

BAYER VETERINARY CARE USAGE STUDY III: FELINE FINDINGS



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Bayer HealthCare

Ian Spinks

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Why a New Feline Study



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SPEAKERS

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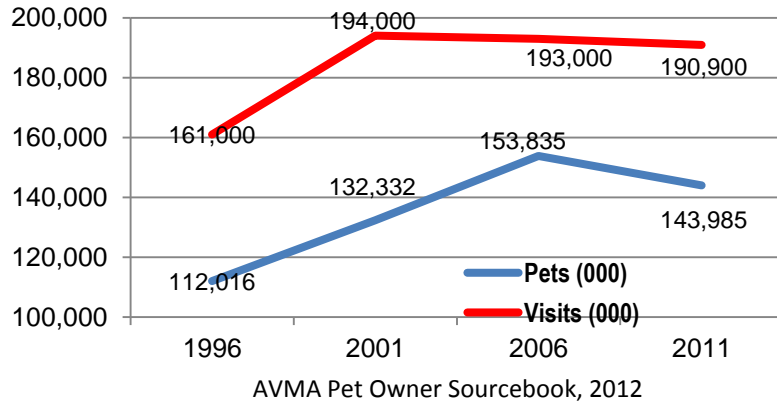
Bayer Veterinary Care Usage Study III: Feline Findings
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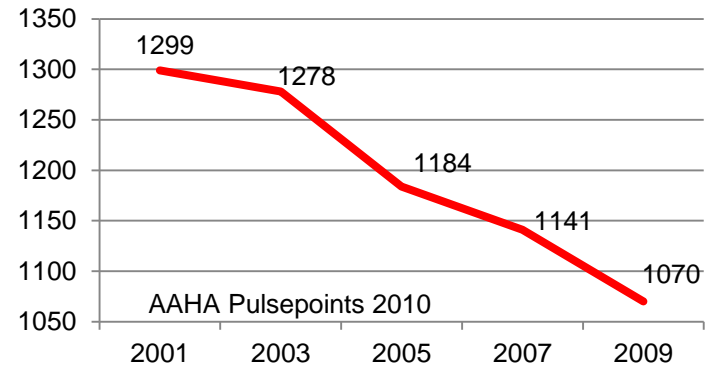
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Why Bayer Veterinary Care Usage Study

Pets, Visits 1996-2011



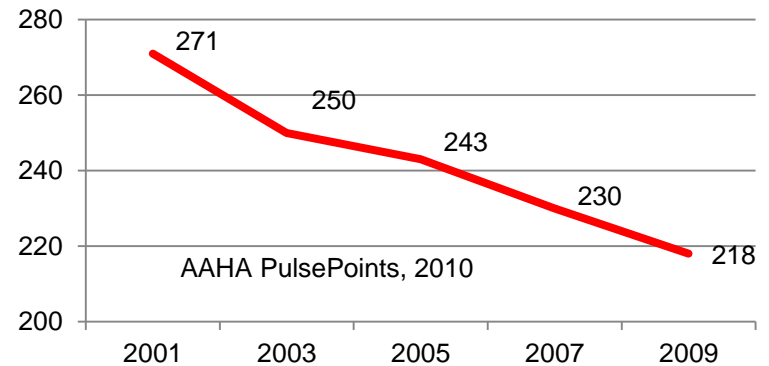
Active Clients/Vet



Patients/Vet/Week



New Clients/FTE Vet



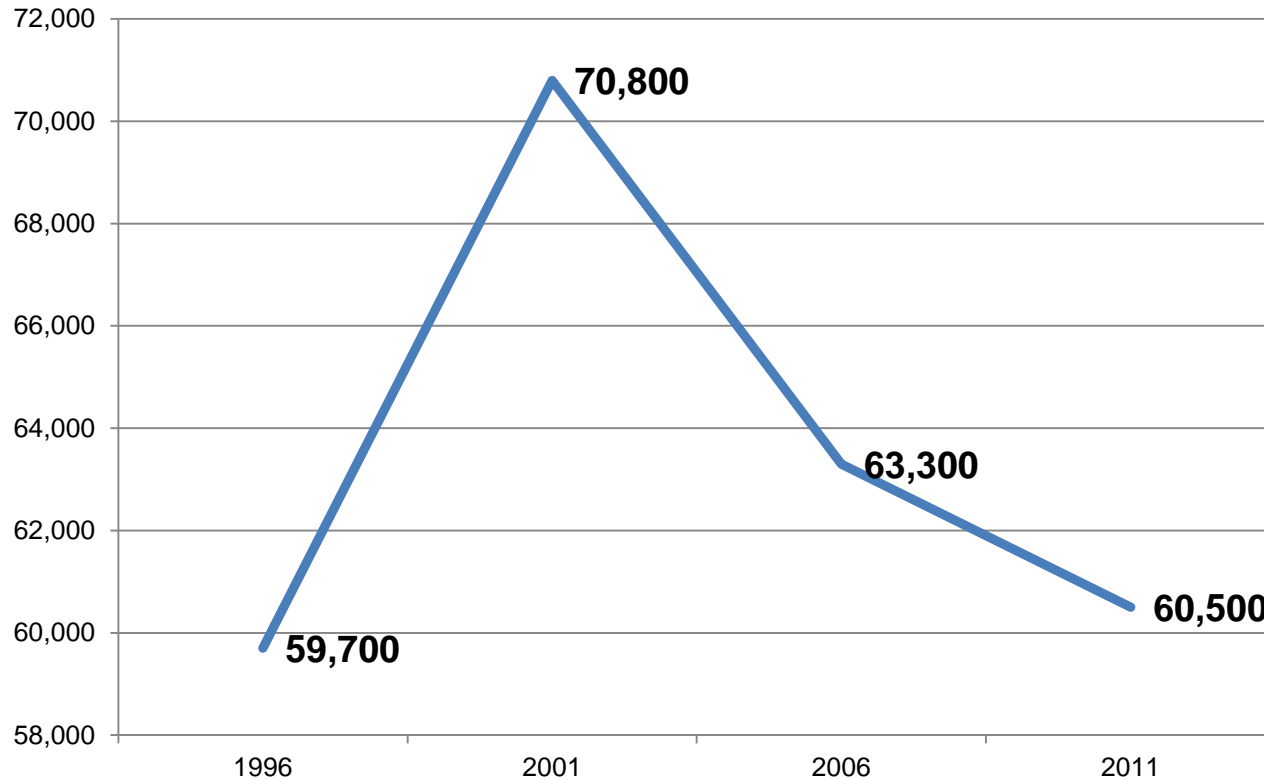
Study Identified Reasons

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



Downward Trend Continues

Total Feline Visits, 1996-2011
(000)



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



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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 $\pm 4.9\%$ at 95% confidence level



