

DIGITAL CLINIC STUDY



February 18, 2008

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➤ Objectives and methods

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Objectives

- Examine how veterinary professionals – veterinarians, animal clinic and hospital practice managers and administrators, veterinary technicians, veterinary students, and veterinary technician students – are using the Internet, digital devices, and information technology to communicate, conduct research, learn, manage their practices, and deliver medical care to animals.

Methods

- Fleishman-Hillard developed the Digital Clinic survey questionnaire in consultation with our partners in this research initiative, the American Veterinary Medical Association (AVMA) and the American Animal Hospital Association (AAHA). Several business partners also commented on and made contributions to the survey questionnaire.
- AAHA and AVMA sent e-mail links to the online survey to a random sample of veterinarians with valid e-mail addresses in their membership database and to all practice managers, veterinary technicians, veterinary students, and veterinary technician students with valid e-mail addresses in their membership database.
- The survey was open from December 14 through December 28, 2007.
- Approximate margins of error due to sampling are no more than plus or minus three percentage points for veterinarians and no more than six percentage points for other groups.

	Sample list	Completed surveys	Response rate
Veterinarians	10,000	1,088	11%
Practice managers	2,755	324	12%
Veterinary technicians	4,345	289	7%
Veterinary students	5,854	206	4%
Veterinary technician students	2,276	116	5%
Total	25,230	2,023	8%

For copies of this report and additional releases, go to www.aahanet.org or www.avma.org. For additional information, contact:

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Brian Cox (816-512-2252)
Fleishman-Hillard

Respondent profiles

- The following profile describes the respondents to the Digital Clinic survey. This is not intended to be a demographic and statistical profile of the profession. For current statistics on the profession, consult publications and studies issued by the AVMA and AAHA. The business and demographic profiles of the survey respondents are closely reflective of the profession today. See slides 65-73 for more detail.
- Fifty-five percent (55%) of survey respondents are DVM's/VMD's.
- Fifty-seven percent (57%) of survey respondents work in a small animal practice: 57% of veterinarians, 90% of practice managers, and 81% of veterinary technicians.
- Seventy-two percent (72%) of all respondents are between the ages of 30 and 59. Fifty-six percent (56%) of respondents under 30 are veterinary students or techs.
- Seventy percent (70%) of all survey respondents are women as are 53% of veterinarians, 87% of practice managers, 92% of veterinary technicians, 90% of veterinary students, and 96% of veterinary technician students.
- Respondents tend to be members of three veterinary associations: AVMA (71%), AAHA (43%), and/or VMA (40%). Virtually all veterinarians (99%) are members of the AVMA, while managers, techs, and students are more likely to be members of AAHA or the VMA. These figures are determined by association membership categories and the fact that the survey was distributed to AAHA and AVMA members.
- Most veterinary practices (56%) are what would be considered medium-size; between 5 and 20 employees. Just one in four (28%) have more than 20 employees.
- A majority (68%) of the practices also employ between one and four veterinarians.

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Veterinary professionals adopting digital devices

- Veterinary professionals are adopting digital devices in their professional and personal lives. For professional purposes, they are making heavy use of the Internet (92%), though remember that this survey was conducted online, and are heavy users of cell phones (64%), desktop computers (86%), digital cameras (63%), and laptop computers (53%). They are not heavy users of personal digital assistants (24%) for work or mixed work and personal use. They are also adopting digital audio devices (46%), though primarily for personal use (41%), and video cameras (44% total, 28% for personal use only). See slides 14-15.
- Veterinary professionals are using digital devices for a variety of purposes, particularly keeping in touch with friends and family (65%), learning new things (60%), communicating with colleagues (59%), and doing their job (53%). See slides 16-17.

Attitudes to communications technology and information

- Is the profession suffering from an information overload? This survey indicates not for the most part. Sixty eight percent (68%) of respondents like "having so much information to choose from," though a significant minority (28%) "feel overwhelmed with information these days," a figure that rises to 29% for veterinarians themselves. These figures are consistent with national figures developed by the Pew Internet and American Life Project. See slide 19.
- 87% of veterinary professionals feel that they are more productive because of computing and communications devices. This figure is lowest for the respondents under age 30 (42%) and highest for respondents over age 60 (65%). Older respondents are more appreciative of the advantages of computing and communications devices because they began their careers without these technologies. Younger respondents can only speculate about life before the Internet and the cell phone. See slides 20-21.

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Attitudes to communications technology and information (continued)

- Veterinary professionals see the benefits that cell phones and mobile devices make them more available to others (81%), though a small minority (8%) does not like the universal accessibility afforded by the mobile communications devices. See slides 20-21.
- The survey indicates that the profession can make more and better use of advances in computing and communications technologies. Indeed, 86% of respondents feel that their computing and communications devices can do more than they currently use them for, and 45% usually need someone else to show them how to use new devices. These percentages increase with age. See slides 20-21.

Home use of the Internet

- At home, veterinary professionals are predominantly accessing the Internet over a broadband connection (83%). The most common activities are e-mail, keeping up with the news, surfing the Internet for personal entertainment, making travel arrangements, shopping, and online banking. See slides 23-29.
- Less common activities are gaming (16%), reading blogs (19%), blogging (7%), or visiting online virtual worlds (3%) (percentages signify undertaking an activity at least every few weeks).

Switching on to the digital world

- As noted above, veterinary professionals feel that they are more productive because of computing and communications devices. The survey provides additional indications of how veterinarians are switching on to the digital world. See slide 31.
 - Eighty-eight percent (88%) of veterinarians feel the Internet enhances their ability to access the latest science and research.
 - Sixty-four percent (64%) feel the Internet makes their practice more efficient fewer, though 32% feel that the Internet makes their practice more profitable.
 - Sixty-one percent (61%) feel the Internet helps them provide better care for animals.
 - However, fewer than half feel that the Internet helps them communicate better with their clients (43%).
- Veterinary professionals rely on a wide range of digital tools to perform their jobs. See slides 32-35.
 - Most important are e-mail within their organization (52% rely “extensively” or “considerably”), Veterinary Information Network /VIN (49%), e-mail to associates outside of their organization (44%), research on diagnosis or drug information (46%), and keeping up on veterinary best practices (45%).
 - They make some use of the Internet for online discussions and forums with veterinarians (33%), professional newsletters received via e-mail (41%), online professional journals (32%), and Web sites of other companies and organizations (31%).
 - They rely very little on e-mail with clients (16%), drug company Web sites (22%), business-oriented Web sites (16%), blogs about veterinary medicine or animals (11%), or consumer-oriented Web sites about animal care (9%).

Switching on to the digital world (continued)

- Veterinary professionals seek information online on a variety of topics and from a wide range of sources. Within the past six months, they have sought information from or about:
 - Web sites of veterinary associations or organizations (86%) or veterinary schools or research organizations (76%). See slides 36-39.
 - Other veterinary clinics or animal hospitals (70%).
 - Online continuing education (68%).
 - A variety of veterinary topics including animal nutrition (64%), toxicology and poisoning (59%), zoonoses (58%), veterinary diagnostic databases (54%), animal behavior and training (52%), therapeutic and wellness pet food diets (48%), animal oncology (36%), integrative medicine (29%), and animal genetics (24%).
 - They have also looked on the Internet for information about employment opportunities (50%) and the service offerings and/or prices of other local clinics and hospitals (33%).
- Usage of digital tools varies with age. See slides 34-35.
 - Usage increases with age for e-mail inside and outside of their organization as well as e-mail with clients.
 - Usage is highest among younger professionals and decreases with age for several digital tools. Is this a function of age and experience? Or will the use of digital tools roll like a wave through the veterinary profession?
 - VIN (60% for veterinarians under 30, dropping to 31% for veterinarians aged 50-59).
 - Discussions or online forums with veterinarians (47% for veterinarians age 30-39 and dropping to 30% for veterinarians 50-59 years old).

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Switching on to the digital world (continued)

- Seeking information online also varies with age. See slides 38-39.
 - Usage decreases with age for consulting veterinary association Web sites, consulting veterinary school Web sites, checking veterinary clinic or animal hospital Web sites.
 - Usage decreases with age for seeking information on animal nutrition, toxicology and poisoning, veterinary diagnostic databases, animal behavior and training, and therapeutic and wellness pet food diets. Does this reflect the experience-based professional knowledge, or is this a greater inclination of new generations of veterinarians to turn to the Internet?
 - Usage increases with age for zoonoses, rising from 51% for veterinarians under 30 to 58% for veterinarians over 60.
 - Seeking information on employment opportunities is highest for veterinarians under age 30 (51%) and 30-39 (52%), lower for those 40-49 and 50-59 (39% and 37%), and lowest for those over age 60 (19%).
- In a world driven by a sales force model, 46% of veterinarians say they would prefer to receive information about new products from manufacturers on an industry-related Web site compared to 36% who would prefer a visit by a sales representative. See slide 43.
- Veterinary professionals do not have any particular pattern in time of day when they turn to the Internet; 62% report that they use the Internet when they have the chance. See slides 44-45.
- VIN is by far the most popular veterinary-specific Web site, cited by 44% of those with Internet access at work. Preference for VIN declines with age. See slides 46 and 47.

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Switching on to the digital world (continued)

- Veterinarians have mixed views on whether the availability of veterinary information on the Internet helps their clients. See slide 31.
 - For 67% of veterinarians, clients frequently bring in information on animal health obtained on the Internet.
 - However, 61% feel that the availability of veterinary information on the Internet confuses their clients.
 - Far fewer feel the veterinary equivalent of WebMD would be beneficial for their clients (43%) or that the availability to clients of veterinary information on the Internet has improved their ability to care for animals (39%).
- Compounding the mixed views held by veterinarians about the availability to their clients of veterinary information on the Internet is their low level of confidence in much of this veterinary information available to their clients. See slides 40-42.
 - Veterinarians have high regard for information available from veterinary school and veterinary research organizations (78% “very confident” and 96% “very” or “somewhat confident”) as well as veterinary associations and organizations (60% and 96%).
 - They have lower confidence in information on Web sites of drug manufacturers (27% “very confident”) and Web sites of veterinary supply and equipment manufacturers (17%).
 - They have almost no confidence in personal blogs on animal care (1% “very confident”), consumer-oriented Web sites on animal care (2%), and blogs by veterinary professionals (9%).

Veterinary clinics and animal hospitals on the Web (continued)

- The veterinary practices represented in this survey report growing use of other technologies. See slides 54-55.
 - Practice management software appears to have covered its potential market, as 69% report that they currently use software, 2% plan to add software in 2008, while the remaining practices have no plans or do not know whether they will add software.
 - Forty-six percent (46%) currently use electronic medical records, and 17% have plans to add electronic medical records in the next few years.
 - Forty-one percent (41%) currently use digital imaging, and 24% have plans to add digital imaging in the next few years.
 - Twenty-nine percent (29%) currently use telemedicine services, while 9% have plans to add telemedicine services in the next few years.
 - Eighteen percent (18%) of practices would like to be able to file insurance claims electronically through practice management software. See slide 31.

Veterinary clinics and animal hospitals on the Web (continued)

- 69% of veterinary practices represented in this survey report that they have their own Web site. See slide 51.
- Veterinary practices are primarily using the Internet for practice operations: 50% order supplies and medications online, 43% order prescription drugs, 34% use Internet banking, and 32% order pet food. These uses of the Internet increase with practice size. See slides 51-53.
- Veterinary practices are only beginning to use the Internet for marketing and managing client relationships. This suggests that there is a significant opportunity for veterinary practices to develop client relationships online, following practices of some pioneers. See slides 51-53.
 - 30% advertise in online directories, and 21% advertise on search engines or on other Web sites.
 - 22% e-mail appointments to clients, 18% send newsletters on pet care, and 16% send information to clients following up on appointments.
 - These uses of the Internet increase with practice size.
- Animal clinic and hospital Web sites are generally providing only the most basic information to clients and potential clients; they are still in Web 1.0 for the most part. See slides 56-58.
 - They provide basic information such as a description of services (95%), maps and directions (85%), and links to other animal care resources (68%).
 - While 61% do allow e-mails to be sent to clinic staff, only 22% allow clients to order pet food and supplies, 22% offer advertising, 18% offer a video tour of the facility, 18% offer online appointment scheduling, 15% have a blog by a staff member, 13% have prices, and 3% have video messages from staff.

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Veterinary clinics and animal hospitals on the Web (continued)

- 20% of practices with a Web site use search engine optimization or online advertising to promote their Web site. See slides 63-64.
- Clinics and animal hospitals update their Web sites frequently, with 35% of respondents reporting that they update their Web site every three months. See slide 62.
- The individual responsible for updating the Web site varies with practice size. See slides 59-61.
 - In small practices with 1 to 4 employees, a veterinarian in the practice most commonly updates the Web site (40%), while in other cases it is a consultant or Web services company (19%) or a practice manager (12%).
 - In small practices with 5 to 9 employees, nearly equal percentages assign responsibility to a veterinarian in the practice (24%), a consultant or Web services company (26%), or a practice manager (24%).
 - Large practices with 10 or more employees more commonly turn to an office/ practice manager (38%), though some also assign responsibility to a consultant or Web services company (25%) or a veterinarian (12%).

12

Veterinary professionals using technology

DIGITAL CLINIC STUDY

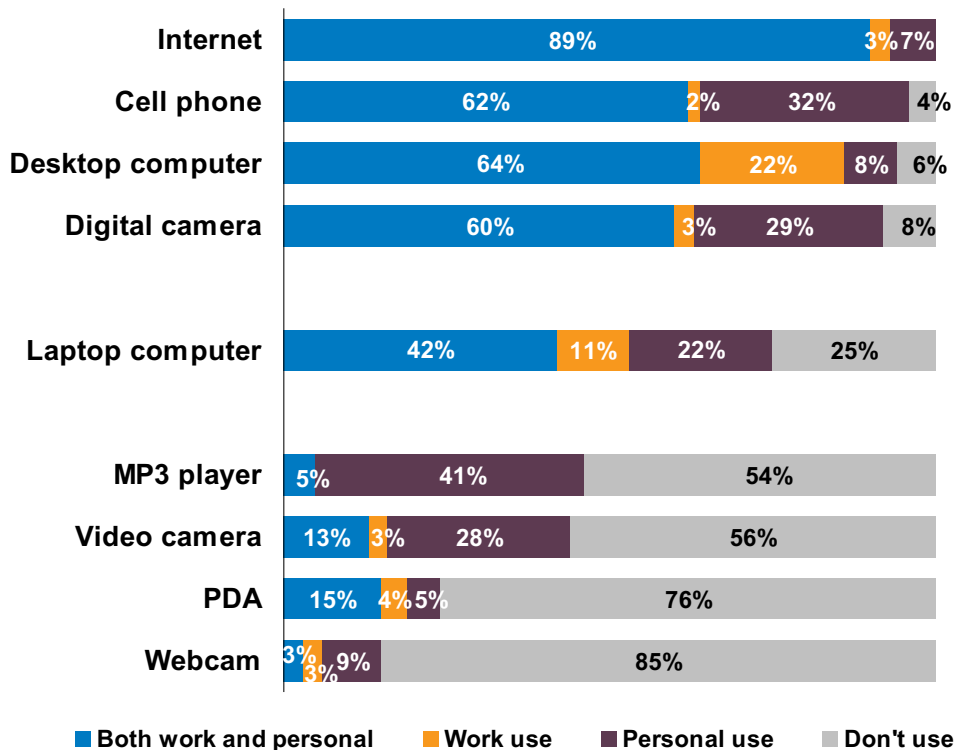


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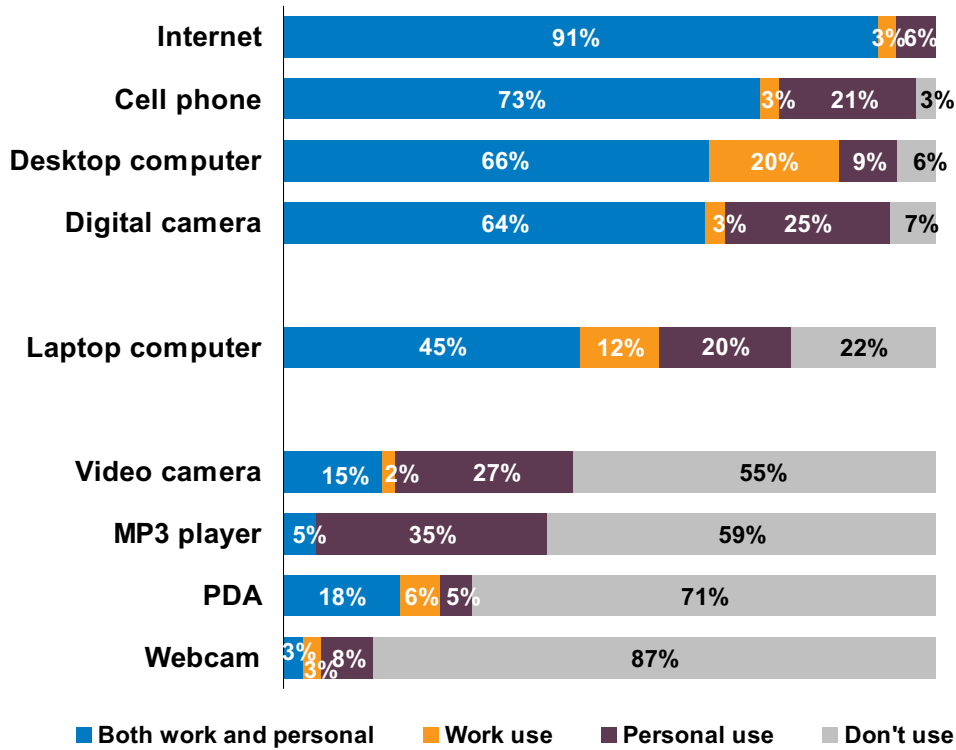
Technology use

