

*An American Animal Hospital Association-American Veterinary Medical Association White Paper*

# Reversing the Decline in Veterinary Care Utilization: Progress Made, Challenges Remain

## **Executive Summary**

In response to a decade-long decline in the utilization of professional veterinary care, Partners for Healthy Pets was established in 2011 with the mission “to ensure that pets receive the preventive healthcare they deserve through regular visits to a veterinarian.” Two coinciding events were the landmark 2011 Bayer Veterinary Care Usage Study, which identified reasons why pet owners were taking their animals to the veterinarian less often, and publication of the AAHA-AVMA Canine and Feline Preventive Care Guidelines, which emphasize the value and scope of regular pet exams. Partners for Healthy Pets is a consortium of professional and industry organizations that has developed resources to help veterinarians educate pet owners on the importance of preventive pet healthcare, and in 2013 it spearheaded programs to create pet owner awareness of the importance of annual exams. While these initiatives have produced some successes, recent survey data show that many pet owners continue to resist seeing veterinarians on a regular basis and are poorly motivated to do so.

In March, 2014, Partners for Healthy Pets commissioned a survey to determine the impact of its programs as perceived by members of the veterinary profession. The survey population included veterinary practice team members, veterinary school educators, and Associate Members of the partnership (these included state veterinary medical associations and other veterinary organizations with practitioner constituencies). Survey results showed strong positive trends in terms of greater focus on preventive healthcare in clinical practice,

efforts by healthcare teams to communicate the value and benefit of preventive healthcare to pet owners, and the emphasis placed by veterinary school deans and primary care faculty on preventive healthcare curriculum and clinical education.

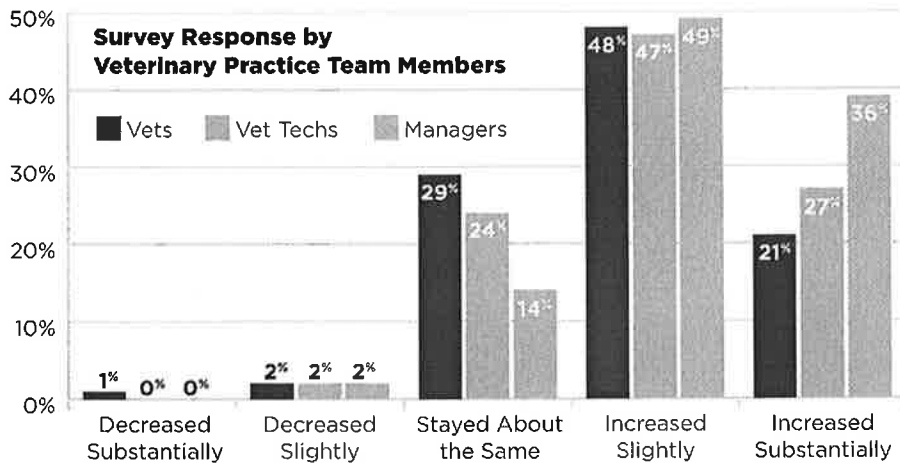
Partners for Healthy Pets also commissioned a 2014 update of selected components of the original Bayer Veterinary Care Usage Study. The 2014 study found that in the past four years, visits to veterinarians have not increased and that pet owner attitudes about preventive healthcare for their animals have either changed very little or were less favorable. Pet owner concerns about the cost of veterinary services increased markedly since 2010, despite significant improvement in the economy. The stress of visits to the veterinarian experienced by pets and their owners has increasingly become a barrier to regular utilization of services. The reliance of pet owners on the Internet as the first option for information on pet healthcare has also increased substantially, reducing the incentive for visiting a veterinary clinic.

The two large-scale surveys indicate that companion animal medicine in the U.S. is in a two-stage, evolutionary transformation away from a transaction-based practice model focusing on vaccinations and acute care. The

first stage of the process involves creating awareness within the veterinary community of the importance of individualized preventive healthcare and its delivery in the form of a care pathway based on regular exams throughout the lifetime of the pet. To a great extent, this initial phase is progressing in a positive direction. A second stage consists of widespread acceptance by pet owners of the benefits and value of preventive pet healthcare and the veterinary profession as its best provider. An attitudinal change by the public toward accepting regular pet healthcare visits has yet to occur and will require continued diligence by the veterinary profession in communicating the benefits and value of preventive healthcare to pet owners. In addition, the veterinary profession needs to better address certain practical barriers to service utilization identified by pet owners, such as affordability and reducing stress associated with the veterinary visit experience.