Bayer Study Helping Practices

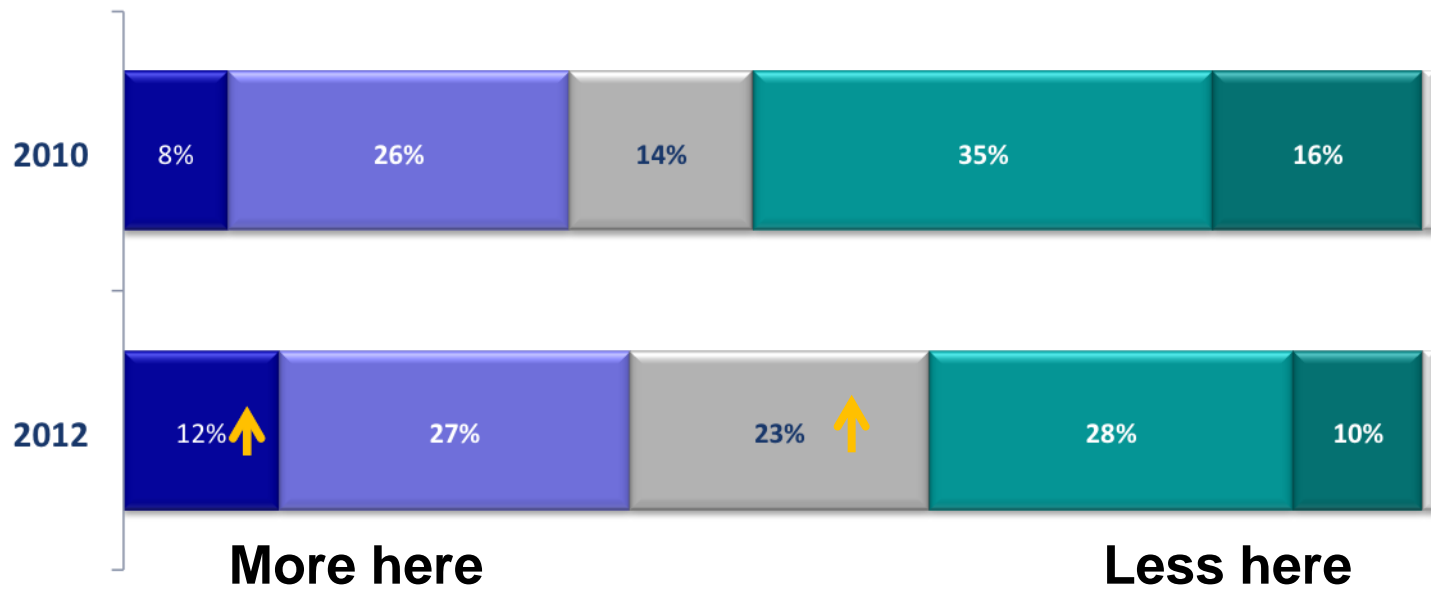
- 70% claim at least some familiarity with the Bayer Veterinary Care Usage Study
 - 48% have specific recall
 - Of these, 48% have made specific changes in their practices as the result of the Study



Visits Stagnant, But Improved

Increase

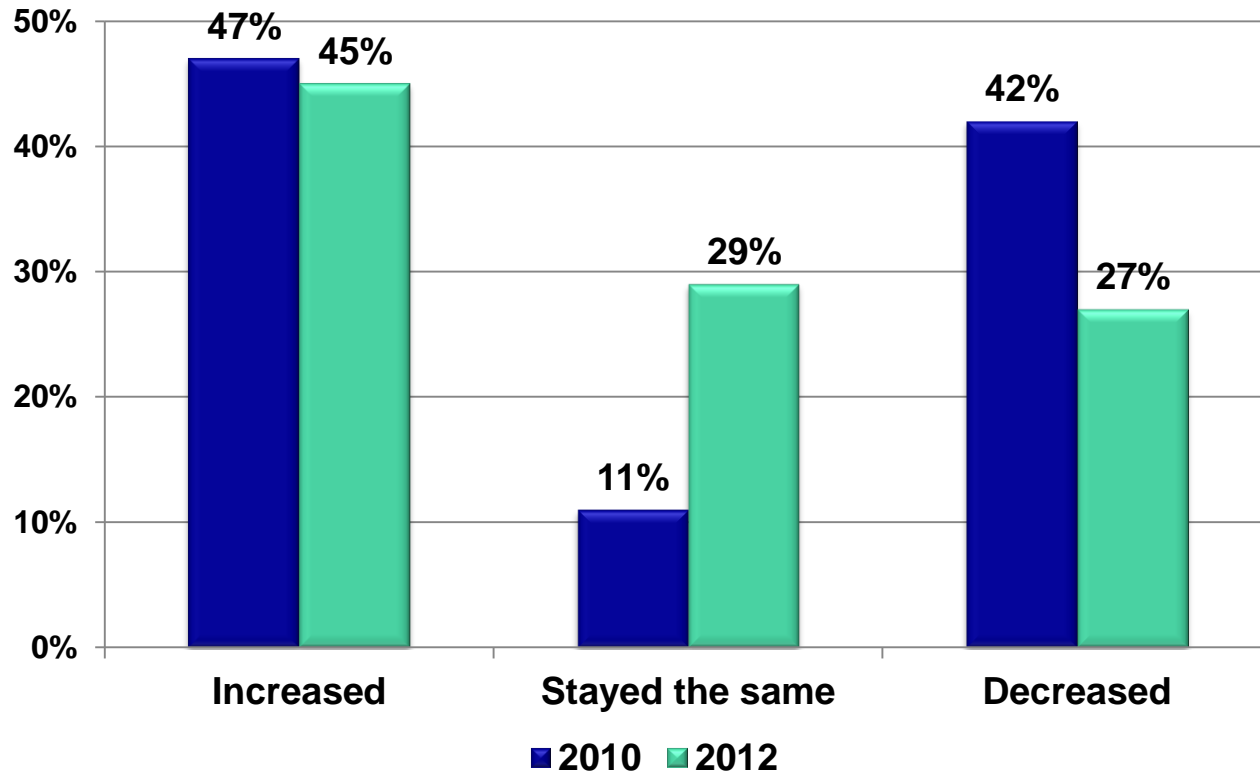
Decrease



■ Increased 10% or more ■ Increased 1-9% ■ Stayed the same ■ Decreased 1-9% ■ Decreased 10% or more ■ Don't know