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Technology use: veterinarians

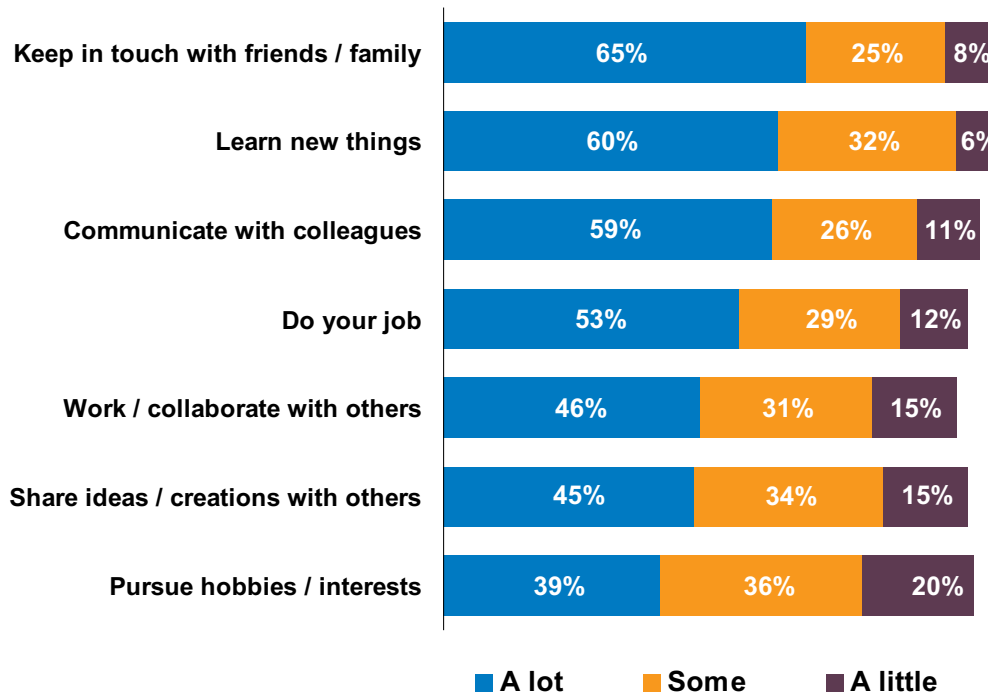
Veterinarians (n=1,088)



15

Technology applications

“To what extent do communications devices, information devices, and the Internet affect your ability to do each of the following?”

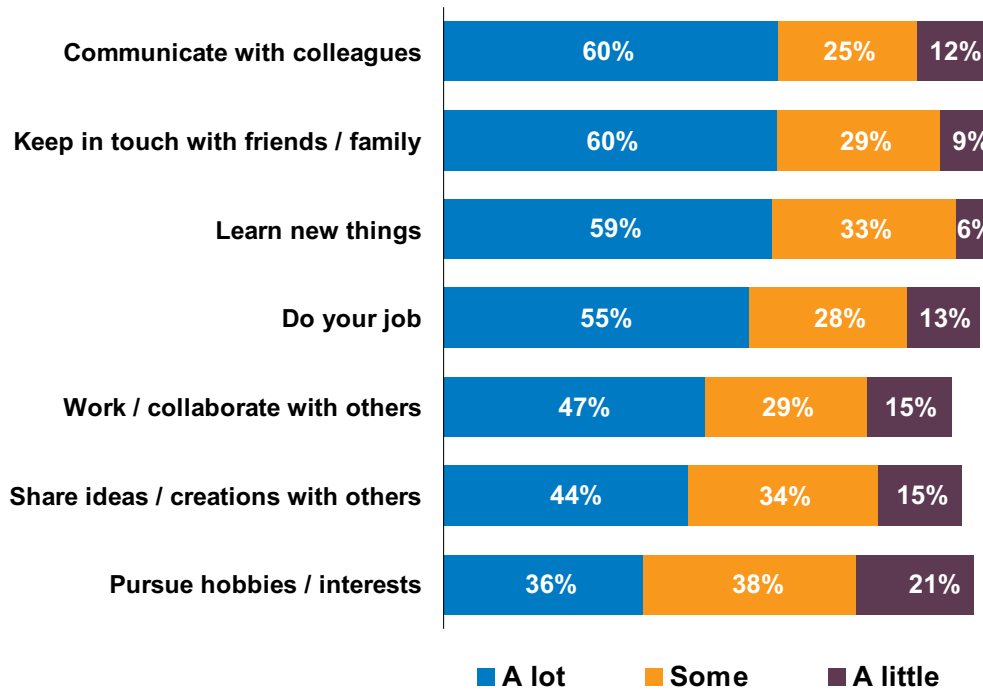


16

Technology applications

Veterinarians (n=1,088)

“To what extent do communications devices, information devices, and the Internet affect your ability to do each of the following?”

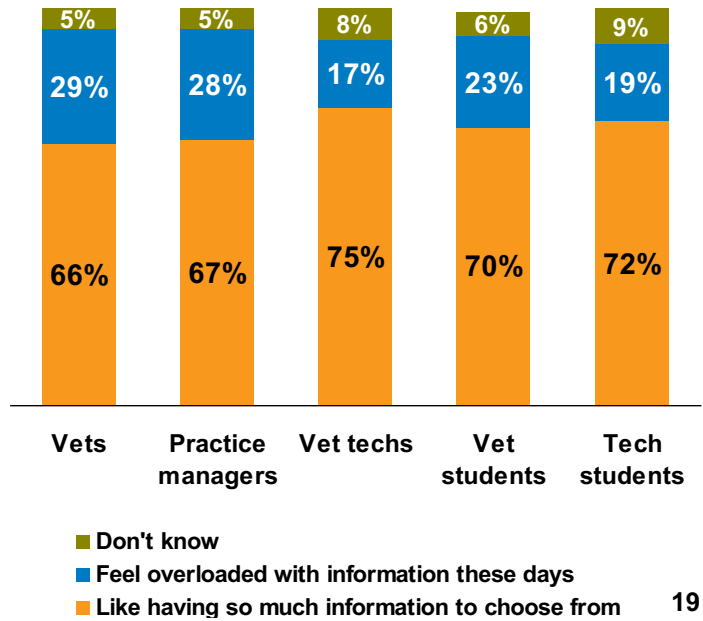
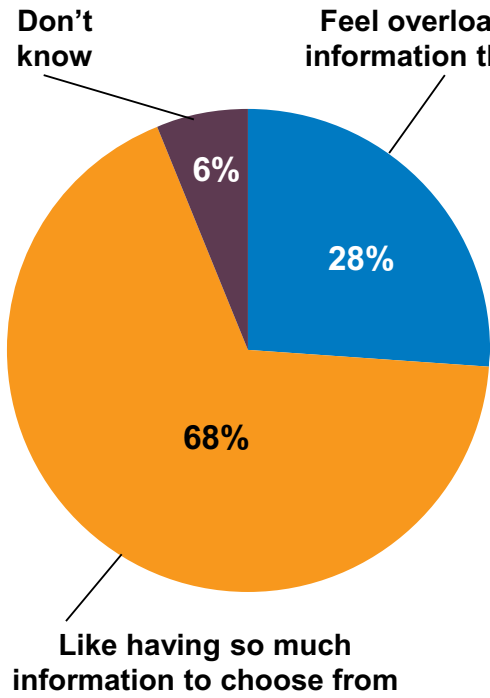


Attitudes to communications technology and information



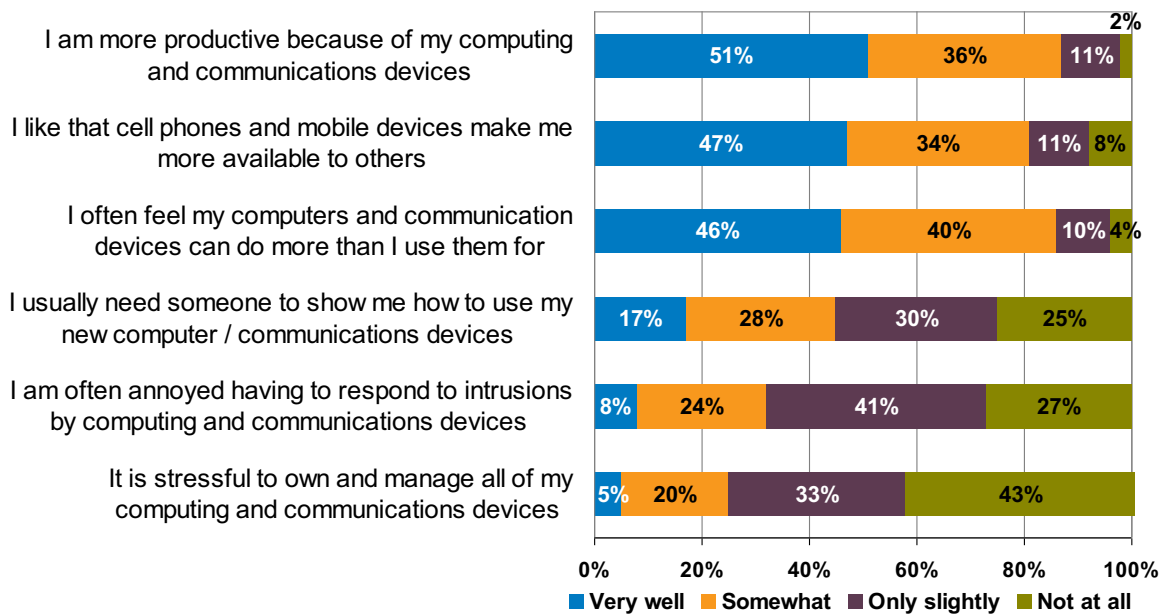
Information overload?

“Considering all the TV news shows, magazines, newspapers, and computer information services, how do you feel these days?”



Attitudes to communications technologies

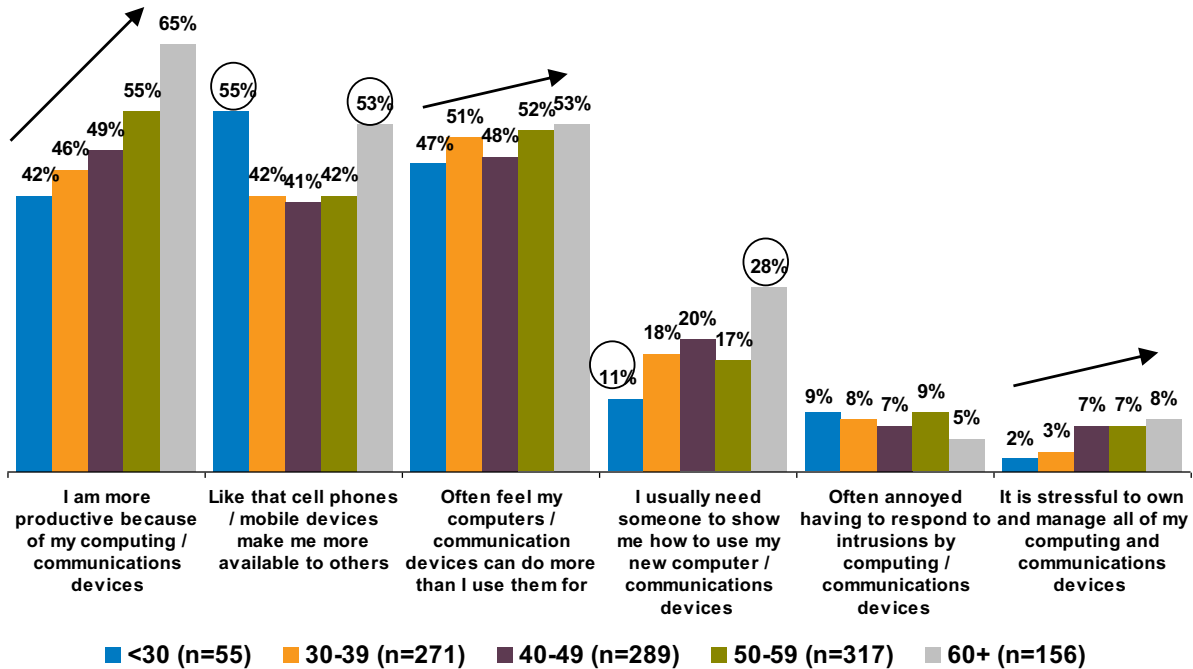
“How well does each one of these statements describe you?”



Attitudes to communications Veterinarians by age

“How well does each one of these statements describe you?”

Percent responding describes “very well”

