BAYER VETERINARY CARE USAGE STUDY III: FELINE FINDINGS
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Why a New Feline Study
SPEAKERS

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Why Bayer Veterinary Care Usage Study

Pets, Visits 1996-2011

Active Clients/Vet

Patients/Vet/Week

New Clients/FTE Vet
Study Identified Reasons

• “Environmental” Factors
  – Recession
  – Fragmentation of veterinary services
  – Impact of Internet—information, communication, commerce

• Client Factors
  – Don’t understand need
  – “Sticker shock”
  – Feline resistance
Cats Especially Underserved

More cats than dogs

Fewer visits

Receive less veterinary care
Downward Trend Continues

Total Feline Visits, 1996-2011

AVMA Pet Owner Sourcebook, 2012
Bayer and AAFP

• Formed new collaboration
• Goals
  – Understand obstacles more clearly
  – Develop innovative solutions
  – Foster broader utilization of AAFP’s Cat Friendly Practice protocols
New Veterinarian Study

• Understand changes since original study
  – Visits
  – Focus on cats
  – Attitudes towards feline practice
• Improve feline healthcare
• Help veterinarians attract and serve more feline patients
What We Learned

• Some progress in past 2 years
• Visit volume, revenue still depressed
• Significant available capacity
• Growing recognition of cat opportunity
• Many good intentions, but need stronger follow-through
• AAFP recognized, respected for feline practice leadership
John Volk
Brakke Consulting

Jim Thomas, PhD
Bayer Healthcare LLC Animal Health Division, North America

Veterinary Research Findings 2012
Methodology

• Qualitative
  – 6 Focus groups – Boston, Atlanta, San Francisco
  – Sept-Oct 2012
  – Practice owners and associates

• Quantitative
  – Online survey using proprietary Ipsos-Forward panel
  – 401 practice owners, nationally representative
  – Nov 2012
  – Statistical margin of error ± 4.9% at 95% confidence level
Bayer Study Helping Practices

- 70% claim at least some familiarity with the Bayer Veterinary Care Usage Study
  - 48% have specific recall
  - Of these, 48% have made specific changes in their practices as the result of the Study
Visits Stagnant, But Improved

Increase

<table>
<thead>
<tr>
<th>Year</th>
<th>Increased 10% or more</th>
<th>Increased 1-9%</th>
<th>Stayed the same</th>
<th>Decreased 1-9%</th>
<th>Decreased 10% or more</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>8%</td>
<td>26%</td>
<td>14%</td>
<td>35%</td>
<td>16%</td>
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</tr>
</tbody>
</table>

Decrease

<table>
<thead>
<tr>
<th>Year</th>
<th>Increased 10% or more</th>
<th>Increased 1-9%</th>
<th>Stayed the same</th>
<th>Decreased 1-9%</th>
<th>Decreased 10% or more</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>12%</td>
<td>27%</td>
<td>23%</td>
<td>28%</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

More here

Less here
Revenues More Stable

- Increased: 47% (2010), 45% (2012)
- Stayed the same: 11% (2010), 29% (2012)
- Decreased: 42% (2010), 27% (2012)
Significant Unused Capacity

% Appointments utilized Jan-Sep 2012

- <30%: 5%
- 30%-49%: 15%
- 50%-69%: 32%
- 70%-79%: 31%
- 80%-89%: 10%
- 90%+: 8%

More than half < 70% filled
Many See Room for Improvement

Levels of Satisfaction with Practice Success

- 51% Satisfied
- 32% Dissatisfied

- 8% Very Satisfied
- 17% Satisfied
- 26% Neutral
- 18% Dissatisfied
- 18% Very Dissatisfied
- 10% Much worse
- 4% Much better

Yet Most See Practice as Average or Above

- 92%
Increased Visits Top Priority for Growth

- Increased dog visits: 39% - 20% - 18% - 9% - 5% - 4% - 4%
- Increased cat visits: 19% - 39% - 19% - 11% - 7% - 32%
- Dental examinations/cleanings: 22% - 17% - 27% - 19% - 8% - 42%
- Medication sales: 8% - 10% - 20% - 23% - 15% - 17% - 7%
- Wellness Plans paid monthly: 10% - 6% - 10% - 12% - 13% - 19% - 18% - 12%

Bayer Veterinary Care Usage Study III: Feline Findings
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For Cats, Action Lags Intention

- Practice could handle increase in cat visits without significant changes:
  - Completely Agree: 60%
  - Somewhat Agree: 31%
  - Neutral: 6%
  - Somewhat Disagree: 5%
  - Completely Disagree: 1%

- Cats represent one of the most significant missed opportunities for profession:
  - Completely Agree: 35%
  - Somewhat Agree: 43%
  - Neutral: 17%
  - Somewhat Disagree: 5%
  - Completely Disagree: 2%

