



Veterinary Medical Survey



Companion Animal Pain Landscape

Survey of 50 veterinarians | US (60%) Europe (40%)



Practice types: Small animal clinics, specialty hospitals



Focus: Pain assessment, treatment practices, challenges, and unmet needs (dogs & cats)

Study Overview



Sample size: 50 veterinarians



Practice: Small animal clinics, specialty hospitals



Focus areas: Assessment, treatment practices, challenges, and unmet needs



Key Insight

Pain management is a core, everyday responsibility in veterinary practice.

Geographic Distribution

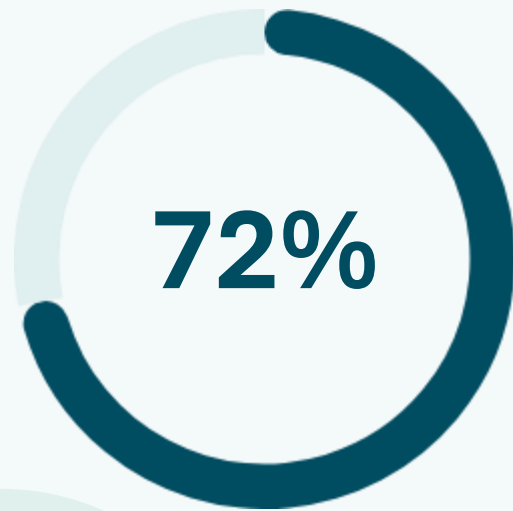


● United States (60%) ● Europe (40%)

Frequency of Pain Cases in Practice



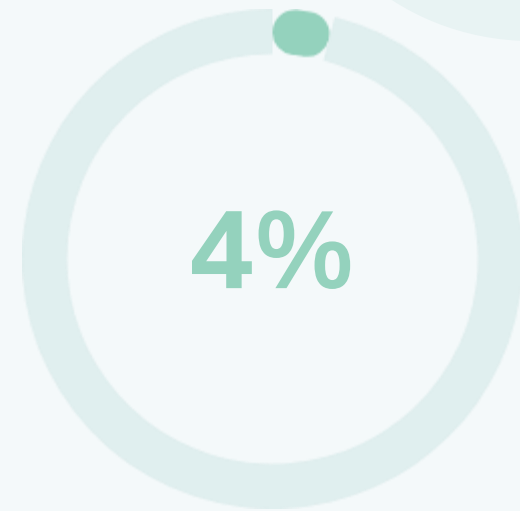
How often veterinarians encounter companion animals experiencing pain