### **2014 Survey of Veterinary Profession Stakeholders**

Partners for Healthy Pets commissioned a 2014 study of veterinary profession stakeholders to assess their opinion on the importance of preventive pet healthcare and progress in its implementation in clinical practice. The study was conducted by Jeremy Kees, PhD, of Villanova University,



**FIGURE 1.** The graph shows the responses by veterinary practice team members to the question, “During the past four years, at your practice (or at practices at which you have worked), have you observed any change in the effort to communicate to pet owners the value and benefit of preventive healthcare versus simply making a recommendation for preventive healthcare services?”

who surveyed 1,117 veterinary practice team members (veterinarians, technicians, office managers), 69 school of veterinary medicine deans and faculty members, and 28 representatives of Partners for Healthy Pets Associate Member organizations.

Survey responses by veterinary practice team members reflected a growing recognition of the importance of preventive healthcare and regular healthcare exams. Veterinarians, technicians, and practice managers said the following trends had occurred during the past four years at their practices:

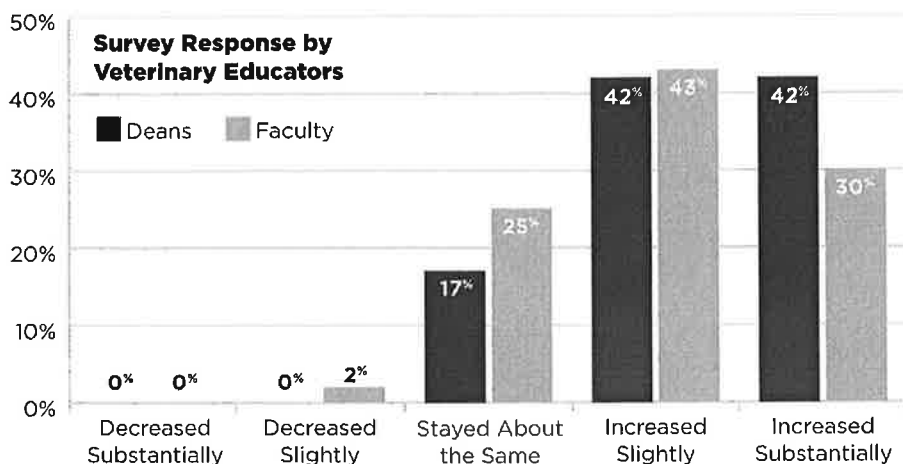
- More than 60% said that there has been an increased emphasis on preventive healthcare in their practices.
- More than 60% said that there has been an increased effort to

communicate the value and benefit of preventive healthcare to pet owners (**Figure 1**).

- More than 70% said that they have made an increased effort to emphasize the importance of the annual checkup to pet owners instead of just recommending specific elements of disease prevention such as vaccination and heartworm prevention.

Deans and primary care faculty at North American veterinary schools were even more emphatic than practice team members about the growing emphasis on the importance of preventive pet healthcare at their institutions. Veterinary educators said that the following trends had occurred at their schools within the past four years:

- More than 90% of deans and 70% of faculty said that their clinics



**FIGURE 2.** The graph shows the responses by veterinary educators to the question, "During the past four years, at your college, has the emphasis and importance focused on preventive healthcare as evidenced by changes in curriculum and clinical service education provided to students increased, decreased, or stayed about the same?"

have placed increased emphasis on providing preventive healthcare to pet owners.

- More than 80% of deans and 70% of faculty said that there has been an increase in changes in curriculum and clinical service education related to preventive pet healthcare (**Figure 2**).
- More than 80% of deans and 70% of faculty said their institutions have increased their efforts to communicate the value and benefit of preventive healthcare versus simply making a recommendation for preventive healthcare services.
- More than 80% of deans and 90% of faculty said that their school uses or instructs their students on how to use the 2011 AAHA-AVMA Canine and Feline Preventive Healthcare Guidelines.<sup>3</sup>

