

Special Report

Executive summary of phase 3 of the Bayer veterinary care usage study

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The annual number of feline visits to veterinarians decreased 14% from 2001 to 2011, according to the 2012 *US Pet Ownership and Demographics Sourcebook* published by the AVMA, despite an increase in the cat population during that period.¹ Earlier research conducted by Bayer HealthCare Animal Health in cooperation with Brakke Consulting Inc and the National Commission on Veterinary Economic Issues (NCVEI) showed that feline resistance to carriers and transportation was a formidable obstacle for many cat owners in taking their pet to the veterinarian.²

To probe more deeply into why cats are not taken to the veterinarian more often and to determine what veterinarians can do to improve feline medical care, Bayer and Brakke collaborated with the American Association of Feline Practitioners (AAFP) to examine the issue more closely. Bayer, Brakke, and the AAFP conducted focus group sessions as well as nationally representative surveys with cat owners and veterinarians.

Methods

This phase of the Bayer veterinary care usage study consisted of 4 parts. First, 6 focus group sessions were conducted with cat owners in May 2012 in Charlotte, NC; Milwaukee; and Los Angeles. Participants included people who owned only cats as well as those who owned both dogs and cats and who had not taken their cats to the veterinarian within the past year. Second, an additional 6 focus group sessions were conducted with veterinary practice owners and associates in October 2012 in Boston, Atlanta, and San Francisco.

Third, an online survey of a nationally representative group of 1,938 cat owners drawn from Ipsos' proprietary panel of 140,000 US cat owners was conducted in July 2012. All respondents were the primary cat caregiver in the household or shared in pet care responsibilities. In conducting the online survey, a detailed quota plan based on AVMA pet ownership statistics was developed to ensure that responses were representative of all regions and demographic groups. Statistical mar-

gin of error for the entire sample at the 95% confidence level was $\pm 2.2\%$.

Finally, in November 2012, an online survey of a nationally representative group of US companion animal practice owners was conducted. Potential participants were selected from an Ipsos proprietary panel. There were 400 respondents. Statistical margin of error at the 95% confidence level was $\pm 4.9\%$.

In analyzing the quantitative surveys, logistic binary regression was used to examine all variables simultaneously to identify attributes most associated with an increase or decrease in the number of feline visits to veterinary hospitals.

Key Findings

Four major reasons cat owners did not take their cats to the veterinarian for routine annual examinations were identified: lack of knowledge, feline resistance to pet carriers and travel, stressful experiences in the veterinary hospital, and cost.

Unlike the situation for dogs, most cats were acquired for free and without forethought. Many were gifts from family or friends or simply strays that showed up on the doorstep. Consequently, most cat owners received little or no initial instruction on proper veterinary care for their new pet. Only 48% of cat owners surveyed had taken their cat to the veterinarian within the preceding year. Many (37%) did not recall their veterinarian ever recommending annual examinations. Further, owners perceived that indoor cats were less likely to get sick and were unaware that cats are adept at hiding signs of illness or injury.

The first phase of the Bayer veterinary care usage study² established that feline resistance to pet carriers and travel was a major obstacle to veterinary visits. During focus group sessions conducted for the present phase of the study, cat owners were asked to make collages demonstrating what taking their cat to the veterinarian is like. Most of the collages used pictures from horror films and other sources that reflected a terrible and stressful experience for the cat and owner. Yet, only 18% of cat owners surveyed said they had received any instruction from their veterinarian on how to make bringing the cat to the hospital less stressful.

Once the owner dealt with getting the cat to the veterinary practice, the stress did not end there. More than half of cat owners (57%) were less than completely satisfied with waiting room comfort for their cats, and nearly the same percentage were less than completely satisfied

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with waiting room comfort for themselves. It was clear from the focus group sessions that for most owners, a veterinary visit was something to be dreaded and endured.

