

BAYER VETERINARY CARE USAGE STUDY III: FELINE FINDINGS



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Cats: The Challenge and the Opportunity



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Cats: The Challenge and the Opportunity



New Research

- Bayer Veterinary Care Usage Study III: Feline Findings
 - 3rd in a series of reports on why pet visits are declining and how veterinarians can reverse the trend



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Phase 1 Study Identified Six Reasons

- “Environmental” Factors
 - Recession
 - Fragmentation of veterinary services
 - Impact of Internet—information, communication, commerce
- Client Factors
 - Don’t understand need
 - “Sticker shock”
 - Feline resistance



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Phase II Study Uncovers Perception Gap

- Nearly all veterinarians believe pets require at least one veterinary well-visit annually
- But two-thirds believe pet owners don’t value these exams



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Focus of BVCUS III: Feline Findings

- Understand why pet owners aren’t bringing in cats; develop tools for veterinarians
- Veterinarian study released in January 2013
 - “Most significant missed opportunity”



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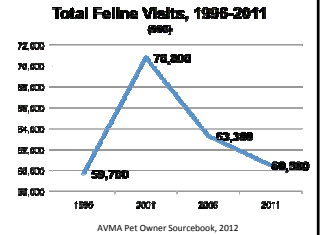
Challenge: Veterinarians Have Open Appointments to Fill

- AVMA Veterinary Workforce Study: 18% excess capacity
- Bayer Veterinary Care Usage Study: 52% of practices filling less than 70% of available appointments



Opportunity: 50% of America's Cats Need Better Veterinary Care

- <50% of cats have visited veterinarian in last year
- 14% drop in actual visits, 2001-2011



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- Collaboration with American Association of Feline Practitioners (AAFP)
- Comprehensive research among cat owners and veterinarians



What We Learned

- Cats are perceived and treated very differently than dogs by pet owners
 - The differences have a huge impact on use of veterinary care
- Many issues are addressable by veterinarians
- There is one window of opportunity to reach nearly every potential feline patient
- There are specific techniques that can help nearly every practice grow its feline business



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Consumer Research Findings



Cats Especially Underserved

More cats
than dogs

Fewer visits

Receive less
veterinary
care

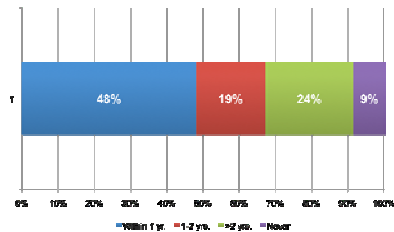


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Visit Frequency

Time Since Last Veterinary Visit



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Methodology – Cat Owners

- Qualitative
 - 6 focus groups – Charlotte, Milwaukee, Los Angeles
 - Had not taken cat to vet within last year
- Quantitative
 - Online survey using proprietary Ipsos-Forward panel
 - 1,938 cat owners, nationally representative
 - Statistical margin of error $\pm 2.2\%$ at 95% confidence level



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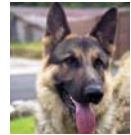
WHY PET OWNERS ROUTINELY BRING IN DOGS BUT NOT CATS . . .



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Acquisition



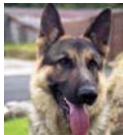
- Often acquired without prior thought
 - 59%: "Cat found me"
- Acquired purposefully



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Acquisition Cost



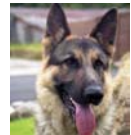
- Free
 - 69% paid \$0
 - Many acquired because they are low cost pet
- Purchased, adopted for \$100's or more



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Health Instructions



- None
- Recommendations on veterinary care from breeder, shelter
 - Often written



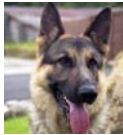
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Perceived Care Requirements



- Low maintenance



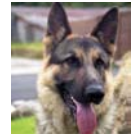
- High maintenance



Relationship to Owner



- Pet



- Companion



Personality



- Independent



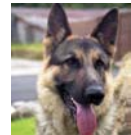
- Dependent, even
 needed
- Much more childlike
- Reciprocate affection



Habitat



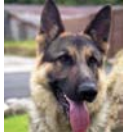
- Indoor



- Indoor/outdoor



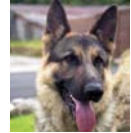
“Automatic” Vet Visits



- Few, if any
 - 37% don't even think vet recommends annual checkups
- Rabies vaccination
- Bordetella vaccination
- Etc., etc., etc.