Daily



Weekly



Occasionally



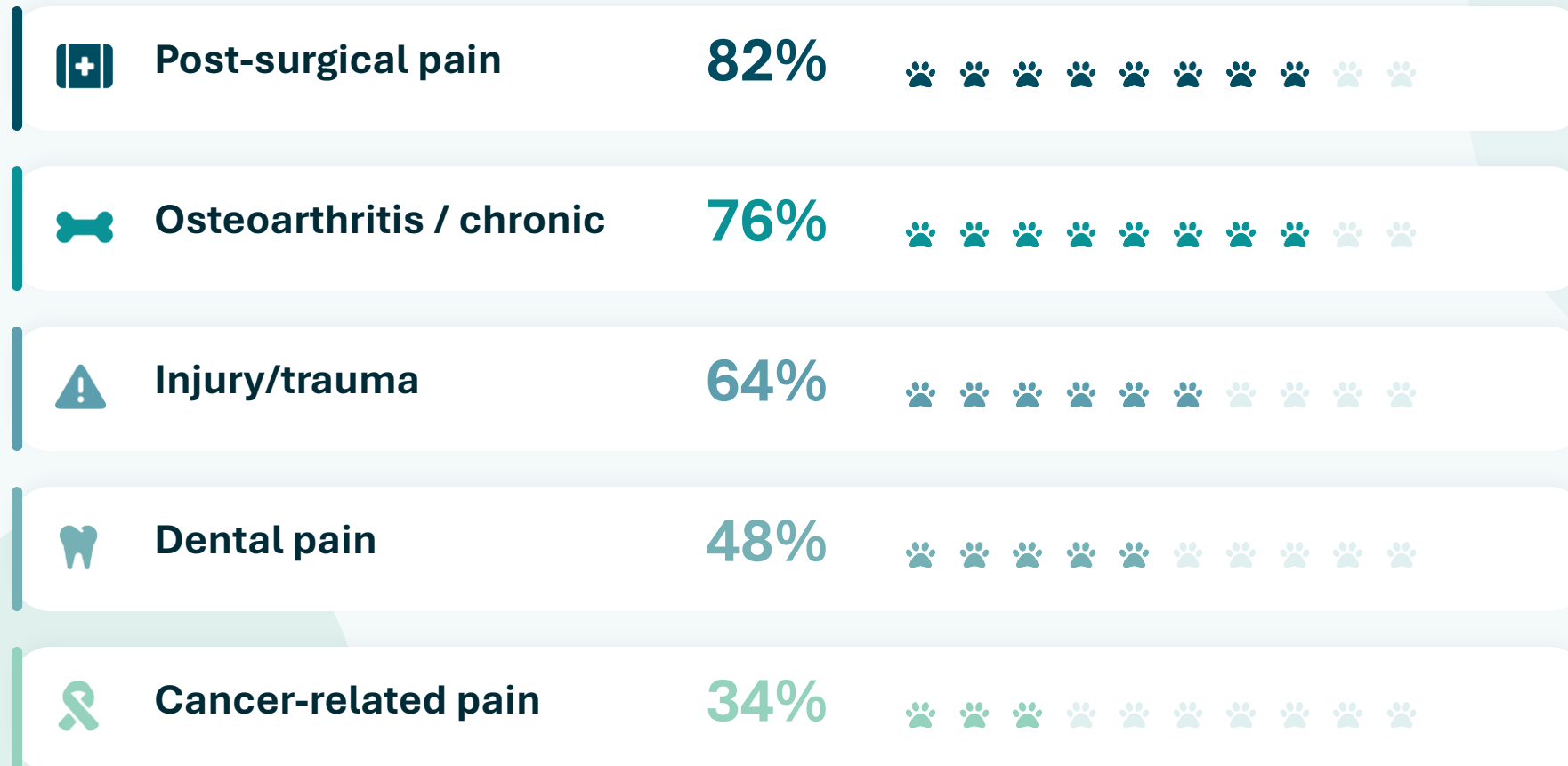
Key Insight

Pain management is a core, everyday responsibility in veterinary practice.

