

Profiles of Clients

The Morris Foundation Study

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Part I

During the '50's & '60's, veterinarians throughout the U.S. had more clients seeking their services than the profession could comfortably manage. The '70's brought about a trend of decreasing client visits that particularly influenced most small animal practitioners.

The early years of this trend were viewed with mixed emotions, but it did allow the veterinarian more free time for both leisure and continuing education. Also, with fewer clients per day, more time could be spent examining each patient; thus more thorough and complete medical care could be provided.

Any business providing service, veterinary medicine included, must develop an understanding of what the client wants, how the service is to be provided, and how to set a fee that is equitable to the client and also financially rewarding to the veterinarian. The technique of determining this balance of factors influencing the delivery of service is often called marketing.

One aspect of the marketing of veterinary service is to learn more about the people that own the pets. Today there are many sociologic and economic conditions which may result in attitudinal changes that will influence the delivery of veterinary medical services.

In an attempt to assess dog and cat owner attitudes toward the increasing sophistication of veterinary medicine, a telephone interview survey was completed with 250 dog and cat owners in the Denver, Colorado metropolitan area. The study was designed and completed for the Morris Animal Foundation with the consultation and funding by the American Animal Hospital Association.

This article will present some of the data from that survey and suggest the manner in which veterinary medical services might be in-

fluenced by the characteristics that were observed. A total of 553 contacts was made to identify 250 pet owners. Slightly less than half (45%) of the contacts did own either a dog or cat.

More than seven of ten (70%) of the pet owners responded in terms of a dog. Although most pet owners have only one dog or one cat, 19% of the dog owners reported more than one dog and 15% also owned a cat. Of the pet owners responding in terms of a cat, 25% own more than one cat and 25% also own a dog. Approximately one out of three (32%) households had more than one pet.

The decade of age with the highest pet ownership is 24-34 years. Twenty-four per cent of the area population was over 55 years of age, while the survey determined that only 16% of the pets were owned by people over 55 years of age.

Reduced pet ownership by people over 55 years of age may be associated with single family living or apartment living where restrictions prevent pets. If there is any group in which pet ownership should be encouraged, it is in the older individual, particularly those that live alone and need the companionship. Recent studies have demonstrated a person has a greater chance of recovering from a heart attack if there is a pet in the home.

Although 24% of the respondents did not report their income, the highest percent reported an income of \$25,000-40,000. One of ten (10%) reported income of less than \$10,000 compared to 19% of the areas' households reporting less than \$10,000 income. In households with more than one dog, a majority of the units (54%) made less than \$20,000, whereas in households with more than one cat 7 out of 10 (71%) made more than \$20,000.

More than four out of five (82%) pet owners own their home, while only 65% of the total area households own their home.

Almost 9 of 10 (88%) live in single family structures. Only 7% of the dog owners live in multi-family housing, although 24% of the cat owners lived in multi-family units. Of the dog owners, 13% rent their homes, while over twice as many (29%) of the cat owners rent their home.

It would appear that pet ownership tends to indicate a more affluent society, and that households with incomes less than \$10,000 are under-represented in this data. This would suggest that the majority of pet owners have discretionary income to spend on their pet; thus pet owners should be financially capable of paying for adequate medical care for their pet. The affluency of pet owners is also indicated by the higher percentage of pet owners owning their homes as compared to the general population. A higher number of cat owners rent their homes; thus indicating that the cat may be a more desirable pet in a restrictive environment.

Four of five (80%) of the respondents owning pets were married. More than half (52%) of the households had children less than 17 years of age.

Children have a great influence on the spending of discretionary dollars within the household. Veterinary education directed to the children would probably improve the medical care of the family pet. This would be particularly true in health maintenance. Activities which would encourage this understanding by children would be (1) the veterinarian or an animal technician making talks to school classes, particularly the elementary grades; (2) a photographic tour of your hospital displayed in your reception area.

Single member households represented 26% of the cat owners and only 18% of the dog owners. Both "adult household heads" are employed in more than one of the three (37%) pet-owning households. When considering the number of single households (20%), and the number of households where both adults work (37%) individuals may have a difficult time scheduling an appointment for their pet to be seen by the veterinarian. During the period of time when the number of clients per veterinarian was growing, restrictive office hours appealed to the veterinarian. Today, with decreasing client number, perhaps some consideration needs to

be given to scheduling office hours more convenient for the pet owners.