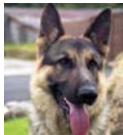
Observable Health Status



- Effective at masking signs of illness, injury
 - Which cat owners don't believe
 - 53% think cat has “never” been sick or injured
- Less accomplished at hiding signs



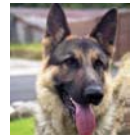
Cooperativeness



- 58% of owners say cat “hates” going to vet
 - Single biggest obstacle to veterinary visits
- 38% say dogs dislike going to vet
 - Not a big obstacle



Consequences of NOT Going to Vet



- Cat owners don't perceive a downside
 - Cats mask illness, injury
 - Many live to be a ripe old age without vet care
- Vet visits expected; part of responsible dog ownership
 - You're not a good owner if you don't take dog to vet

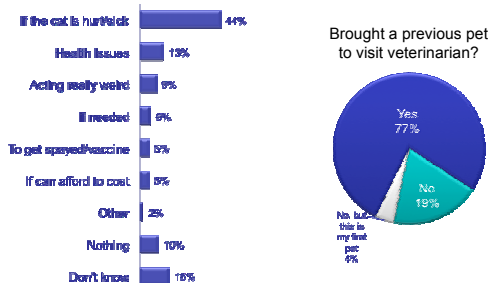


Best Window of Opportunity

- 83% of owners take cat to vet within first year
- 82% have a regular veterinary practice
 - 90% completely or somewhat satisfied overall
- Not inherently adverse to veterinary care



Even Non-Users Would Bring Sick, Injured Cat to Vet



Q24. Under what circumstances, if any, would you be persuaded you to bring (SURVEY CAT) to visit a veterinarian?
Base: All SURVEY CATs never visited a veterinarian (Total n=253)

Q25. Have you ever brought a previous pet to visit the veterinarian before?
Base: All SURVEY CATs never visited a veterinarian (Total n=253)



BUT THERE ARE PROBLEMS TO ADDRESS . . .



1. Taking Cat To Vet Is Stressful!



Very Stressful!



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Very, Very Stressful!

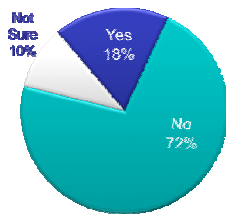


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% of Cat Owners Receiving Info on Transportation



Q40. Has a veterinarian ever provided information or instructions on how to make it easier to transport (SURVEY CAT) to the veterinarian?
Base: All SURVEY CATs have visited a veterinarian (Total n=1685)

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2. Waiting Room Uncomfortable

- Less than completely satisfied
 - Waiting room comfort for pet 57%
 - Waiting room comfort for owners 56%

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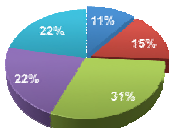
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3. Unclear Communication

- In focus groups, veterinarians did not provide logical and succinct responses when asked to explain why cats should be brought in for annual exams
- And cat owners clearly aren't getting the message

Wet Recommends More Frequent Exams



■ Completely Agree
■ Agree
■ Neither Agree nor Disagree
■ Completely Disagree

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4. Cost/Value Is An Issue

- Least satisfied
 - Value for money 59%
 - Also payment options 52%
- When asked what would motivate them to visit more often, top 3 suggestions were cost-related
 - E.g., discounts, coupons, etc.

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GROWING YOUR FELINE PRACTICE: 10 SOLUTIONS

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10 Solutions

1. Make the first visit count
2. Educate about pre- and post-visit experience
3. Enhance the exam
4. Provide feline-friendly handling
5. Reinforce and reward good behavior
6. Be more assertive in recommending, reminding, following up on care
7. Identify lapsed cats
8. Provide resources specific to cats
9. Provide single-page take home resources
10. Join AAFF's Cat-Friendly Practice Program

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1. Make the First Visit Count

- Engage and connect with client
- Develop an “elevator speech” on the need for routine exams
- Teach appropriate cat care, including handling and carrier use
- Advise on normal behavior and signs to watch for
- Develop individualized healthcare plans for each cat



2. Provide Resources Specific to Cats

- Cat-friendly waiting area
 - Calm, non-threatening environment
 - Reassurance that practice is staffed by people that care about cats
 - Cat images and reading materials
 - Elevated space for cat carriers
- Cat-only exam room
- Feline-only hospitalization ward



3. Provide Feline-Friendly Handling

- Create a plan
- Train all team members
- Integrate feline-friendly handling throughout the entire visit



4. Enhance the Exam

- Engage client proactively; get them talking about their cat
- Introduce yourself, make eye contact, ask open-ended questions
- Narrate the exam in detail

Narration Example
Instead of only physically examining the cat, be sure to verbalize the entire experience. "As I am palpating Fluffy's abdomen, I am checking for painful spots, normal organs and anything unusual that might be significant. I see that everything appears to be normal so we will move on to her..."