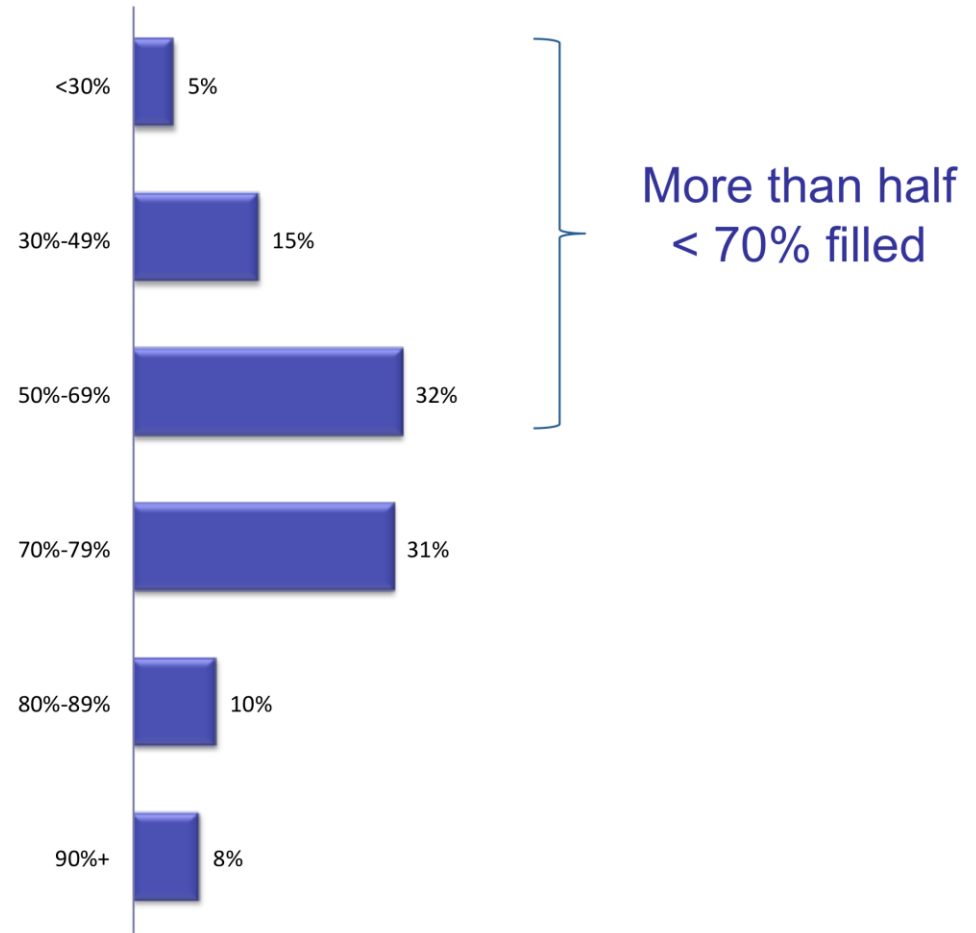


Revenues More Stable



Significant Unused Capacity

% Appointments
utilized Jan-Sep 2012



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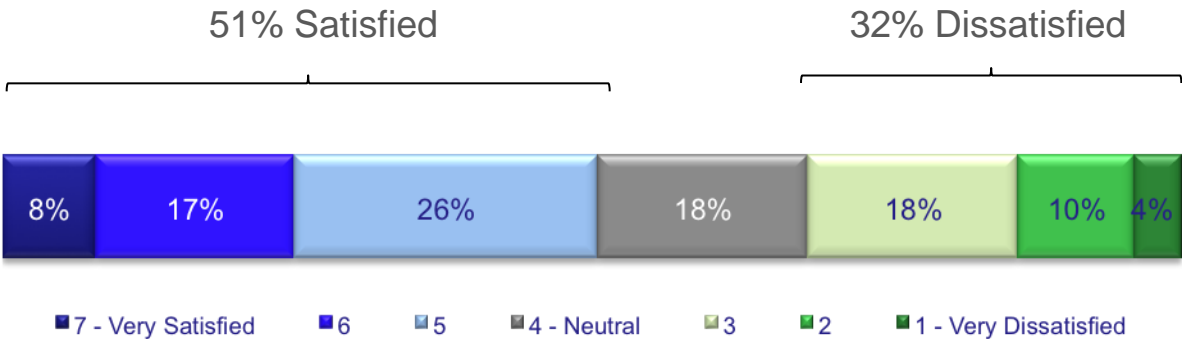
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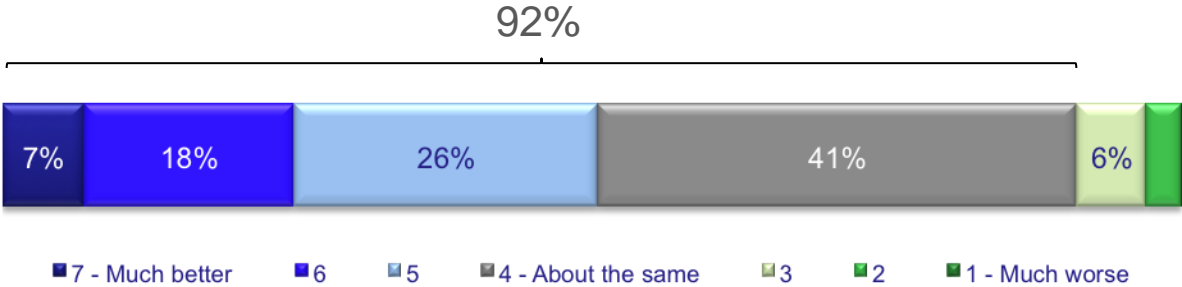
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Many See Room for Improvement

