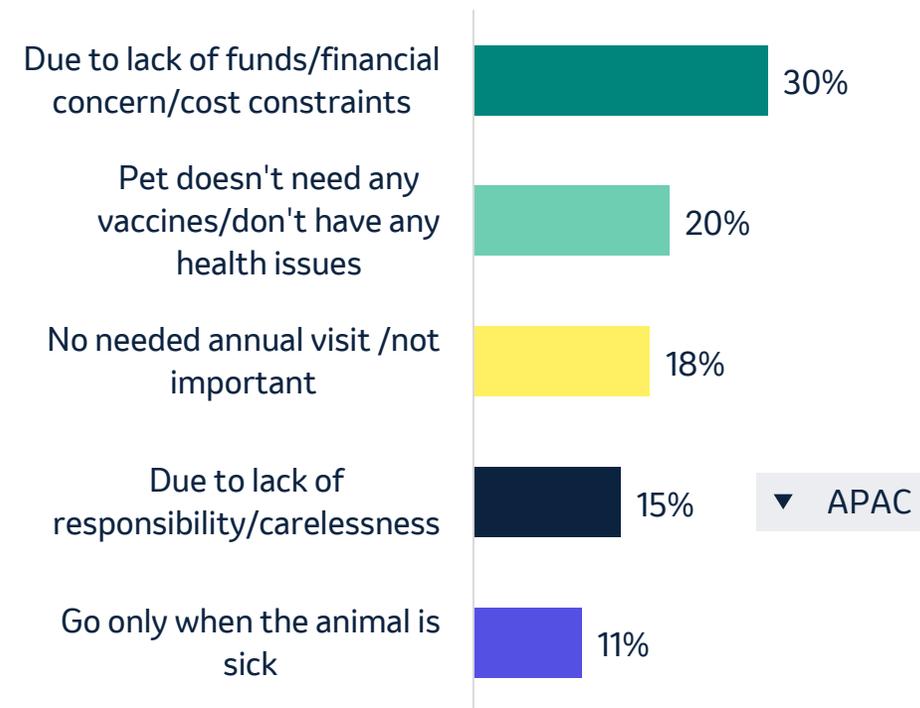
Vets in AMERs cite higher proportions of owners not coming in annually (30% mean vs. 20% EMEA, 22% APAC)

Average proportion of pet owners who do not visit the practice annually



Top 5 reasons why pet owners do not come in annually

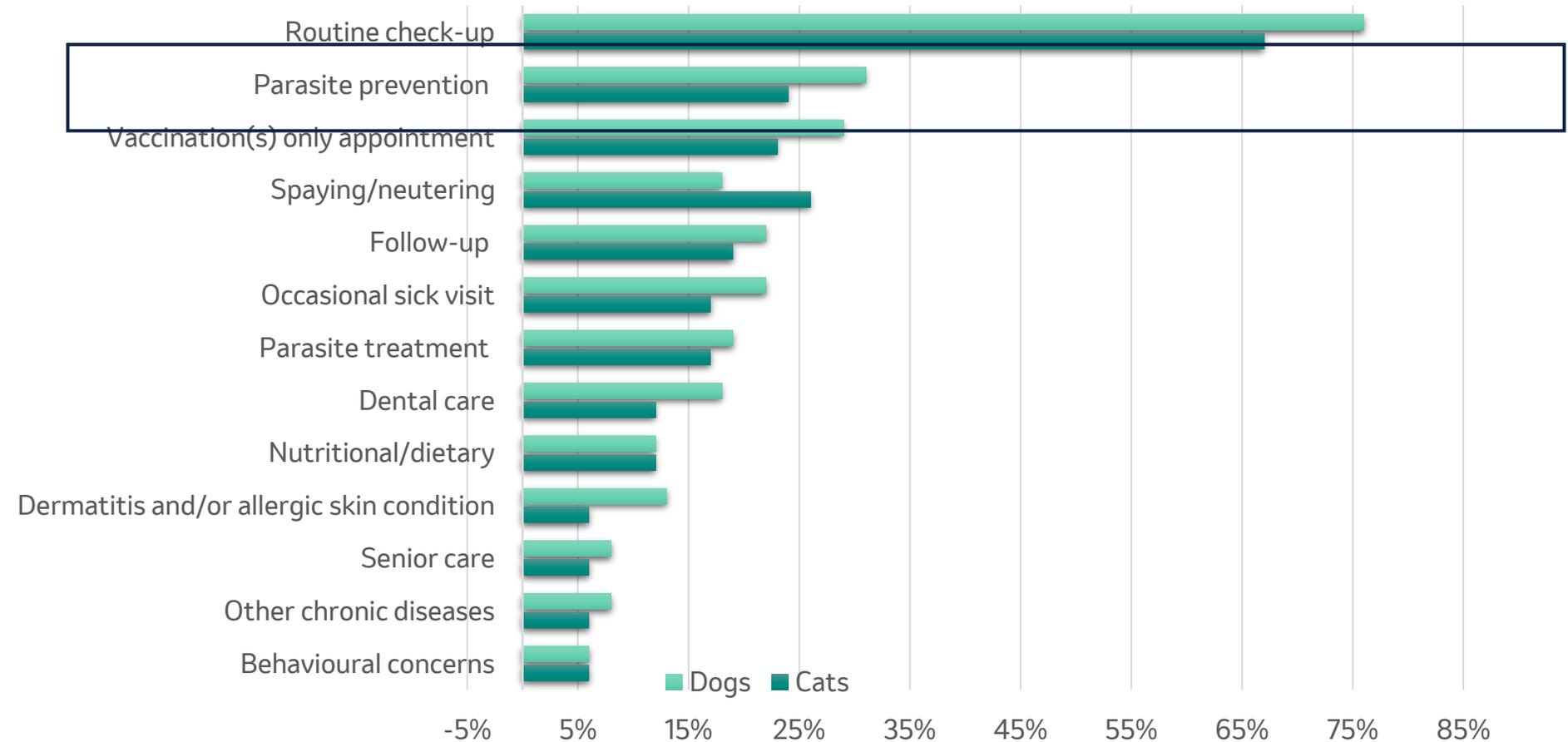
(based on coded responses)



Q10A. WHAT PERCENTAGE OF CAT AND/OR DOG OWNERS REGISTERED AT YOUR PRACTICE DO NOT COME IN ANNUALLY?
 BASE: VETERINARIANS: GLOBAL (N=582)
 Q10B. YOU MENTIONED [X%] OF CAT AND/OR DOG OWNERS REGISTERED AT YOUR PRACTICE WHO DO NOT COME IN ANNUALLY? DO YOU KNOW WHY THAT IS?
 BASE: VETERINARIANS WHO HAVE ANY CLIENTS WHO DO NOT COME IN ANNUALLY (N=566)

Parasite prevention and vaccinations are among the most common reasons for visiting the veterinarian, particularly among dog owners

Reason for visiting the vet in the past 2 years



LETTER INDICATES SIGNIFICANT DIFFERENCE VS. INDICATED SUBGROUP AT A 95% CONFIDENCE LEVEL



Q22. IN THE PAST 2 YEARS, HAVE YOU EVER TAKEN YOUR [CAT/DOG/PETS] TO THE VETERINARIAN FOR ANY OF THE FOLLOWING REASONS?
 BASE: DOG OWNERS (N=3145), CAT OWNERS (N=2292)

During routine appointments, vets most commonly initiate discussions of flea/tick treatments/preventative medications

Discussions of flea/tick treatments and/or preventative medications at routine appointments in the past 2 years

	Dog (A)	Indoor Cat (B)	Outdoor Cat (C)	Indoor/Outdoor Cat (D)
Flea/tick treatment discussed at routine appointment	82% ^B	76%	90% ^B	83% ^B
Vet brought it up	57% ^B	52%	71% ^B	56%
Owner brought it up	26%	24%	19%	26%

LETTER INDICATES SIGNIFICANT DIFFERENCE VS. INDICATED SUBGROUP AT A 95% CONFIDENCE LEVEL

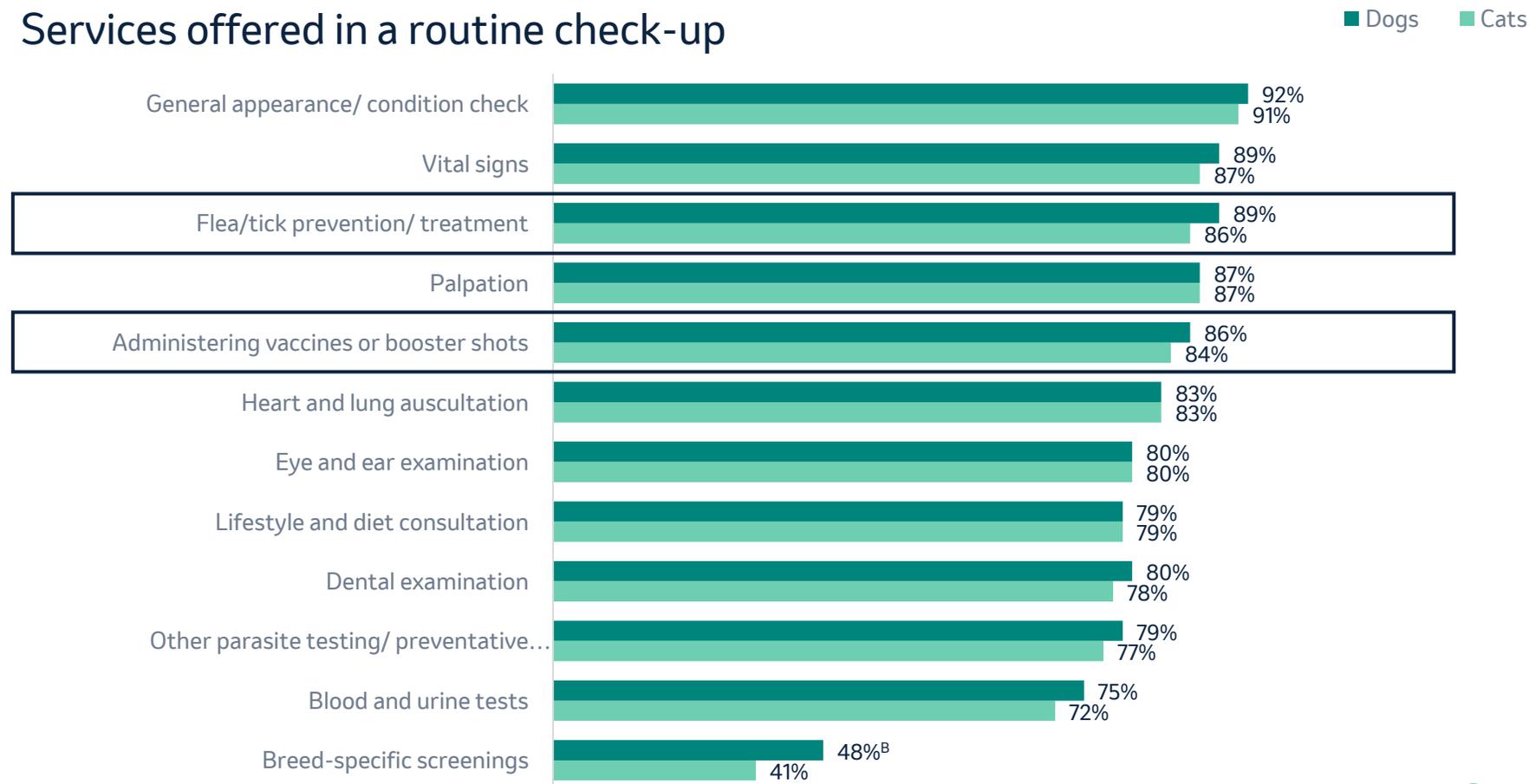
Vets emphasize discussing and providing these preventions/treatments as a part of check-ups

Vets more likely to say they offer flea/tick prevention for both cats and dogs:

- Female vets
- 10+ years in practice
- View Rx as more effective

Offering flea/tick prevention/treatment as part of a routine check-up is a more common practice among EMEA veterinarians.

Services offered in a routine check-up



LETTER INDICATES SIGNIFICANT DIFFERENCE VS. INDICATED SUBGROUP AT A 95% CONFIDENCE LEVEL

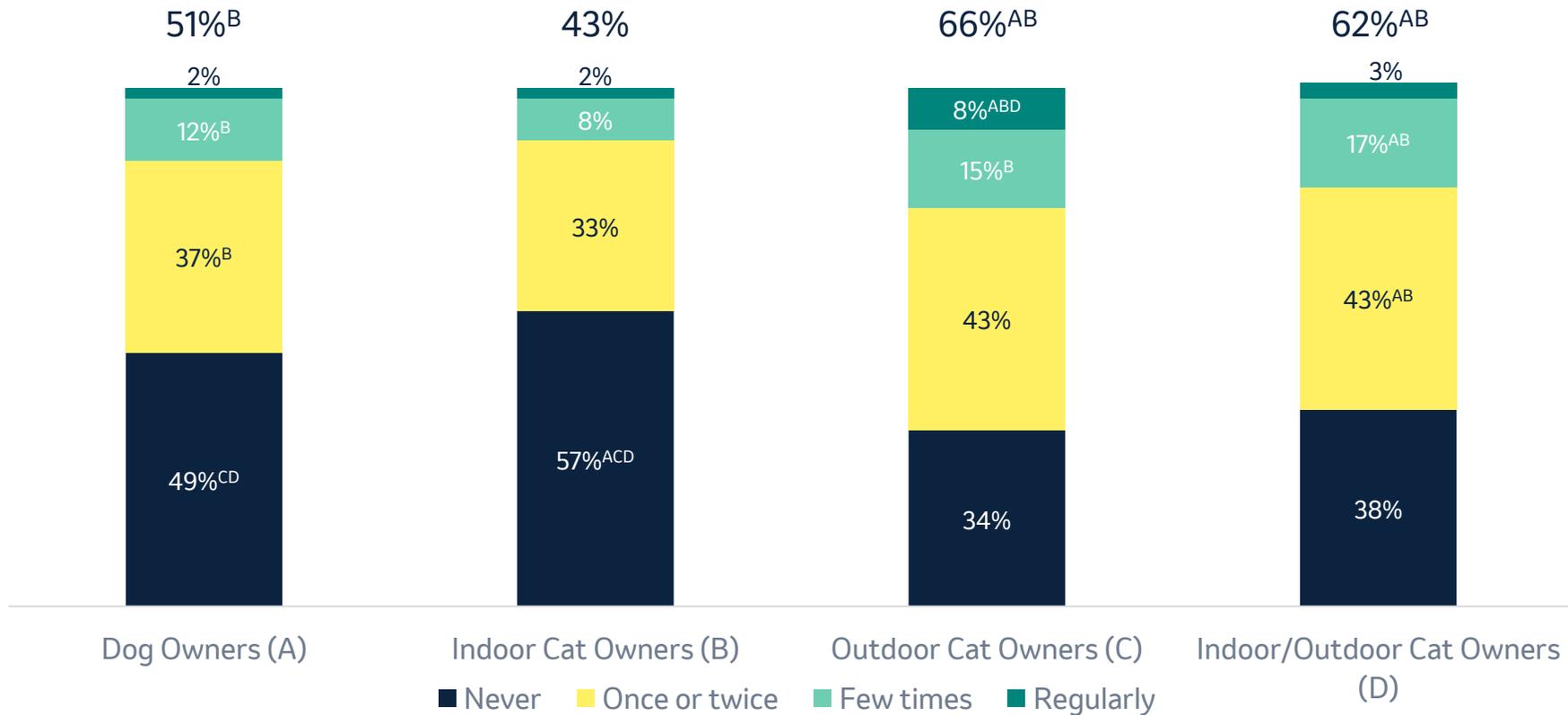
Threat of fleas and ticks



Owners with pets that spend time outdoors are more likely to have had flea/tick problems in their home