- My clients' cats typically receive adequate veterinary care:
  - Completely Agree: 18%
  - Somewhat Agree: 39%
  - Neutral: 21%
  - Somewhat Disagree: 20%
  - Completely Disagree: 2%

- Practice is taking actions to increase visits among current feline patients:
  - Completely Agree: 13%
  - Somewhat Agree: 37%
  - Neutral: 30%
  - Somewhat Disagree: 16%
  - Completely Disagree: 5%

- Practice is making more of an effort to attract more cat-owning clients:
  - Completely Agree: 14%
  - Somewhat Agree: 32%
  - Neutral: 36%
  - Somewhat Disagree: 14%
  - Completely Disagree: 5%

- Practice has taken specific steps to make practice more friendly to cats/cat owners:
  - Completely Agree: 15%
  - Somewhat Agree: 26%
  - Neutral: 35%
  - Somewhat Disagree: 15%
  - Completely Disagree: 10%

- I do not believe that cat owners will bring their pets in more often no matter what we do:
  - Completely Agree: 5%
  - Somewhat Agree: 26%
  - Neutral: 26%
  - Somewhat Disagree: 31%
  - Completely Disagree: 11%
Earlier Study Identified Major Obstacle Is Getting Cat to the Vet

- Dog owners: Just thinking about it is stressful (26%) vs. pet hates going to the vet (38%)
- Cat owners: Pet hates going to the vet (58%)

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Some Addressing Problem; Many Not

Implemented Changes in last 2 years to reduce stress for cats?

- Yes: 41%
- No, but we intend to: 24%
- No, we do not intend to: 35%
Staff Training Varies

Has staff been trained to make cat visits less stressful?

- Yes, all non-vet staff received training: 38%
- Yes, some non-vet staff received training: 32%
- No: 31%
# Use of Other Cat-Friendly Techniques

<table>
<thead>
<tr>
<th>Technique</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Use of towels to cover carriers or exam tables</td>
<td>85%</td>
</tr>
<tr>
<td>Staff members who have good feline-friendly handling skills</td>
<td>67%</td>
</tr>
<tr>
<td>Feline handling training for all staff</td>
<td>62%</td>
</tr>
<tr>
<td>Use of Feliway in exam rooms</td>
<td>41%</td>
</tr>
<tr>
<td>Exam rooms used only for cats</td>
<td>35%</td>
</tr>
<tr>
<td>A cat-only waiting area physically and visually separated from dogs</td>
<td>18%</td>
</tr>
<tr>
<td>Cat-only days or appointment hours</td>
<td>11%</td>
</tr>
<tr>
<td>Other procedures or processes designed to specifically meet needs of cats</td>
<td>13%</td>
</tr>
</tbody>
</table>

**Provide Written Report**

- Yes, in all cases: 17%
- Yes, in most cases: 10%
- Yes, in a few cases: 20%
- No: 53%
Limited Standardization of Wellness Exams Within Practice

The practice has a standardized approach

Each doctor is responsible for his/her own approach

56%

44%
Efforts to Keep Wellness Protocols Current

Last Time Wellness Approach Revised

- 1-2 yrs: 50%
- 2-3 yrs: 22%
- 3-5 yrs: 18%
- 5-10 yrs: 5%
- 10+ yrs: 0%
- Never been revised: 5%

Reasons Why Revised

- Review Vaccine Protocols (Net): 42%
- Improve Service (Net): 24%
- Due to New Information (Net): 24%
- Other Patient Reasons (Net): 21%
Measurement of Compliance With Reminders Weak

Types of Reminders Used

- Reminder postcards: 95%
- Phone calls: 79%
- Emails: 57%
- Texts: 9%

Compliance Monitored

- No: 58%
- Yes: 42%
Familiarity with AAFP

- Very familiar: 57%
- Aware but not familiar: 42%
- Have not heard of: 1%

Familiarity with AAFP Programs

- Vaccine protocols: 63% (Have Used It), 15% (Know A Lot About It, Have Never Used), 18% (Know A Little)
- Practice Guidelines: 38% (Have Used It), 16% (Know A Lot About It, Have Never Used), 35% (Know A Little)
- www.catvets.com: 31% (Have Used It), 12% (Know A Lot About It, Have Never Used), 35% (Know A Little)
- Conferences, Meetings and Seminars: 21% (Have Used It), 20% (Know A Lot About It, Have Never Used), 42% (Know A Little)
- Journal of Feline Medicine and Surgery: 17% (Have Used It), 14% (Know A Lot About It, Have Never Used), 50% (Know A Little)
- Cat Friendly Practice Program: 12% (Have Used It), 15% (Know A Lot About It, Have Never Used), 39% (Know A Little)
Improving Medicine, Improving Practice

Elizabeth Colleran, DVM, MS, Dipl ABVP
American Association of Feline Practitioners
We’re Not All Cat People