Finally, when asked how satisfied they were with their veterinary experience, cat owners were least satisfied with the value obtained for the money they spent, with 59% rating this factor lowest in satisfaction. When asked which items on a list of 16 concepts would motivate them to take their cat to the veterinarian more often, the top 3 items were cost related: a coupon for 50% off the cost of a veterinary visit (50% of respondents), a low-cost preventive care plan paid monthly (40%), and a 20% discount for multiple pets if brought in within a 30-day period (30%). The cost issue was all the more important because many owners indicated during focus group sessions that they had cats primarily because they perceived cats as low-cost pets.

One of the most encouraging findings of the study was that 82% of cat owners had a regular veterinary practice, and 83% took a new cat to the veterinarian within the first year of ownership. This suggests there may be a small but critical window for veterinarians to educate owners on proper health care and how to reduce the stress to themselves and their pets in getting cats to the practice.

Veterinarians recognized the opportunity presented by increasing the number of feline visits. Seventy-seven percent of respondents agreed that cats represent one of the most substantial missed opportunities for the veterinary profession, and 91% agreed that their practices could handle an increase in cat visits without major changes. Although there had been modest improvement between 2010 and 2012, the annual number of visits to veterinarians remained low, with considerable unused capacity; 52% of veterinarians were filling < 70% of their available appointments.

Many veterinarians recognized that transporting cats to the veterinary hospital was a major obstacle; however, most had not taken action to address the issue. Only 24% of respondents to the veterinary survey said they always (3%) or often (21%) provided specific instructions to clients on making the visit less stressful. However, 41% of veterinarians said they had made changes to reduce feline stress within their practice, and 70% had conducted some type of staff training.

Most (56%) veterinarians said they had standardized protocols for feline examinations; the others left the examination protocol up to the individual doctor. There was little follow up on feline visits, however. Nearly all practices had a reminder system (most used postcards), but 58% did not follow up to determine whether clients actually complied with the reminder and scheduled an appointment.

During focus group sessions with both cat owners and veterinarians, a number of potential concepts or approaches emerged that could potentially increase the number of feline visits. Sixteen of these concepts were tested in the quantitative surveys, and 3 concepts received relatively high levels of acceptance among both veterinarians and cat owners: low-cost preventive care plans paid in monthly installments, the veterinary practice having available by telephone a person knowledgeable about cats (eg, a registered veterinary technician)

who could answer questions, and providing a written examination report on the health status of the cat and recommended care over the next year.

Preventive care plans billed monthly and written examination reports both scored highly in the 2010 Bayer veterinary care usage study.² Having a staff person knowledgeable in feline health available by telephone was not tested in the earlier study.

Summary of Findings

Cat acquisition and role in household—Only 31% of owners who responded to the survey acquired their cat from a breeder, pet store, or shelter. Approximately a third indicated they acquired their cat from a friend, neighbor, or colleague, and 27% indicated their cats were foundlings. Interestingly, many acquisitions were not previously intended; 59% of respondents to the cat owner survey agreed with the statement that “I didn’t necessarily find the cat, the cat found me.” Most cat owners (88%) agreed with the statement “My cat is a member of my family.” However, during extensive probing during focus group sessions, it quickly became clear that pet owner attitudes toward cats were quite different from their attitudes toward dogs. Dogs were typically viewed as companions, whereas cats were viewed as pets. In the focus group discussions, pet owners clearly were more emotionally attached to their dogs, and if they had both dogs and cats, they typically considered themselves a dog person who also owned cats. Dogs were viewed as dependent on their owners and high maintenance, whereas cats were viewed as independent and low maintenance.