Have had a flea/tick problem

Frequency of having a flea/tick problem in the home



LETTER INDICATES SIGNIFICANT DIFFERENCE VS. INDICATED SUBGROUP AT A 95% CONFIDENCE LEVEL

Q20C. HAVE YOU EVER HAD A FLEA OR TICK PROBLEM IN YOUR HOME? IF YES, HOW OFTEN DO YOU EXPERIENCE A FLEA PROBLEM?
 FULL SCALE: I HAVE NEVER HAD A FLEA OR TICK PROBLEM; I HAVE ONLY HAD A FLEA OR TICK PROBLEM IN MY HOME ONCE OR TWICE; I HAVE HAD A FLEA OR TICK PROBLEM IN MY HOME A FEW TIMES; I HAVE REGULAR FLEA AND TICK PROBLEMS IN MY HOME
 BASE: PET OWNERS: DOG OWNERS (N=3145), INDOOR CATS (N=1159), OUTDOOR CATS (N=65), INDOOR/OUTDOOR CATS (N=1068)

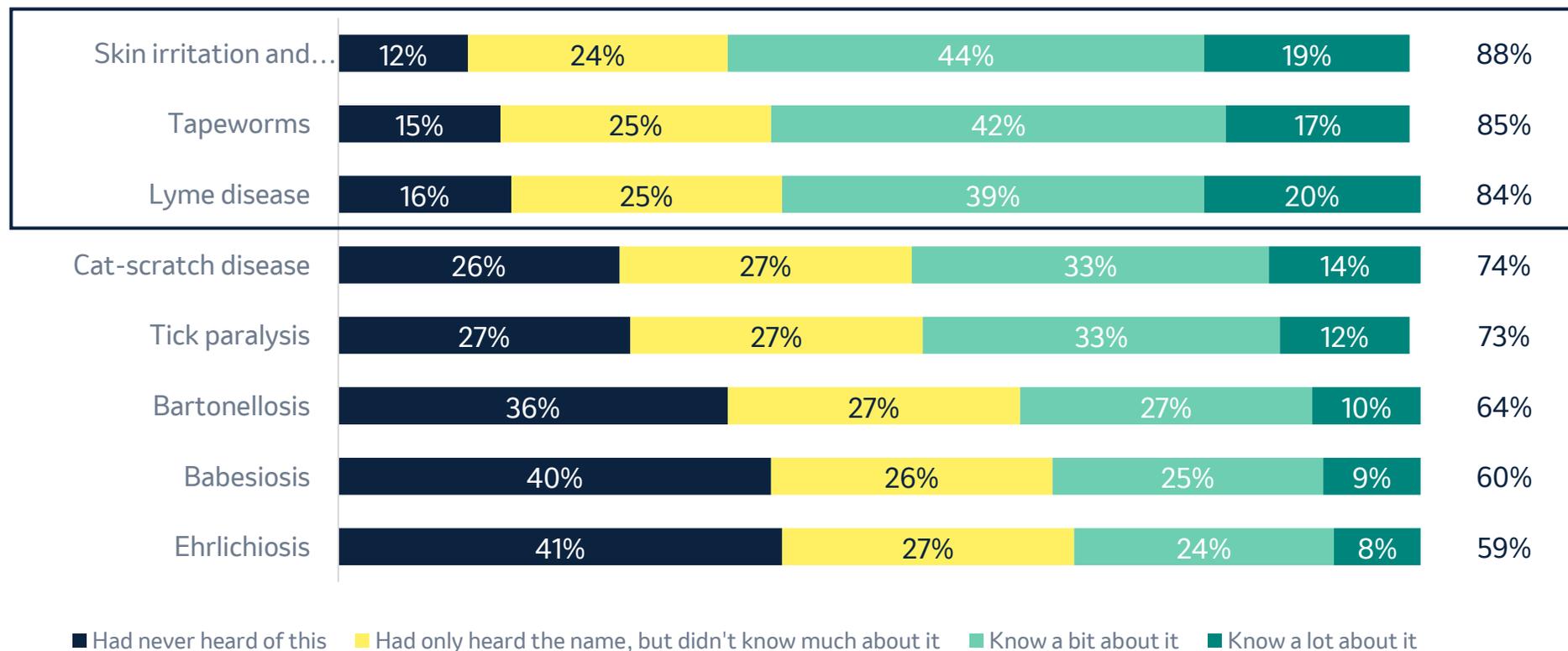
While most pet owners are aware of skin irritation, tapeworms, and Lyme disease, knowledge around other conditions is more lukewarm, leaving many pet owners uninformed

Owners more likely to be aware of threats:

- Have flea/tick experience

Pet owners in APAC display greater awareness of Cat-scratch disease, tick paralysis, and babesiosis compared to AMERS and EMEA; Lyme disease awareness is higher in EMEA

Awareness and familiarity with threats of ticks/fleas



Globally, pet owners are highly aware of flea/tick threats to their pet and family's health

Agreement that fleas/ticks are a threat to health is more pronounced among dog owners, and owners of cats that live both outdoors and indoors.

Perceived threat of fleas/ticks

Flea/ticks are a threat to my cat and/or dog's health



Fleas/ticks are a threat to my own / my family's health



■ Don't know ■ Strongly disagree ■ Somewhat disagree ■ Neither agree nor disagree ■ Somewhat agree ■ Strongly agree

Agree

Global	AMERS	EMEA	APAC
82%	84%	83%	77% ▼

75%	78% ▲	75%	70% ▼
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▼/ ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Q29. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?
 BASE: PET OWNERS: GLOBAL (N=4072), AMERS (N=1594), EMEA (N=1665), APAC (N=813)

And more than half of pet owners consider this a moderate or severe threat

Owners more likely to believe fleas/ticks are harmful to pets:

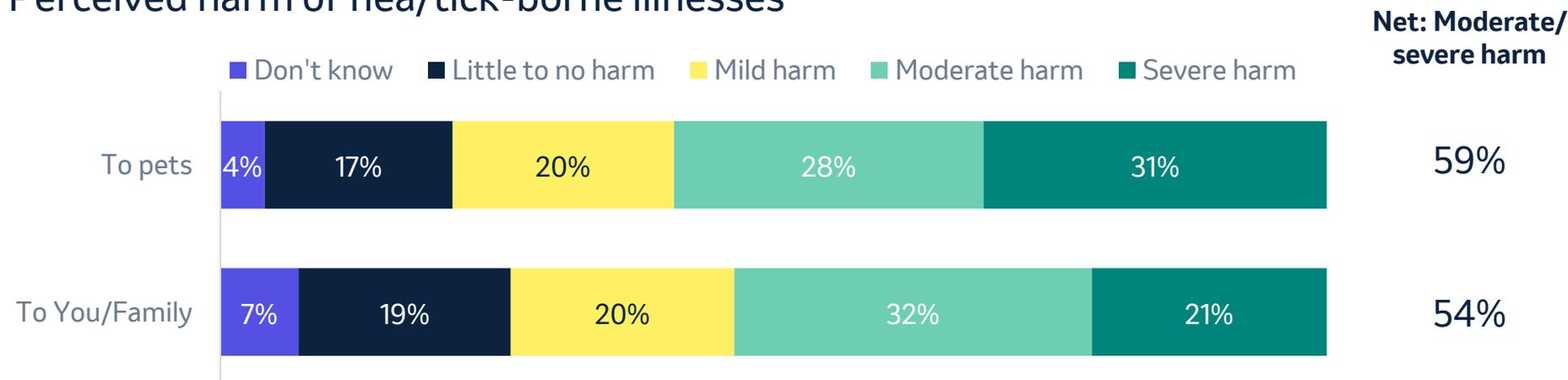
- Have flea/tick experience
- Do not define flea/tick as year-round
- 1st time owners

Owners more likely to believe fleas/ticks are harmful to humans:

- Define flea/tick as year-round
- Experienced owners

However, *flea/tick borne illnesses are seen as a less serious threat in APAC*, compared to AMERS and EMEA regions, despite the generally warmer and humid climates in APAC.

Perceived harm of flea/tick-borne illnesses



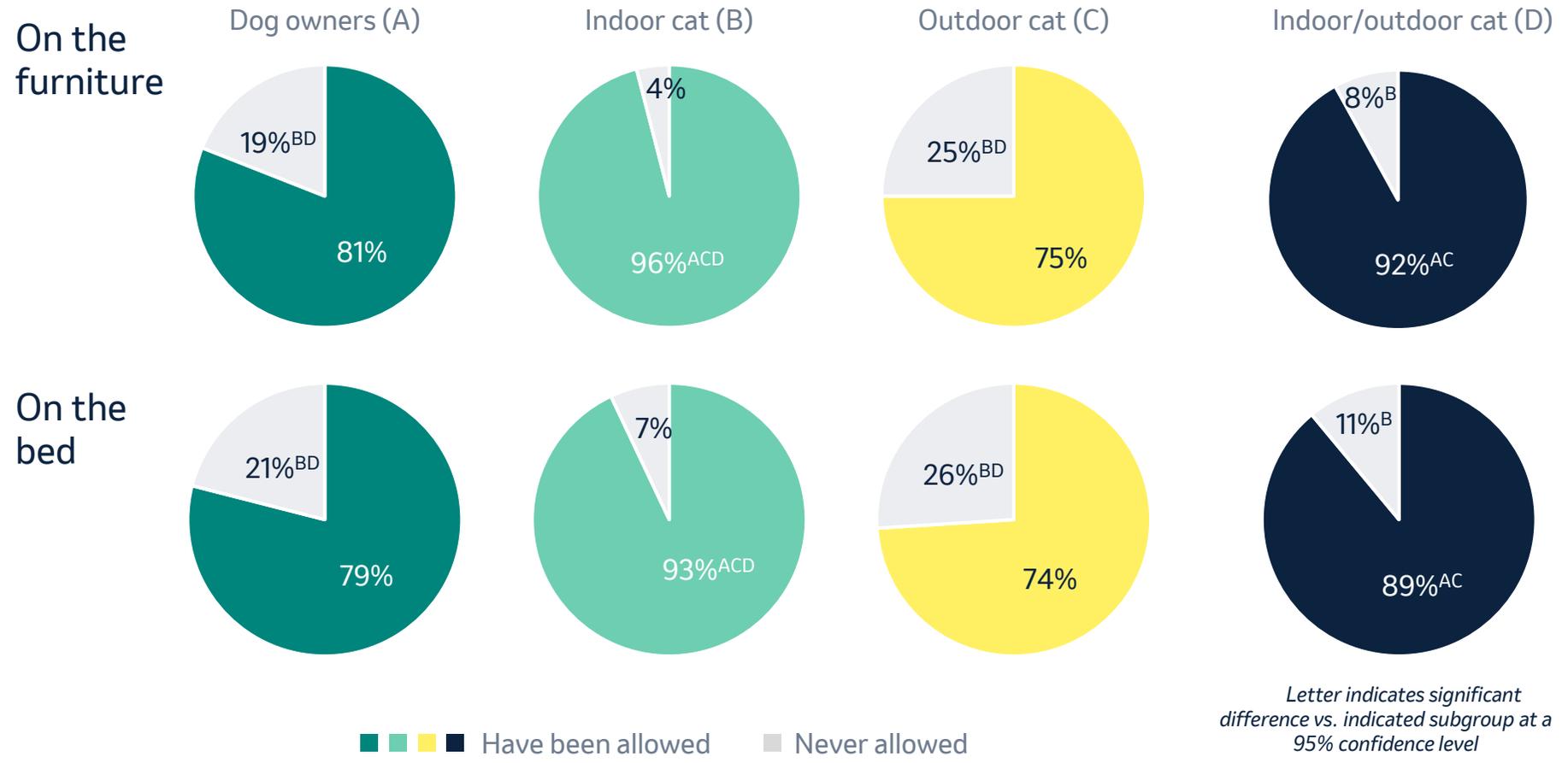
Moderate/severe harm	AMERS	EMEA	APAC
To pets	▲ 65%	57%	▼ 48%
To you/family	▲ 58%	55%	▼ 43%

▼/ ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Q37B. HOW HARMFUL DO YOU BELIEVE THAT FLEA AND/OR TICK-BORNE ILLNESSES CAN BE TO YOUR PETS/ YOU AND YOUR FAMILY?
 FULL SCALE: LITTLE TO NO HARM - WITH NO NOTICEABLE CHANGE TO HEALTH; MILD HARM - GETS BETTER ON ITS OWN WITHOUT INTERVENTION OR MEDICATION; MODERATE HARM THAT REQUIRES AN APPOINTMENT AND POSSIBLY PRESCRIPTION MEDICATION OR OTHER TREATMENT FOR RECOVERY; SEVERE HARM THAT COULD HAVE LONG-TERM EFFECTS OR EVEN DEATH; DON'T KNOW
 BASE: PET OWNERS: GLOBAL (N=4072), AMERS (N=1594), EMEA (N=1665), APAC (N=813)

Despite the possible threat of fleas and ticks, the vast majority of pet owners allow pets on furniture and beds

Interestingly, previous issues with fleas and ticks do not have a significant impact on whether the cat or dog is allowed on the furniture, or on the bed.