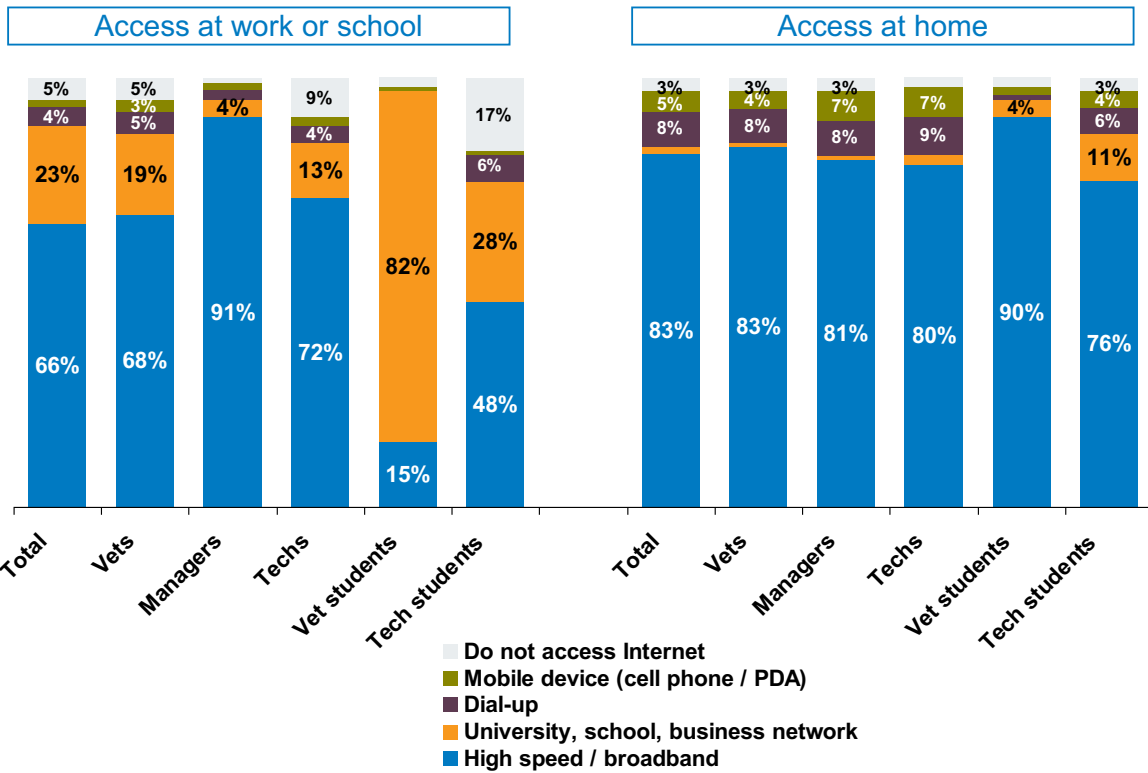


Internet usage at home



Accessing the Internet

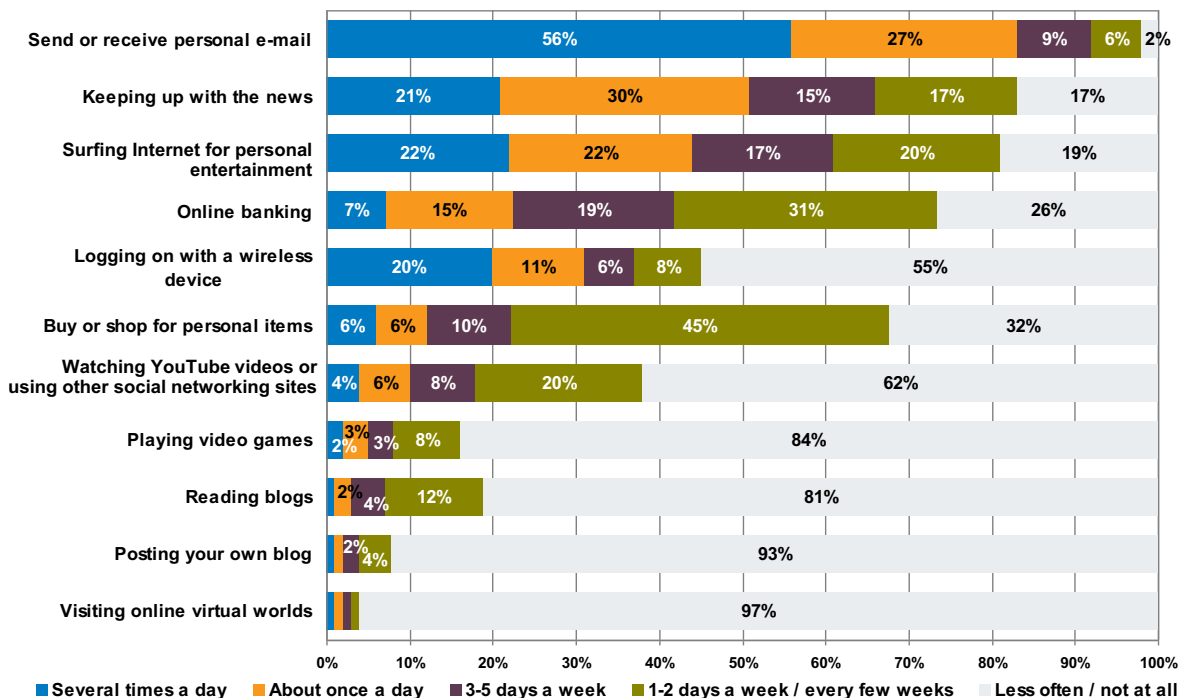
Base = Respondents who use digital devices (n=2,048)



Internet activities at home

Base = Those who have Internet access at home (n=1,989)

At home, how often do you use the Internet for the following activities?

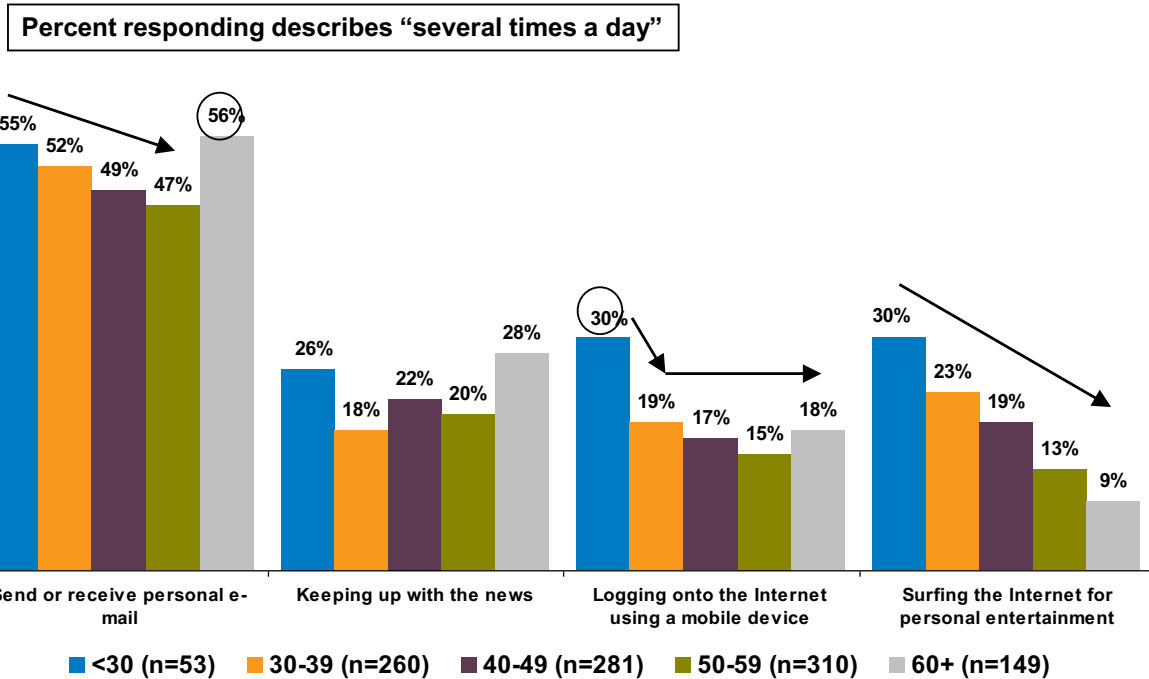


Internet activities at home

Veterinarians by age

Base = Veterinarians with Internet access at home (n=1,053)

“At home, how often do you use the Internet for the following activities?”

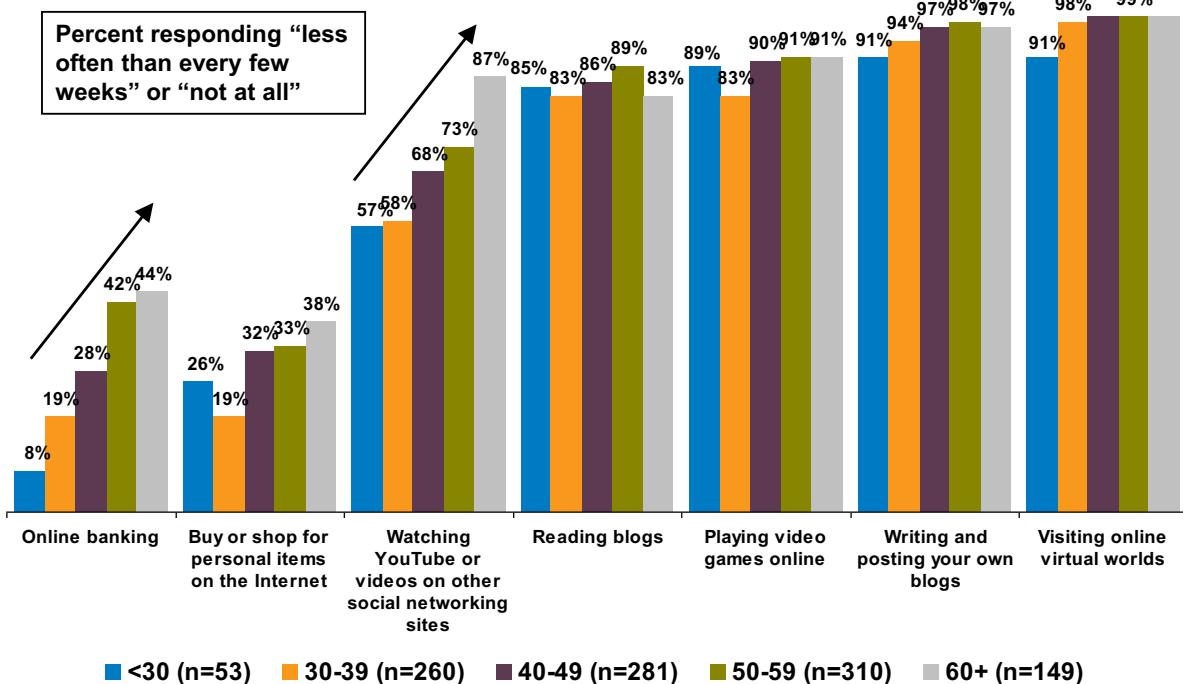


Internet activities at home

Veterinarians by age

Base = Respondents with home Internet access (n=1,989)

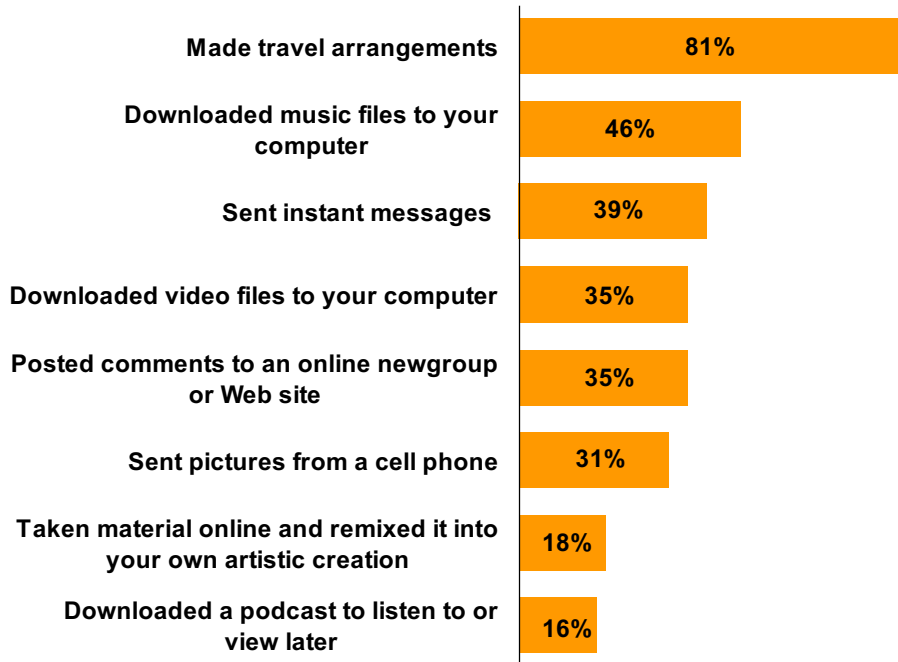
“At home, how often do you use the Internet for the following activities?”



Internet activities

Base = Respondents with home Internet access (n=1,989)

“Which of the following Internet activities have you done in the past 6 months?”

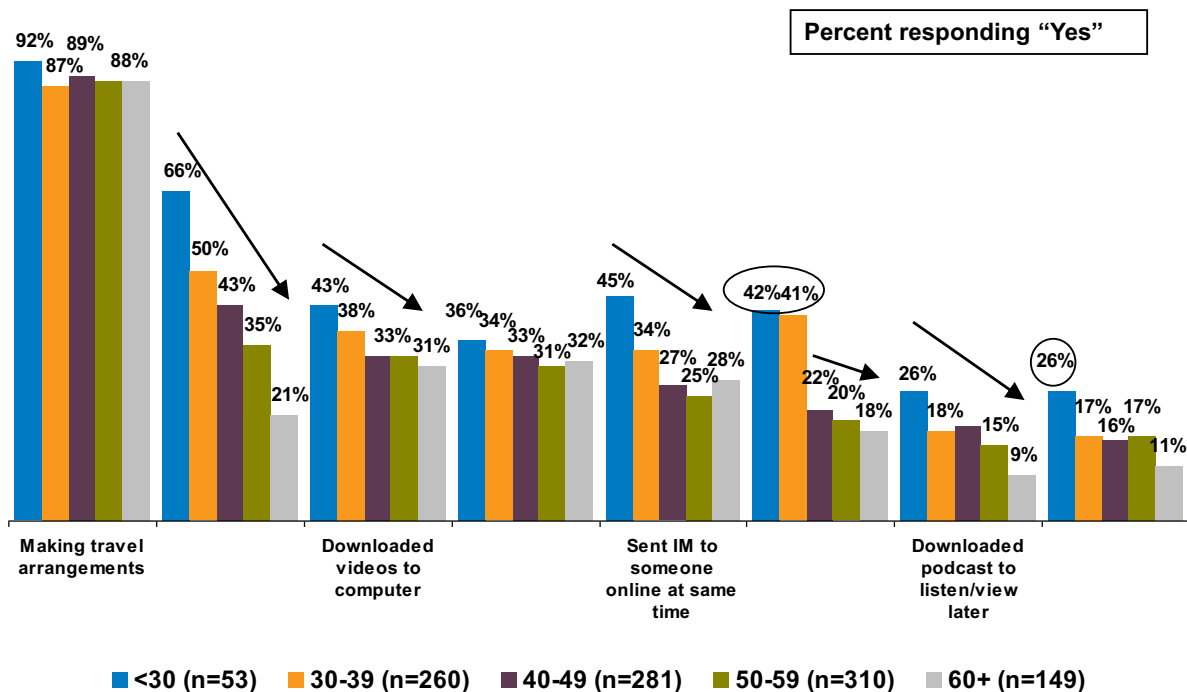


27

Internet activities at home Veterinarians by age

Base = Veterinarians with Internet access at home (n=1,053)

“Which of the following Internet activities have you done in the past six months?”

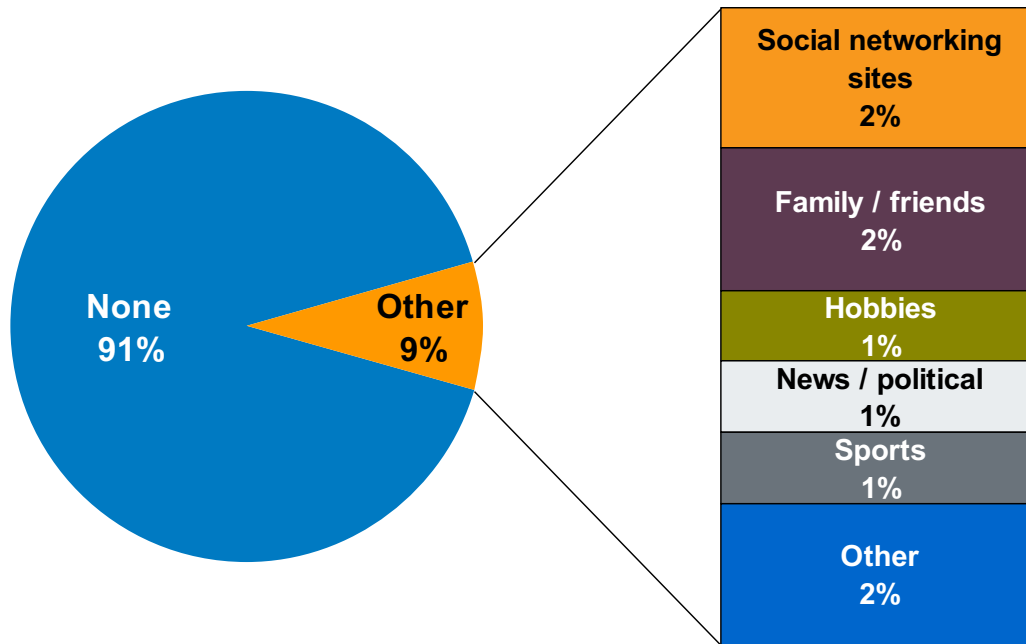


28

Top personal blogs

Respondents with Internet access at home (n=1,989)