Cats and veterinary care—In the cat owner survey, most respondents (52%) had not taken their cat to the veterinarian for any reason within the past year, and only 37% had specifically visited the veterinarian for a routine examination. Interestingly, only 24% of respondents said their veterinarians had recommended more frequent examinations. Eighty-one percent believed their cat was in excellent health; 53% said their cat had never been sick or injured. In focus group discussions, cat owners were generally incredulous when told that their cat could be sick without them knowing it because cats are adept at hiding signs of illness. In the quantitative survey, only 70% of cat owners said they believed the following statement: “Cats have the ability to endure pain and suffering without any outward signs and could be sick without your knowing about it unless it has periodic check-ups at the veterinarian.” Interestingly, this statement scored the lowest (in terms of percentage of owners who believed the statement) of 6 truthful statements about cat health. On a more positive note, 83% of owners took their cat to the veterinarian within the first year of ownership, suggesting there may be an opportunity for veterinarians to educate cat owners about the importance and benefits of routine care.

Cat owners and the veterinary experience—Eighty-two percent of cat owners surveyed had a primary veterinary clinic, and 90% were generally satisfied with the practice. However, taking their cat to the practice was a

different story. In focus group discussions, cat owners were asked to make collages representing what it is like to take their pet to the veterinarian. Most of the collages were made up of highly negative images, showing frightened cats, fear, and torture. Nearly every collage illustrated a stressful experience for the cat and the owner.

When asked in the survey whether their veterinarian had ever provided information on how to make the trip less stressful, only 18% of respondents said yes. Once at the veterinary hospital, the stress often continued. Although respondents were generally satisfied with the practice overall, the lowest-rated attributes were comfort of waiting room for the owner and the pet, value obtained for the money spent, and payment options (Figure 1).

Veterinarians and the feline opportunity—In the survey of veterinarians, 78% agreed that cats represented one of the most substantial missed opportunities for the veterinary profession, and 91% agreed that their practice could handle more feline visits without major changes. Seventy-seven percent indicated that increased feline visits represented one of the most substantial opportunities for revenue growth in the next 3 years. Fifty-eight percent had experienced stagnant or declining revenue, compared with the previous year; 38% had experienced a decline in patient visits. More than half (52%) had filled < 70% of their available appointments. However, although the use of appointment reminders (generally postcards) was ubiquitous, most (58%) veterinarians did not check compliance to determine whether clients had actually scheduled an appointment.

Are veterinarians dog people?—Far more veterinarians found working with cats challenging than found working with dogs challenging. Ninety percent agreed that dogs are easy to work with during examinations, but only 65% agreed that cats are easy to work with. Likewise, only 33% of respondents said that obtaining a diagnosis is challenging in dogs, whereas 47% said obtaining a diagnosis is challenging in cats. Perhaps not surprisingly, even though 70% of veterinarians owned cats (81% owned dogs), 48% said they preferred dogs as pets and only 17% preferred cats.

Feline wellness protocols—Cat owners may not experience consistent veterinary care even within a practice. Only 56% of practice owners said their prac-

tice had a standardized approach to wellness. Nearly half (44%) left it up to each doctor. Half of all practices had reviewed their feline wellness protocols within the preceding 2 years, and 90% had done so within the preceding 5 years. The most common reason for reviewing wellness protocols was to update vaccination protocols. Nearly all practice owners recommended at least annual examinations for adult cats (2 to 10 years old) and even more frequent examinations for senior cats and cats < 2 years old. Yet, many cat owners were unaware of these recommendations and even fewer complied, as evidenced in the cat owner survey.

Wellness examination procedures—When asked to list what should be included in a standard feline wellness examination, many practice owners described procedures that were not consistent with guidelines published by the AAFP. For example, only 11% consistently included an environmental enrichment assessment, and only 16% consistently included a behavioral assessment. Both procedures are highly recommended by the AAFP to properly evaluate feline health and well-being. Only 31% of respondents consistently included a pain assessment, and screening tests were not common.

Making the visit less stressful—The first phase of the Bayer veterinary care usage study established that feline resistance to the carrier and transportation was one of the major factors preventing cat owners from taking that pet to the veterinarian more often.² However, although half of veterinarians responding to the current survey acknowledged that cat owners consider a visit stressful, only 3% said they always provide advice to their clients on how to make the visit less stressful. On the other hand, 41% said they had implemented changes in the preceding 2 years to reduce stress for feline patients within the hospital, and 24% said they intend to make changes but have not yet done so. The most common feline-friendly techniques used by respondents were using towels to cover the carrier or examination table, employing staff members with good cat handling skills, staff training, and using a feline facial pheromone^a in examination rooms (Figure 2).