Q20A. HOW OFTEN, IF AT ALL, DO YOU ALLOW YOUR [CAT/ DOG/ PETS] TO GET ON THE FURNITURE? Q20B. AND HOW OFTEN, IF AT ALL, DO YOU ALLOW YOUR [CAT/ DOG/ PETS] TO GET ON THE BED WITH YOU OR ANOTHER MEMBER OF YOUR HOUSEHOLD?
 FULL SCALE: ALL OF THE TIME; MOST OF THE TIME; SOMETIMES; RARELY; NEVER
 BASE: PET OWNERS: DOG OWNERS (N=3145), INDOOR CATS (N=1159), OUTDOOR CATS (N=65), INDOOR/OUTDOOR CATS (N=1068)

Usage and recommendation of flea/tick treatments and prevention

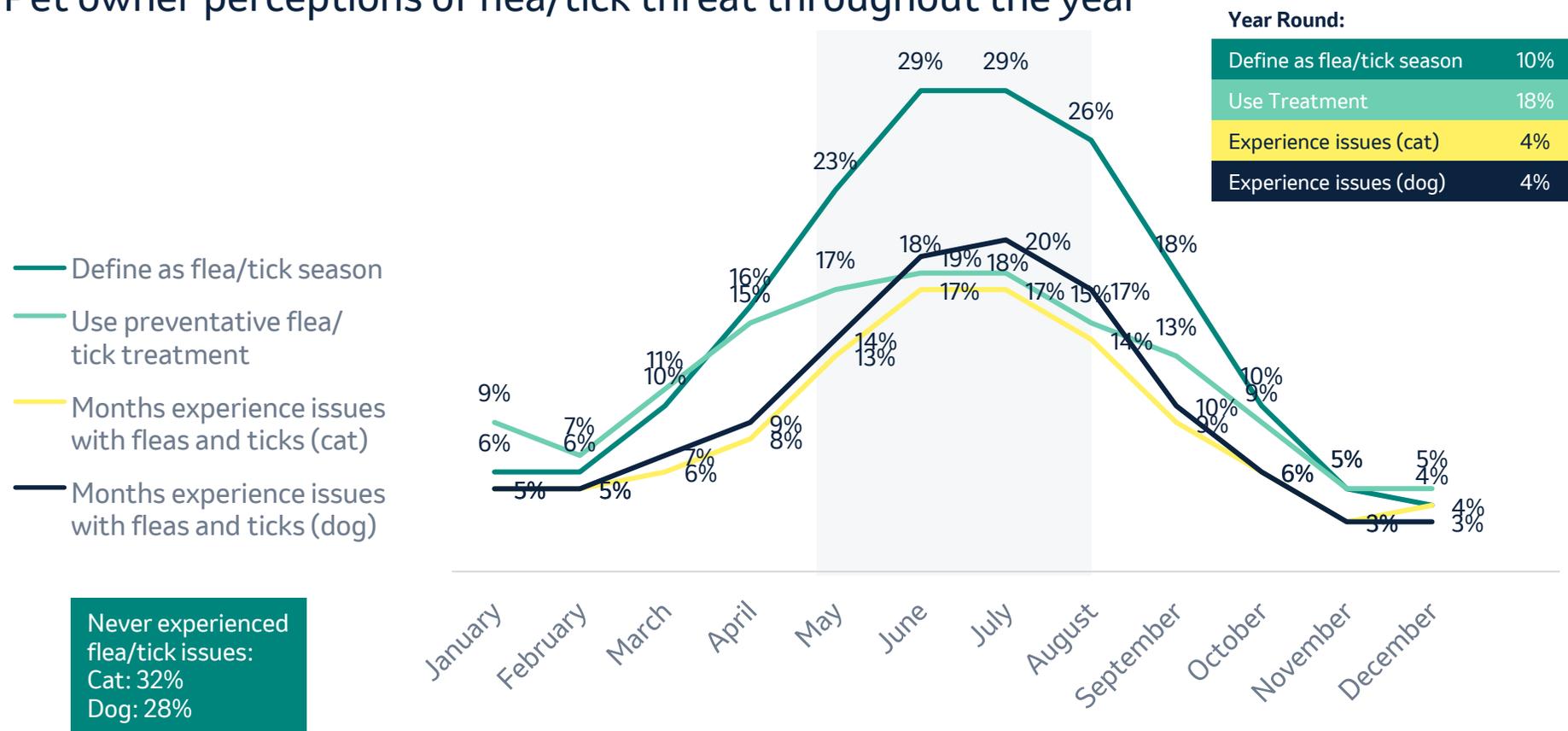


According to pet owners, flea/tick season peaks in the summer, with treatment and experienced issues following the same trend; less than 1 in 5 treat year-round

Owners more likely to define flea/tick season as year-round:

- Never experienced flea/tick issue
- Experienced owners

Pet owner perceptions of flea/tick threat throughout the year



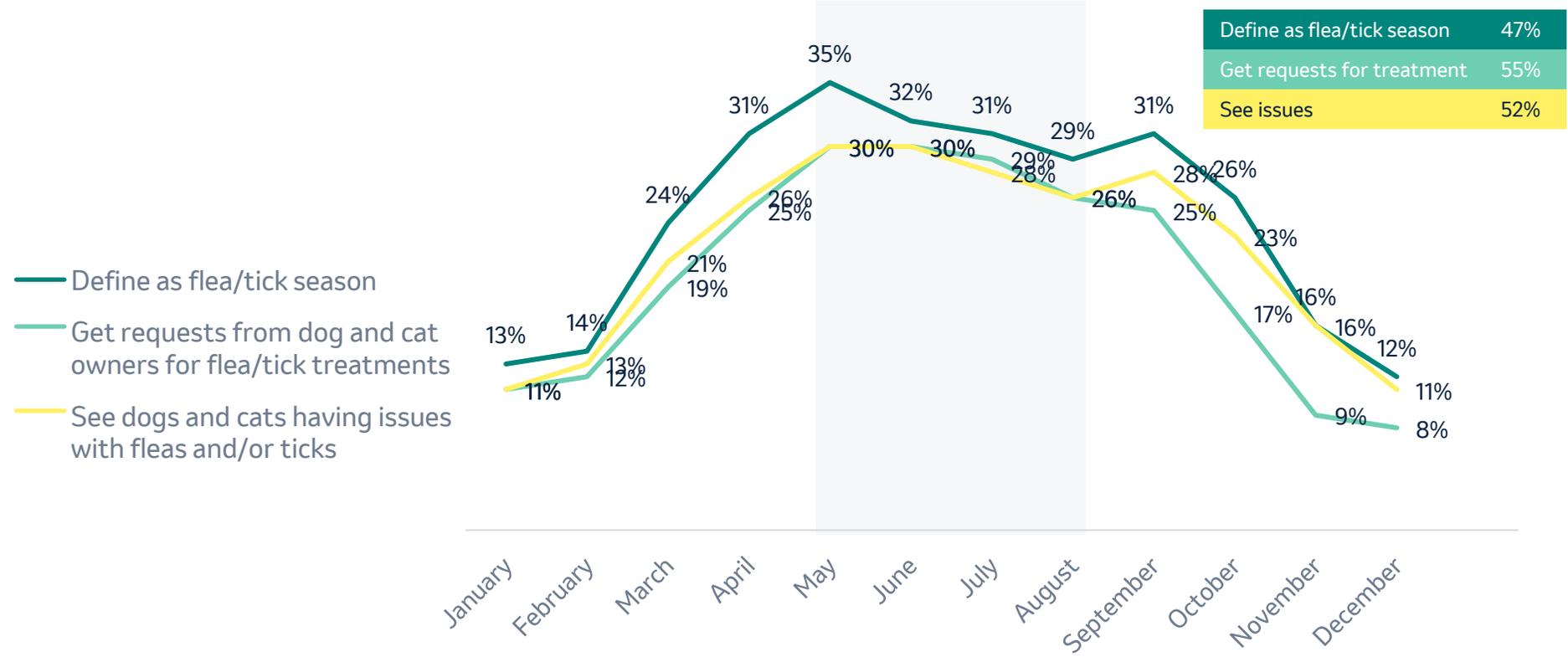
Q23. THINKING SPECIFICALLY ABOUT FLEAS AND TICKS, WHICH OF THE FOLLOWING MONTHS DO YOU...?
 BASE: PET OWNERS (N=4072), CAT OWNERS (N=2292), DOG OWNERS (N=3145)

In contrast, around half of veterinarians define the flea/tick season as year-round

Vets more likely to define flea/tick season as year-round:

- Female vets
- View Rx as more effective

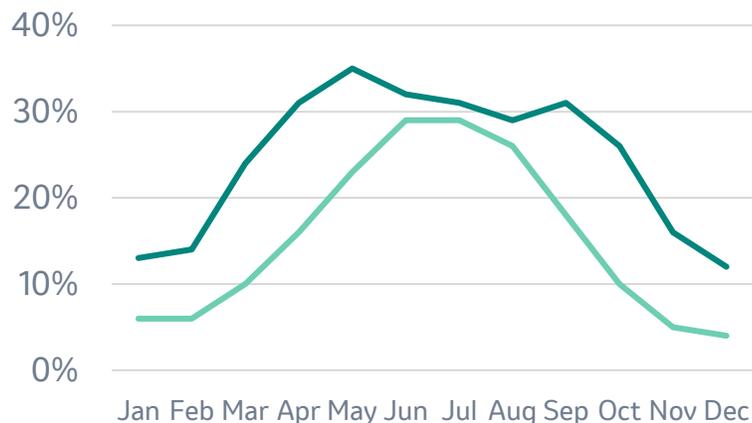
Veterinarian perceptions of flea/tick threat throughout the year



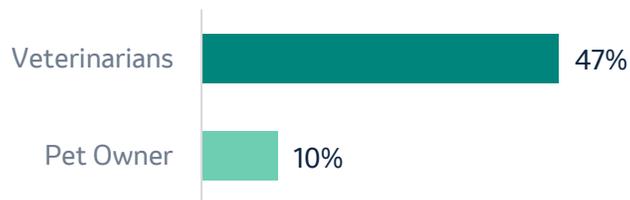
Q7. WHICH OF THE FOLLOWING MONTHS DO YOU...? BASE: VETERINARIANS (N=582)

Vets are over four times more likely to define flea/tick season as year-round, while pet owners emphasize the summer months

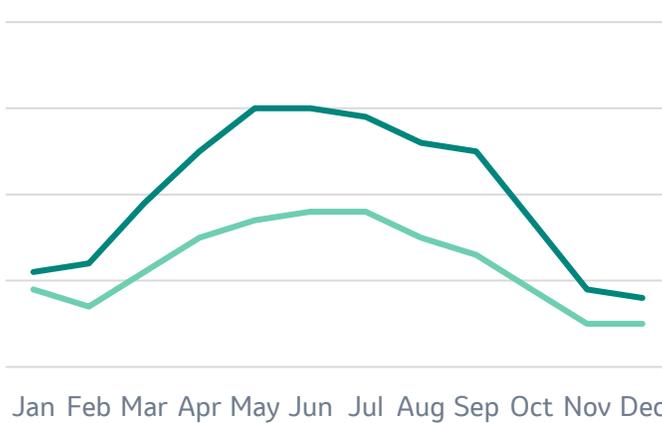
Defining flea/tick season



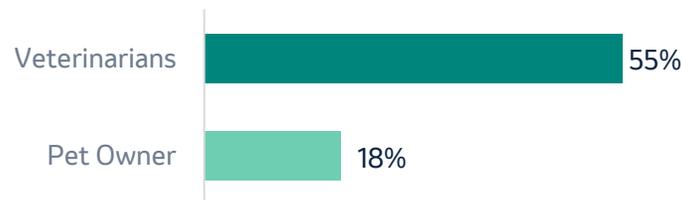
Year Round



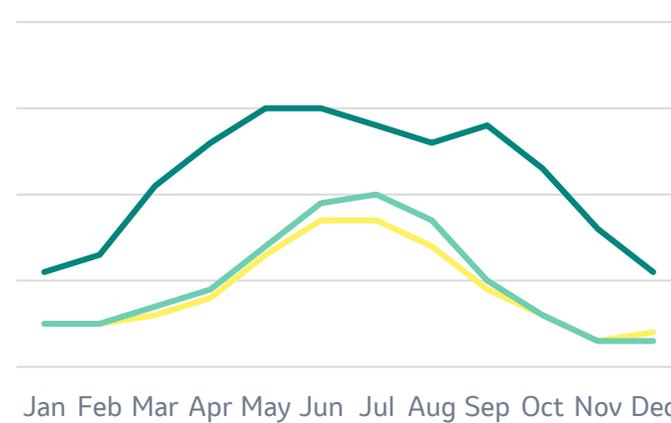
Use/get requests for treatments



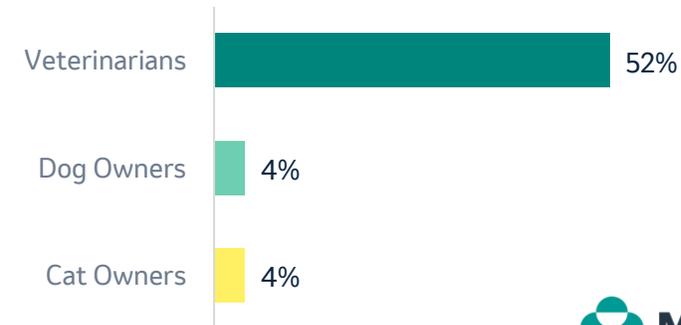
Year Round



Experience/see flea/tick issues



Year Round



Q23. THINKING SPECIFICALLY ABOUT FLEAS AND TICKS, WHICH OF THE FOLLOWING MONTHS DO YOU...?
 BASE: PET OWNERS (N=4072), CAT OWNERS (N=2292), DOG OWNERS (N=3145)
 Q7. WHICH OF THE FOLLOWING MONTHS DO YOU...?
 BASE: VETERINARIANS (N=582)

Veterinarians report a higher response rate as they consider all the pets that come to their practice, while pet owners reflect only on their personal experiences.