Levels of Satisfaction with Practice Success

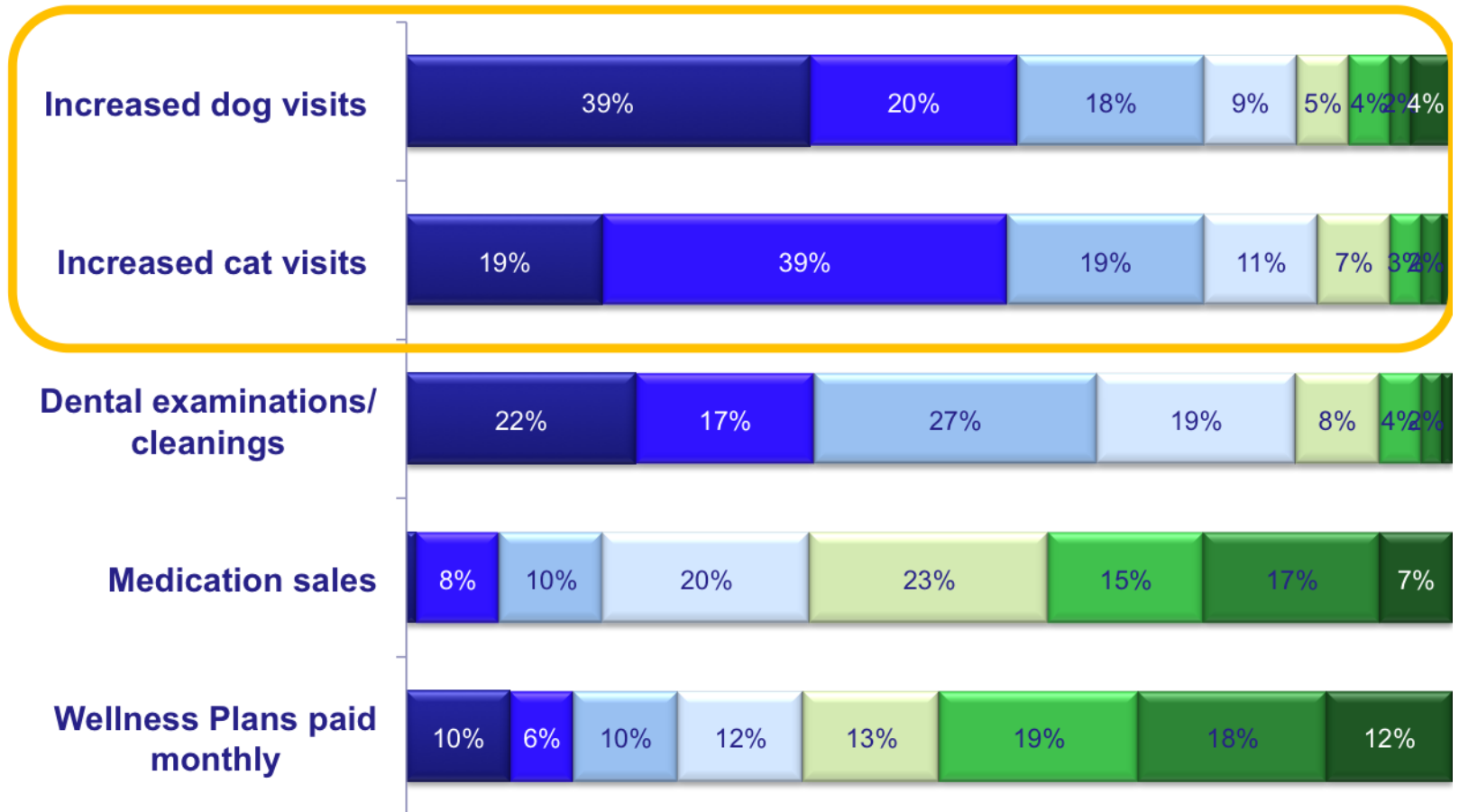


Yet Most See Practice as Average or Above



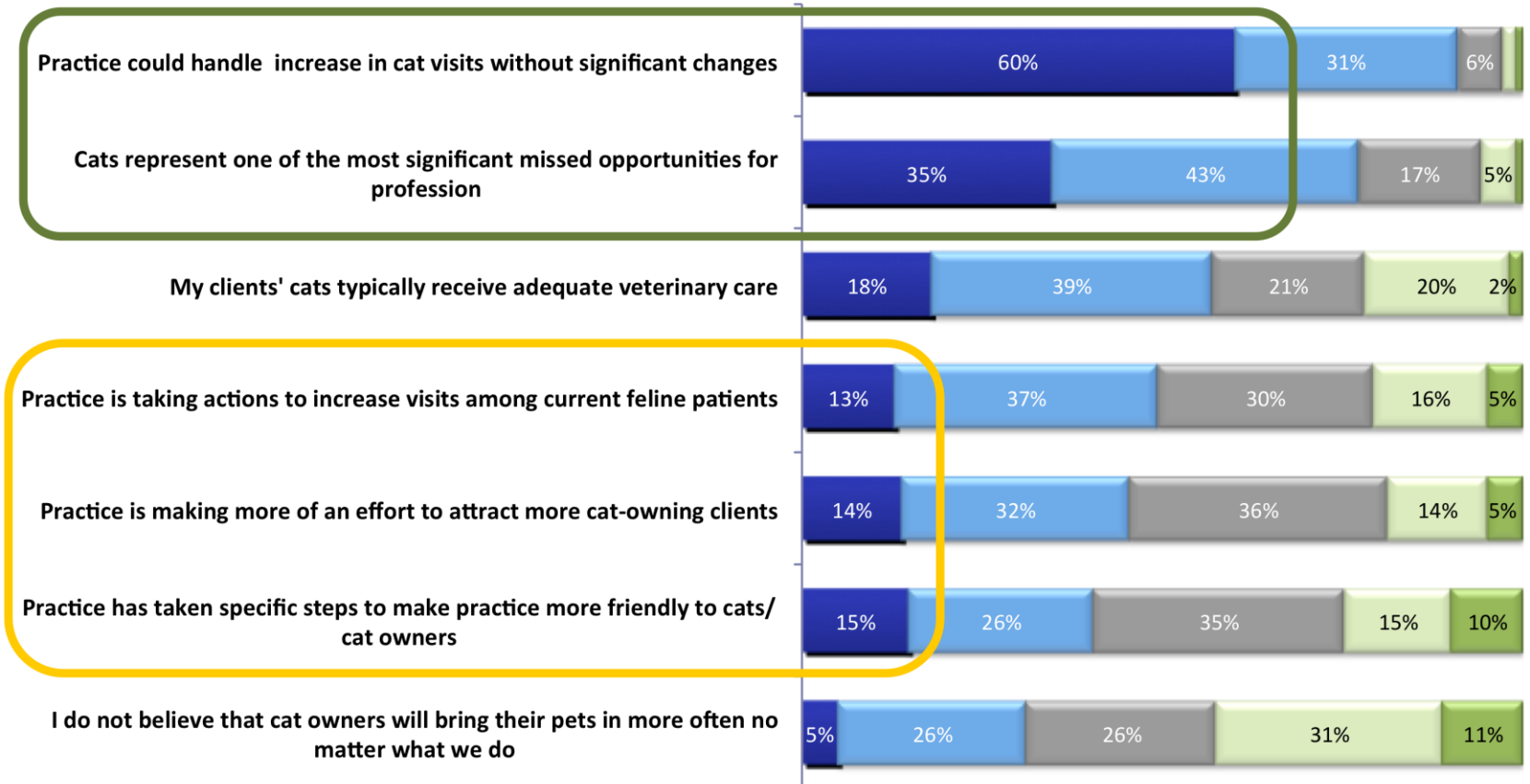
Increased Visits Top Priority for Growth

■ 1 - Most significant source ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 - Least significant source

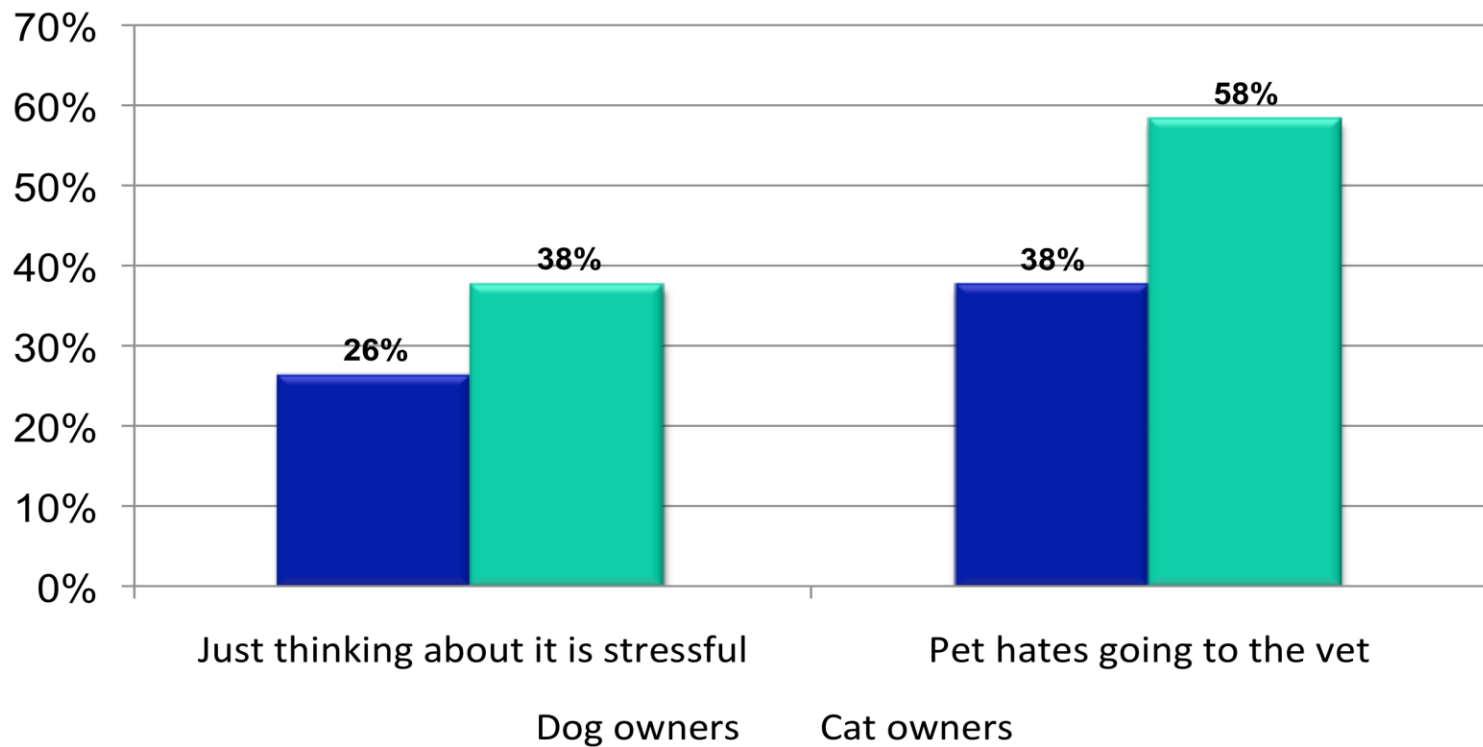


For Cats, Action Lags Intention

■ Completely Agree ■ Somewhat Agree ■ Neutral ■ Somewhat Disagree ■ Completely Disagree