Most Common Pain Types



Prevalence of pain conditions most frequently treated by surveyed veterinarians



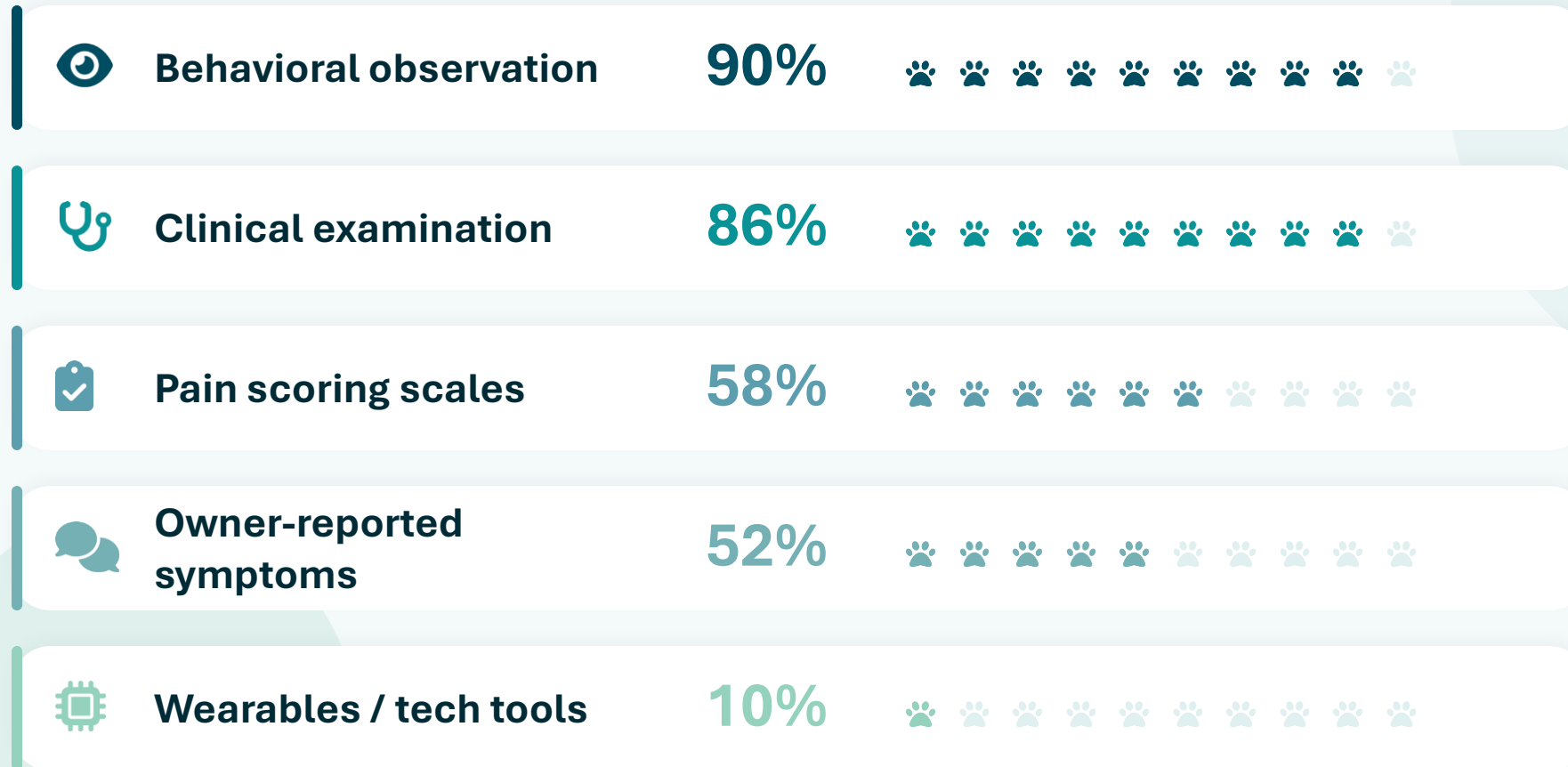
Key Insight

Chronic conditions (especially osteoarthritis) are nearly as prevalent as acute surgical pain.

Pain Assessment Methods Used



Primary techniques utilized by veterinarians to evaluate companion animal pain



Key Insight

Assessment is still largely subjective, with limited adoption of standardized objective tools.

Confidence in Pain Assessment



How confident are veterinarians in their ability to assess animal pain?