4. Enhance the Exam's Value

- Gain understanding and agreement
- Avoid the “back” of the hospital
- Make your team the client's cat-care coach
- Consider preventive care program paid monthly



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5. Educate About Pre- and Post-Visit

- The visit starts and ends at home
 - Teach clients how to manage the process
 - Alert clients to likely post-visit behavior



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6. Reinforce and Reward Good Behavior

- Praise for bringing cat in, no matter how long it has been
- Let client know you appreciate her/his business
- Reinforce recommendations; send home written instructions
- Educate owners on behavior issues and how to avoid them

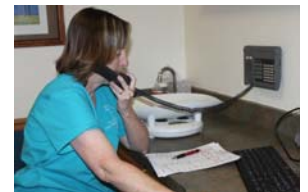
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7. Be More Assertive on Reminders, Follow-up

- Be clear that you recommend annual exams
- Schedule next exam before cat leaves practice
- Send multiple types of reminders
- Track compliance



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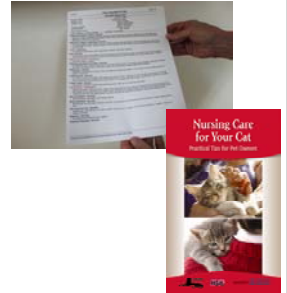
8. Identify Lapsed Cats

- Ask about other household pets on every visit
- Encourage clients to schedule exams for pets not seen within last year
- Provide incentives for compliance
 - Discounts for multiple pets
 - Incentive for cats brought in within 12 months



9. Provide Take Home Resources

- Report cards
 - Essential to perceived value of visit
 - Indicate when cat is due back, and why
- Brochures or hand-outs on cat care



10. Join AAFP's Certified Cat-Friendly Practice

- **Cat Friendly Practice (CFP) Goals**
 - Help all staff levels
 - Reduce stress for cats, owners and staff
 - Enhance feline care



10. Become a Certified Cat-Friendly Practice

- **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:



10. Become a Certified Cat-Friendly Practice

- **CFP Benefits**

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



www.catvets.com

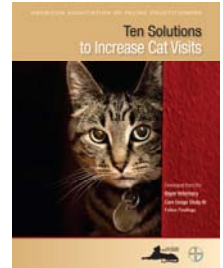


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Ten Solutions to Increase Cat Visits

- AAHP has created a comprehensive online document for practices www.catvets.com
- CE Session at AVMA
- FREE Online Webinar starting 7/29/13 at <https://www.aahanet.org/Education/WebConferences.aspx>



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WHAT CAT OWNERS CAN DO: THE FELINE FIVE

What Can Cat Owners Do?

1. Make the carrier a familiar, comfortable place
 - Place carrier near where the cat rests with soft bedding; leave the door open
 - Place treats in the carrier occasionally
2. Familiarize cat to car
 - Take your cat on car rides in the carrier, to the ATM, grocery store, coffee shop
 - Do not leave in car alone
 - Reward upon returning home



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What Can Cat Owners Do?

3. Recognize impact of lifespan and importance of regular check-ups
 - First 2 years of a cat's life = 24 human years; each successive year = 4 human years
 - Because cats can easily develop health problems in a year, they need veterinary check-ups at least annually
4. Realize that cats keep secrets
 - Health problems often go undetected for a long period of time because cats hide signs of illness



What Can Cat Owners Do?

5. Know signs of illness, injury
 - Changes in Interactions
 - Changes in Activity
 - Changes in Sleeping Habits
 - Unexplained Weight Loss or Gain
 - Changes in Food and Water Consumption
 - Changes in Grooming
 - Signs of Stress
 - Changes in Vocalization
 - Bad Breath



**BAYER VETERINARY CARE USAGE STUDY III:
FELINE FINDINGS**

QUESTIONS?



**BAYER VETERINARY CARE USAGE STUDY III:
FELINE FINDINGS**

THANK YOU!