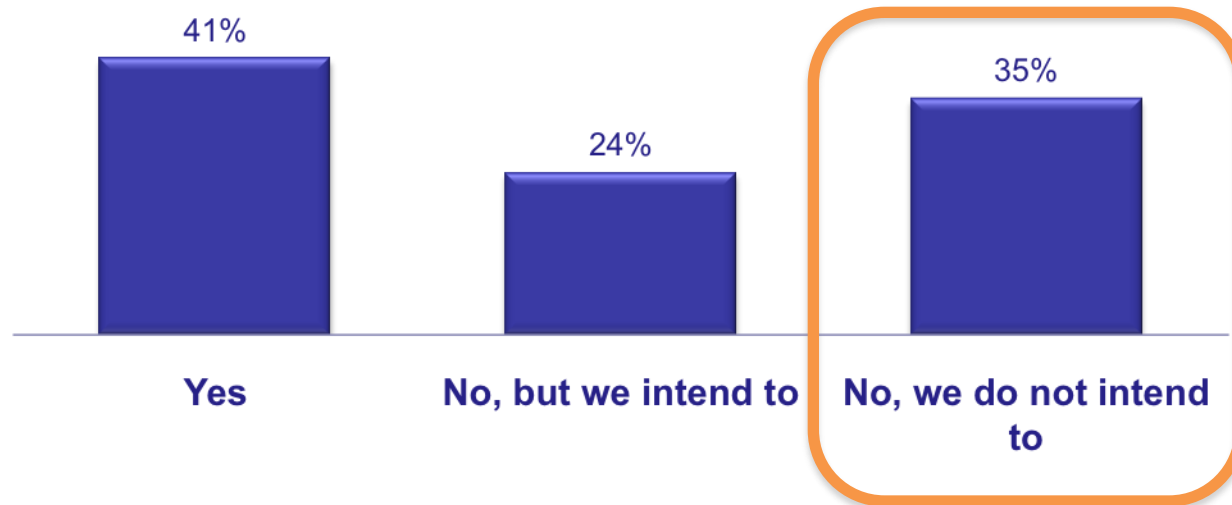


Earlier Study Identified Major Obstacle Is Getting Cat to the Vet



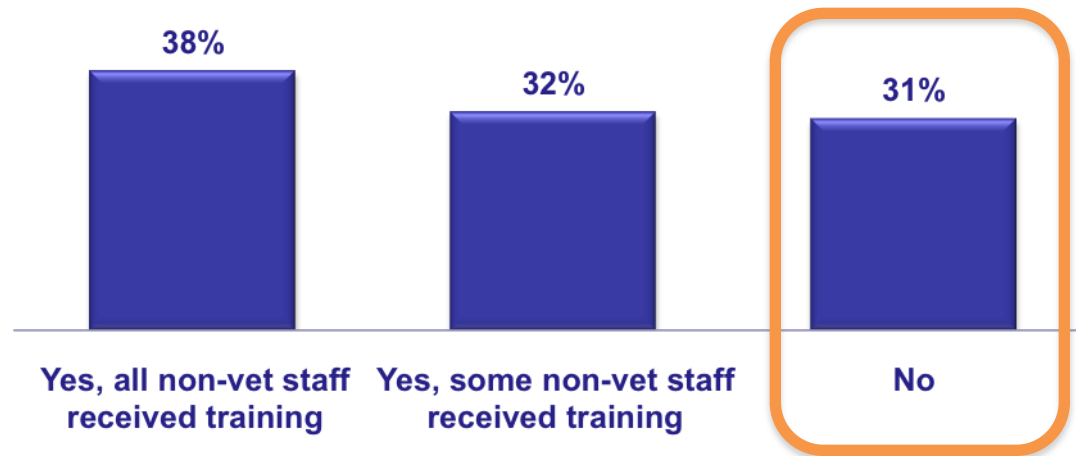
Some Addressing Problem; Many Not

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



Staff Training Varies

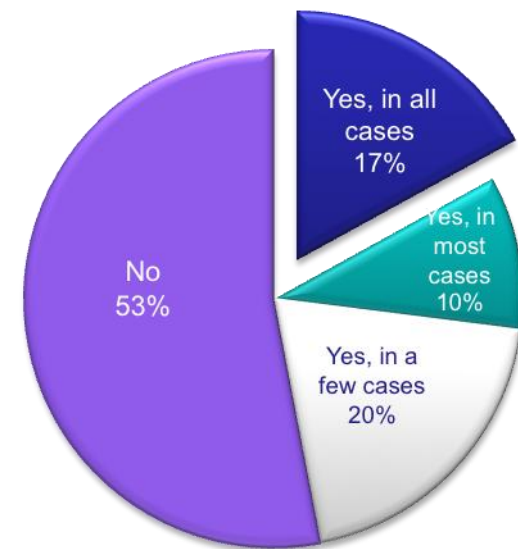
Has staff been trained to make cat visits less stressful?