Very Confident



Moderately Confident



Low Confidence

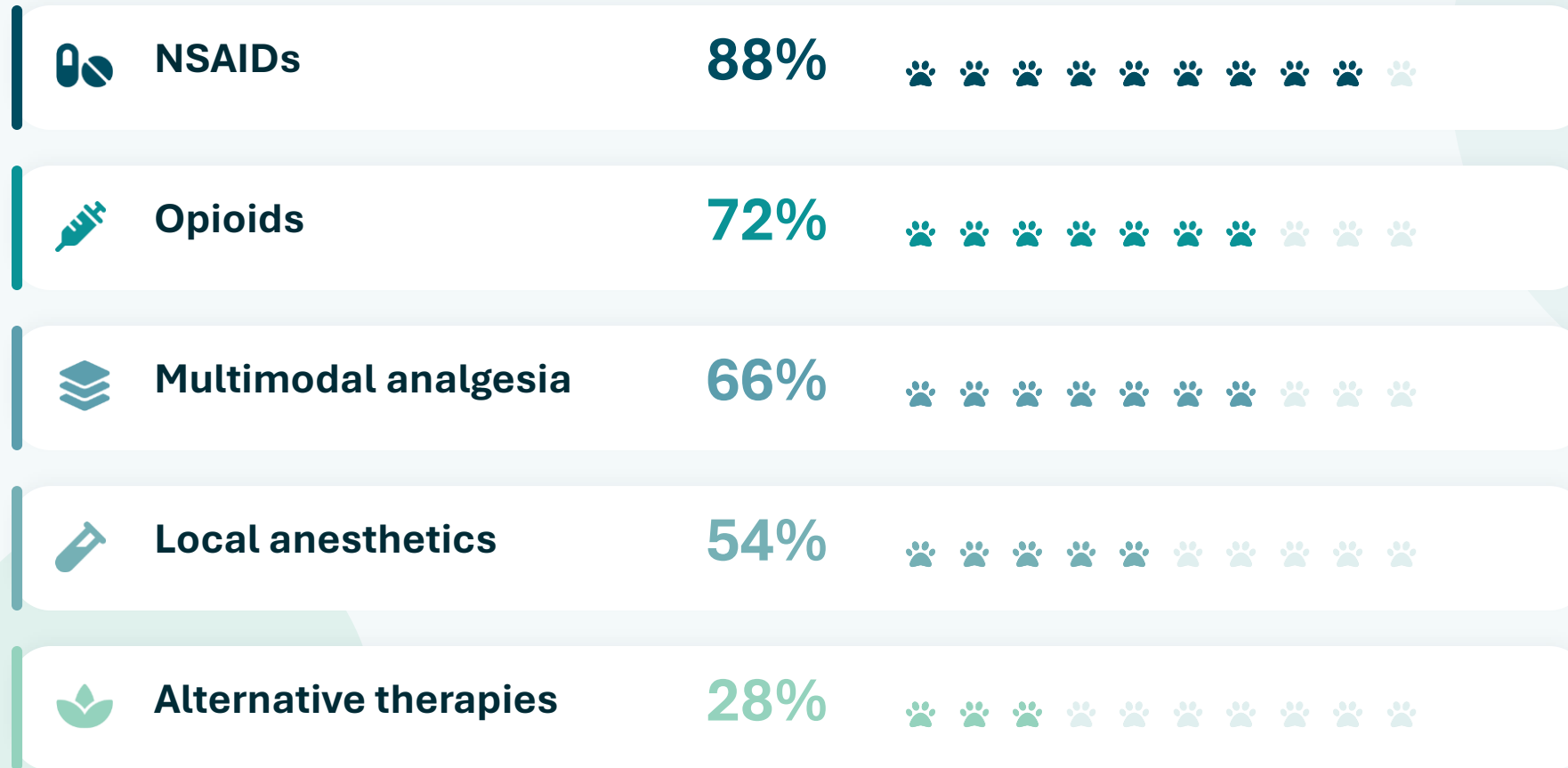
Key Insight



Despite frequent exposure, 62% lack full confidence, highlighting diagnostic uncertainty.

Common Pain Management Approaches

Treatment methods most frequently utilized by surveyed veterinarians



Key Insight

There is strong adoption of multimodal approaches, but still a heavy reliance on NSAIDs.

Challenges in Pain Detection



Which species is harder to assess for pain?