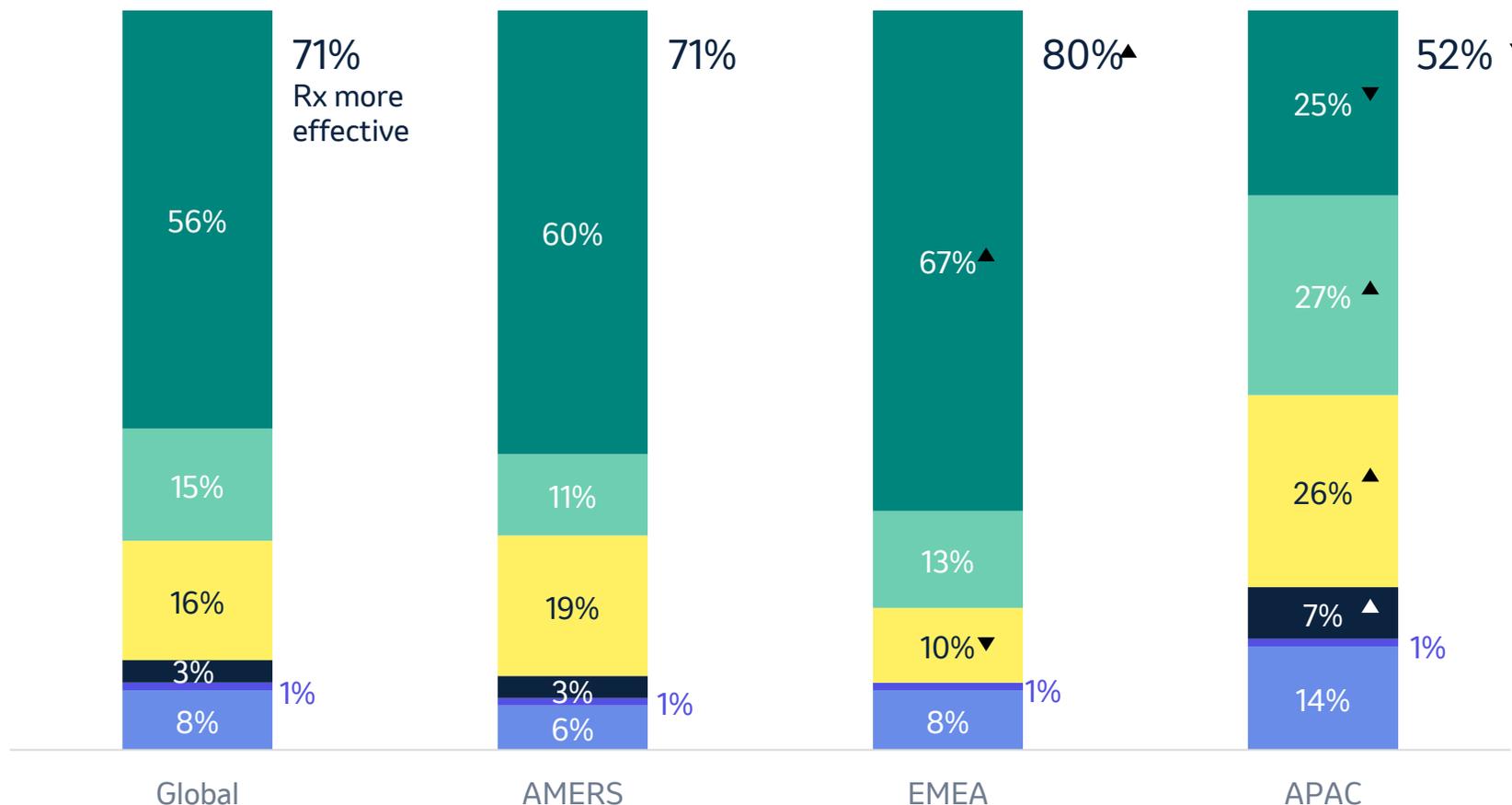
Veterinarians generally consider Rx solutions more effective than OTC, though to a lesser degree in APAC

Veterinarian perceptions of effectiveness of prescribed vs OTC flea/tick medications

- Prescribed solutions are much more effective than OTC solutions
- Prescribed solutions are somewhat more effective than OTC solutions
- Both solutions are equally effective
- OTC solutions are somewhat more effective than prescribed solutions
- OTC solutions are a much more effective than prescribed solutions
- I have no preference, as long as pet owners are using something

▼/ ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

Market Note: Please be aware that in Brazil, Mexico, and Peru, oral treatments are available over the counter. This should be taken into account during the analysis of the results.



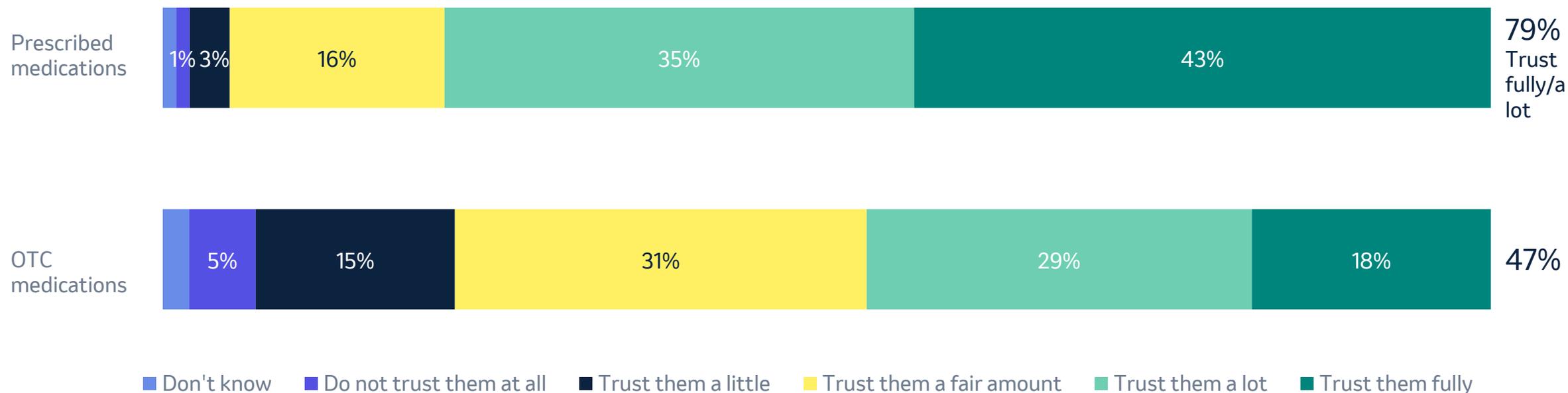
Q12A. IN YOUR OPINION, WHICH OF THE FOLLOWING OPTIONS BEST DESCRIBE HOW YOU FEEL ABOUT FLEA AND TICK TREATMENTS AND/OR PREVENTATIVE MEDICATIONS?
 BASE: VETERINARIANS: GLOBAL (N=582), AMERS (N=220), EMEA (N=246), APAC (N=116)

Mirroring vets, nearly 4 in 5 pet owners trust Rx options, while less than half say the same for OTC

Owners more likely to trust OTC medications:

- Have flea/tick experience

Pet owner trust in Rx vs. OTC medications



Q28B. AND TO WHAT EXTENT DO YOU TRUST FLEA AND TICK TREATMENTS/PREVENTATIVE MEDICATIONS PRESCRIBED BY VETERINARIANS VERSUS OVER-THE-COUNTER (OTC) PRODUCTS?
BASE: PET OWNERS (N=4072)

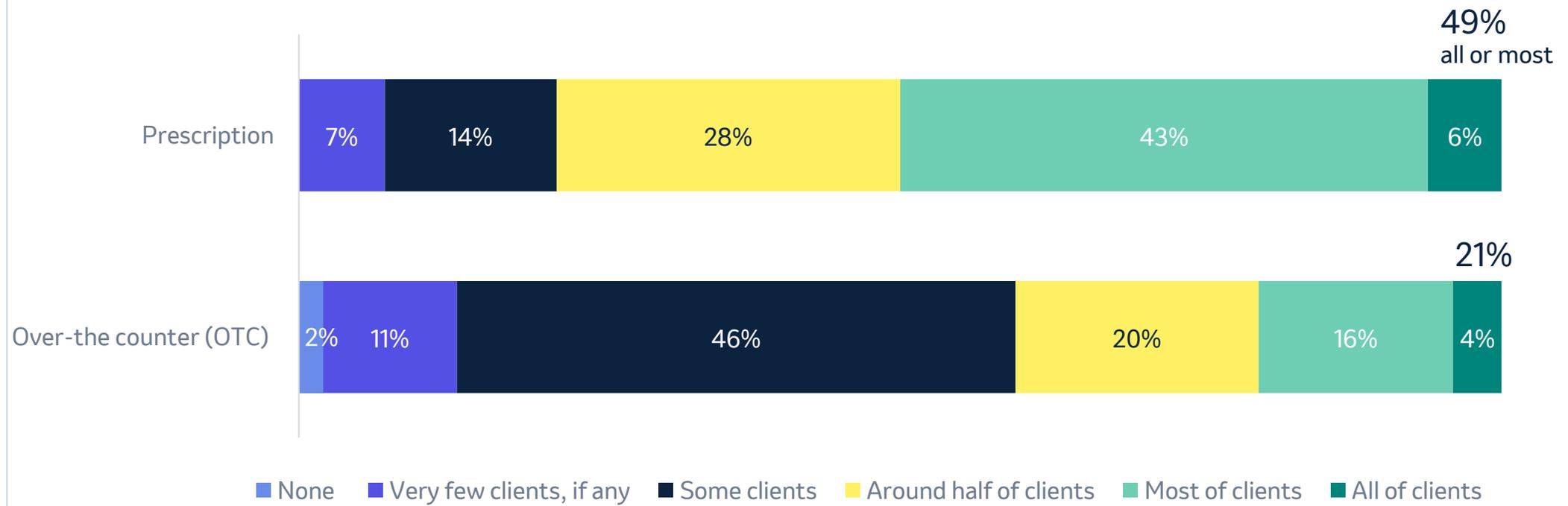


Half of vets believe that all or most of their pet owners use prescription flea/tick treatments/preventative medication

In EMEA, 52% say that all or most of their clients use Rx medications, compared to 40% in APAC.

Conversely, 33% of vets in APAC report that all or most of their clients use OTC medications, compared to 25% in AMERS and 11% in EMEA.

Veterinarian estimations of pet owners' use of Rx vs. OTC solutions



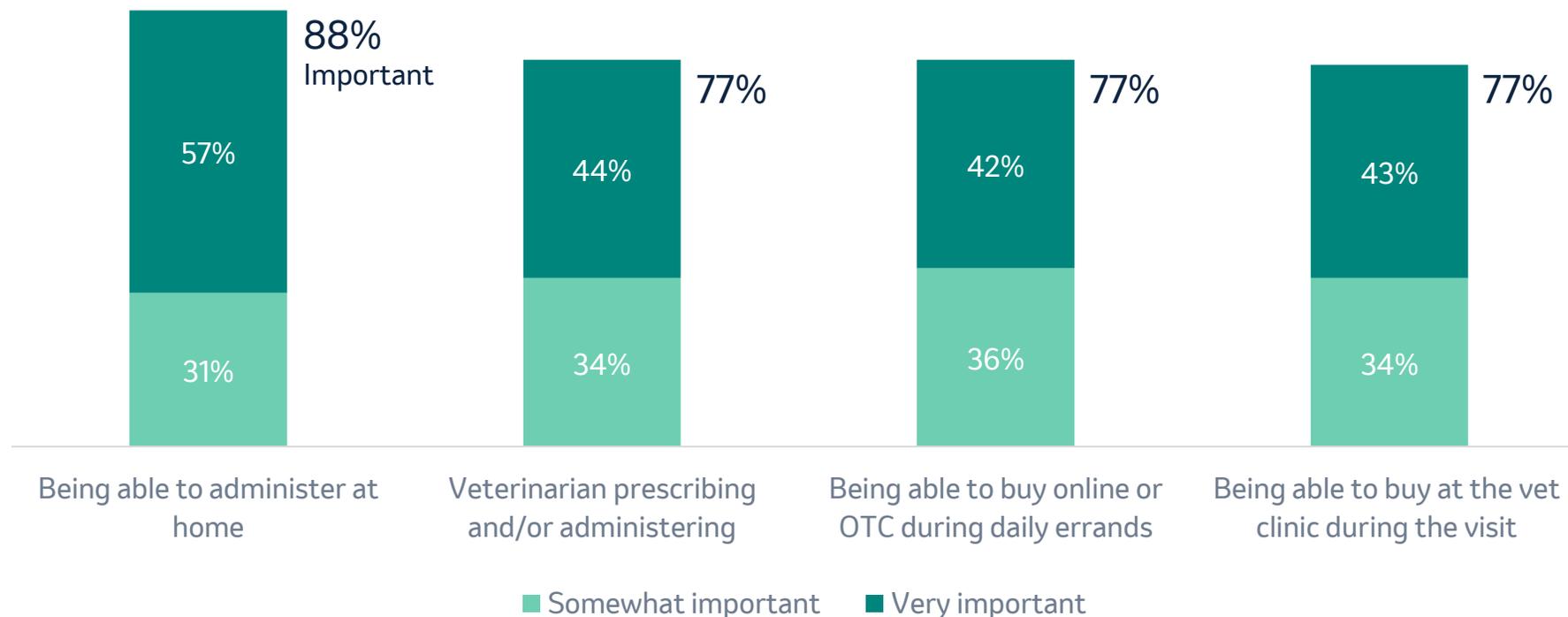
Q13. BY YOUR ESTIMATION, HOW MANY CAT AND/OR DOG OWNERS WHO COME TO YOUR PRACTICE ...?
BASE: VETERINARIANS: GLOBAL (N=582), AMERS (N=220), EMEA (N=246), APAC (N=116)

While pet owners place more trust in Rx options, in practice, the ability to buy in-store is just as important to them as purchasing from the vet

Owners more likely to find these considerations important:

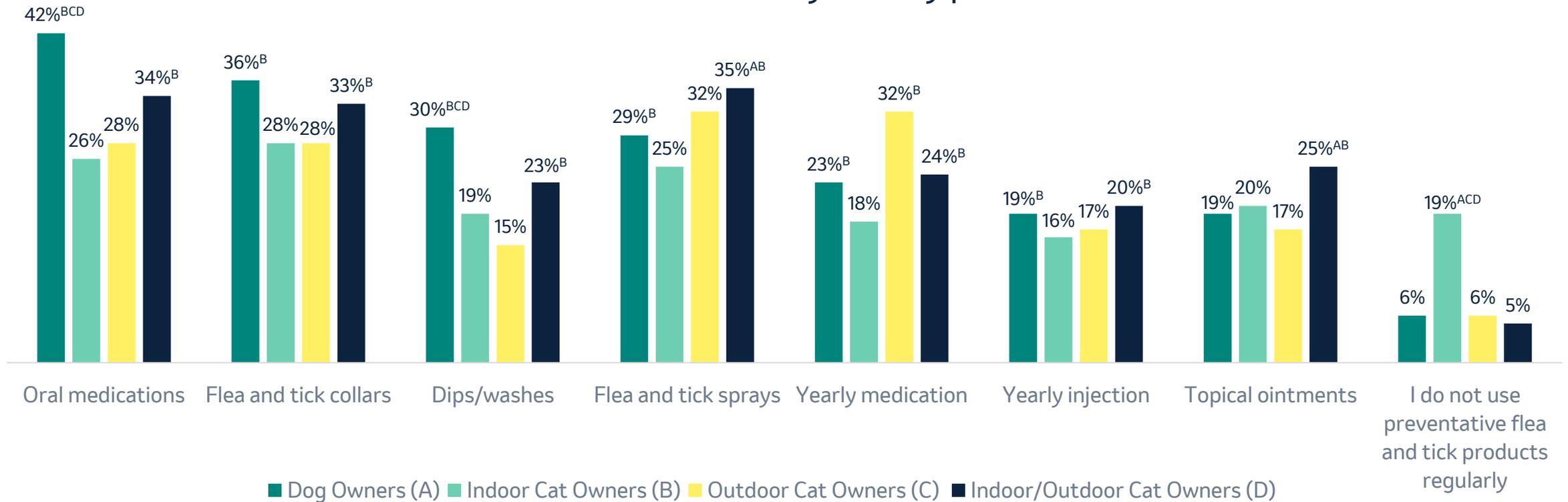
- Have flea/tick experience

Importance of considerations for flea/tick treatment and preventative medications



Oral medications and flea/tick collars are the most popular solutions among pet owners

Treatments currently used by pet owners



LETTER INDICATES SIGNIFICANT DIFFERENCE VS. INDICATED SUBGROUP AT A 95% CONFIDENCE LEVEL



Q32. AND, WHICH OF THE FOLLOWING FLEA AND TICK TREATMENTS AND/OR PREVENTATIVE MEDICATIONS, IF ANY, DO YOU USE FOR YOUR [CAT / DOG / PETS]?
 BASE: PET OWNERS: DOGS (N=3145), INDOOR CATS (N=1159), OUTDOOR CATS (N=65), INDOOR/OUTDOOR CATS (N=1068)

Flea/tick treatment usage varies by region

Treatments currently used by pet owners: by region

	Dog Owners				Cat Owners			
	Total	AMERs	EMEA	APAC	Total	AMERs	EMEA	APAC
	n=3,145	n=1,307	n=1,242	n=596	n=2,292	n=924	n=946	n=422
Oral medications (pills, chews, and/or tablets)	42%	44%	37% ▼	45%	30%	31%	26% ▼	34%
Flea and tick collars	36%	31% ▼	46% ▲	26% ▼	30%	30%	33%	24% ▼
Dips/washes	30%	36% ▲	22% ▼	30%	21%	23%	15% ▼	29% ▲
Flea and tick sprays	29%	26% ▼	32%	30%	30%	28%	30%	32%
Yearly medication	23%	24%	21%	23%	21%	23%	20%	22%
Topical ointments	19%	19%	14% ▼	27% ▲	22%	22%	17% ▼	35% ▲
Yearly injection (for prevention and treatment, not vaccination)	19%	22% ▲	21% ▲	5% ▼	18%	22% ▲	20%	4% ▼
Other	1%	2%	2%	0%	1%	1%	2%	0%
I do not use preventative flea and tick products regularly	6%	7%	5% ▼	8%	12%	11%	13%	14%

▼/ ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

And, are the most recommended or administered solutions among veterinarians, especially in EMEA

Vets more likely to administer or recommend...

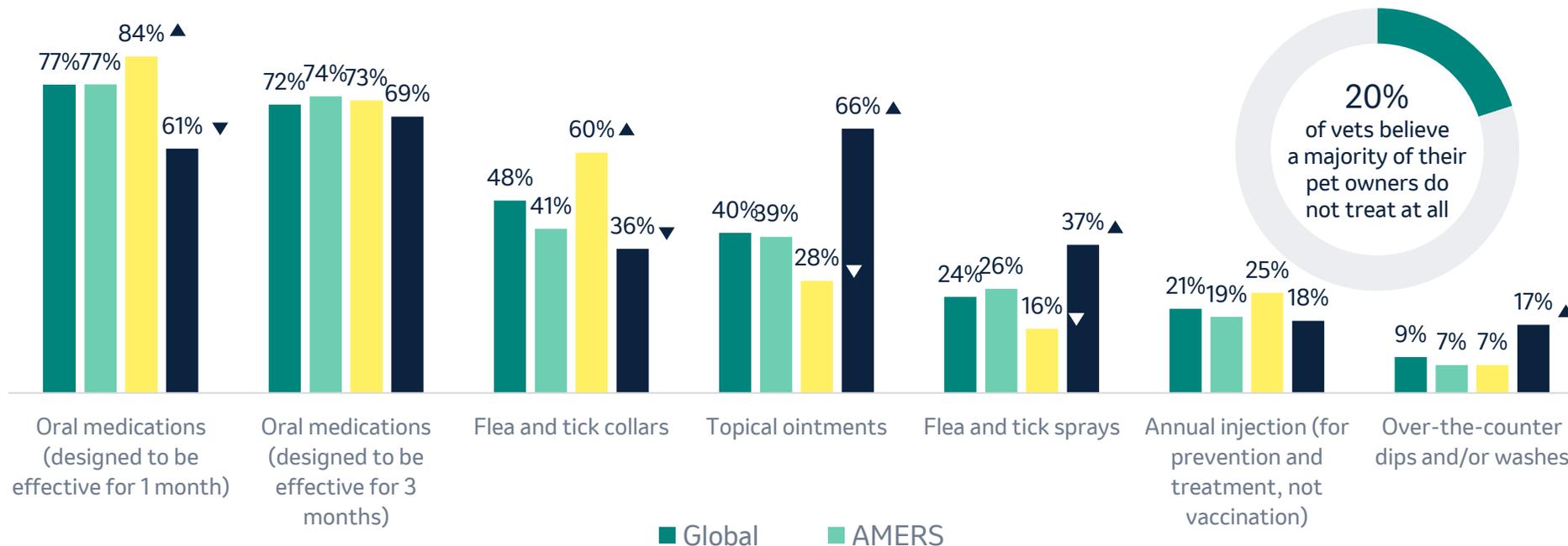
Injections:

- Fewer years in practice

Sprays:

- Do not view Rx as more effective

Treatments currently administered or recommended by veterinarians



▼/ ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

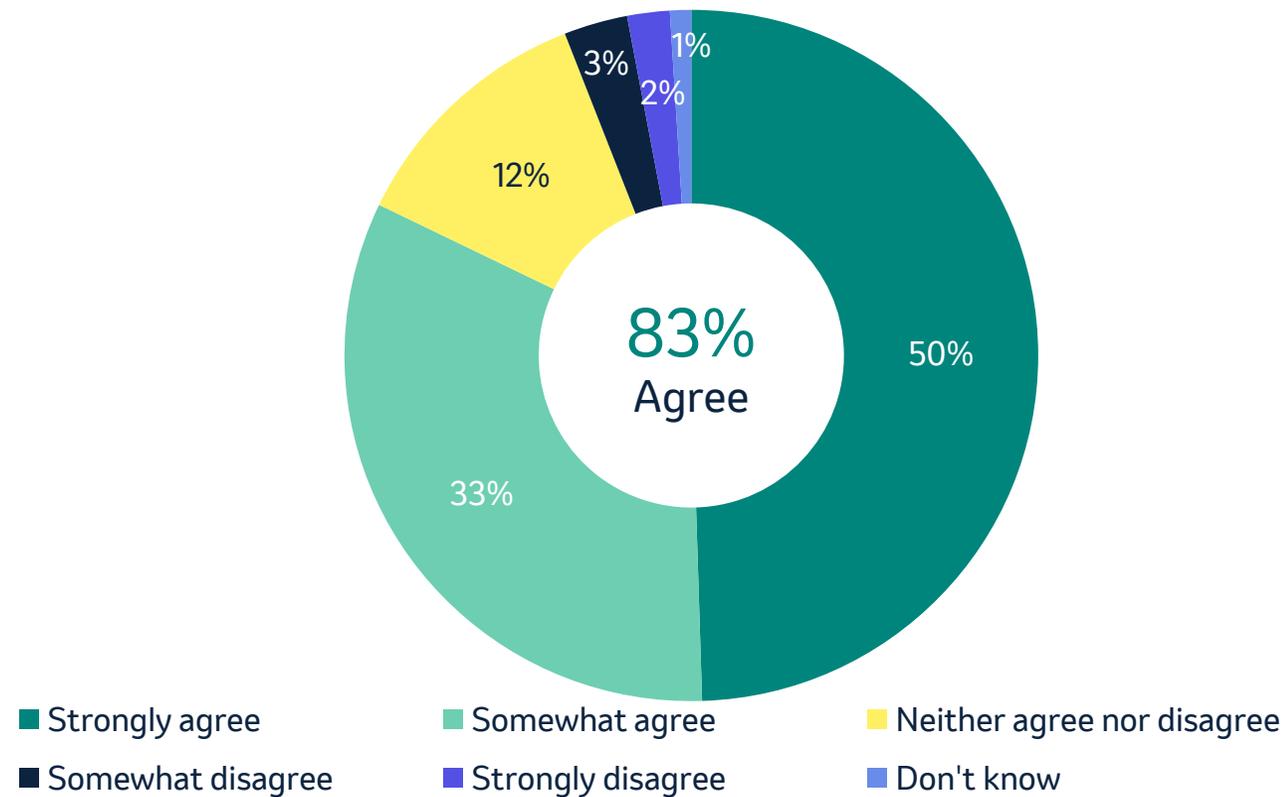
Q13. BY YOUR ESTIMATION, HOW MANY CAT AND/OR DOG OWNERS WHO COME TO YOUR PRACTICE ...?
 FULL SCALE: ALL OF THE CLIENTS, MOST OF THE CLIENTS, AROUND HALF OF THE CLIENTS, SOME CLIENTS, VERY FEW CLIENTS, IF ANY, NONE OF THE CLIENTS, DON'T KNOW Q13A. WHICH OF THE FOLLOWING FLEA AND TICK TREATMENTS AND/OR PREVENTATIVE MEDICATIONS DO YOU CURRENTLY ADMINISTER OR RECOMMEND TO CAT AND/OR DOG OWNERS WHO COME TO YOUR PRACTICE?
 BASE: VETERINARIANS: GLOBAL (N=582), AMERS (N=220), EMEA (N=246), APAC (N=116)

Compliance with flea/tick treatments and prevention



8 in 10 pet owners consider flea/tick treatment a crucial part of pet care

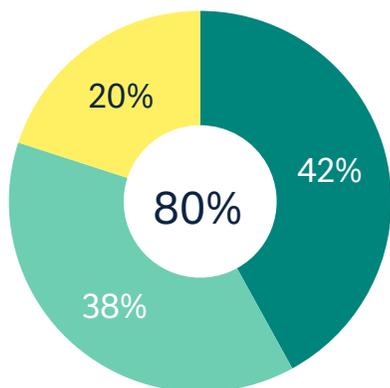
“Flea/tick treatment is a crucial part of my cat and/or dog's health care”



Pet owners display high confidence in administering treatment and highlight the importance of vet recommendations and instructions

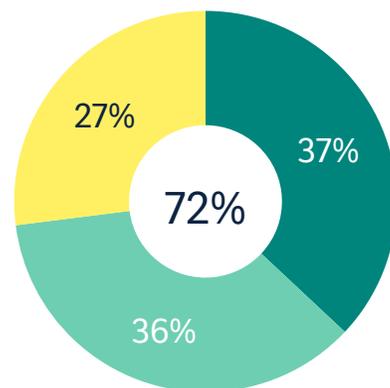
Agreement with confidence and clarity in treatment

“I feel confident administering flea/tick treatments and/or preventative medications to my pet”



■ Strongly agree ■ Somewhat agree ■ Neutral/Disagree

“I received a clear recommendation for flea/tick treatment from my veterinarian”



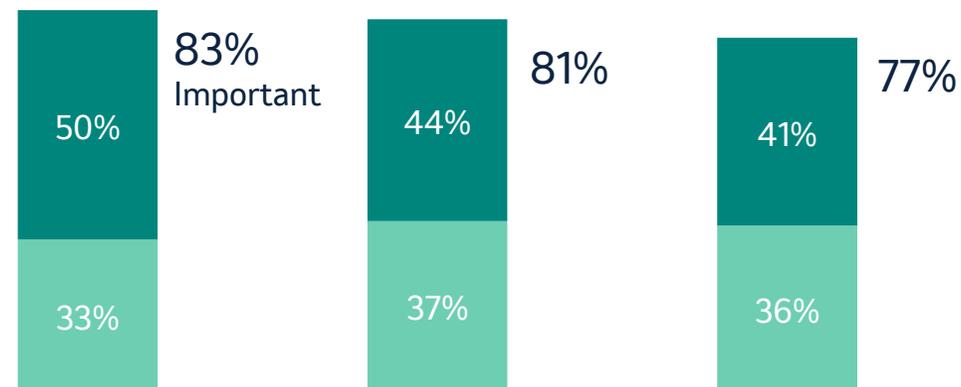
Owners more likely to agree:

- Experienced pet owners
- Define flea/tick season as year-round
- Have flea/tick experience

Owners more likely to agree:

- Have flea/tick experience

Importance of considerations for flea/tick treatment and preventative medications



Vet instructions on the best way to administer Vet recommendation of the best brand Vet reminding you to treat/ use

■ Somewhat important
■ Very important

Owners more likely to find this consideration important:

- 1st time owners
- Define flea/tick season as year-round
- Have flea/tick experience [more likely to find **all** important]

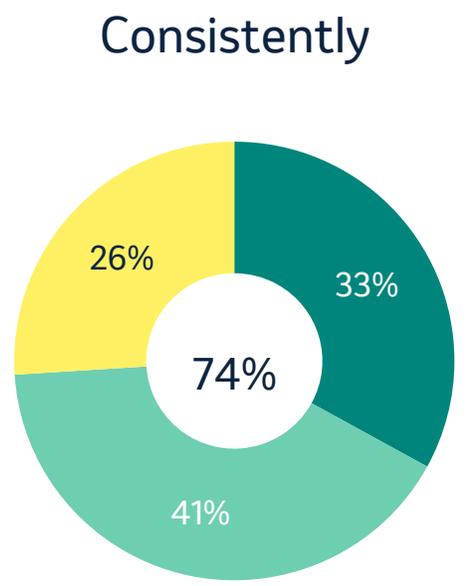
Q27. HOW IMPORTANT OR UNIMPORTANT ARE THE FOLLOWING CONSIDERATIONS TO YOUR TICK AND FLEA PREVENTION EFFORTS?
 FULL SCALE: VERY IMPORTANT, SOMEWHAT IMPORTANT, NEITHER IMPORTANT NOR UNIMPORTANT, SOMEWHAT UNIMPORTANT, VERY UNIMPORTANT, DON'T KNOW
 Q29. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?
 FULL SCALE: STRONGLY AGREE, SOMEWHAT AGREE, NEITHER AGREE NOR DISAGREE, SOMEWHAT DISAGREE, STRONGLY DISAGREE, DON'T KNOW
 BASE: PET OWNERS (N=4072)

However, veterinarians are worried about the consistency and accuracy of flea/tick prevention administration among pet owners

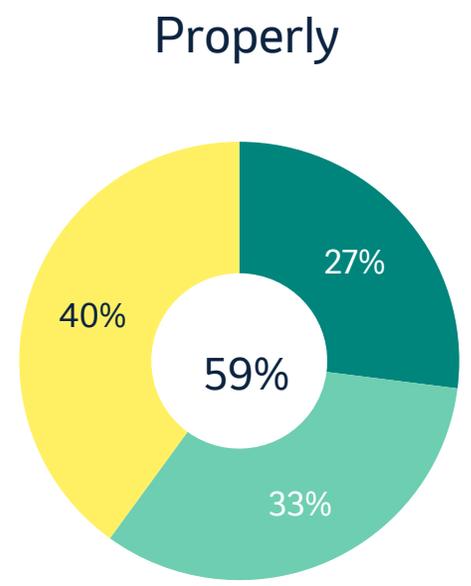
Vets more likely to agree:

- Fewer years in practice

Agreement with
“I am worried pet owners who come into my practice are not administering flea/tick prevention...”



■ Strongly agree ■ Somewhat agree ■ Neutral/Disagree



■ Strongly agree ■ Somewhat agree ■ Neutral/Disagree

Q11B. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?
FULL SCALE: STRONGLY AGREE, SOMEWHAT AGREE, NEITHER AGREE NOR DISAGREE, SOMEWHAT DISAGREE, STRONGLY DISAGREE, DON'T KNOW
BASE: VETERINARIANS (N=582)

Some vets believe that a majority of their clients exhibit specific aspects of non-adherence, including not treating year-round, administering late, or missing treatment all together

Vets more likely to feel a majority of their clients...

Administer late:

- Do not view Rx as more effective

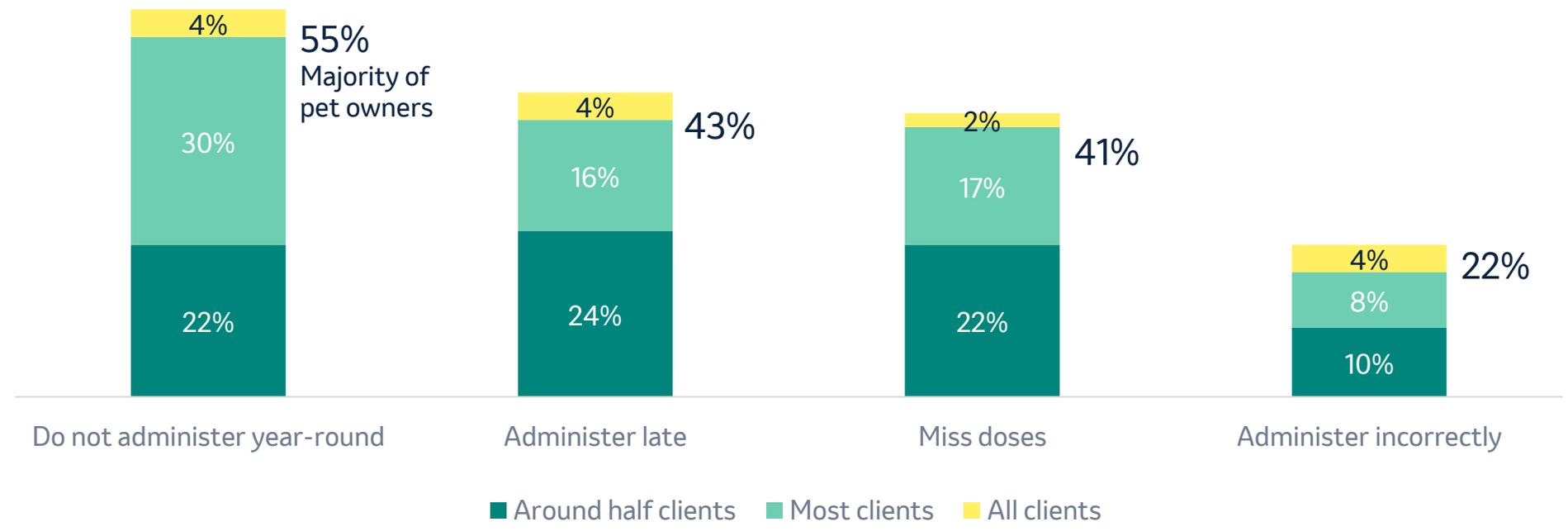
Miss doses:

- Do not view Rx as more effective

Administer incorrectly

- Male vets
- Do not view Rx as more effective

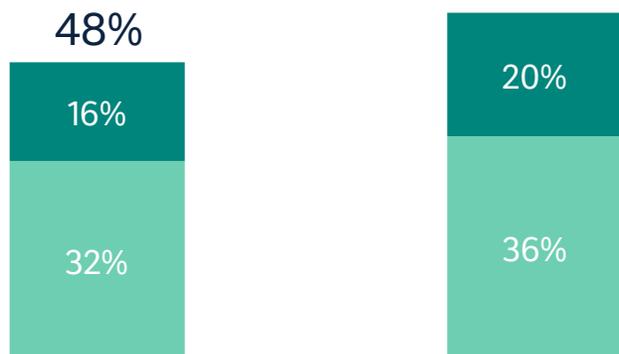
Estimations of pet owners' compliance with specific aspects of treatment



Q13. BY YOUR ESTIMATION, HOW MANY CAT AND/OR DOG OWNERS WHO COME TO YOUR PRACTICE ...?
 FULL SCALE: ALL OF THE CLIENTS, MOST OF THE CLIENTS, AROUND HALF OF THE CLIENTS, SOME CLIENTS, VERY FEW CLIENTS, IF ANY, NONE OF THE CLIENTS, DON'T KNOW
 BASE: VETERINARIANS (N= 582)

Veterinarians may be justified, as around half of pet owners admit that administering flea/tick solutions can be difficult

Agreement with statements regarding difficulty administering

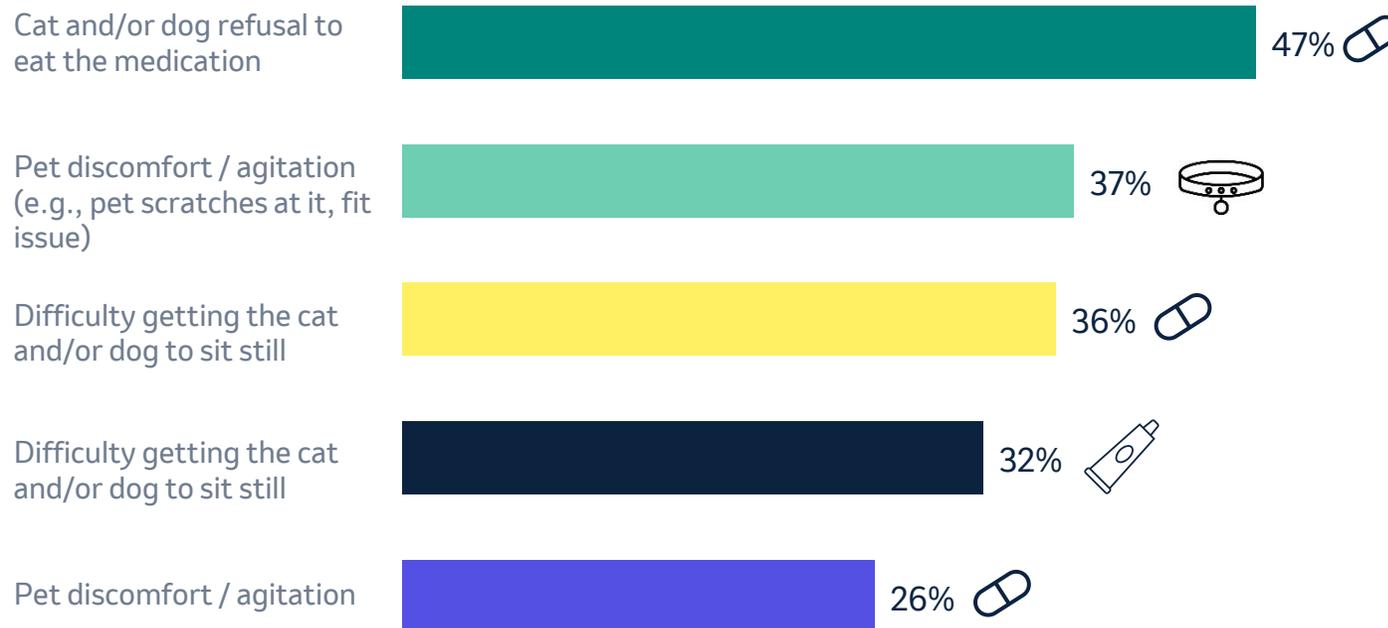


It can be hard to remember administering flea/tick preventative medications regularly

Administering oral or topical flea/tick treatments and/or preventative medications can be difficult

■ Somewhat agree ■ Strongly agree

Pet owner difficulties administering flea/tick medication



Q29. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?

FULL SCALE: STRONGLY AGREE, SOMEWHAT AGREE, NEITHER AGREE NOR DISAGREE, SOMEWHAT DISAGREE, STRONGLY DISAGREE, DON'T KNOW

BASE: PET OWNERS (N=4075)

Q30. WHAT ARE THE DIFFICULTIES YOU HAVE EXPERIENCED WHEN ADMINISTERING ORAL OR TOPICAL FLEA AND TICK TREATMENTS AND/OR PREVENTATIVE MEDICATIONS?

BASE: PET OWNERS WHO FIND IT DIFFICULT TO ADMINISTER ORAL/TOPICAL FLEA AND TICK TREATMENTS/PREVENTATIVE MEDICATIONS (N=2288)

Many pet owners admit to less than adherent approaches to administering flea/tick treatments

Treatment administration frequency

	Oral Medications		Topical Ointments		Flea/Tick Collars		Flea/Tick Sprays	
	Dog owners (A)	Cat Owners (B)	Dog owners (A)	Cat Owners (B)	Dog owners (A)	Cat Owners (B)	Dog owners (A)	Cat Owners (B)
Monthly	32%	30%	32%	34%	24%	23%	27%	25%
Once per year	19%	23% ^A	16%	15%	20%	25% ^A	14%	15%
Only during flea/tick season	21%	22%	26%	22%	29%	25%	33%	36%
When I remember to	3%	3%	6%	6%	5%	6%	7%	5%
When see a flea/tick on them	4%	5%	7%	6%	4%	5%	10%	9%
As indicated on the label	21% ^B	16%	14%	16%	17%	16%	10%	9%

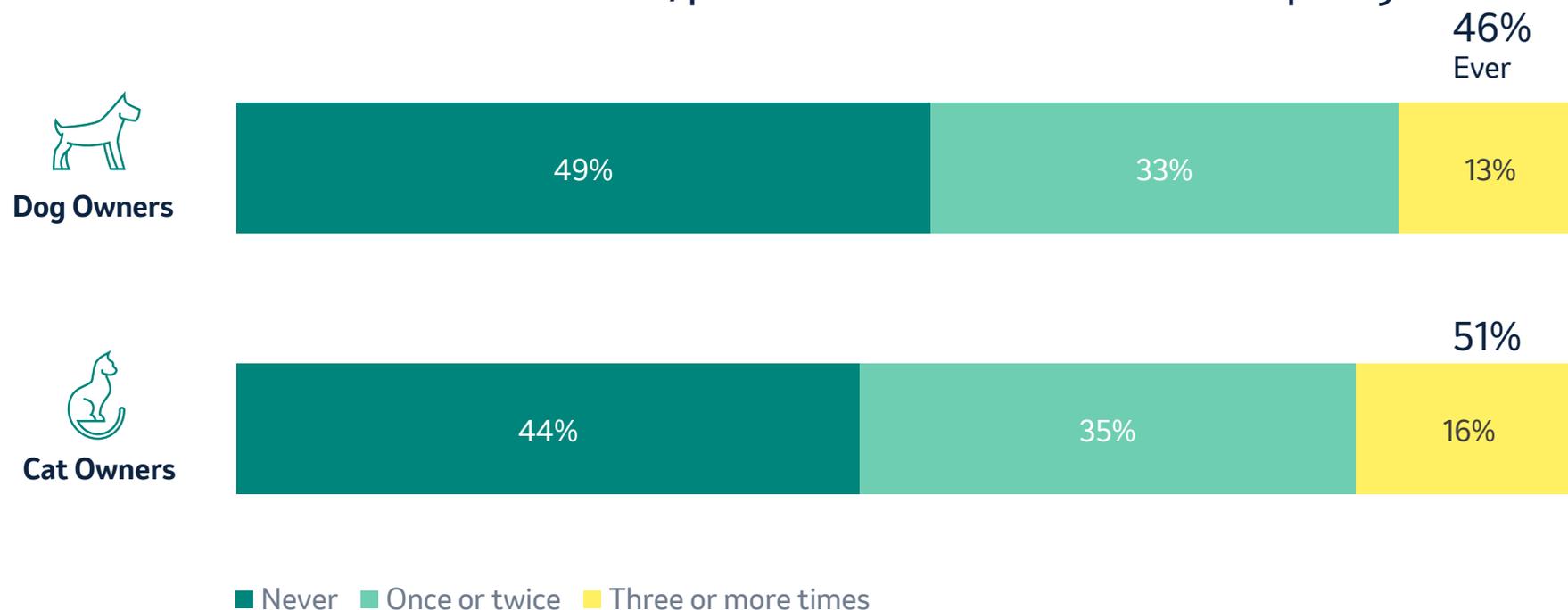
LETTER INDICATES SIGNIFICANT DIFFERENCE VS. INDICATED SUBGROUP AT A 95% CONFIDENCE LEVEL