- 70% own cats
- 81% own dogs
- But we have preferences

48% Prefer dogs

17% Prefer cats

- 25% Strongly Prefer Dogs
- 23% Somewhat Dogs
- 35% Neutral
- 9% Somewhat Cats
- 8% Strongly Prefer Cats
We Don’t Always Practice What We Preach

Wellness Exam Frequency On Own Pets

For Dogs (n=323):
- 46% every 6 months
- 42% once per year
- 3% once every 18 months
- 5% once every 2 years
- 5% other

For Cats (n=280):
- 28% every 6 months
- 53% once per year
- 4% once every 18 months
- 9% once every 2 years
- 7% other

20% above 1 year
Communication is Major Issue

- When asked in focus groups, veterinarians had significant difficulty articulating a short, concise reason why cat owners should come back for annual exams
  - Most agreed, at least to some degree, that a healthy cat should be seen at least once a year for a preventive checkup
  - But when asked to explain why, they were unable to present a logical and succinct response
Find Cats More Challenging Than Dogs

Dogs
- Easy to work with during exams: 2% (Completely Agree), 3% (Somewhat Agree), 14% (Neutral), 31% (Somewhat Disagree), 60% (Completely Disagree)
- Challenging to diagnose: 2% (Completely Agree), 3% (Somewhat Agree), 14% (Neutral), 36% (Somewhat Disagree), 7% (Completely Disagree)

Cats
- Easy to work with during exams: 14% (Completely Agree), 17% (Somewhat Agree), 17% (Neutral), 51% (Somewhat Disagree), 22% (Completely Disagree)
- Challenging to diagnose: 14% (Completely Agree), 17% (Somewhat Agree), 17% (Neutral), 43% (Somewhat Disagree), 5% (Completely Disagree)
Improving Exam Protocols

• Feline exams can be improved with more routine use of some procedures, e.g.:
  – Behavioral assessment
  – Environmental assessment
  – Pain assessment
  – Screening bloodwork
How To **Reverse** the Trend

- **Enhance** care
- **Lessen** stress level for pet owners
- **Increase** visits
- **Build** a reputation as a cat friendly practice
What can the **Cat Friendly Practice** program do for veterinarians?
Cat Friendly Practice (CFP) Goals

1. Help all staff levels

2. Reduce stress for cats, owners and staff

3. Enhance feline care
What is the CFP Program?

- Self Assessment Checklist with 10 topic areas
- Comprehensive Educational Manual
- Online Process with Video
- Supplemental Photo and Educational Resources

Sponsored By:
Specific Areas of Focus

- Understanding Behavior
- Owner Communication
- Waiting Room Comfort
- Handling Guidelines
- Exam Room
- Hospitalization/Cat Wards
Why invest the time?

- **Create** safer, more relaxing visits
- **Enrich** health and well being of felines
- **Foster** trusting relationships, cat and owner
- **Attract** more cat owners and feline patients
- **Boost** job satisfaction
- **Grow** profitability
CFP Benefits

- Public Relations Support
- Marketing Toolkit
- E-newsletters
- New Education Materials
- Ongoing Resources
- 2013 Consumer Campaign
Public Campaign

2013 Consumer Campaign Directives Include:
• Educate pet owners on the need for routine veterinary care
• Increase awareness on the value of visiting a Cat Friendly Practice

Cat Friendly Practice
By the American Association of Feline Practitioners

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Program **Success**!

- 259 Approved Cat Friendly Practices
- 8 Pending Approval
- 522 In the Process of becoming a CFP
- Extremely positive survey feedback

Figures as of 12/17/12

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For more information

• Visit www.catvets.com CFP Icon

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Director of Veterinary Technical Services  
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Call to Action
What Veterinarians Can Do Now To Increase Cat Visits

• Find the un-served/under-served cats in your practice
  – Ask about other household pets on every visit
  – Track reminder compliance

• Educate cat owners on carrier use and transporting
  – The No. 1 obstacle!
What Veterinarians Can Do Now To Increase Cat Visits

• Make your waiting room as cat-welcoming as possible
  – Separate areas for dogs and cats
  – Visual barriers if possible

• Reserve one or more exam rooms for cats only
What Veterinarians Can Do Now To Increase Cat Visits

• Train all staff regularly in cat-friendly handling
• Review & refine exam protocols
• Talk through the exam
• Use and dispense feline-friendly medications
What Veterinarians Can Do Now To Increase Cat Visits

• Send home exam report every time
• Schedule the next exam before the cat leaves practice
What Veterinarians Can Do Now To Increase Cat Visits

• Join AAFP
• Become a certified Cat Friendly Practice
Later This Year . . .

• Bayer and AAFP will
  – Report the results of additional research
  – Explore additional ways to help veterinarians build their feline practice
BAYER VETERINARY CARE USAGE STUDY III: FELINE FINDINGS

QUESTIONS?
BAYER VETERINARY CARE USAGE STUDY III: FELINE FINDINGS

THANK YOU!