84%

Cats



10%

Dogs



6%

Equal Difficulty



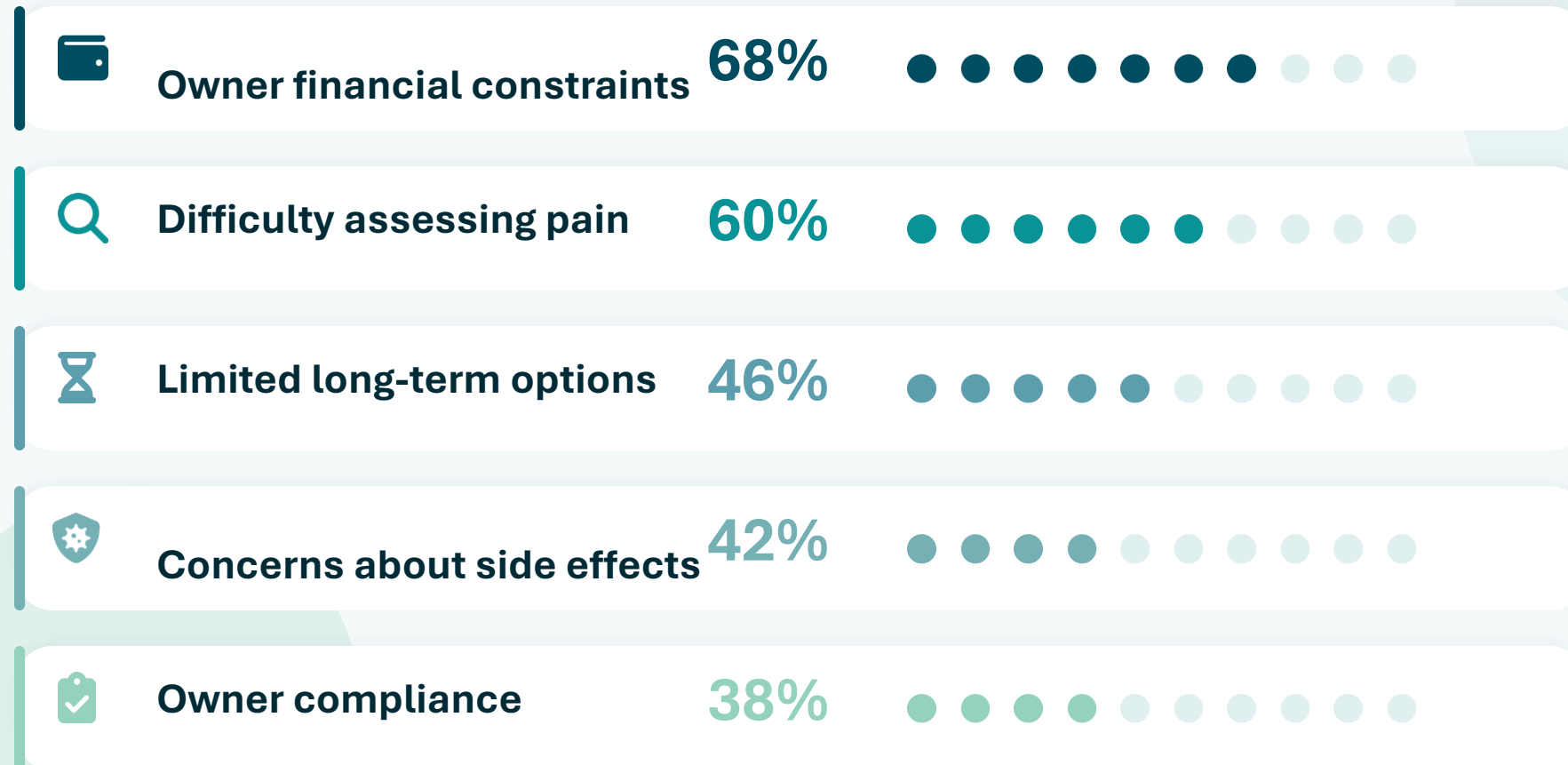
Key Insight

Pain in cats remains significantly under-recognized.