Increasing the number of feline visits—During focus group sessions with cat owners and veterinarians, researchers identified a number of ideas or concepts that might lead to increased use of veterinary services by cat owners. In the quantitative surveys of cat owners and veterinarians, 16 concepts were tested. Interestingly, the 3 concepts ranked the highest by cat owners were all cost-reducing items (Figure 3). Conversely, concepts ranked highest by veterinarians involved changes in office procedures, not concepts related to cost reductions (Figure 4).

Comparing responses from cat owners and veterinarians, researchers identified 3 concepts acceptable to the largest numbers of owners and veterinarians that would have the greatest probability of increasing feline visits: low-cost preventive care plans paid in monthly installments, the veterinary practice having available by telephone a person knowledgeable about cats (eg, a registered veterinary technician) who could answer questions, and the veterinary practice providing the client with a written examination report on the health status of the cat and recommended care over the next year.

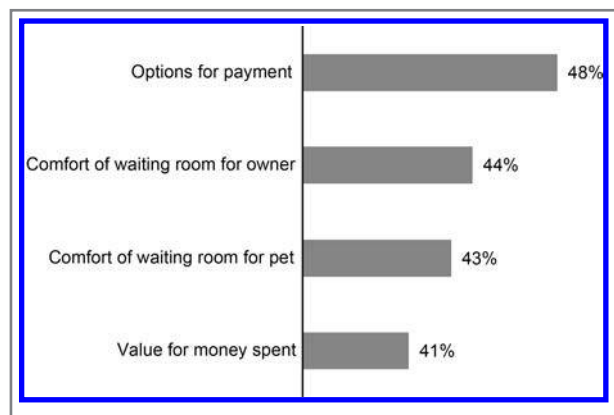


Figure 1—Cat owner satisfaction with select characteristics of visiting a veterinary practice; values represent percentages of cat owners (n = 1,938) who completed the national Bayer veterinary care usage online survey and indicated that they were completely satisfied.

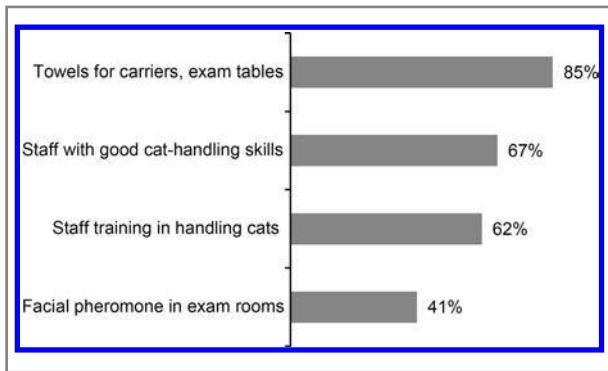


Figure 2—Techniques most commonly used by companion animal practices to make veterinary visits feline friendly; values represent percentages of US companion animal practice owners (n = 400) who completed the national Bayer veterinary care usage online survey and indicated they used each technique.

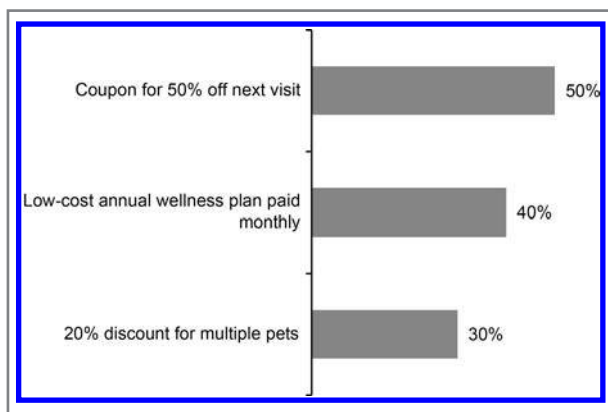


Figure 3—Concepts ranked highest (from a list of 16 concepts) in a survey of cat owners regarding ideas that might lead to increased use of veterinary services.