The median age for pet dogs was 5.6 years (28% were 9 years or older) while the median age for cats was 5.1 years (19.5% were 9 years or older). Only 6% of the pet population was less than 1 year of age whereas over 25% of the pet population was 9 years or older. This statistic speaks well for improved medical care and should also indicate that the emphasis in continuing education for the veterinarian should include more geriatric medicine. In households with no children, 37.5% of the animals were 9 years or older, while only 19.3% of the animals were 9 years or older in households with children. A higher percentage of pets over nine years of age are owned by people over 55 years of age. No pets under 1 year of age were owned by this age group. This may indicate that quality care is provided by the older individuals and that replacement of pets by people over 55 is rare.

More than two of three pet owners describe their animal as "a member of the family." Dog owners more frequently describe their pet as "members of the family" while there is a significantly greater tendency for cat owners to think of the cat as "a nice pet." The "member of the family" attachment was also more frequently expressed by: (1) owners of pedigree pets, (2) women, (3) person 65 years of age or older, (4) householders with no children, and (5) if the pet is 9 or more years old. Only 2 of 250 people identified their pet as a nuisance. Since the majority of people consider their pet to be "a member of their family," this would indicate an attachment that would encourage the expenditure of discretionary dollars for veterinary care. Quality care may not be sought by the pet owner due more to not understanding what care is necessary rather than a prohibitive cost of the service.

Since the majority of people regard their pet as "a member of the family," the owners need to feel that the veterinary service indicates that level of caring. Being able to call pets by their name and gentle handling of the pet, would all be supportive of that type of attachment to the family. The more things the veterinarian and his assistants can do to enhance this feeling, the more likely the owner will appreciate the veterinary care and will be willing to pay an equitable fee.

Part 2

This second report of pet owner attitudes toward veterinary care will present data on medical history, assessment of the veterinarian, and pet owner views of veterinary medical costs. These attitudes should be useful to the practitioner in improving the care of the pet and service to the pet owner, making sure the pet owners perceives what was done, and ensuring that the cost is justified to the pet owner.

Pet Care Problems

When pet owners were asked what was the biggest problem in caring for their pet, about two of five (38%) said "no problem at all." Only 2% of the pet owners identified illness or sickness as the biggest problem.

The biggest care problem identified by pet owners was "having someone take care of him/her when we are away."

The other three problems identified by 10% of the pet owners were:

1. Picking up the yard; still messes in house, etc.
2. Does not want to come in at night; runs away when let out, etc.
3. Expense of grooming, brushing every day, etc.

Behavior problems (barking, scratching furniture, etc.) were identified as the biggest problem by 8% of the pet owners. Shedding "hair all over the place" were mentioned by 6% of the pet owners. Behavior problems were more commonly mentioned when the pet was less than one year of age.

Even though only 2% of the pet owners identified injury or sickness as a problem, 38% of the pets in the survey had been sick or injured at one time, and nearly two of three (65%) pet owners had experience with a sick or injured pet.

Sick and Injured Pets

Of the 250 pet owners, less than 20% had pets that had been sick or injured during the past year. A slightly higher percent of cats had been injured or sick during the past year.

Sickness related to "infection" represented 25% of the causes while accidents accounted for 20%. Bone/muscle injury (lameness) was listed in 12% as were fight injuries.

The pets nine years of age or older were much less involved in accidents and fights, but had a higher incidence of tumors.

When the pet was sick/injured, 90% of the animals were taken to a veterinarian for medical care. One in twenty (5%) indicated "there was nothing we could do—the animal died", and 2% "treated the animal myself, but did call the veterinarian for advice."

Reasons for Selecting Veterinarian

Location was the most common reason (41%) given for selecting a veterinarian. Recommendations of family and friends were mentioned by 36% of the pet owners. Advertising, such as hospital signs and yellow page displays, accounted for one in ten selections of a veterinarian. Only one percent selected their veterinarian on the basis of skill and knowledge.

Recommendation was the most common answer given when the pet owners were younger (under 35 years old) or who had younger pets. Cat owners relied more on recommendation than location to select their veterinarian.