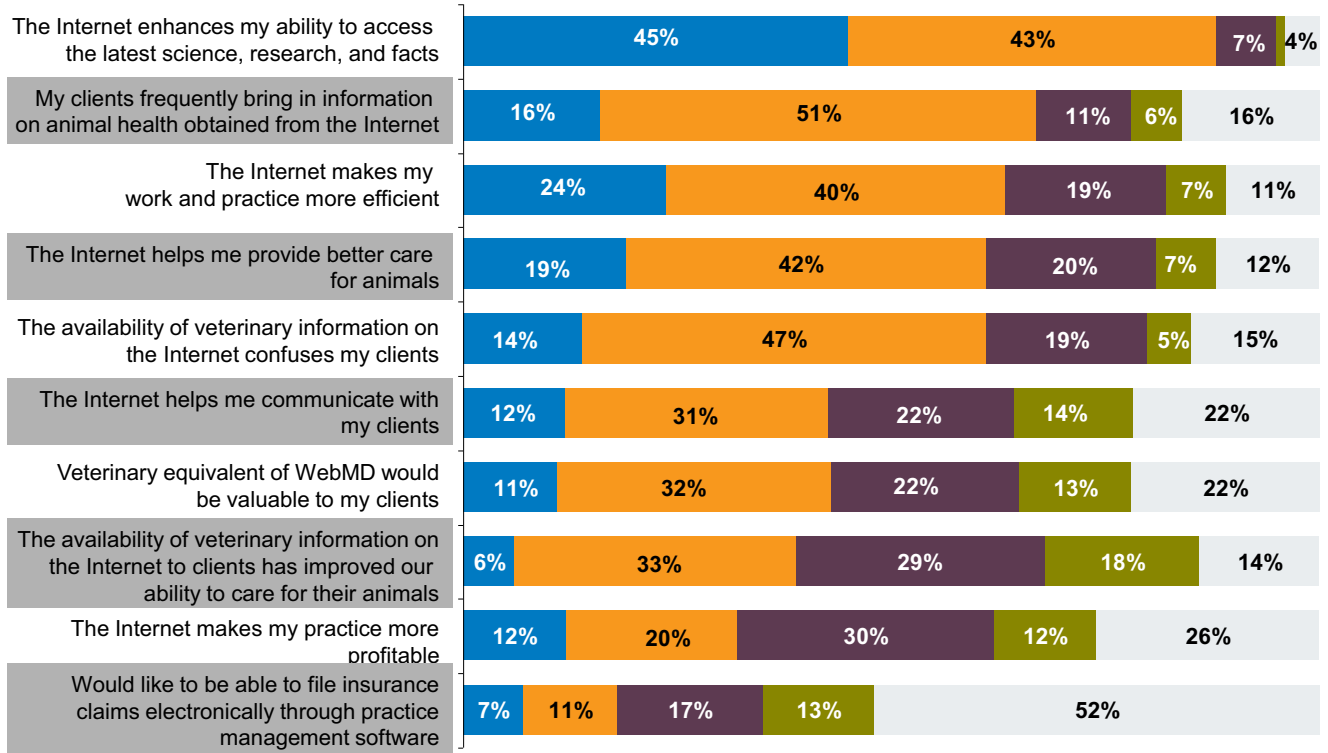
“Outside of work, what blogs are most important to you?”



Veterinary professionals
switching on to the digital world



Views on the Internet and veterinary practice



■ Strongly agree ■ Agree ■ Neither agree nor disagree ■ Disagree / Strongly disagree ■ Don't know / Not applicable

Reliance on online sources to do your job

Base = Those who have Internet access at work (n=1,982)

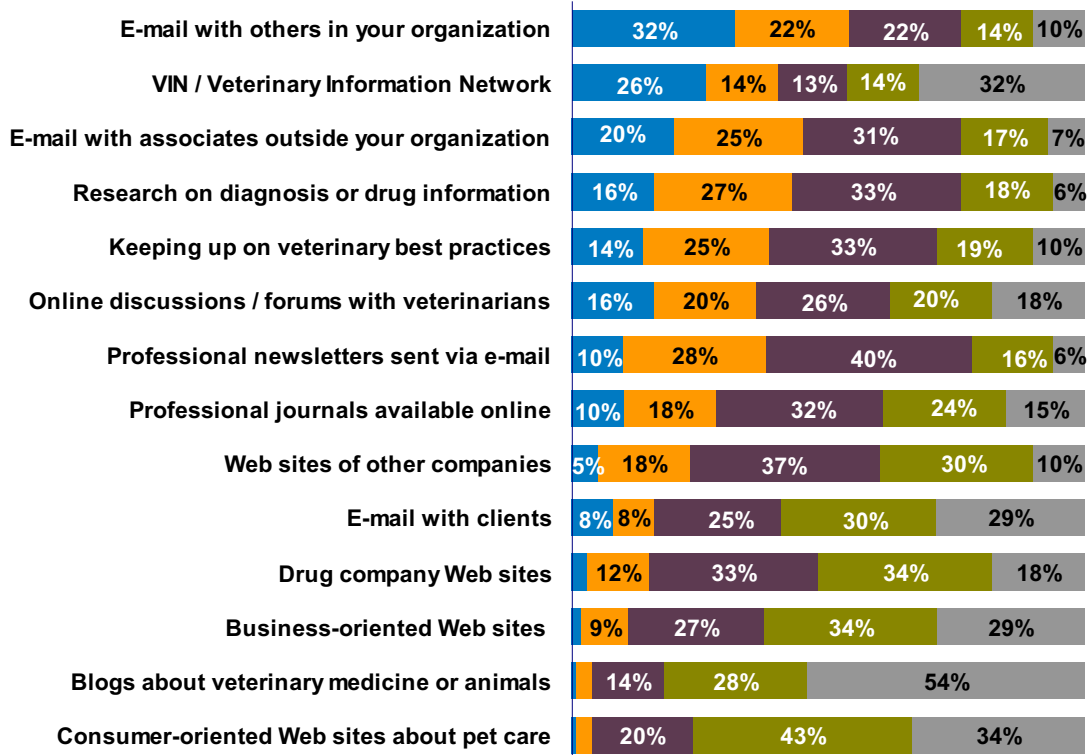


Unlabeled bar segments = 3%

■ Extensively ■ Considerably ■ Some ■ Little ■ Not at all

Reliance on online sources to do your job

Base = Veterinarians with Internet access at work (n=1,063)



Unlabeled bar segments = 1%, 2% or 3%

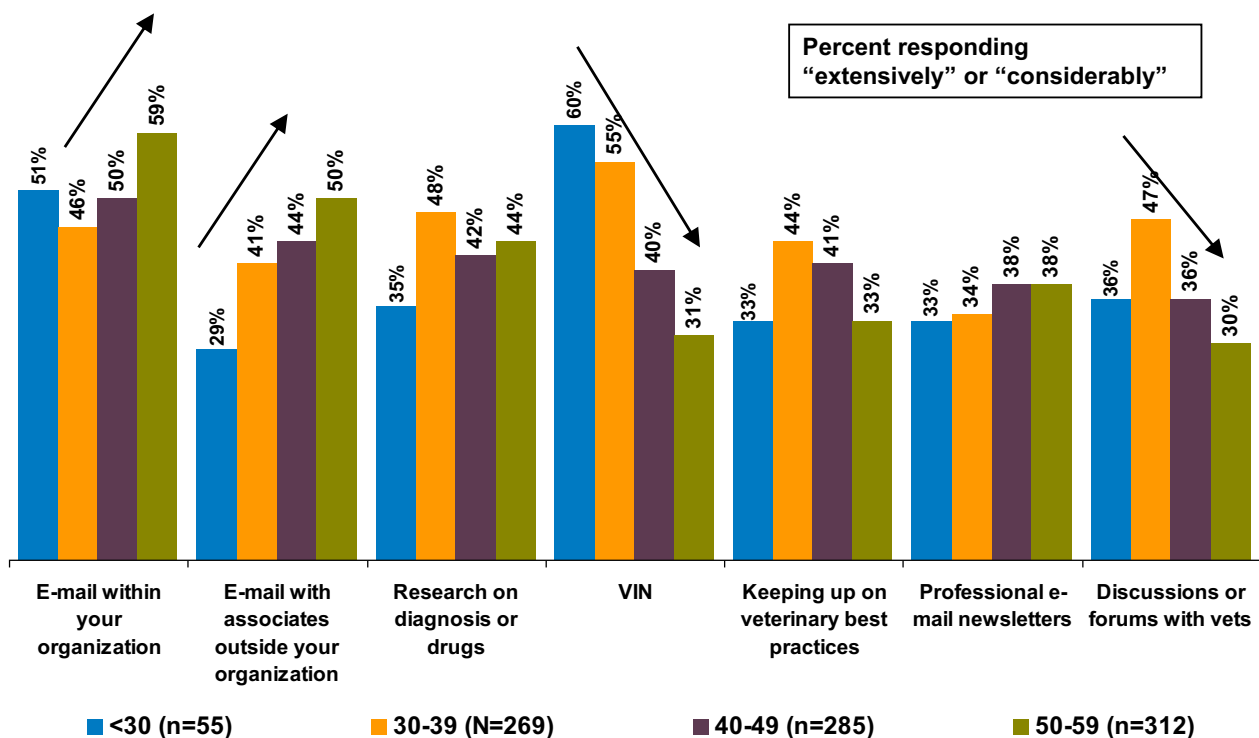
Extensively Considerably Some Little Not at all

33

Reliance on online sources

Base = Veterinarians with Internet access at work (n=1,063)

“Which of the following Internet activities have you done in the past six months?”

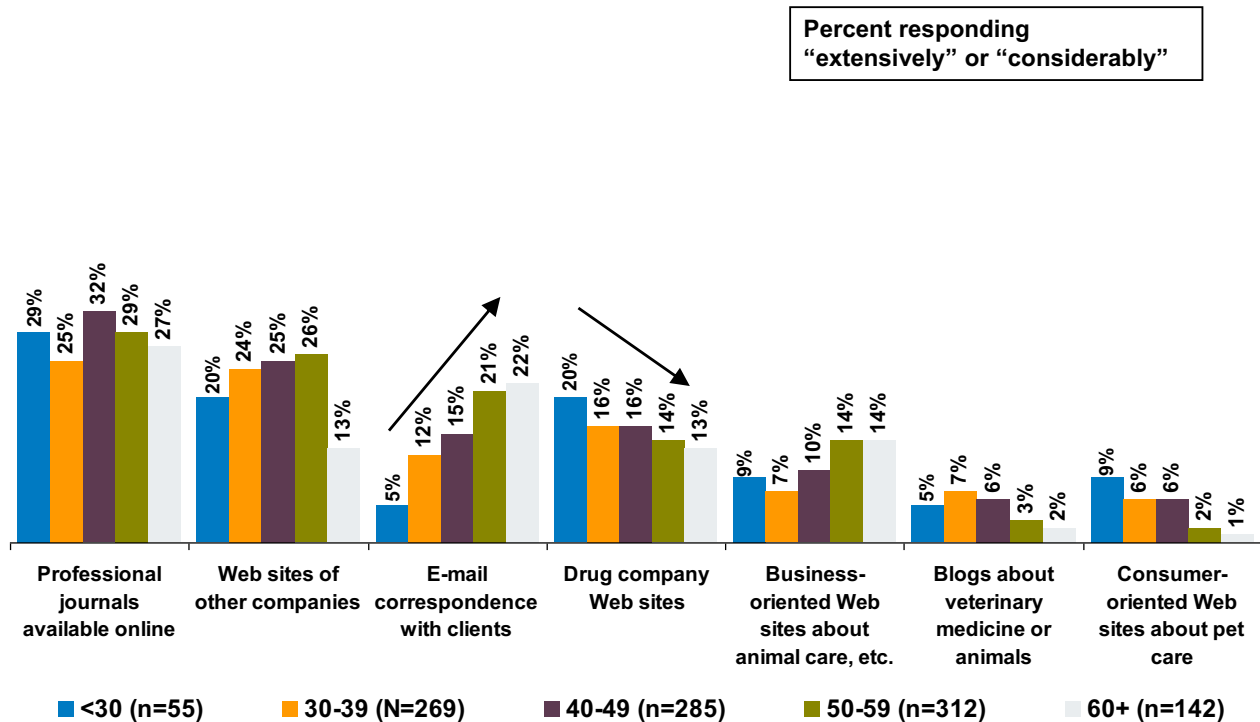


34

Reliance on online sources

Base = Veterinarians with Internet access at work (n=1,063)

“Which of the following Internet activities have you done in the past six months?”

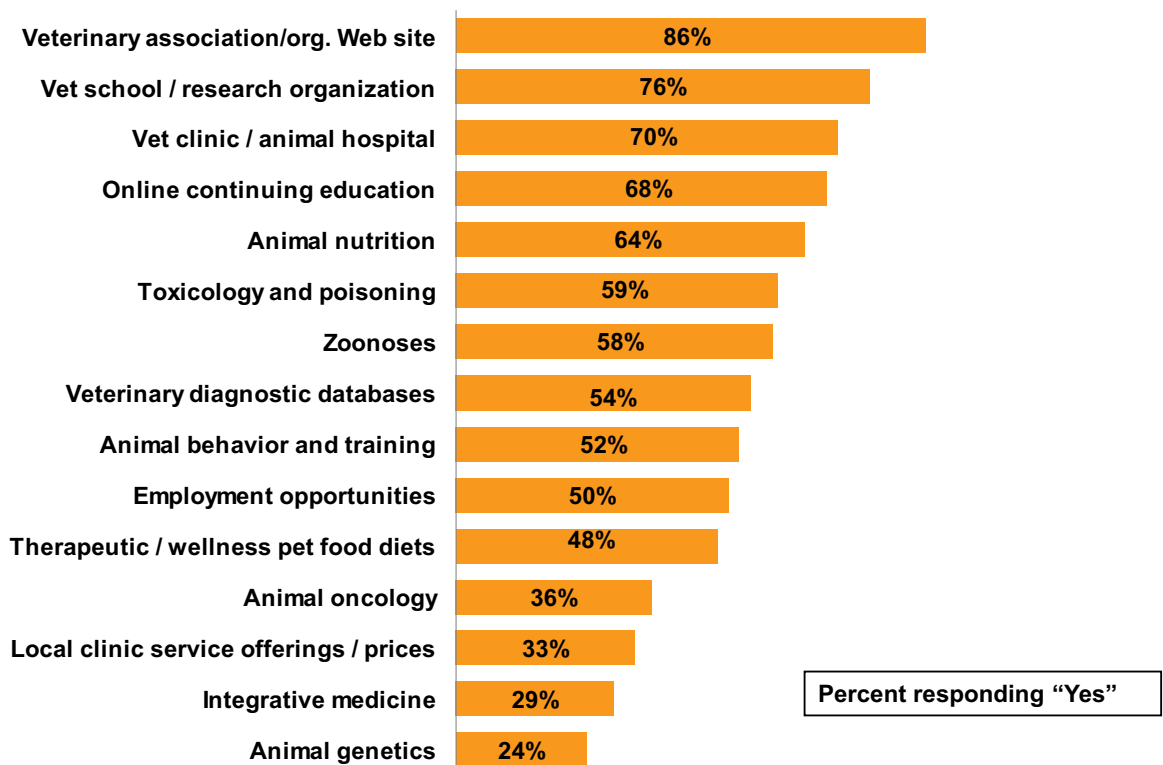


35

Seeking information online

Respondents with Internet access at work (n=1,982)

“Over the past six months, have you visited Web sites for information on the following topics?”

