

Bayer Veterinary Care Usage Study **Media Backgrounder**

While the population of dogs and cats in the U.S. steadily increased to 170 million in 2009ⁱ and is continuing to grow, the Bayer Veterinary Care Usage Study found that 51 percent of veterinarians reported a net decrease in patient visits over the last two years, continuing a trend that has been documented over the last decadeⁱⁱ. The study also found that 42 percent of veterinarians said that revenues decreased in 2010 as compared to 2009.

The decline in veterinary care poses a significant risk to the health of companion animals, and increases economic hardships on the veterinary profession. Through a two-phase study, which was commissioned by Bayer HealthCare LLC, Animal Health Division and conducted by Brakke Consulting in collaboration with the National Commission on Veterinary Economic Issues, this noteworthy decline in pet care, and how this has affected pet owners and veterinarians, was reviewed.

What is the purpose of the Bayer Veterinary Care Usage Study?

The Bayer Veterinary Care Usage Study was conducted in two phases, and was fielded to determine the factors contributing to the decline in veterinary visits. In addition, it also established the veterinarians' point-of-view regarding this decline, as well as their business and companion animals' health needs.

Phase one, which was announced in January 2011, surveyed 2,000 dog and cat owners, while phase two was announced in July 2011 and surveyed 401 veterinarians. Both surveys were fielded nationally, and focus groups with veterinarians and pet owners were also conducted.

What are the findings of the Bayer Veterinary Care Usage Study?

Phase One

- The first phase identified six root causes: the economic impact of the recession; fragmentation of veterinary services; the use of the Internet vs. office visits; feline resistance; perception that regular medical check-ups are unnecessary; and cost of care.
- Key findings included:
 - Older pets see the veterinarian far less often than younger pets. This is especially concerning because as pets age they are more, not less, susceptible to age-related illnesses
 - 39 percent of pet owners looked online before consulting their veterinarian if the pet gets sick or injured
 - 53 percent of pet owners think costs are usually much higher than expected
 - One-third of cats had not been to the veterinarian in the last year. Feline resistance – hiding, aggression, vocalization and stressful behavior – plays a significant role in the declining frequency of cat examinations

Phase Two

- The second phase found a gap between pet owners and veterinarians when it comes to providing for the long-term health of companion pets, as nearly all veterinarians believe that companion pets require at least one veterinary well-visit annually, but two-thirds of them also believe pet owners don't value these exams.
- Key findings included:
 - 51 percent of veterinarians reported a net decrease in patient visits over the last two years
 - 42 percent of veterinarians said that revenues decreased in 2010 as compared to 2009
 - 95 percent of veterinarians surveyed believe that companion animals – both dog and cat – require at least one veterinary well-visit annually
 - 72 percent of veterinarians believe wellness exams are the most important service provided
 - 83 percent of veterinarians believe that running a veterinary practice is as much a people business as it is a medical service

What can veterinarians do to reverse this trend?

Through the first phase of the study, solutions for veterinarians were developed, including the following:

- Develop industry-wide and clinically supported guidance on annual veterinary visits and promote that standard among pet owners in order to educate clients that these visits are important for the health and quality of life of pets
- Communicate to pet owners the health and economic value of regular treatment and exams
- Make veterinary practices more "cat-friendly" with, for example, separate entrances and quiet rooms for cats and their owners
- Make it as easy as possible for pet owners to schedule and keep appointments by adopting electronic scheduling software, reminder notifications, email and text messages
- Consider alternative pricing strategies and offer financing option information to pet owners

After the second phase, the following recommendations for veterinarians were offered, including:

- Develop an individualized full-year wellness program
- Integrate new marketing strategies and tools, including using Facebook and Twitter to connect with pet owners
- Offer options for monthly payments
- Welcome cats. Provide cat-friendly reception areas that are quiet and dog-free and maintain a high level of cat-related training among clinic staff

ⁱ Humane Society of the United States, 2009. "U.S. Pet Ownership Statistics." Available at http://www.humanesociety.org/issues/pet_overpopulation/facts/pet_ownership_statistics.html. Accessed July 14, 2011.

ⁱⁱ DVM State of the Profession Survey, 2009.