Satisfaction with Veterinarian

Nine out of ten people were satisfied with their experiences with the veterinarian. The "almost always satisfactory" answer was more commonly given by dog owners, pedigreed pet owners, and owners of pets that were older. The people least satisfied were lower income pet owners (less than \$15,000) and pet owners renting their home. Pet owners of animals less than one year of age were not as well satisfied as owners of older pets. Of the 13 owners who were less than "completely satisfied", three were depressed by the fact that "the animal died" and two complained that "the animal was still sick after we got back." Only one was dissatisfied because of the cost.

Reasonableness of Veterinary Fees

On their last visit to a veterinarian, 35% of the pet owners paid less than \$20 for service and 51% paid less than \$30. One in ten (10%) paid \$100 or more while 2% were not charged anything.

Nearly half (49%) feel the veterinarian's fee they last paid was "very reasonable", but one in ten (9%) said it "was not reasonable". This judgement was not based on evaluation

of the total charges, as can be seen in Table I comparing median fees charged each group of pet owners.

TABLE I
Reasonableness of Veterinary Fee
Compared to Median Fees

<i>Last Veterinary Fee</i>	<i>Median Amount of Last Veterinary Fee</i>
Very Reasonable	\$24.50
Fairly Reasonable	31.50
Not Reasonable	17.00

Younger (under 25 years old) owners most frequently described veterinary fees as "usually reasonable." Nearly 30% of the pet owners 65 years and older responded that the fee was not reasonable.

Frequency of Visits to Veterinarian

Nearly 7 of 10 (67%) pet owners take their pets to the veterinarian once a year. 15% had been twice and 13% had not been to a veterinarian in the last year.

Three out of ten (31%) cat owners had not been to a veterinarian in the last year while less than 1 out of 10 (6%) of the dog owners had not been to the veterinarian.

Pet owners with mixed breed animals were less likely to see their veterinarian in the last year than were pedigreed pet owners. Pet owners with pets less than one year of age were more likely to have been to the veterinarian twice in the last year.

Most pet owners (90%) had been to a veterinarian during the past year for preventive medicine such as vaccinations or some type of "general check-up". Animals that were sick/injured accounted for 16% of the visits. Spaying resulted in 6% of the visits while grooming and boarding accounted for 7% of the visits. Since respondents could give more than one answer and also could visit the veterinarian more than once a year, the total was more than 100%.

Median Annual Expenditure

The median annual expenditure by groups of pet owners is given in Table II.

TABLE II
Median Annual Expenditure of
Those
In Group Visiting a Veterinarian

All Pet Owners	\$26.75
Cat Owners	31.25
Dog Owners	24.00
Pedigree Animals	29.05
Mixed Breed Animals	23.58

Cat owners paid more than dog owners. Cat owners were also more likely not to be charged anything.

Nearly half (46%) of the pet owners indicated the largest single amount they have ever paid for medical care for their dog or cat was less than \$50.

Dog owners have experienced veterinary expenses of \$100 or more almost twice as often (24% to 14%) as cat owners. Owners of pedigreed animals (24%) have also paid \$100 plus more often than owners of mixed breed animals (19%).

Almost two of three (65%) were satisfied that the largest single amount ever paid for veterinary care was reasonable. Nearly one-fourth (24%) felt they were charged more than expected. This negative assessment was more evident among cat owners, mixed breed pet owners, pet owners making less than \$10,000, and pet owners 65 years or older.

Over 50% of the people who classified their dog as "like any other pet" or "a nuisance" indicated that the pet care costs were higher than they should have been.

The individuals stating that costs were too high were likely to attribute their feelings to "inflation, everything costs more" or "the veterinarian charges too much for the amount of time it takes to do some things."

Worth of Pet

When pet owners were asked their feelings about veterinarians becoming like people doctors, 2 of 3 (67%) stated they were glad pet care was becoming so advanced. The groups more likely to support this feeling were owners regarding their pet as "a member of the family", cat owners, and owners of mixed breed animals. The main reason for this feeling is the value of the pet to the individual family, which justified this improved veterinary service.

More than one-third of the pet owners indicated there was "no limit" to what they would be willing to spend to save the life of a seriously ill pet. The limit was under \$100 for 3% of the pet owners, 6% indicated less than \$200, and 5% indicated less than \$300. Forty percent of the pet owners said there was a limit, but they were not sure what it was. The "no limit" response was more common when the animal was pedigreed and when owners considered their pet "a member of the family."