And over the past year, about half of pet owners admit to occasionally forgetting to administer treatment

Dog owners more likely to have forgotten treatments in the past year:

- Have flea/tick experience
- Do not define flea/tick season as year-round

Frequency of forgetting to administer flea/tick treatment/preventative medication in the past year



Q34. WITHIN THE PAST YEAR, HOW MANY TIMES, IF EVER, HAVE YOU FORGOTTEN TO ADMINISTER A FLEA AND TICK TREATMENT AND/OR PREVENTATIVE MEDICATION TO YOUR [CAT/DOG/ PETS]
 FULL SCALE: NEVER, ONCE OR TWICE, THREE TO FIVE TIMES, SIX TIMES OR MORE, NOT SURE
 ? BASE: OWNERS USING PREVENTATIVE TREATMENT: DOG OWNERS (N=2953), CAT OWNERS (N=2009)

Perceptions towards a yearly medication

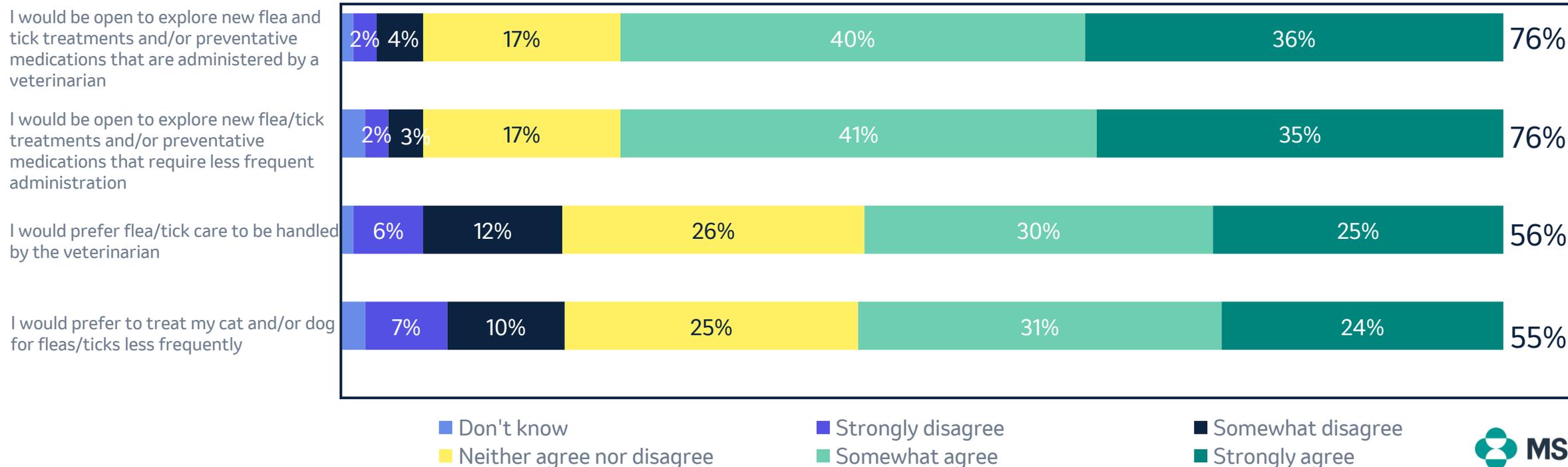


Openness exists for vet-administered or less frequent treatment options, and half would even prefer it

Owners more likely to be open to a treatment administered less frequently:

- Have flea/tick experience

Pet owner agreement with statements related to vet administration and duration of effect



Q29. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?
 BASE: PET OWNERS (N=4072)

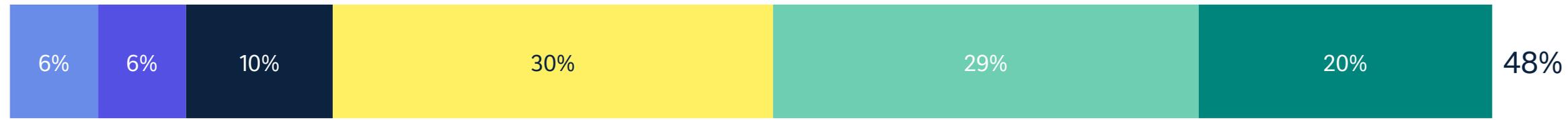


Most pet owners are comfortable giving two medications for parasite control if they are the most effective

Pet owner agreement with statements related to protecting fully for parasite control



I am okay to give two medications to give my pet the needed parasite control if that is the best medicine (e.g., one for heartworm and one for flea/tick)



I will only give flea/tick medication that also includes heartworm medication

■ Don't know ■ Strongly disagree ■ Somewhat disagree ■ Neither agree nor disagree ■ Somewhat agree ■ Strongly agree



Q29. TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?
BASE: PET OWNERS (N=4072)

Pet owners place high trust in oral medications and yearly options

Owners more likely to trust all options:

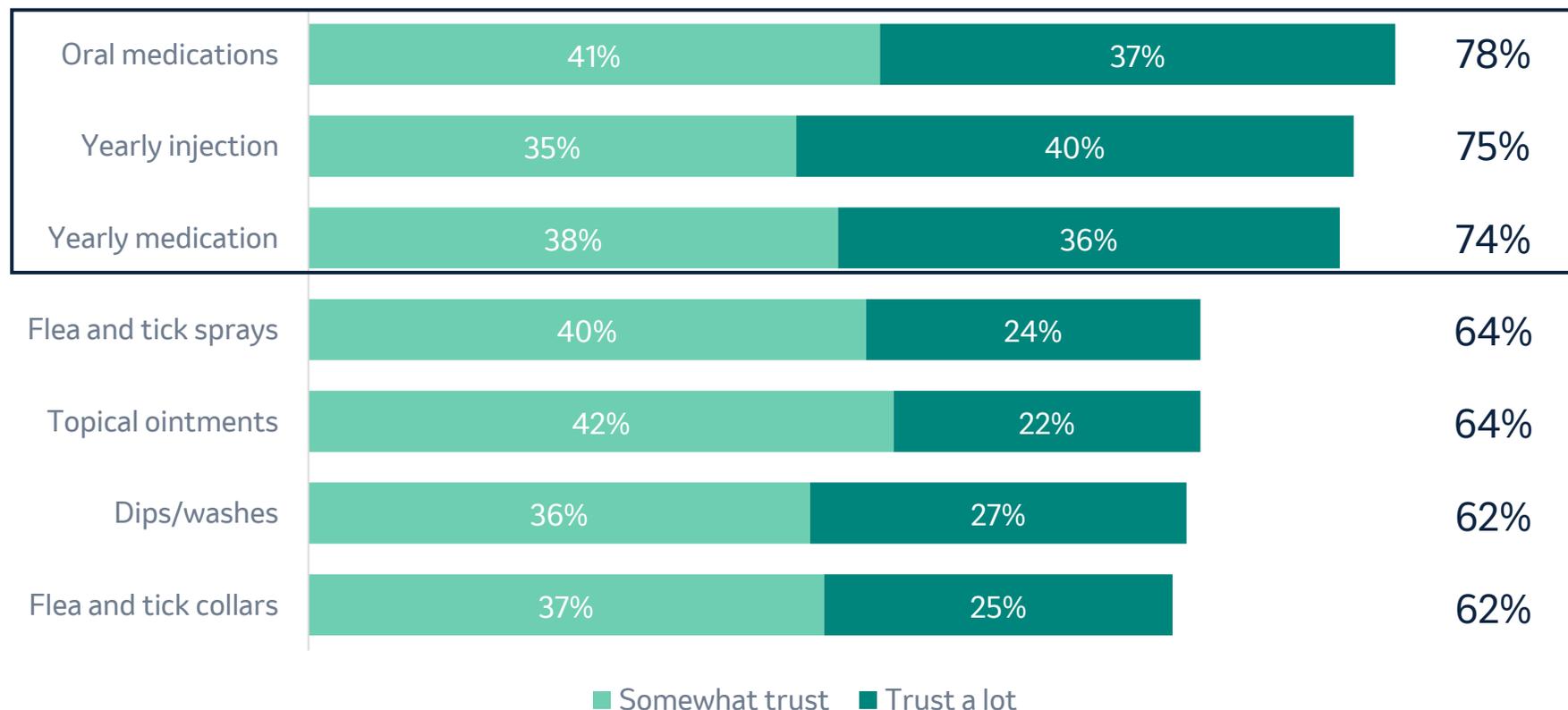
- Have flea/tick experience
- Do **not** define flea/tick season as year-round

Those who define flea/tick season as year-round are more likely to *distrust*:

- Collars
- Dips/washes
- Sprays

Trust in yearly injection is notably higher in the AMERS region - with 49% saying they would trust 'a lot'.

Pet owner trust in flea/tick medication options



Duration of effect is a top consideration when choosing a new flea/tick treatment, second only to safety

More likely to say...

No flea/tick experience

- Vet recco

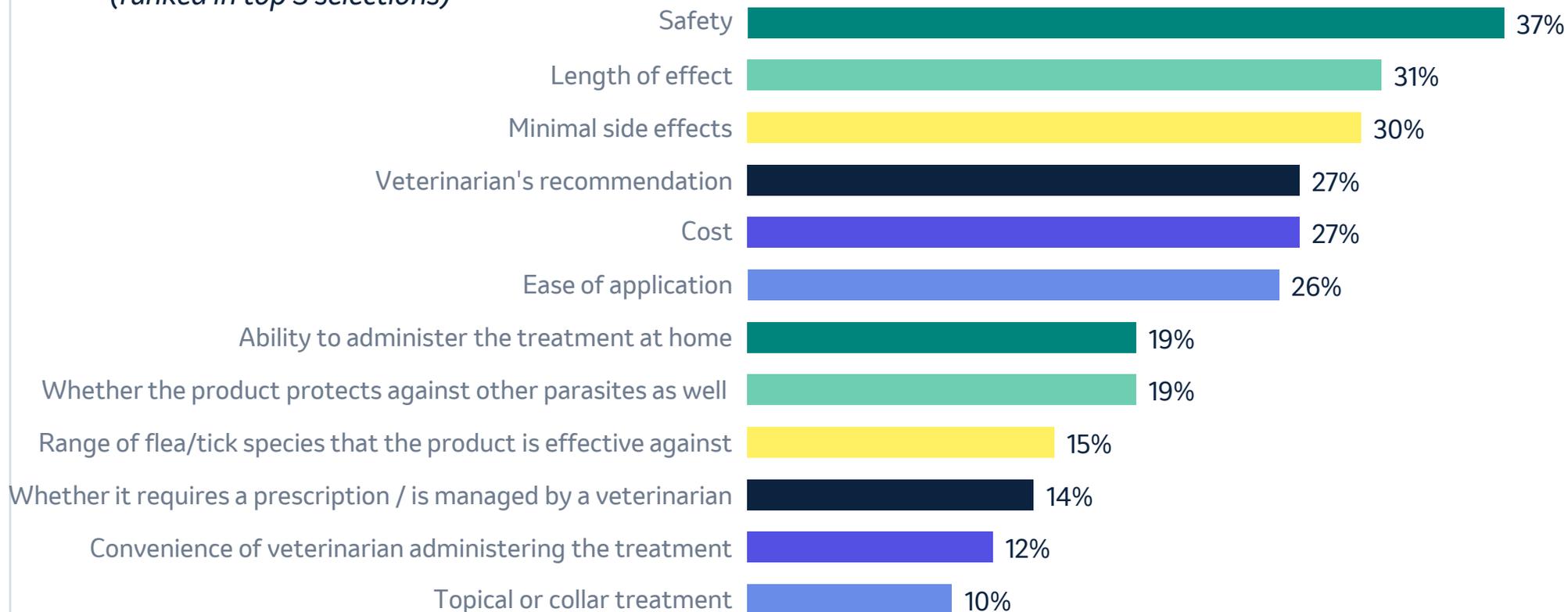
Flea/tick experience

- Ease of application
- Minimal side effects
- Range of efficacy

Define flea/tick season as year-round

- Safety

Considerations viewed as most important when selecting a flea/tick treatment (ranked in top 3 selections)



Q37. IMAGINE LOOKING FOR A NEW FLEA AND TICK A TREATMENT AND/OR PREVENTATIVE MEDICATION FOR YOUR CAT AND/OR DOG. HOW WOULD YOU RANK THE FOLLOWING CONSIDERATIONS IN TERMS OF HOW IMPORTANT THEY ARE WHEN MAKING YOUR DECISION? PLEASE RANK THE OPTIONS BELOW, WHERE 1=THE MOST IMPORTANT CONSIDERATION. IF THERE ARE ANY OTHER CONSIDERATIONS, PLEASE SELECT THE 'OTHER' ANSWER OPTION. RANK AT LEAST 3 OPTIONS
BASE: PET OWNERS (N=4072)

Vets recognize pet owners rely on them for recommendations, and prioritize ease of use and duration of effect

Vets more likely to strongly agree with all 3 statements:

- Fewer years in practice

Veterinarian agreement with considerations when making flea/tick recommendations

90% Agree (52% strongly, 38% somewhat)

“Cat and/or dog owners **rely on me to provide recommendations about flea/tick prevention**”

81% Agree (40% strongly, 41% somewhat)

“I would recommend a more convenient treatment option for flea/tick prevention **if it was easier to administer**”