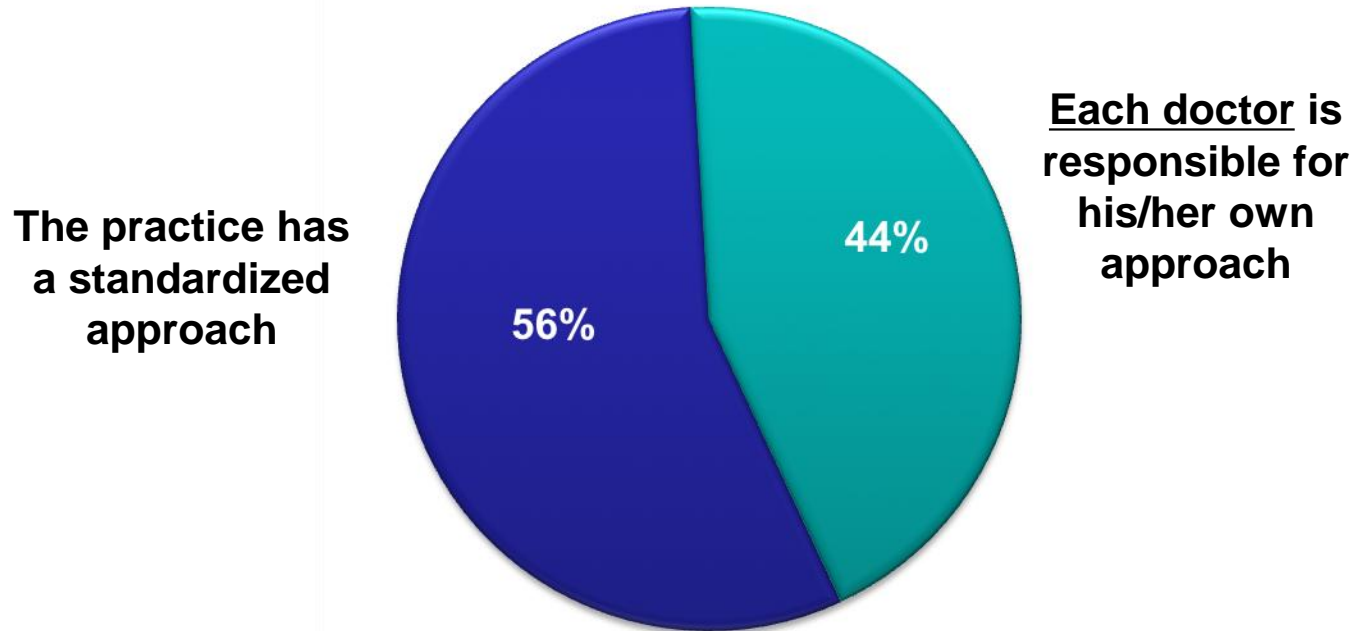
Use of Other Cat-Friendly Techniques



Provide Written Report

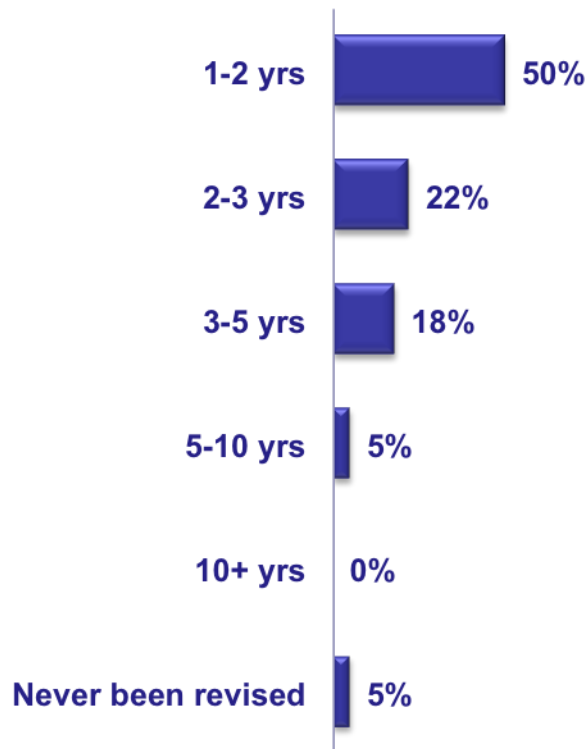


Limited Standardization of Wellness Exams Within Practice

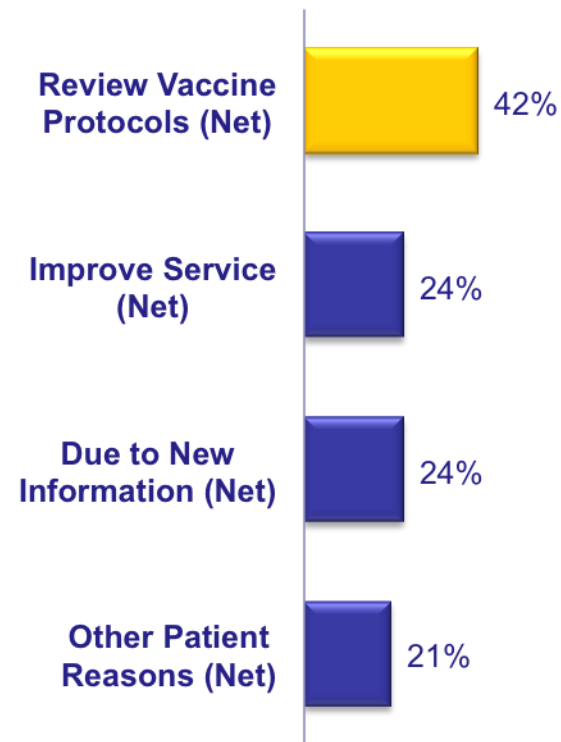


Efforts to Keep Wellness Protocols Current

Last Time Wellness Approach Revised

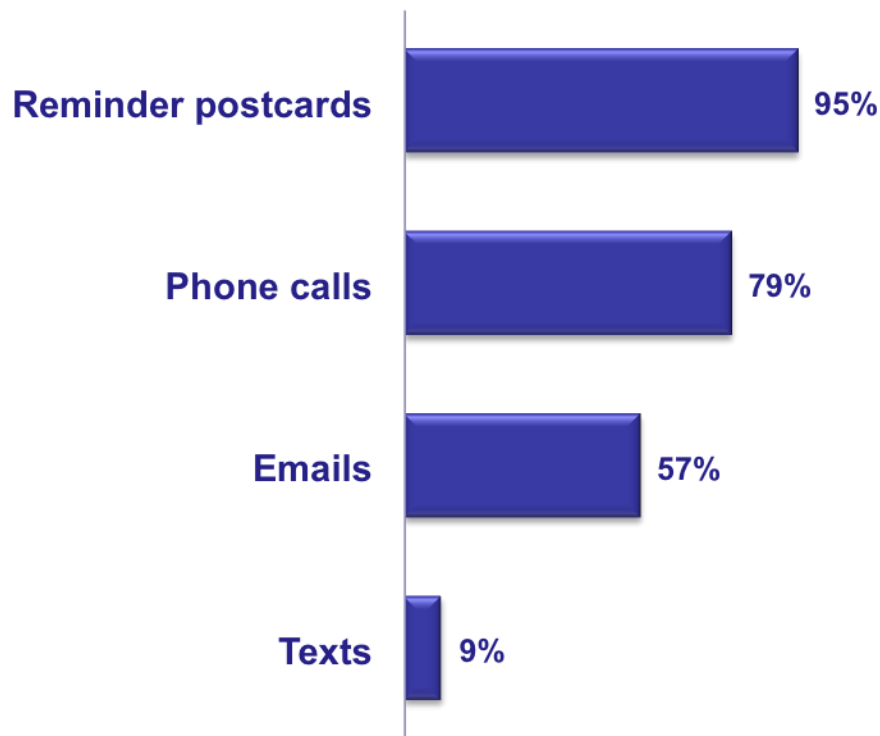


Reasons Why Revised

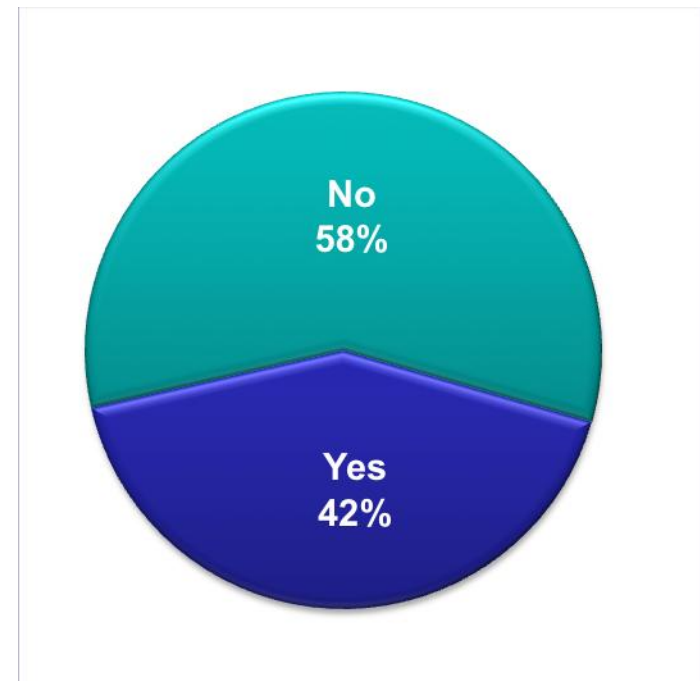


Measurement of Compliance With Reminders Weak