Key Barriers to Effective Pain Management



Major challenges faced by veterinarians in providing optimal pain care



Key Insight

Barriers are both clinical and economic, with owner-related factors playing a major role.

Satisfaction with Treatments



Veterinarian satisfaction levels with currently available pain management options



Very Satisfied



Moderately Satisfied



Dissatisfied

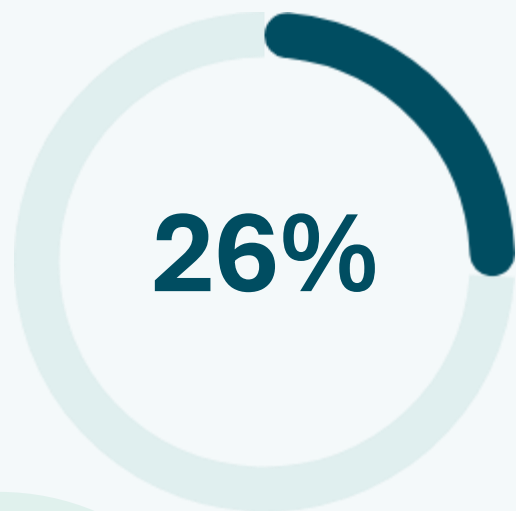


Key Insight

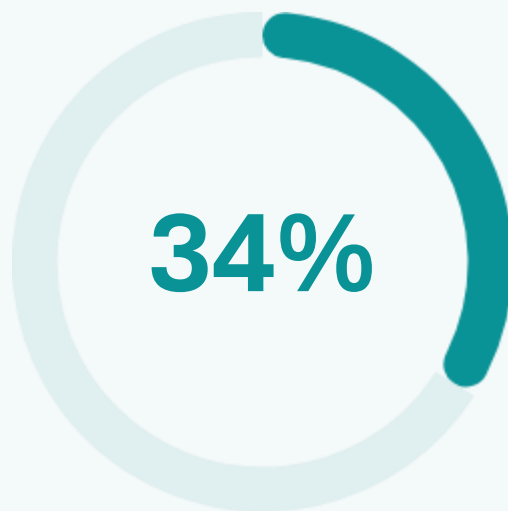
Only 1 in 5 veterinarians are fully satisfied with current options, indicating significant room for innovation.

Use of New / Advanced Therapies

Adoption rates of newer treatments (e.g., monoclonal antibodies, regenerative medicine)