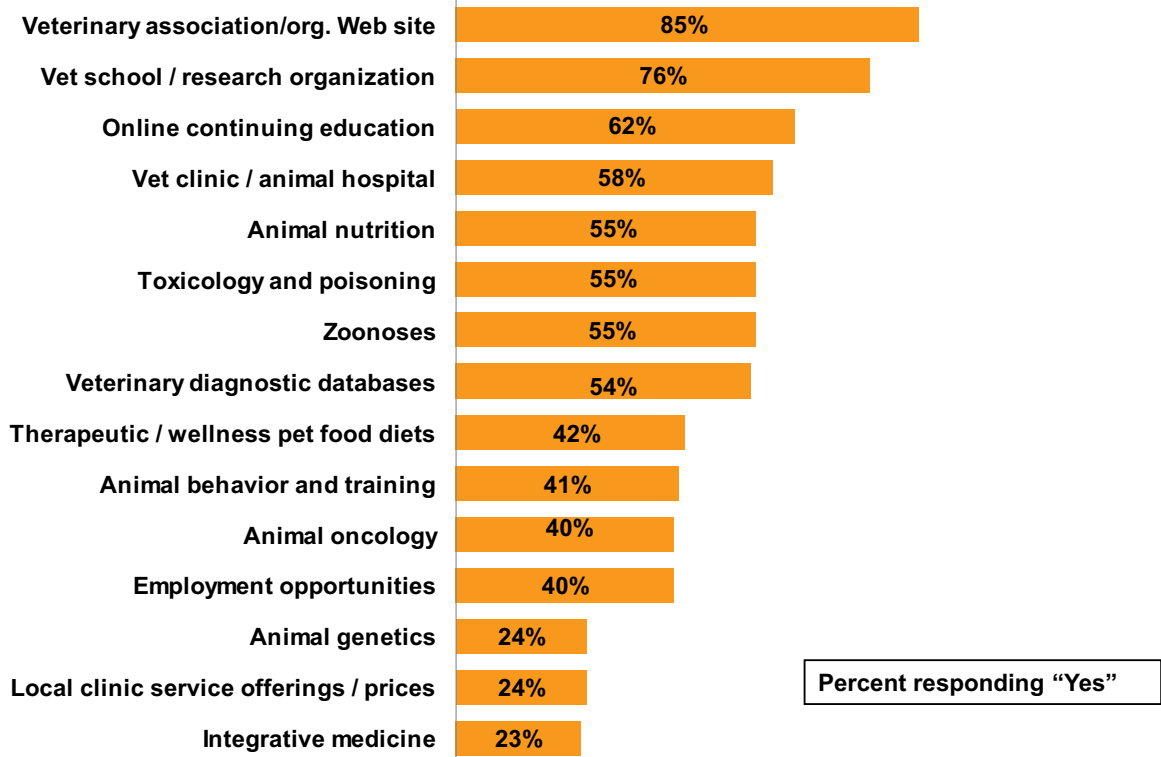


36

Seeking information online

Base = Veterinarians with Internet access at work (n=1,063)

“Over the past six months have you visited websites for information on the following topics?”

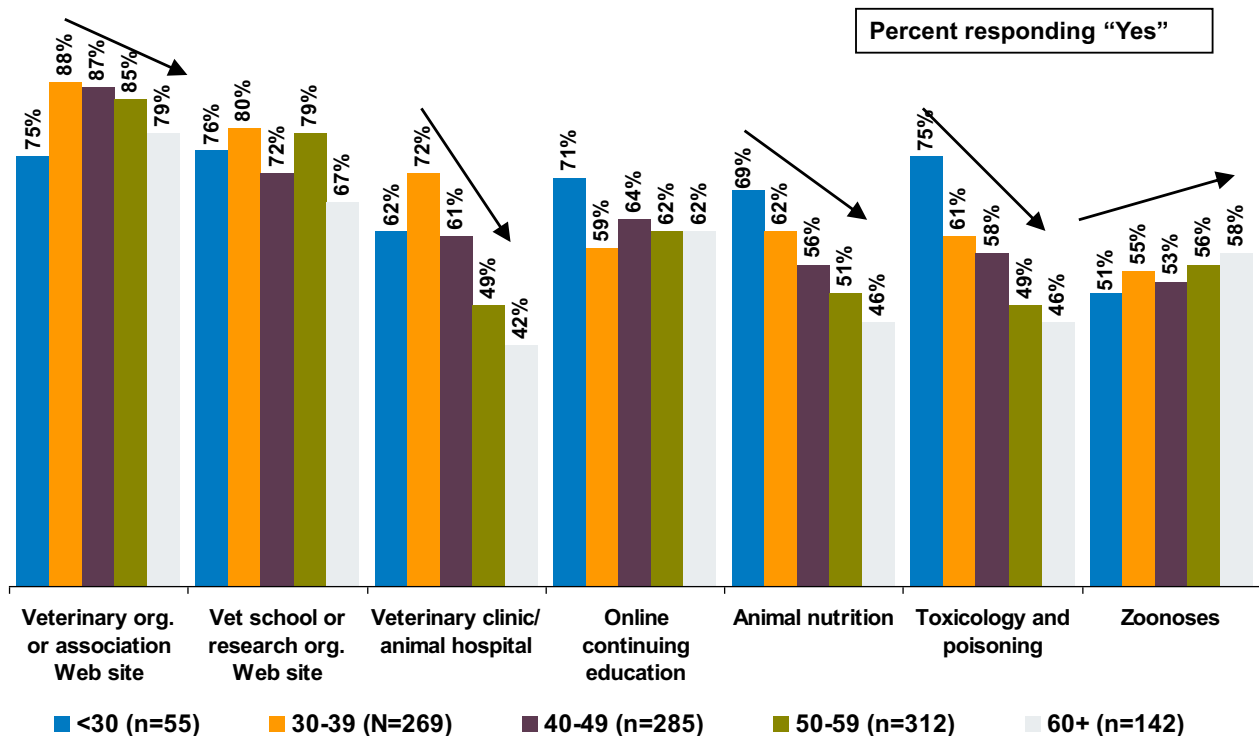


37

Seeking information online

Veterinarians with Internet access at work (n=1,063)

“Over the past six months, have you visited Web sites for information on the following topics?”



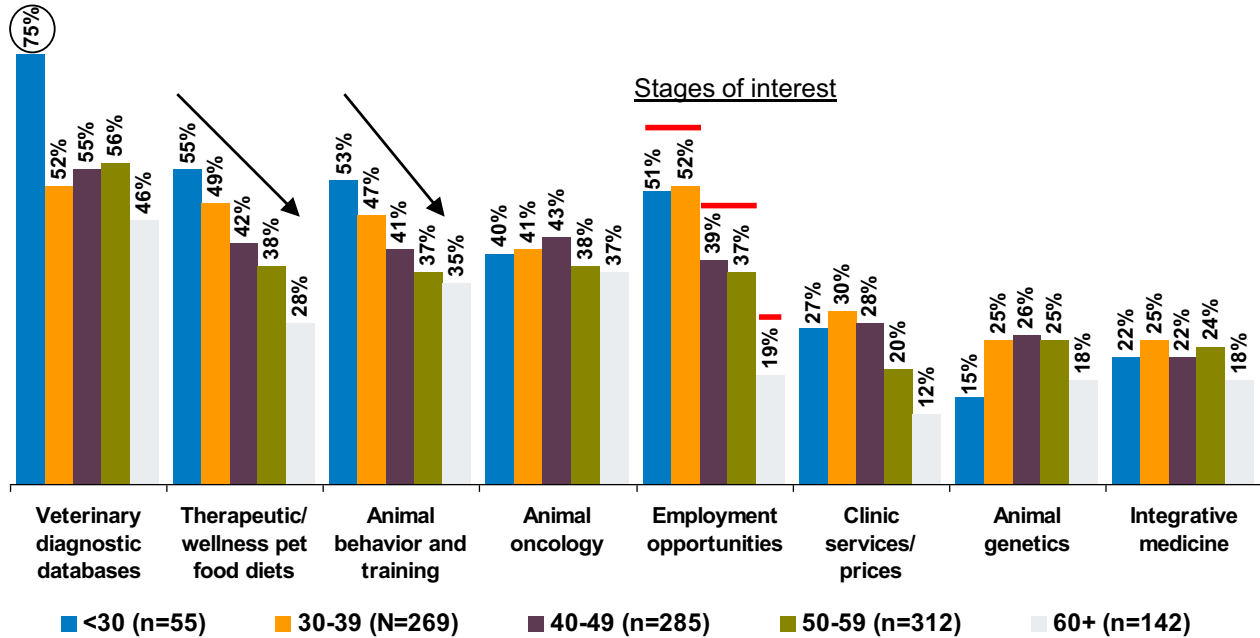
38

Seeking information online

Veterinarians with Internet access at work (n=1,063)

“Over the past six months, have you visited Web sites for information on the following topics?”

Percent responding “Yes”

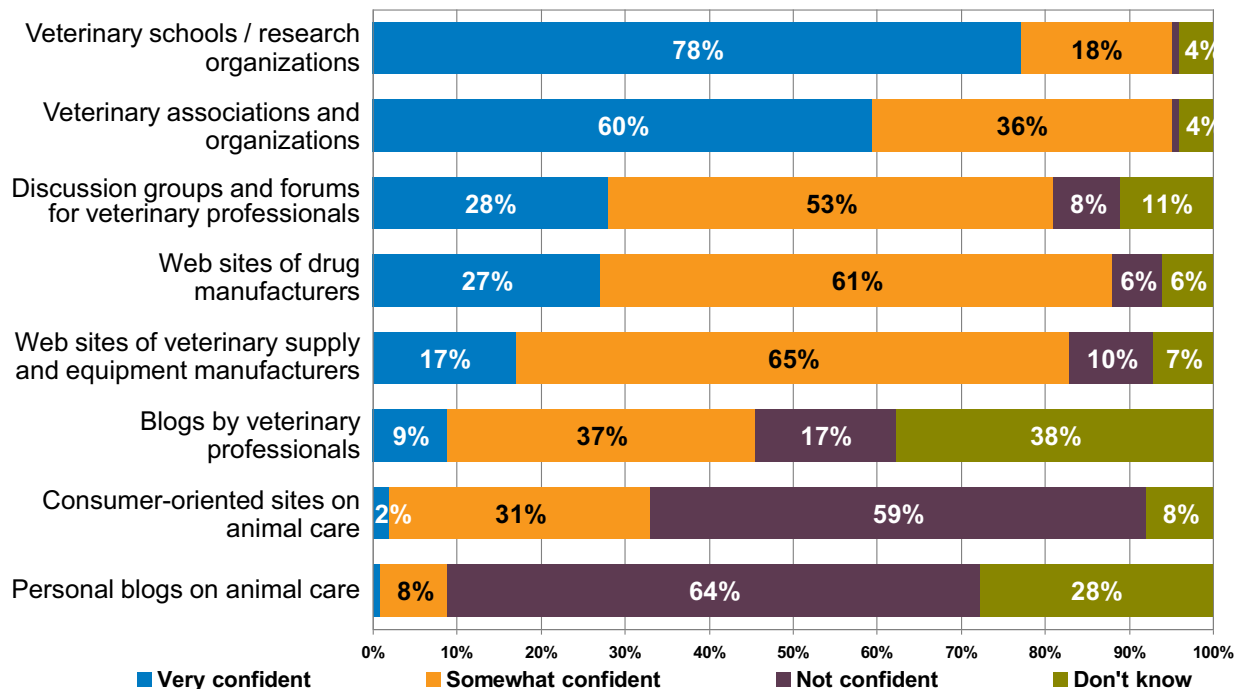


39

Confidence in Internet sources

Base = Those who have Internet access at work (n=1,982)

“How confident are you of veterinary-based information you find from the following Internet sources?”



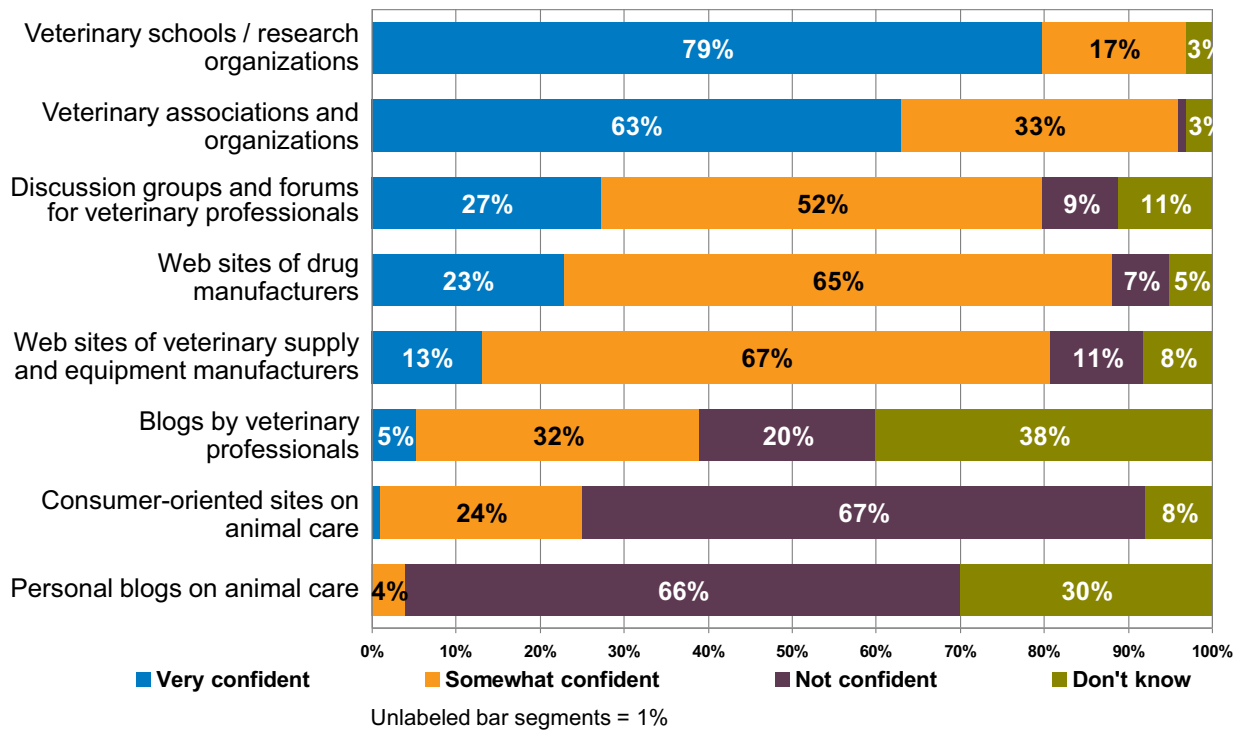
Unlabeled bar segments = 1%

40

Confidence in Internet sources

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“How confident are you of veterinary-based information you find from the following Internet sources?”

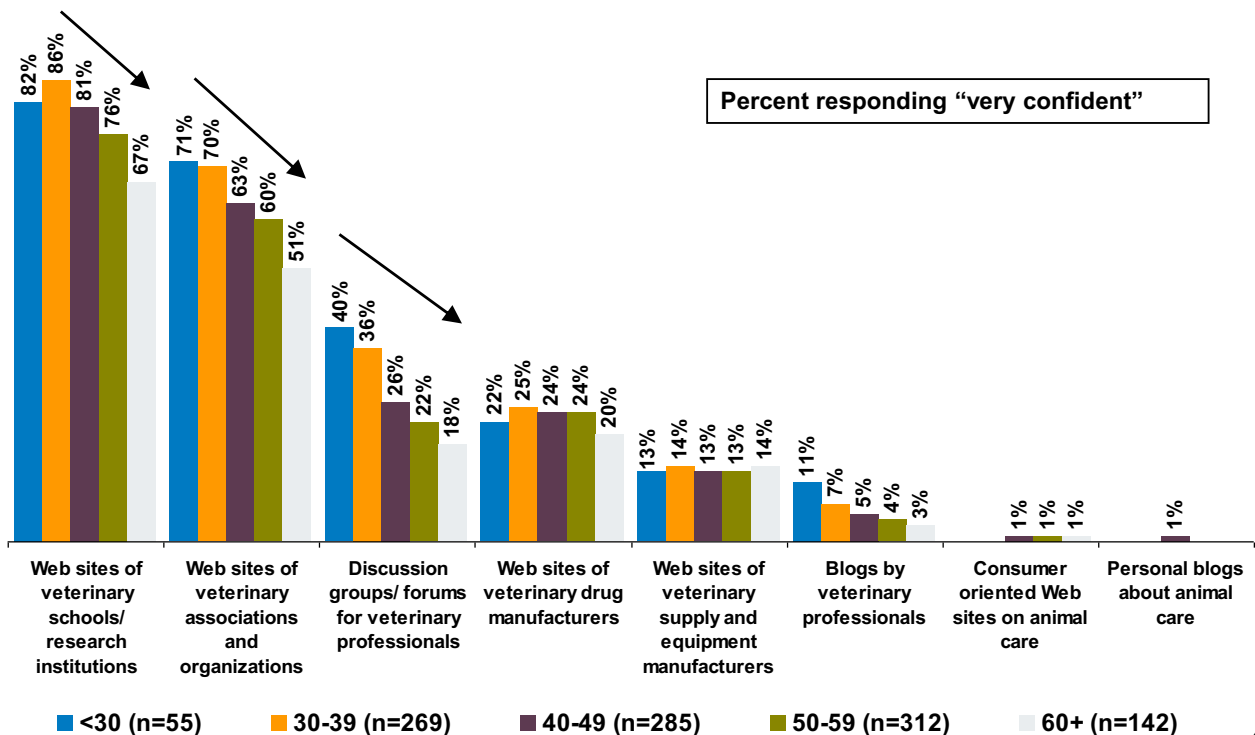


41

Confidence in Internet sources

Veterinarians with Internet access at work (n=1,063)