### The 2011 Bayer Veterinary Care Usage Study

This study of more than 2,000 dog and cat owners was conducted by Brakke Consulting, Inc., to determine why utilization of companion animal veterinary services by pet owners in the U.S. had undergone a decade-long decline beginning in the 2000s.<sup>1</sup> Particularly ominous was the fact that the decline in veterinary visits was occurring despite a 10-year period of growth in the U.S. dog and cat population by more than a third.<sup>2</sup> Concurrent with the declining trend in service utilization, there have been increases in the prevalence of various preventable pet diseases, including parasitism, dental disease, and obesity and overweight.<sup>2</sup> The veterinary care usage study hypothesized that the 2008 recession had a negative impact

on spending for veterinary services, as would be expected. However, the decrease in pet owner visits to veterinarians began well before the recession and could not be attributed solely or even primarily to economic conditions that prevailed later in the decade. The study identified these other contributors to the decrease in veterinary visits:

- Increased reliance by pet owners on the Internet as a default source of information on pet health issues.
- Inadequate understanding by pet owners of the benefits and value of routine preventive healthcare.
- The cost of veterinary care.
- Resistance to veterinary clinic visits by cats, resulting in a marked reduction in frequency of feline visits compared to canine visits.

### **2014 Update to the Veterinary Care Usage Study**

A 2014 update to the veterinary care usage study, also conducted by Brakke Consulting, Inc., and using the same methodology, sought to determine if there were any appreciable changes in pet owner attitudes and behaviors during the four years since the original study was done. The 2014 study evaluated responses to an online survey of 1,100 dog and cat owners. A key finding of the 2014 study was that there has been no reversal of the decline in pet owner

visits to veterinarians within the past four years. The percentage of dog owners who visited a veterinarian during the preceding 12 months dropped from 86% in 2010 to 84% in 2014. The percentage of cat owners who visited a veterinarian dropped from 66% in 2010 to 64% in 2014. Failure of more than a third of cat owners to visit a veterinarian within the past year as revealed in both surveys indicates that cats continue to be an underserved patient population. One of the most troubling findings of the 2014 study was that pet owners are now willing to accept considerably longer intervals between visits to a veterinarian than in the past. For example, dog owners in 2014 said that they were comfortable waiting an average of 16.9 months between visits versus the 11.4 month average interval indicated in the original study.

There was no appreciable change in pet owners' opinions of the value of regular visits to a veterinarian (**Table 1**). The percentage who said that routine veterinary checkups are unnecessary declined from 24% in 2010 to 22% in 2014. The percentage who said they would go to a veterinarian only if their pet was sick or injured declined from 33% in 2010 to 32% in 2014. In contrast to these responses, there was marked deterioration in how pet owners view three other principal reasons for not using veterinary services: cost,

**TABLE 1. Common Reasons Why Pet Owners Don't Use Professional Veterinary Care\***

% who "completely agree" or "somewhat agree"

Survey category and question	2010 Survey	2014 Survey	Trend <sup>†</sup>
<b>Perceived need for preventive care</b>			
Routine veterinary checkups are unnecessary	24%	22%	-4%
Would only go to a veterinarian if pet is sick or injured	33%	32%	-3%
<b>Cost</b>			
Costs of routine visits are higher than expected	53%	59%	+11% <sup>‡</sup>
Would probably switch veterinarians if I found one that was less expensive	26%	32%	+27% <sup>‡</sup>
<b>Stress of visiting a veterinarian</b>			
Pet dislikes going to the veterinarian	45%	51%	+13% <sup>‡</sup>
Just thinking about taking my pet to the veterinarian is stressful	30%	38%	+27% <sup>‡</sup>
<b>Reliance on the Internet</b>			
Internet is the first option when the pet is sick or injured	39%	48%	+23% <sup>‡</sup>

\* Results of Bayer Veterinary Care Usage Studies, 2010 and 2014.

† Relative percentage increase or decrease.

‡ Statistically significant ( $p < 0.05$ ).

stress, and reliance on the Internet. The percentage who said that the cost of routine visits was higher than expected increased by 11%, and the percentage who said they would probably switch veterinarians if they found one less expensive increased by 27%. The percentage of pet owners who said that their pets dislike going to the veterinarian increased by 13%, and the percentage who said that just thinking about taking their pets to a veterinarian was stressful increased by 27%. Pet owner reliance

on the Internet as their first option for information when their pet is sick or injured increased by 23%.

### **Can Veterinarians Thrive in Today's Economy and Market for Services?**

Partners for Healthy Pets strongly believes that the answer to this fundamental question about the future of veterinary medicine is "yes," but individual practices must meet challenges identified in the veterinary

care usage studies in order to achieve their full potential. The partnership has demonstrated that companion animal practices can prosper and grow in today's economic and social environment. A series of "success story" case histories published online at [partnersforhealthypets.org](http://partnersforhealthypets.org) shows how practices can succeed when they embrace preventive healthcare as a primary objective and effectively communicate the benefits and value of regular healthcare visits to their clients. A number of these practices are located in competitive urban markets or in markets where population density is relatively low. Despite those demographic challenges, the success-story practices still managed to thrive.