Yes Regularly



Occasionally



Not Yet

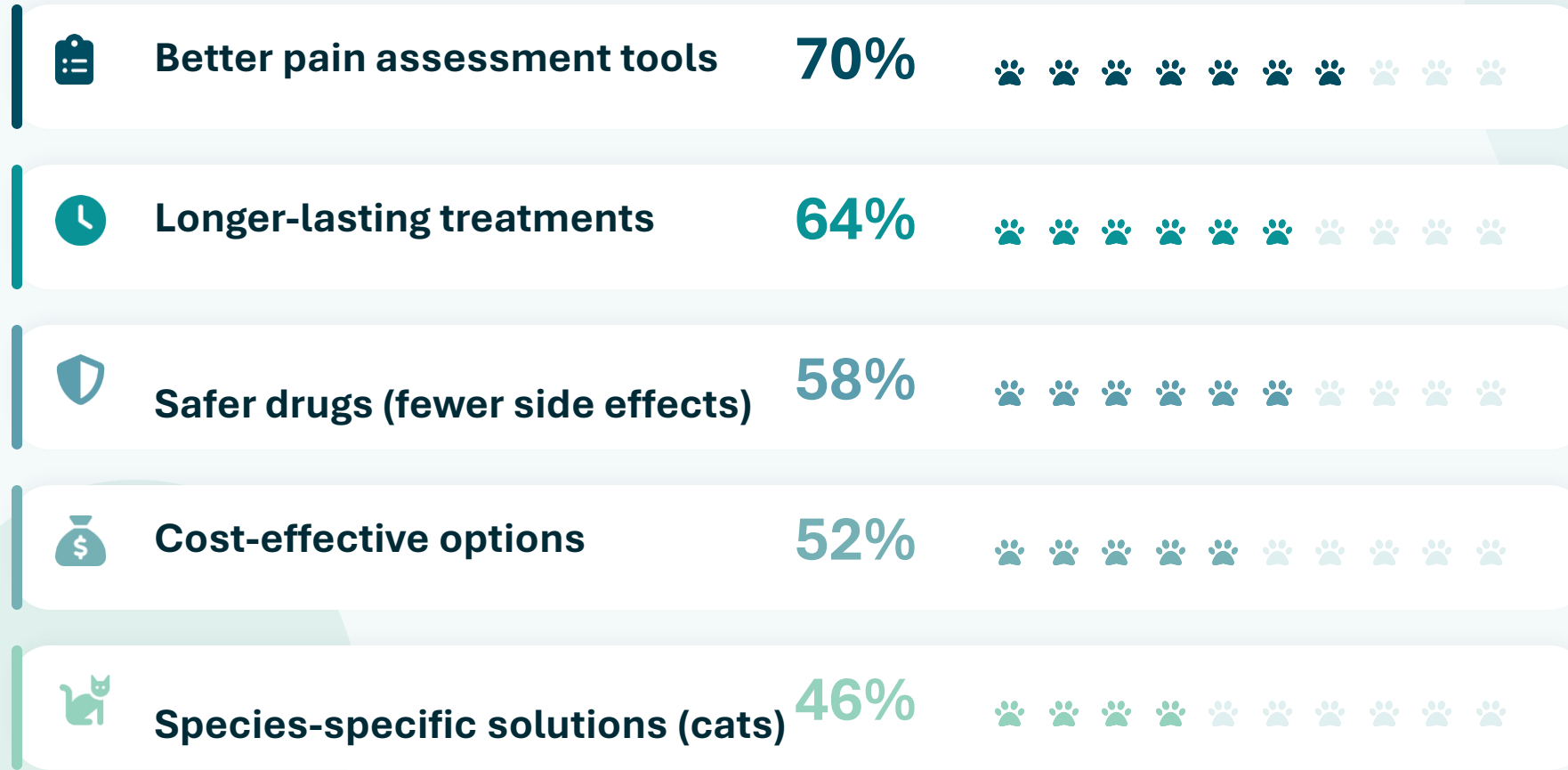


Key Insight

Adoption of advanced therapies is growing but still not mainstream in daily practice.

Unmet Needs in Pain Management

Key improvements required to enhance companion animal care, as reported by veterinarians



Key Insight

Top unmet need:
objective, reliable pain
measurement tools.

Key Takeaways



Summary of critical insights from the companion animal pain landscape survey



1. Pain is Highly Prevalent

Veterinarians deal with pain daily, especially post-surgical and chronic conditions.



2. Assessment is Subjective

Heavy reliance on behavioral cues, with low penetration of objective, standardized tools.



3. Cats Are Underserved

Pain recognition in cats remains a major gap and significantly under-recognized.



4. Treatment is Not Ideal

While multimodal therapy is common, satisfaction is moderate at best.



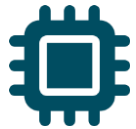
5. Significant Unmet Needs

Particularly in objective diagnostics, long-acting therapies, and safer options.

Strategic Implications



Recommendations for the Pharma & Veterinary Industry



Invest in pain biomarkers & AI-based assessment tools



Expand monoclonal antibody therapies (e.g., for osteoarthritis)



Develop cat-specific pain solutions



Improve affordability & compliance-friendly formats



Thank You

Do you have any questions?

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