Types of Reminders Used

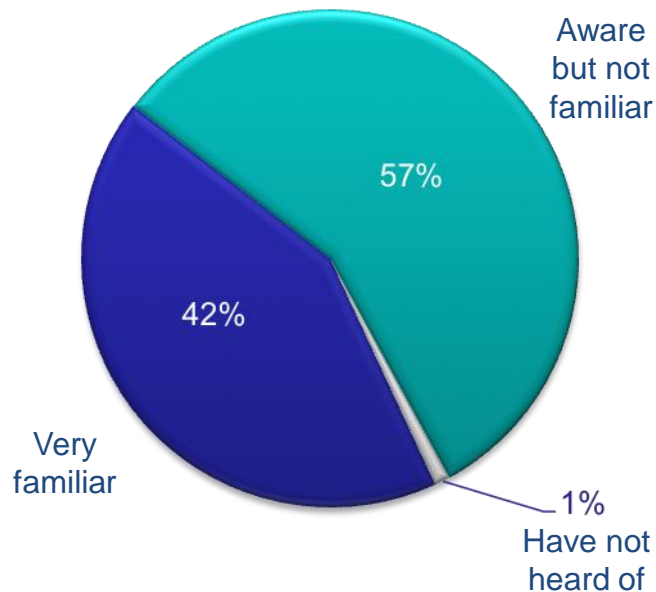


Compliance Monitored

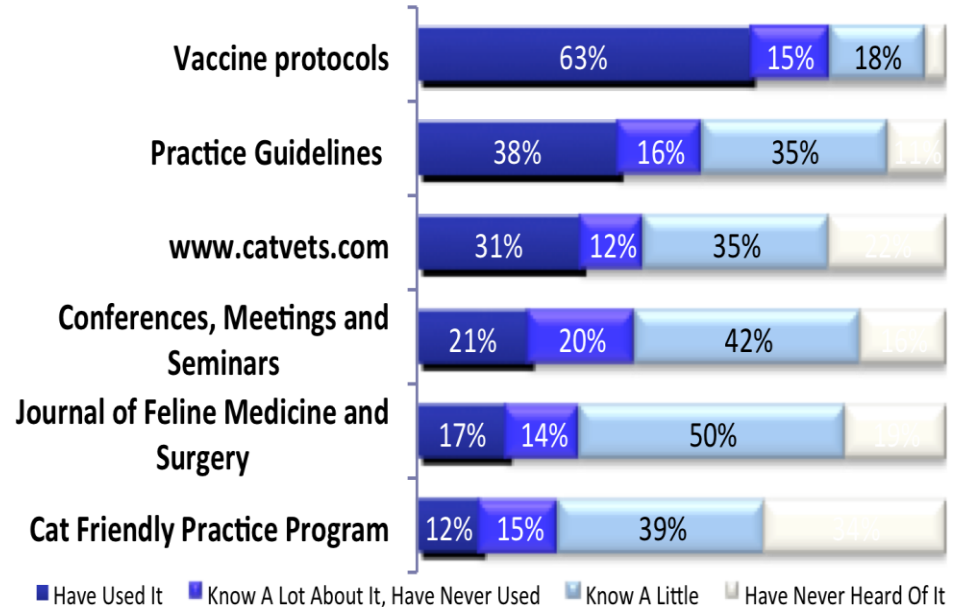


AAFP, Program Awareness

Familiarity with AAFP



Familiarity with AAFP Programs



Elizabeth Colleran, DVM, MS, Dipl ABVP
American Association of Feline Practitioners

Improving Medicine, Improving Practice



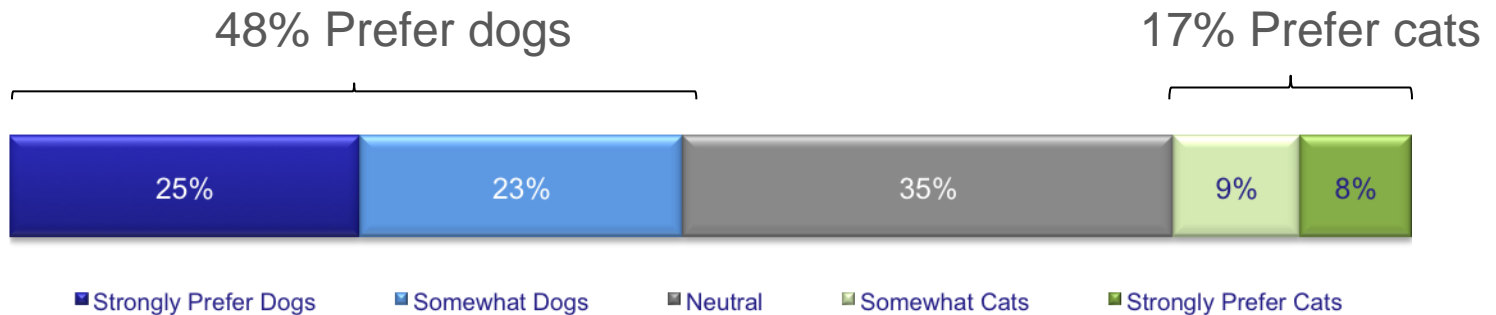
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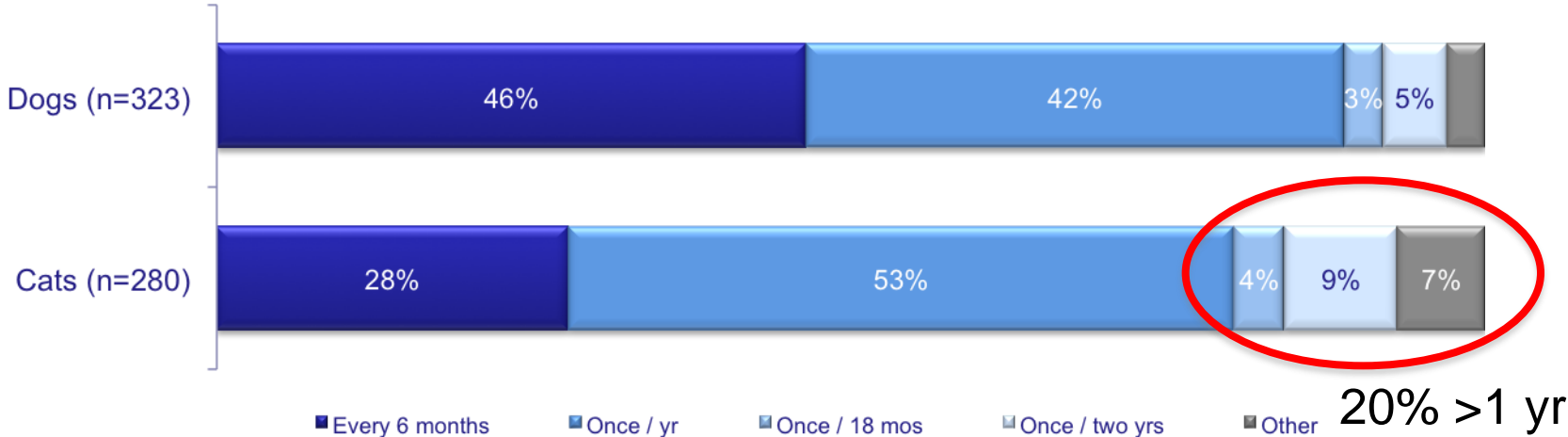
We're Not All Cat People