These peer-to-peer testimonials are examples of how the healthcare teams at the success-story practices used a "toolbox" of professionally developed resources to implement preventive healthcare in clinical practice. The freely available, online tools were developed by Partners for Healthy Pets as an actionable resource for helping veterinary practices provide high quality preventive healthcare to their patients. The tools explain and demonstrate how veterinarians can address the practical concerns pet owners typically have about veterinary visits. For example, one suite of tools provides materials that illustrate

feline-friendly handling methods that can minimize the stress cats often experience during office visits. Other tools discuss monthly payment healthcare plans that can make the cost of veterinary care more manageable. The toolbox of online resources is available at the Partners for Healthy Pets website.

Dr. Kees' study found that Partners for Healthy Pets is widely seen as a leading advocate and resource for implementing preventive pet healthcare. Seventy-four percent of veterinarians, 87% of office managers, and 100% of veterinary educators who responded to the survey were aware of Partners for Healthy Pets and its mission. This high level of awareness of the partnership is an encouraging sign that the veterinary profession recognizes the need for transformational change in companion animal practice and considers Partners for Healthy Pets to be a key resource in that process.

### **Implications of the 2014 Surveys: Where Do We Go from Here?**

The key findings of the 2014 update to the veterinary care usage study are that during the past four years:

- Pet owner visits to veterinarians have been static at best.
- Many pet owners have become increasingly concerned about

some aspects of veterinary care, including the need for regular exams, the cost of care, and the stress and inconvenience of the exam experience.

- Pet owners depend more than ever on the Internet instead of a veterinarian for pet health information.

These results make it clear that the pet-owning public still needs to be broadly informed and convinced of the benefits and value of regular healthcare visits for their animals. To encourage regular healthcare visits, practice teams need to not only overcome the practical barriers that pet owners have identified but also look for opportunities to make themselves an essential and relevant alternative to “Dr. Google.”

In contrast to results of the 2014 pet owner survey, the survey of veterinary profession stakeholders showed that the profession has made considerable progress during the past four years in changing its attitudes, culture, and behavior related to preventive pet healthcare but this too continues to be a “work in progress.” Partners for Healthy Pets has assumed a leading role in this process by providing ready-to-use resources for communicating the benefits and value of regular preventive healthcare to pet owners and by involving the entire healthcare team

in that effort. It remains for veterinarians to use these resources to implement preventive pet healthcare as the first consideration in primary care practice and to effectively communicate the benefits and value of regular healthcare visits to pet owners. To complement its online resources for veterinarians, Partners for Healthy Pets has also launched a direct-to-consumer advertising campaign with the theme, “a yearly visit to your family vet is as essential as food and love” for your pet.<sup>4</sup>

The history of fundamental change in healthcare tends to be incremental rather than abrupt. Smoking cessation in the U.S. was a generational transition, and the appropriate role of physicians in the process was not universally accepted.<sup>5</sup> The use of clinical guidelines and care pathways to develop a systematic approach to treating the epidemic of childhood obesity is still evolving.<sup>6</sup> The paradigm shift in dentistry from treating tooth decay to prophylaxis and periodontal care did not happen overnight, and it has been driven in large part by the dental education community in enabling technology transfer and implementation of new practice models.<sup>7</sup> Evolutionary change will probably occur as well in the wider delivery of high quality preventive pet healthcare, with veterinary schools playing a key role.<sup>8</sup>



Veterinarians already in practice have an existential purpose and a strong medical rationale for maintaining a determined commitment to preventive pet healthcare. Primary care practices that thrived during the recession and its aftermath recognized that preventive healthcare increases pet longevity and quality of life,<sup>2,9</sup> strengthens relationships between pets and their owners, and encourages client loyalty to the practice.<sup>4</sup> Regular healthcare visits

make economic sense for pet owners by avoiding preventable disease and enabling early detection of disease when it does occur, thereby improving case outcomes and minimizing the need for chronic care. When veterinarians focus on keeping pets healthy as their first objective, providing high quality acute care when needed, and communicating those service goals to their clients, experience has shown that all parties involved will benefit.<sup>4</sup>

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