73% Agree (35% strongly, 37% somewhat)

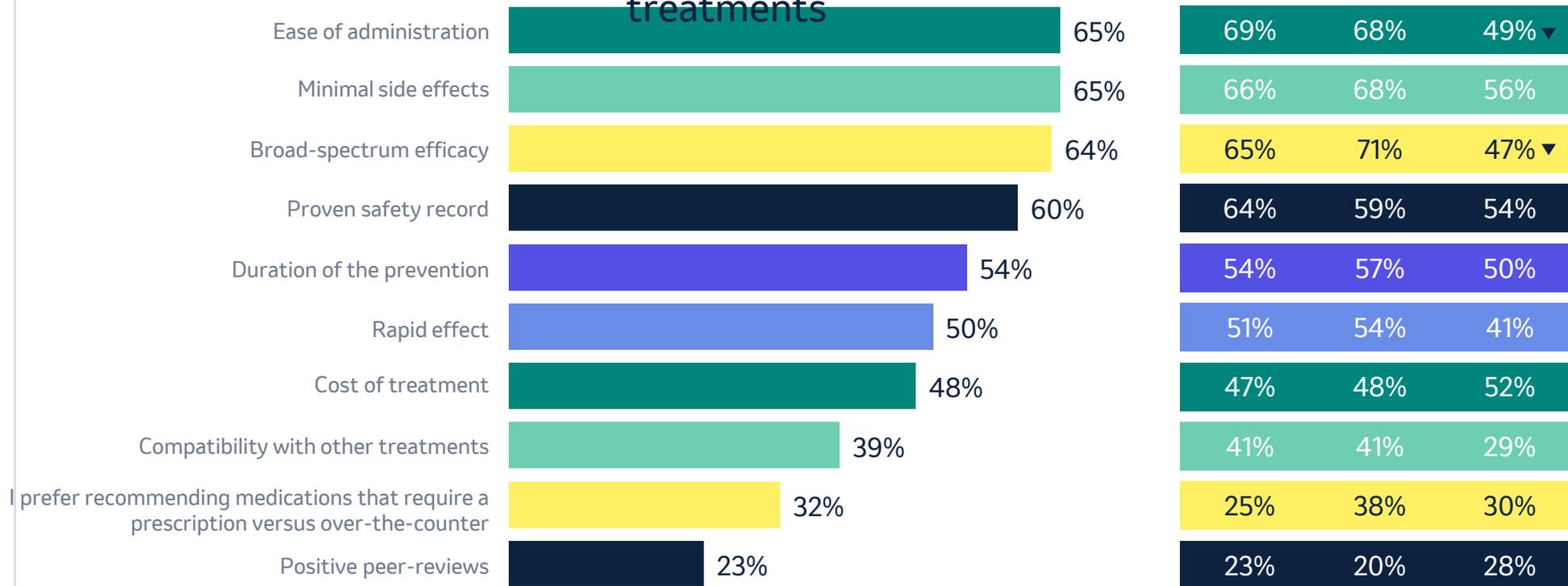
“I would recommend a more convenient treatment option for flea/tick prevention **if it lasted longer**”

Ease of use, minimal side effects, and efficacy are key factors in vets' recommendations

Those with >10 years in practice or view Rx as more effect are more likely to view the following as important...

- Minimal side effects
- Broad-spectrum efficacy [Rx only]
- Proven safety record
- Treatment cost [YIP only]
- Compatibility [Rx only]
- Prefer Rx vs. OTC

Most important criteria for recommending flea/tick treatments



▼/ ▲ = SIGNIFICANTLY LOWER/HIGHER VS. GLOBAL AT 95% CONFIDENCE LEVEL

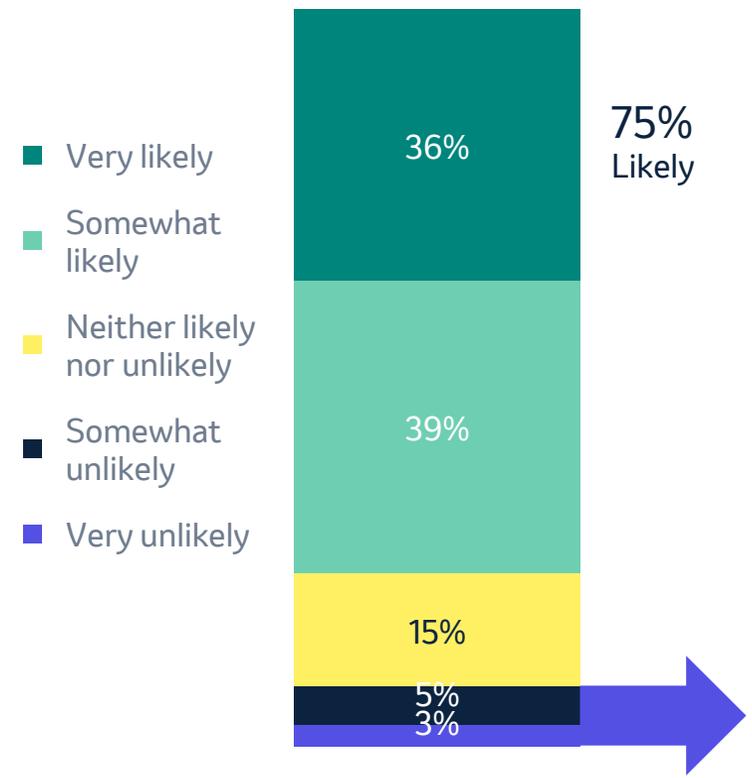
Q16. FROM YOUR PERSPECTIVE, WHAT IS THE MOST IMPORTANT CRITERIA WHEN YOU SELECT YOUR RECOMMENDED FLEA AND TICK TREATMENTS AND/OR PREVENTATIVE MEDICATIONS?
 BASE: VETERINARIANS: GLOBAL (N=582), AMERS (N=220), EMEA (N=246), APAC (N=116)

3 in 4 pet owners are likely to try a once-yearly flea/tick medication

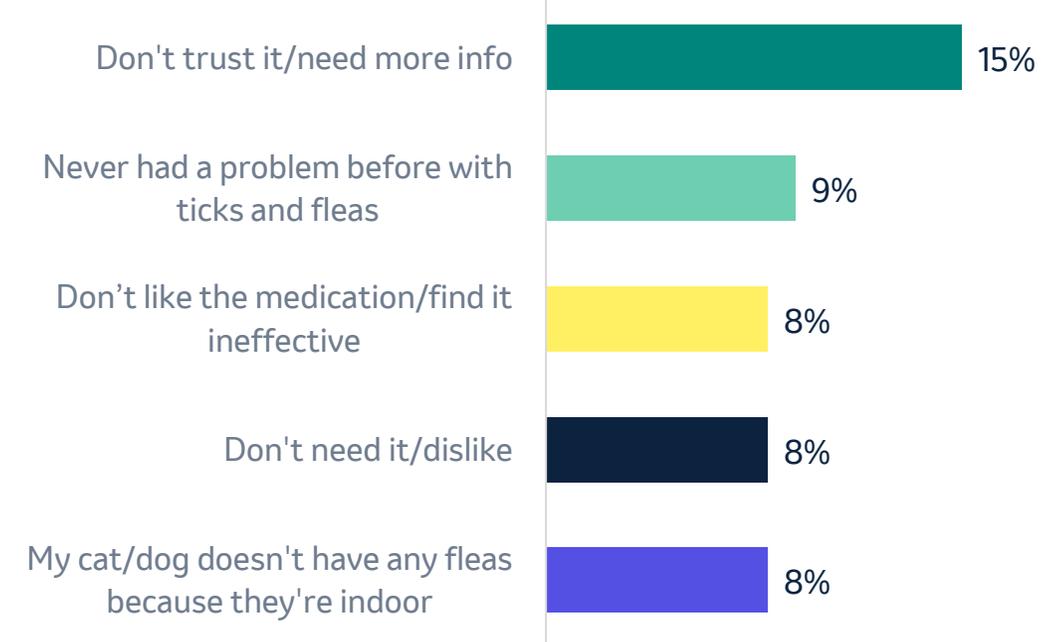
Owners that express greater likelihood to try:

- Have flea/tick experience

Likelihood of pet owners trying a once-yearly flea/tick medication



Top 5 reasons why pet owners are unlikely to try a once-yearly medication *(based on coded responses)*

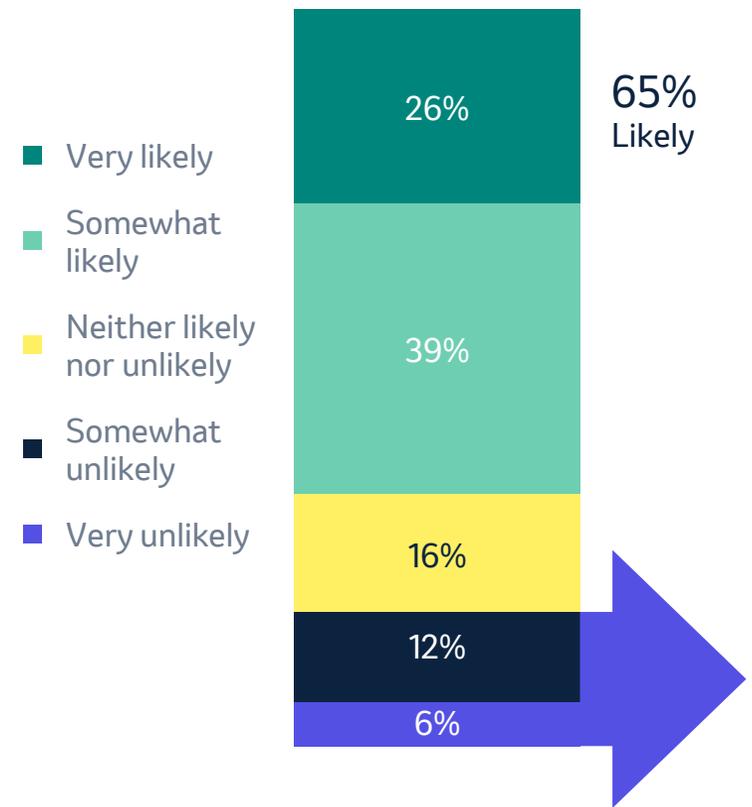


Q35. HOW LIKELY OR UNLIKELY WOULD YOU BE TO TRY A TREATMENT AND/OR PREVENTATIVE MEDICATION THAT PROTECTS YOUR CAT AND/OR DOG FROM FLEAS AND TICKS FOR UP TO A YEAR?
 BASE: PET OWNERS NOT CURRENTLY USING YEARLY MEDICATIONS OR INJECTIONS (N=2793)
 Q36. WHY WOULD YOU BE [...] TO TRY A TREATMENT AND/OR PREVENTATIVE MEDICATION THAT PROTECTS YOUR PET(S) FROM FLEAS AND TICKS FOR UP TO A YEAR?
 BASE: PET OWNERS UNLIKELY TO TRY A FLEA AND TICK TREATMENT THAT PROTECTS FOR UP TO A YEAR (N=633)

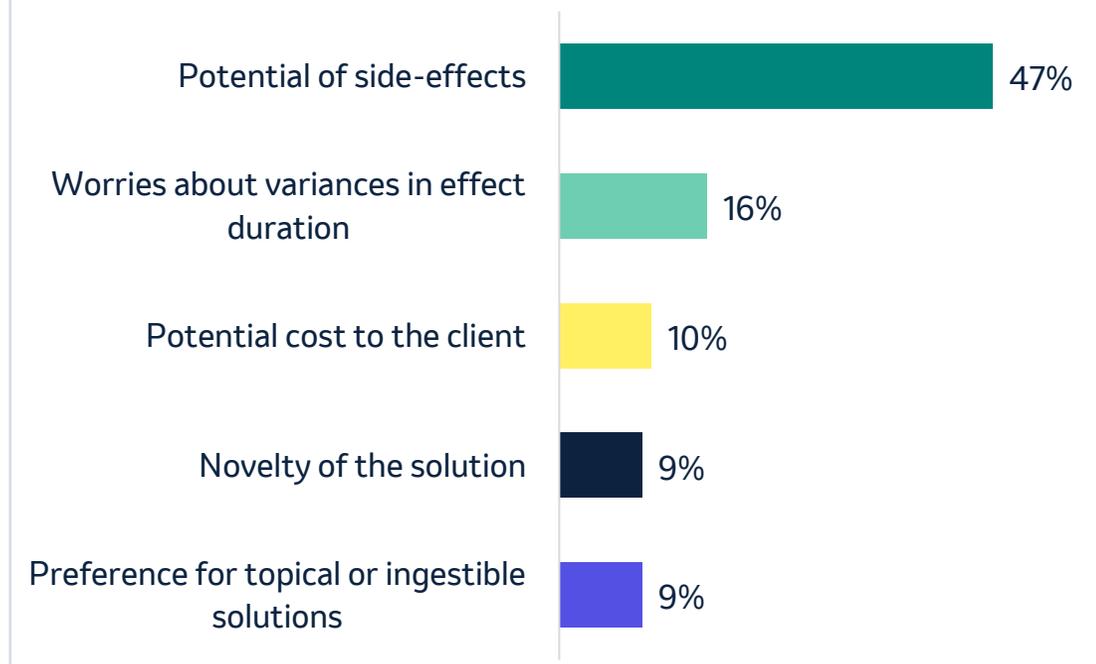
Two-thirds of vets are likely to recommend annual medication, but potential side effects concern those who would not

Vets in EMEA are least likely to recommend once-yearly medications, mainly due to fear of potential side effects

Likelihood of recommending a once-yearly medication



Reasons why veterinarians are unlikely to recommend a once-yearly medication



Q14. HOW LIKELY OR UNLIKELY WOULD YOU BE TO START RECOMMENDING A ONCE-YEARLY MEDICATION FOR FLEA AND TICK PREVENTION AND TREATMENT?
 BASE: VETERINARIANS NOT ADMINISTERING/RECOMMENDING YEARLY INJECTIONS: GLOBAL (N=458)
 Q15. WHY ARE YOU UNLIKELY TO START RECOMMENDING ONCE-YEARLY MEDICATION FOR FLEA AND TICK PREVENTION AND TREATMENT TO CAT AND/OR DOG OWNERS?
 BASE: VETERINARIANS UNLIKELY TO START RECOMMENDING ONCE-YEARLY MEDICATION (N=81)