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



We Don't Always Practice What We Preach

Wellness Exam Frequency On Own Pets

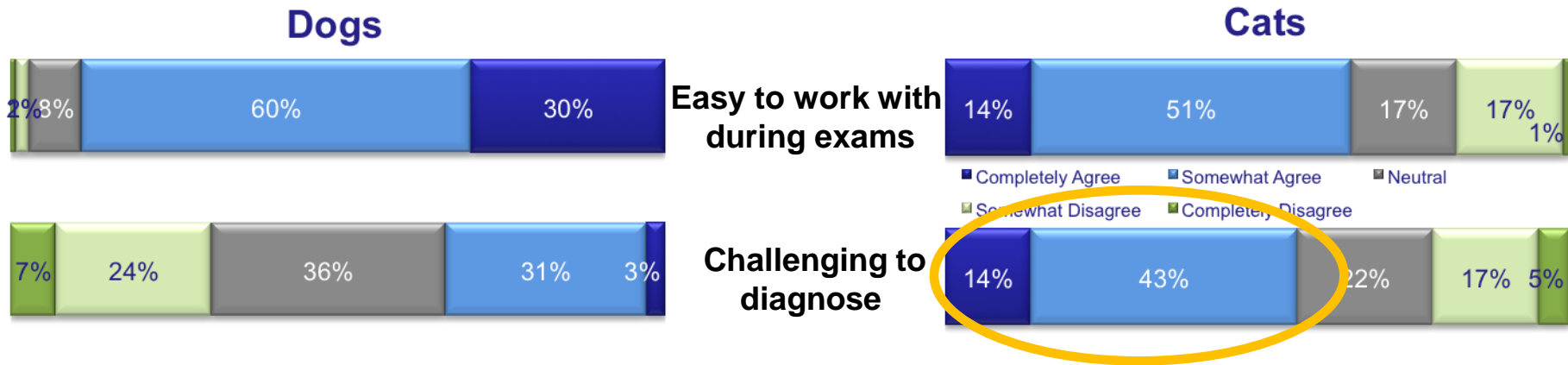


Communication is Major Issue

- 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



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

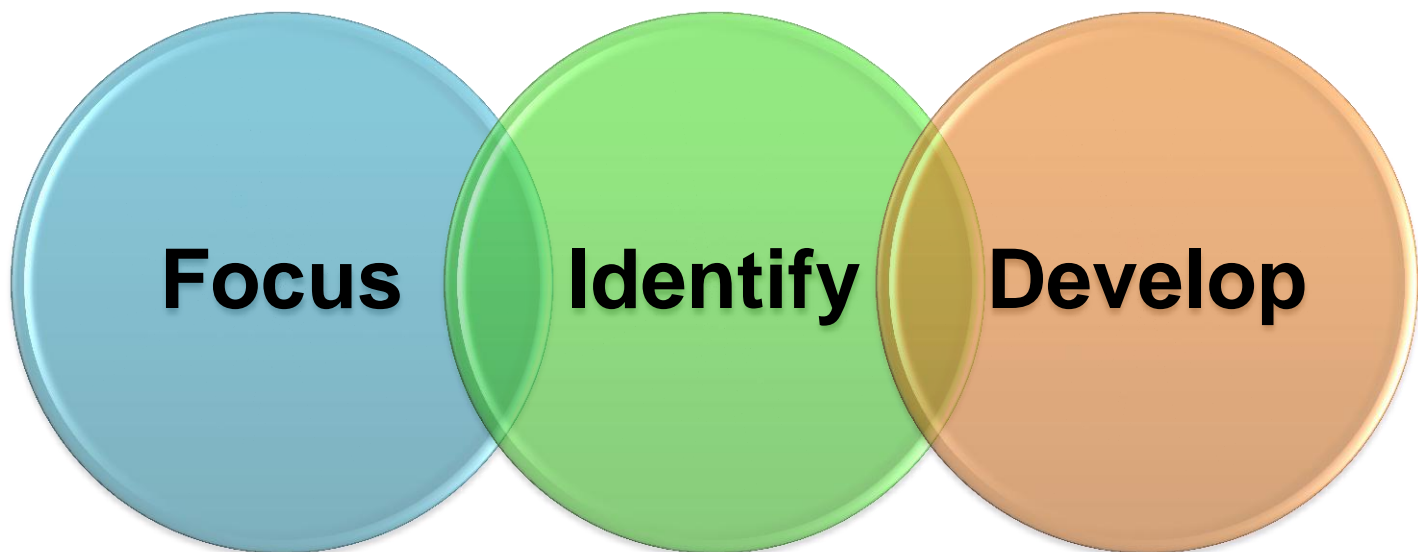


Increase visits

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

Home Research & Trends Why CFP? Contact Us APPLY NOW! About the CFP Program

The Cat Friendly Practice (CFP) program contains the tools for practices to integrate a feline perspective and embrace the standards needed to elevate care for cats.

Welcome to the **CAT Friendly PRACTICE PROGRAM**

The Cat Friendly Practice program seeks to transform and elevate the delivery of feline veterinary care by:

- Laying the groundwork for the delivery of care to the underserved feline population.
- Identifying trends and baseline species information essential for understanding cats.
- Acknowledging the essential role of the cat owner in the veterinary visit.
- Providing support to veterinarians and their teams to create a cat friendly practice environment.
- Outlining strategies for introducing changes in the delivery of care that incorporate a better understanding of the cat's distinct needs and behaviors.

APPLY NOW!

[Search for a Cat Friendly Practice](#)

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Specific **Areas of Focus**

- Understanding Behavior
- Owner Communication
- Waiting Room Comfort
- Handling Guidelines
- Exam Room
- Hospitalization/Cat Wards



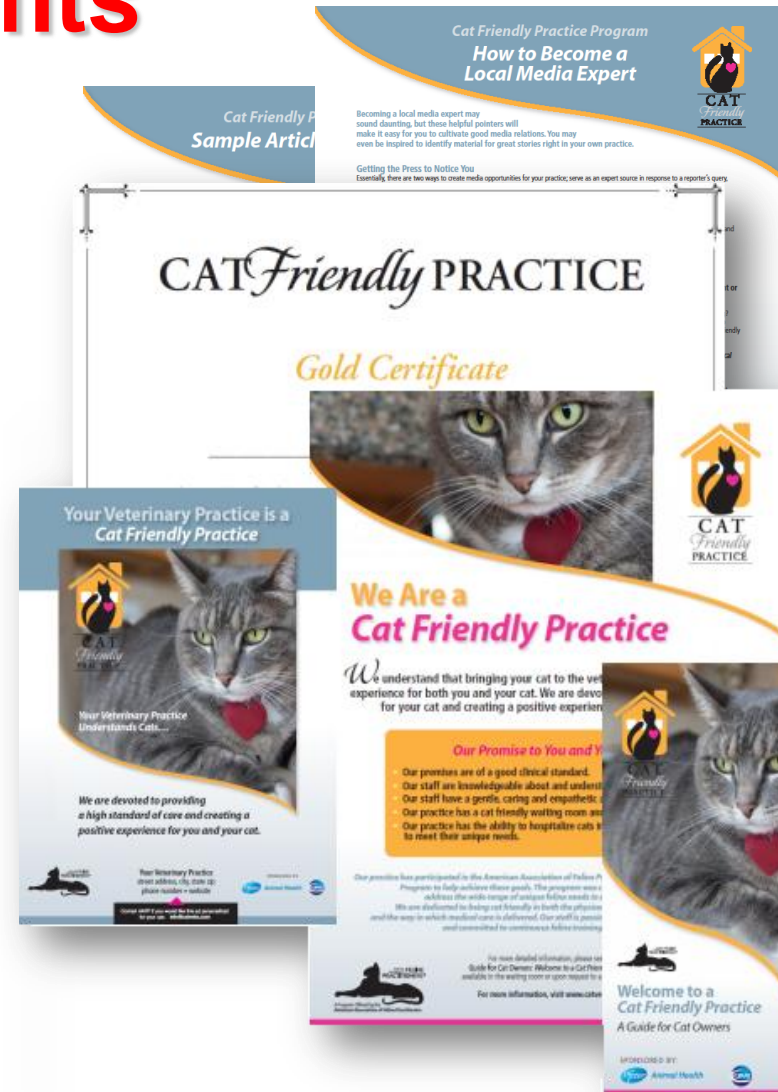
Why **invest** the time?

- **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

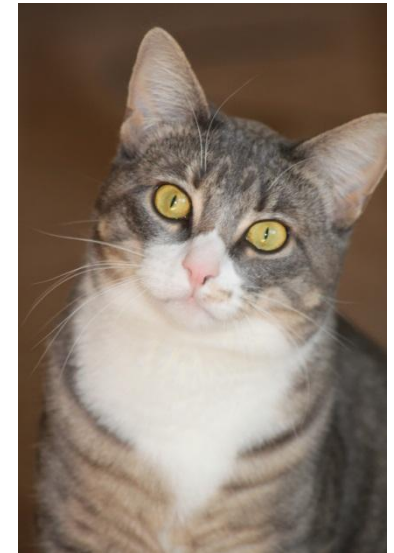
- Public Relations Support
- Marketing Toolkit
- E-newsletters
- New Education Materials
- Ongoing Resources
- 2013 Consumer Campaign



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



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



For more information

- Visit www.catvets.com CFP Icon
- Media Inquiries?
Heather O'Steen, AAFP
hosteen@association-partners.com
(800) 874-0498 x207



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Call to Action



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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



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Bayer Veterinary Care Usage Study III: Feline Findings
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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



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QUESTIONS?



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THANK YOU!



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