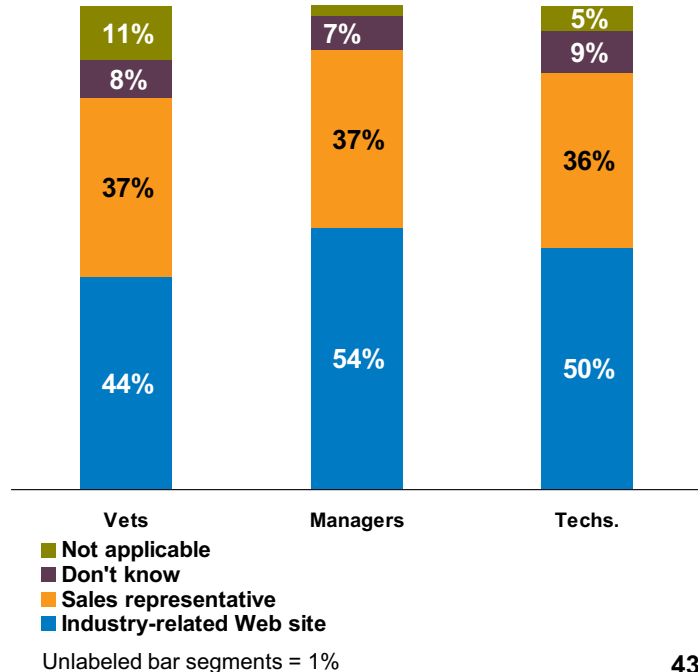
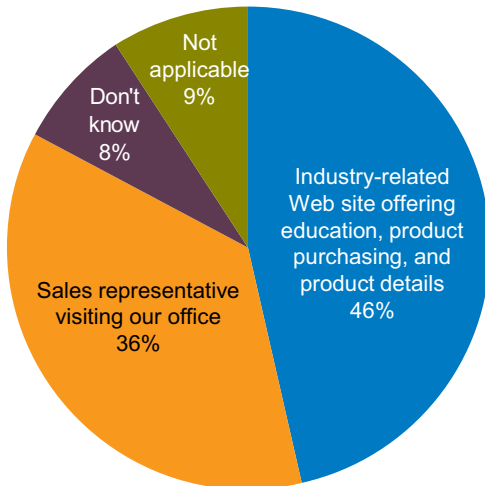
“How confident are you of veterinary-based information you find from the following Internet sources?”



42

➤ Accessing product information

“How would you prefer to receive information about veterinary products from manufacturers?”

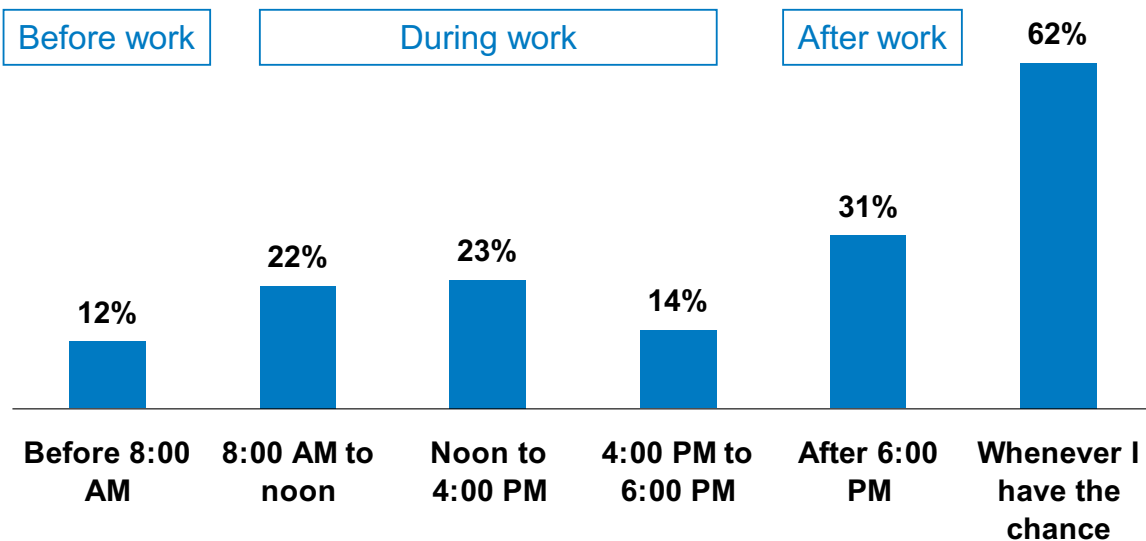


43

➤ Daily Internet use

Respondents with Internet access at work (n=1,982)

“At what time of day do you use the Internet most for work or school?”



Total exceeds 100% due to multiple responses

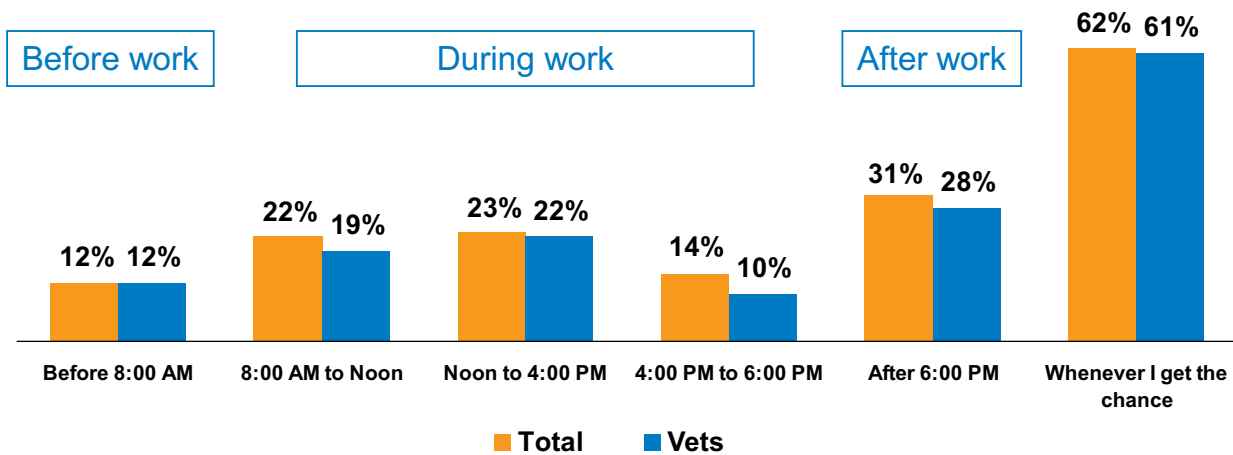
44

Daily Internet use

Respondents with Internet access at work (n=1,982)

Veterinarians with Internet access at work (n=1,063)

“At what time of day do you use the Internet most for work or school?”



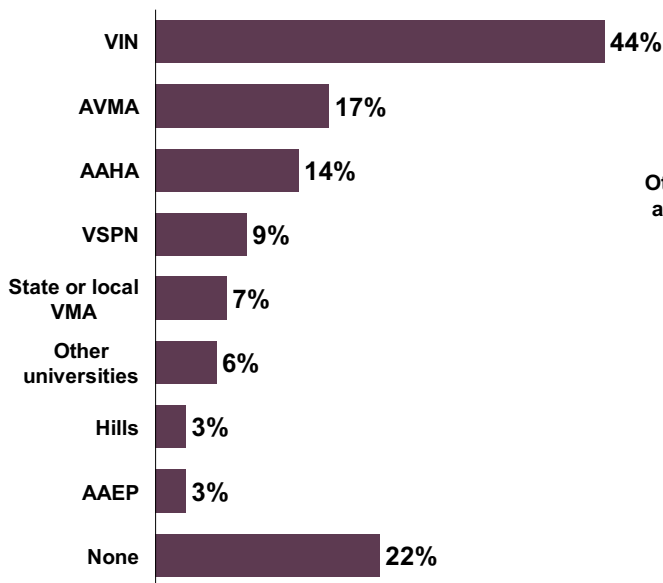
Total exceeds 100% due to multiple responses

Top veterinary Web sites / blogs

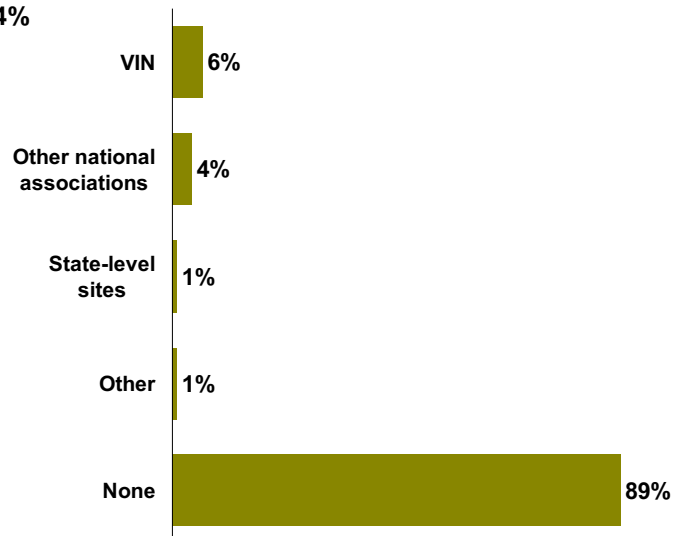
Base = Those who have Internet access at work (n=1,982)

“What are your favorite veterinary-specific Web sites?”

(Only those with more than 2% response are shown)



“What veterinary / professional blogs are most important to you?”

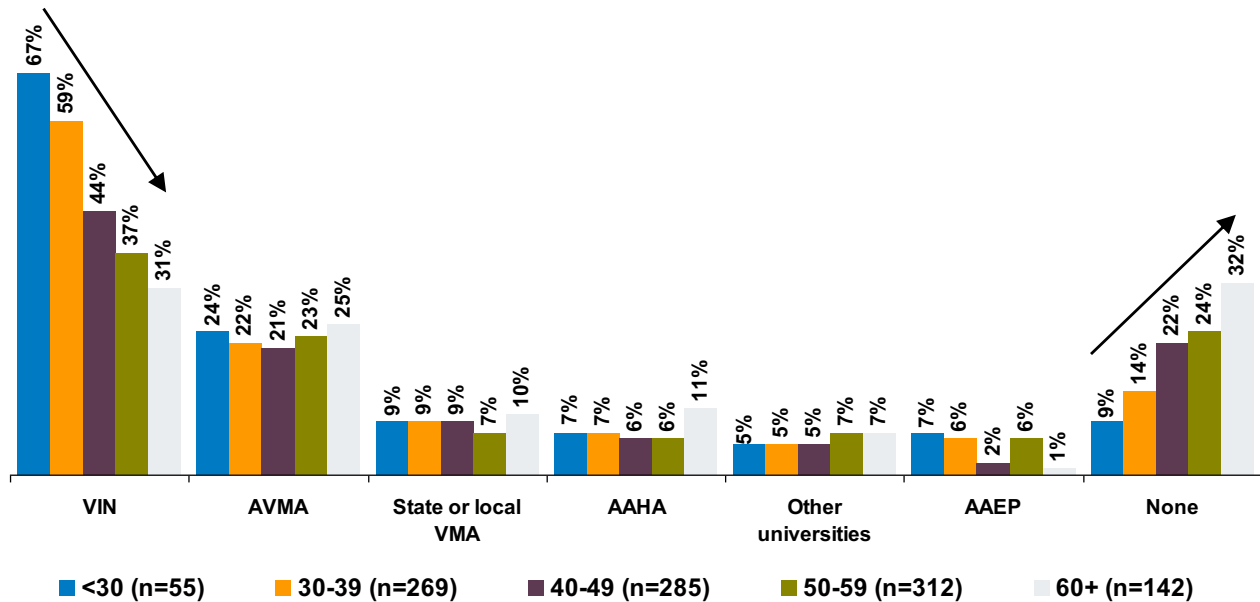


Totals exceed 100% due to multiple responses

Top veterinary Web sites

Veterinarians with Internet access at work (n=1,063)

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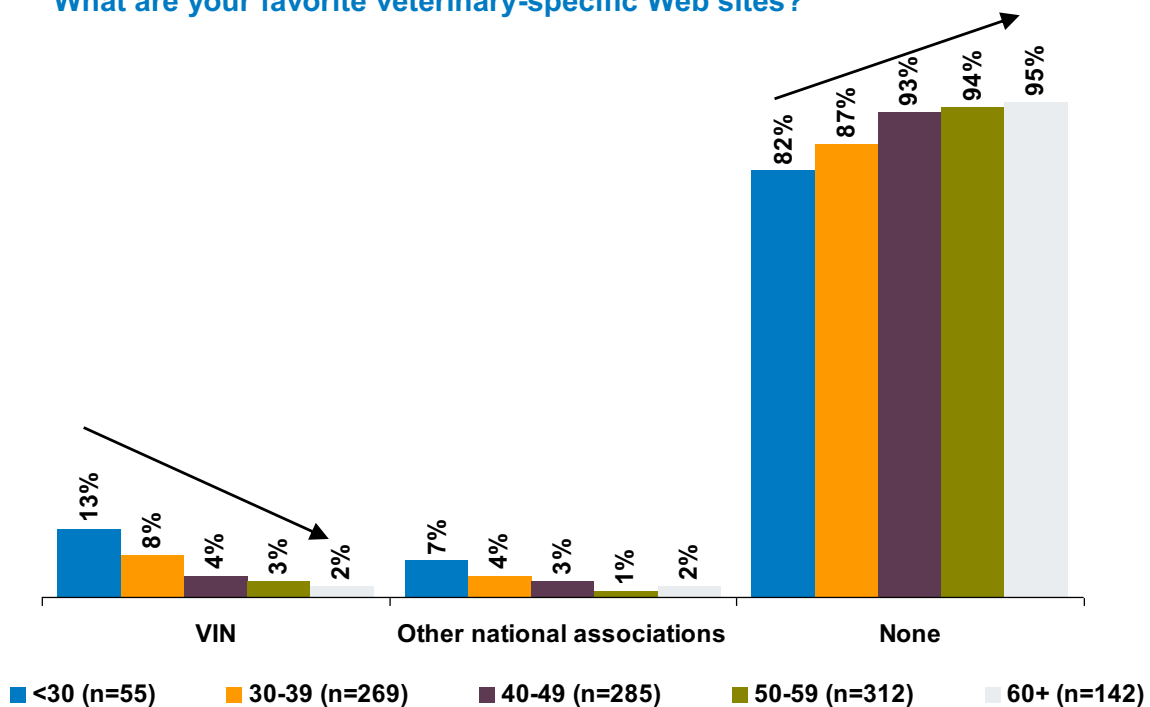
Totals exceed 100% due to multiple responses

47

Top veterinary Web blogs

Veterinarians with Internet access at work (n=1,063)

“What are your favorite veterinary-specific Web sites?”