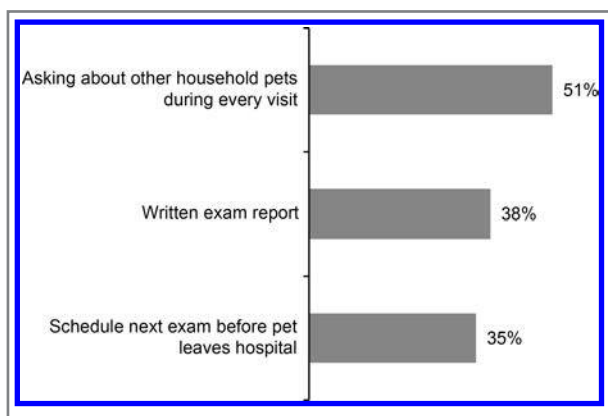


Figure 4—Concepts ranked highest (from a list of 16 concepts) in a survey of companion animal practice owners regarding ideas practice owners would most likely or definitely consider to increase number of veterinary visits by cat owners.

Interestingly, in the initial phase of the Bayer veterinary care usage study² as well as in the present phase, pet owners identified low-cost preventive care plans paid in monthly installments and receiving a written examination report with recommended care instructions as 2 things that would most likely cause them to increase their visits to vet-

erinarians. Yet, in the current survey, only 5% of veterinarians indicated that they offer preventive care plans paid in monthly installments and only 17% said they consistently provide written reports for every examination.

Conclusions

The number of pet visits to companion animal veterinarians remains low, and the profession has substantial unused capacity. Cats represent a major opportunity for increases in the number of visits and revenue because, unlike dogs, fewer than half of all cats receive routine annual wellness examinations.

Four actions were identified that veterinarians can take to increase feline visits. The first was to educate cat owners on the need for and benefits of routine examinations. The best opportunity to start this process is during the cat's first visit (most cats are evaluated at a veterinary practice within the first year of ownership). Veterinarians will also need to better explain the importance of routine examinations; in focus group sessions, veterinarians had a difficult time succinctly articulating a rationale.

The second action was to reduce the stress to cats and owners before and during the visit to the hospital. Information is available from the AAFP and other sources on techniques for training cats to accept carriers and for making hospital waiting and examinations rooms less stressful to cats. Veterinarians should routinely provide information on transporting cats and training them to accept carriers prior to visits and should make their practices more accommodating to feline patients.

The third action was to provide written reports on examination results and recommended care for the next year, including when the cat should next be seen by a veterinarian. It was apparent in the present study that most cat owners wanted to do what was best for their pet, but needed instructions in writing on what constitutes proper care as well as encouragement from their veterinarian. Veterinarians should also provide clients access via telephone or email to a staff member who can answer owners' questions when they arise.

The fourth action was to make routine feline health care as economical and easy to pay for as possible. Cat owners invest little or nothing in acquiring a cat and often choose a cat because of the perception that cats make low-cost pets. Providing bundled preventive care plans that clients can pay in monthly installments would make routine health care much more accessible for many cat owners. Because many owners have multiple cats, it would also behoove veterinarians to offer multiple-cat discounts when economically feasible. Interestingly, despite the fact that cat owners indicated that they were willing to pay substantial amounts to treat a sick pet, routine costs were rated the biggest obstacle to veterinary care.

a. Feliway, Ceva Animal Health US, Lenexa, Kan.

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2. Volk JO, Felsted KE, Thomas JG, et al. Executive summary of the Bayer veterinary care usage study. *J Am Vet Med Assoc* 2011;238:1275–1282.