Totals exceed 100% due to multiple responses

48

Veterinary clinics and animal hospitals on the Web

DIGITAL CLINIC STUDY



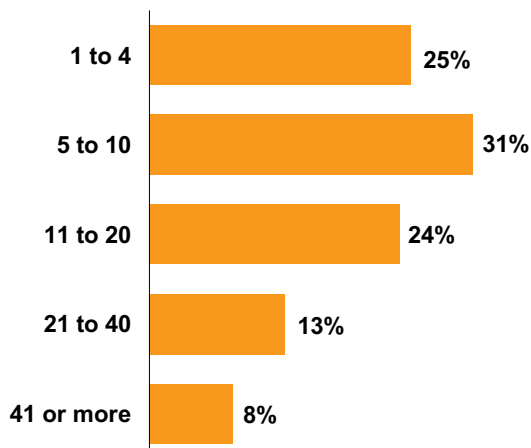
FLEISHMAN HILLARD
INTERNATIONAL COMMUNICATIONS



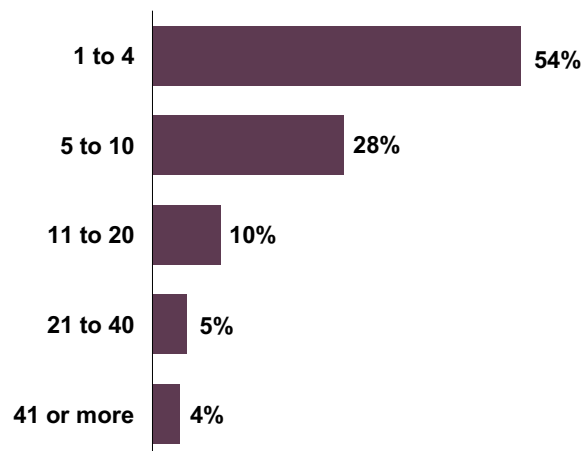
Practice profiles: Computer and Internet use

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How many employees at your practice regularly use a computer as part of their job?*



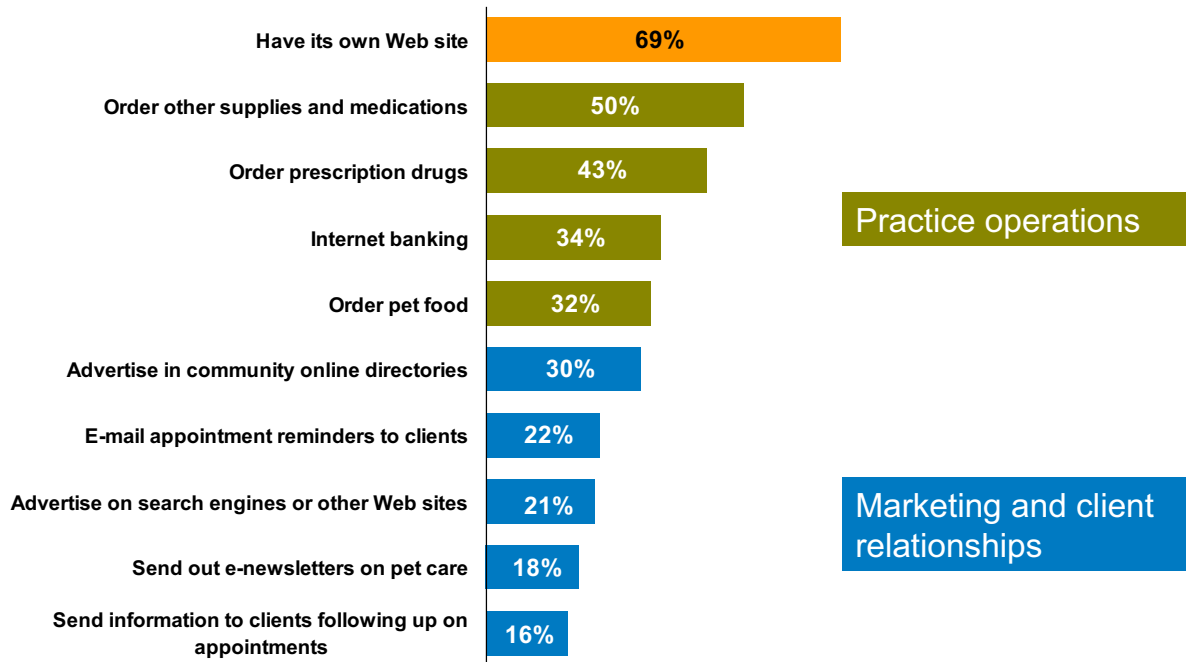
How many employees at your practice regularly use the Internet as part of their job?*



*Base = Those who say they work in a veterinary practice (n=1,505)

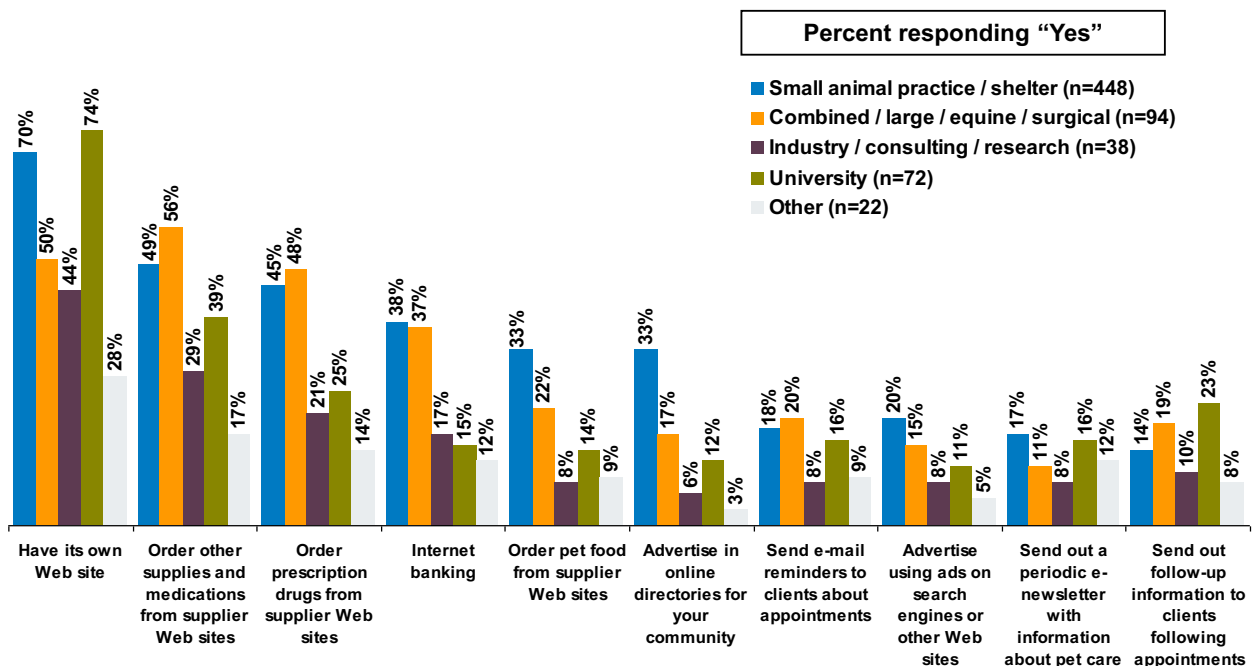
Practice usage of the Internet

“Does your veterinary clinic, hospital, or practice do any of the following using the Internet?”



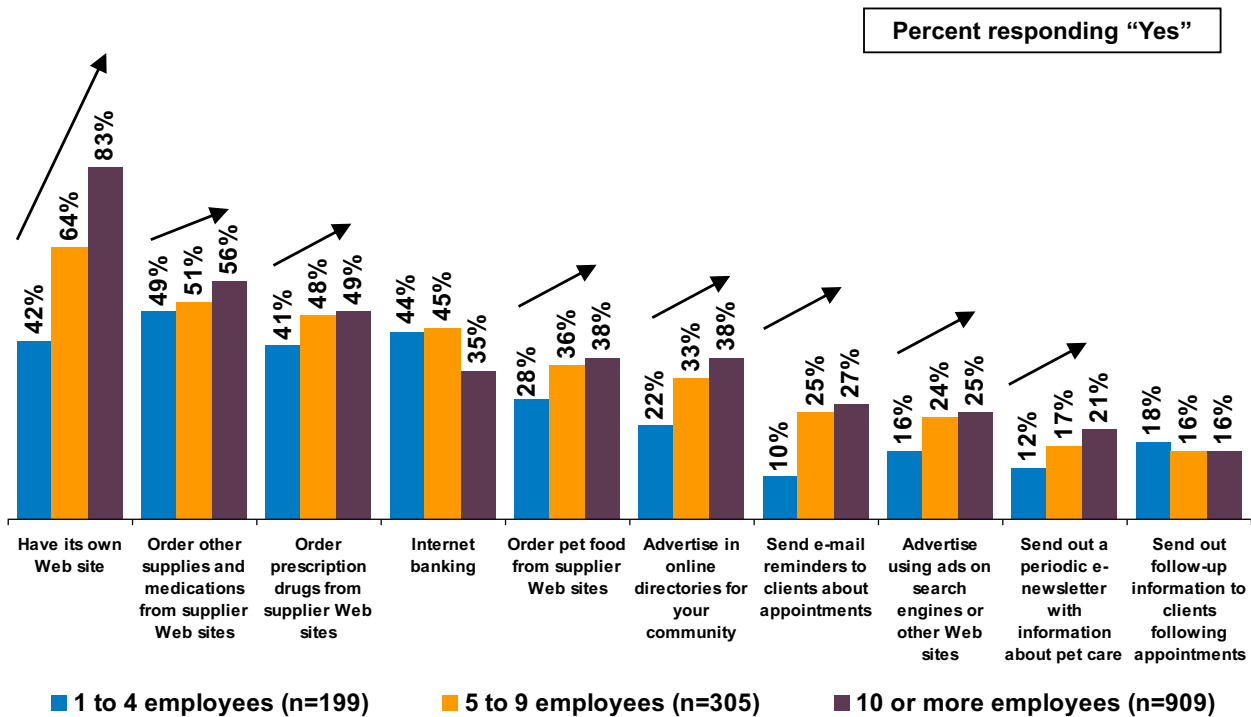
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Practice usage of the Internet

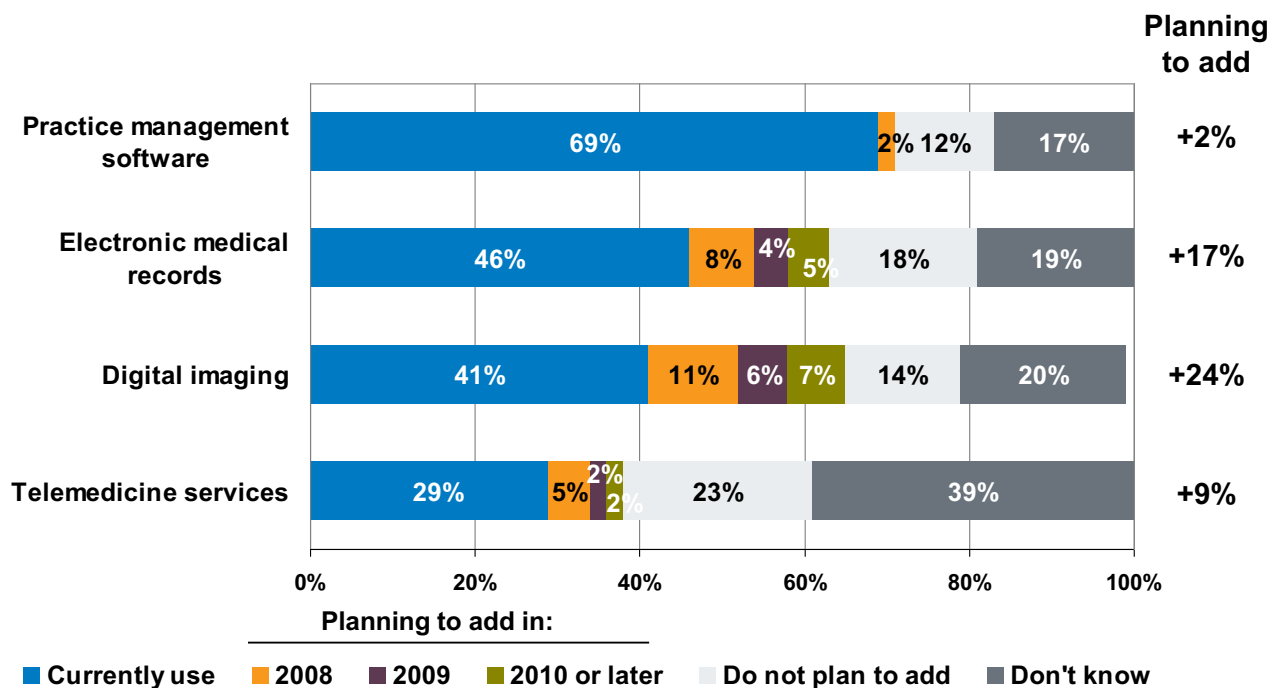
“Does your veterinary clinic, hospital, or practice do any of the following using the Internet?”



53

Practice usage of technology

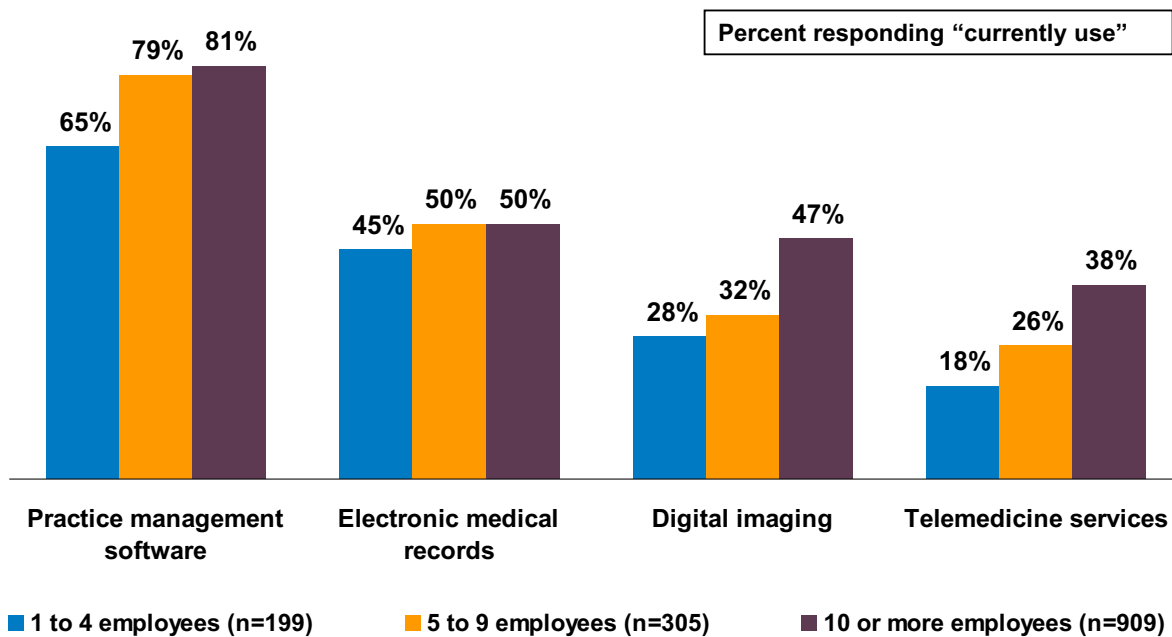
“What are your practice’s current usage or plans for the following technologies?”



54

Practice usage of technology

“What are your practice’s current usage or plans for the following technologies?”

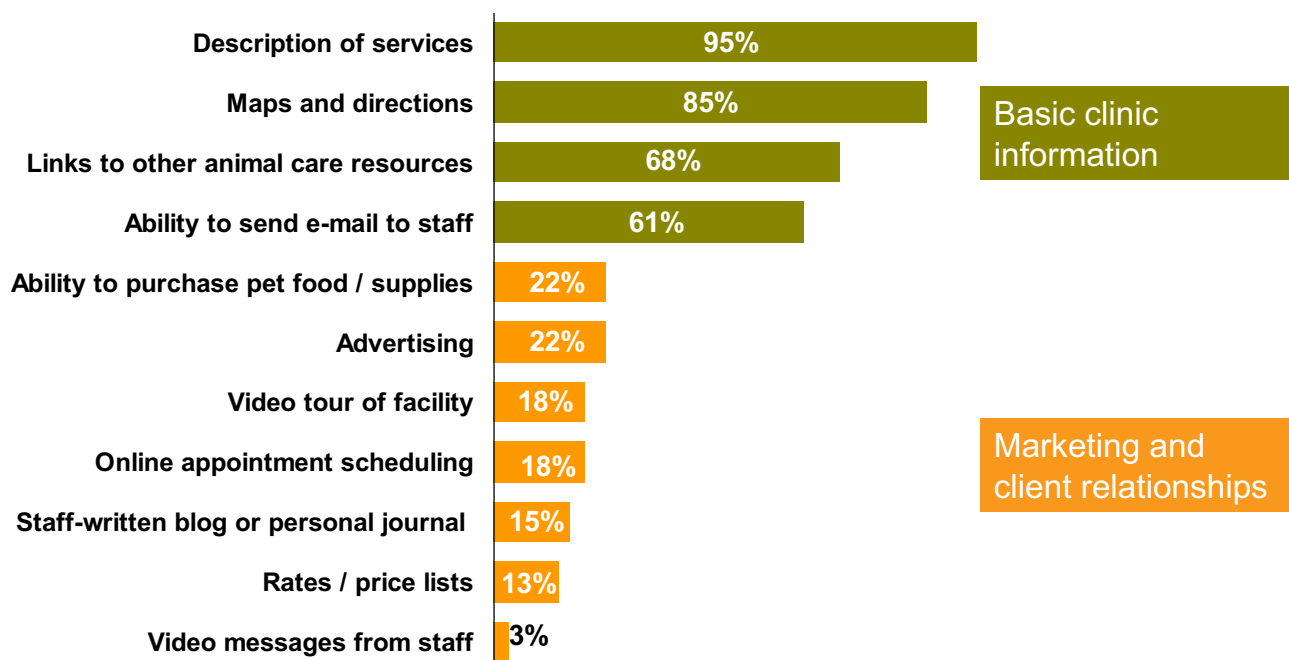


55

Practice Web site features

Base = Those whose clinic, hospital, or practice has a Web site (n=1,202)

“Which of the following features does your Web site provide?”

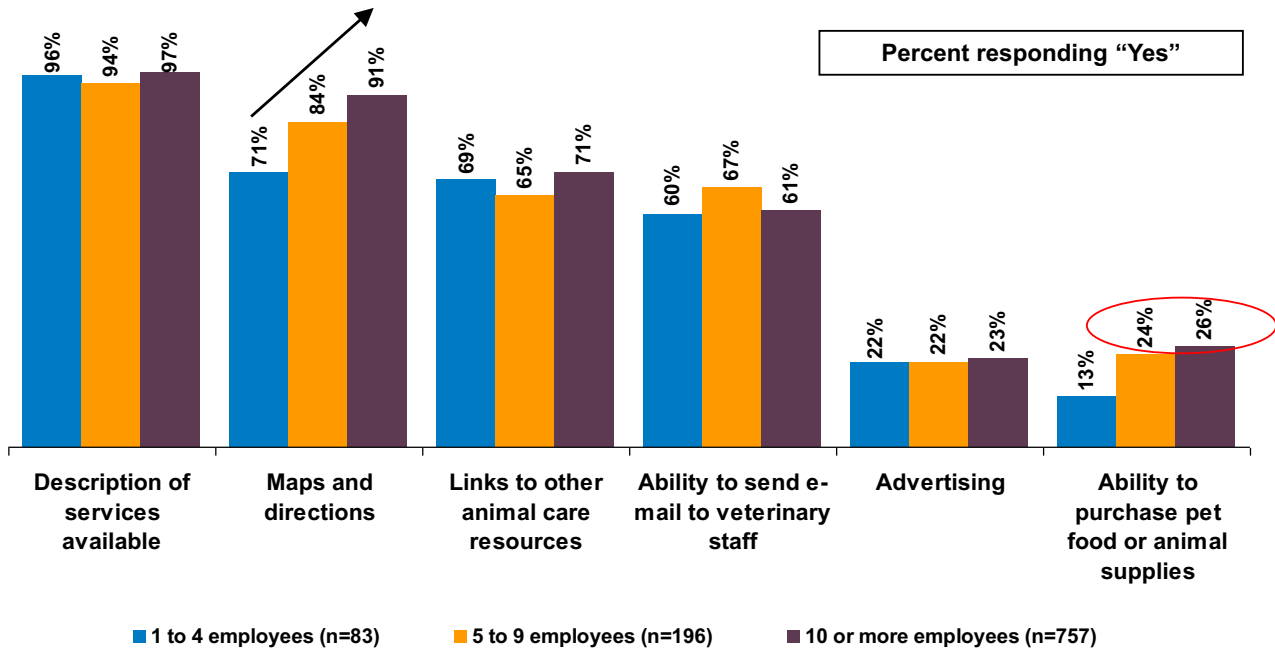


56

Practice Web site features

Base = Those whose clinic, hospital, or practice has a Web site (n=1,202)

“Which of the following features does your website provide?”

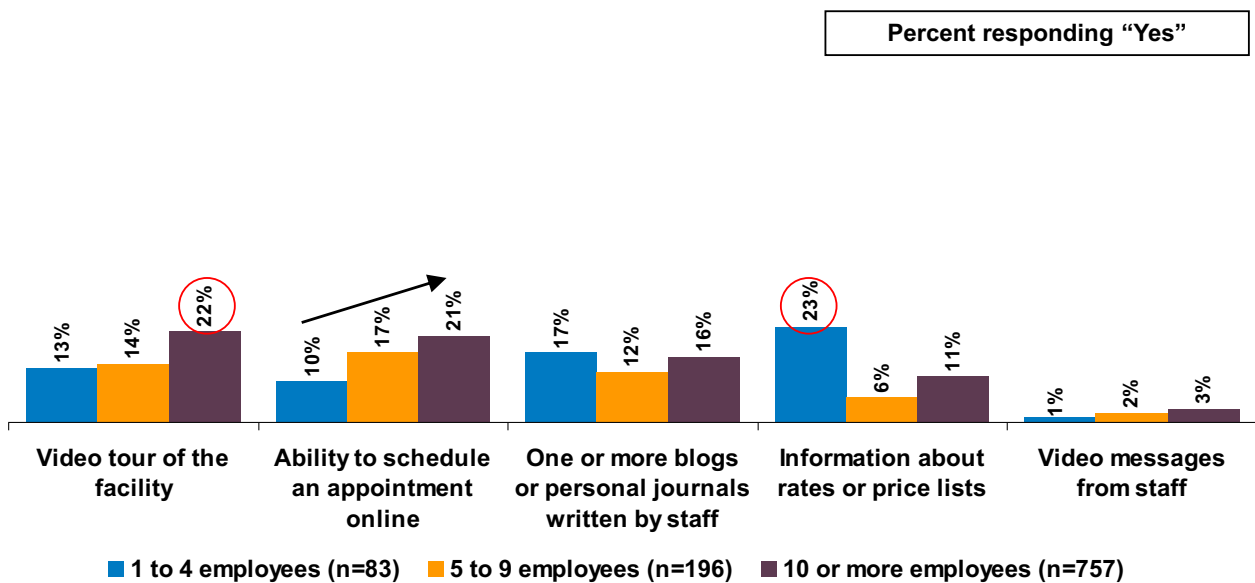


57

Practice Web site features

Base = Those whose clinic, hospital, or practice has a Web site (n=1,202)

“Which of the following features does your Web site provide?”

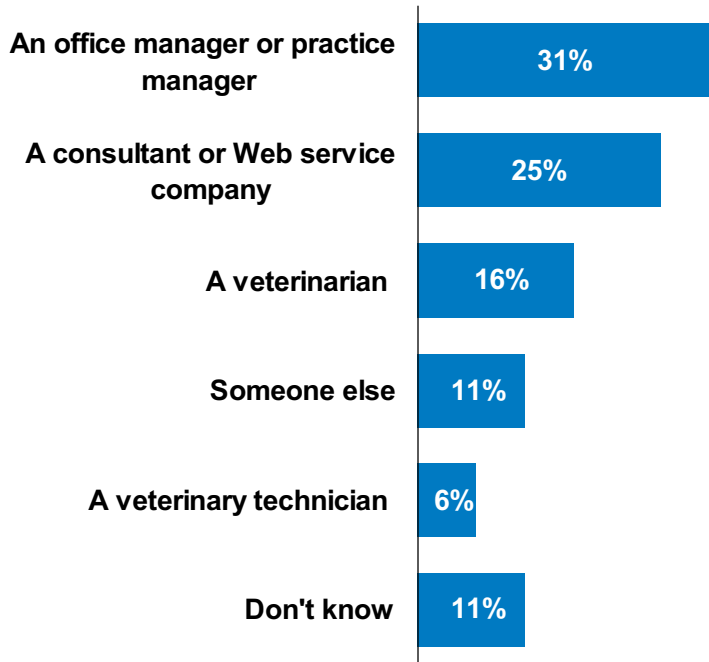


58

Practice Web site updates

Base = Those whose clinic, hospital, or practice has a Web site (N=1,202)

“Who updates your clinic or hospital’s Web site?”

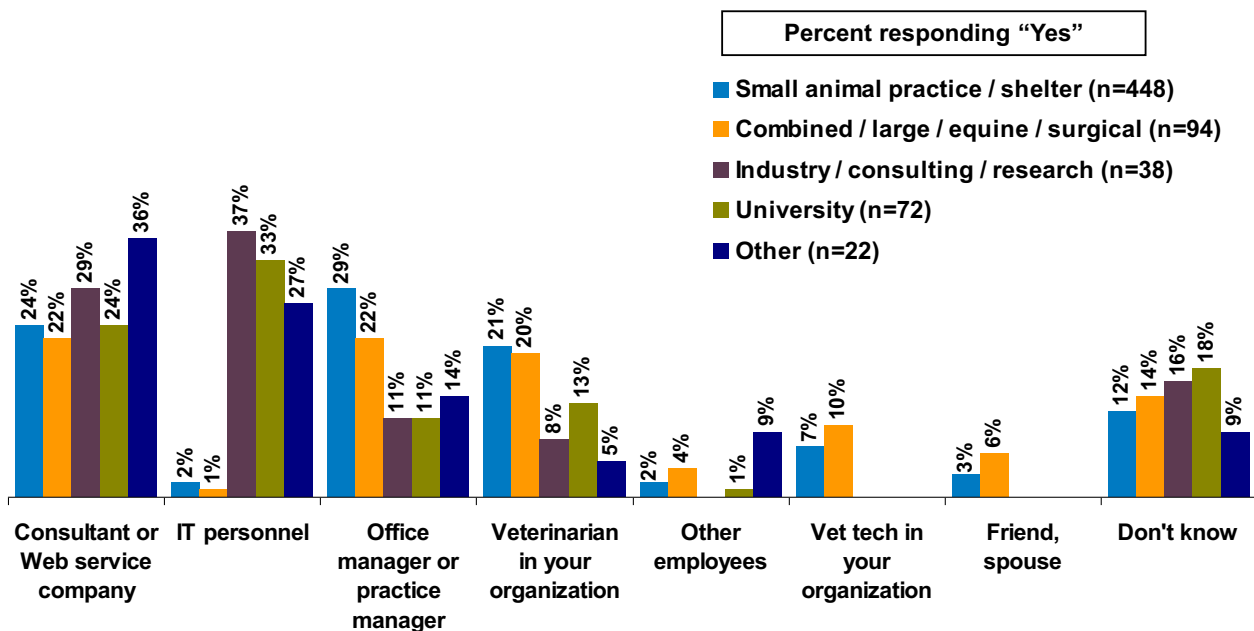


59

Practice Web site updates

Base = Those whose clinic, hospital, or practice has a Web site (n=1,202)

“Who updates your clinic or hospital’s Web site?”

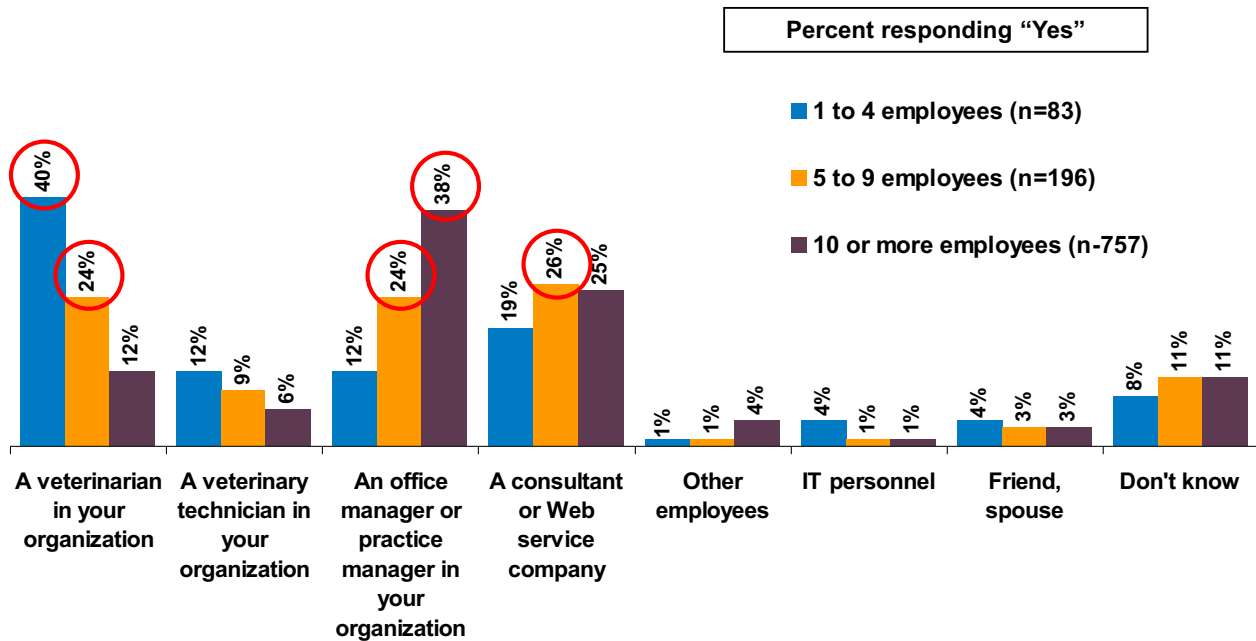


60

Practice Web site updates

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“Who updates your clinic or hospital’s Web site?”

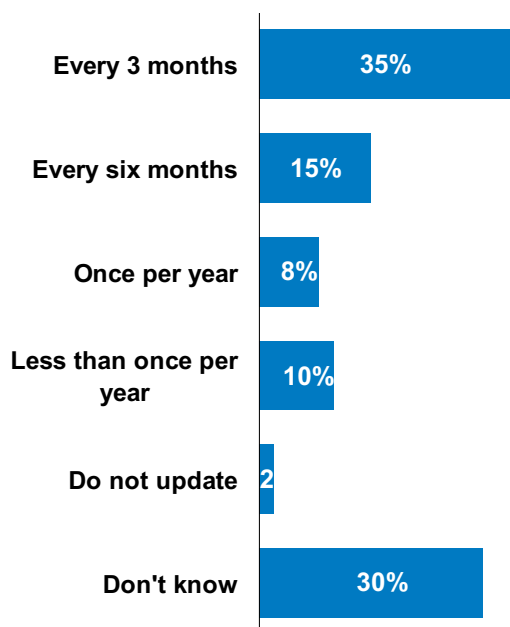


61

Practice Web site updates

Base = Those whose clinic, hospital, or practice has a Website (N=1,202)

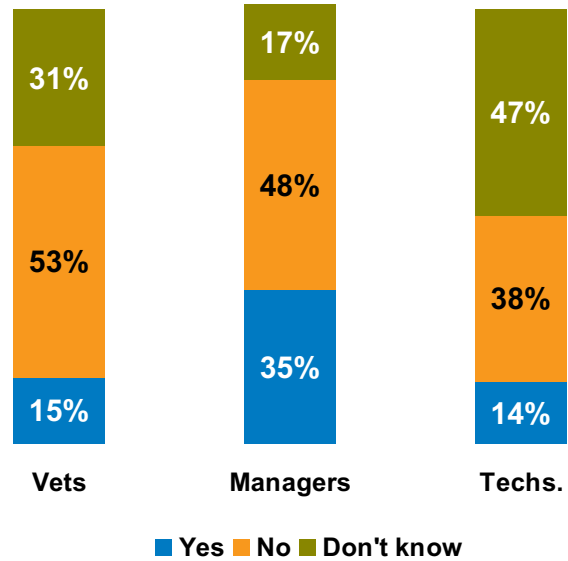
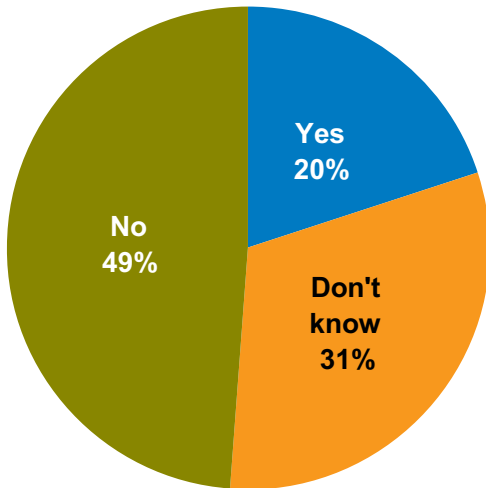
How often does your veterinary clinic, hospital, or practice update its website?”



62

Practice online marketing

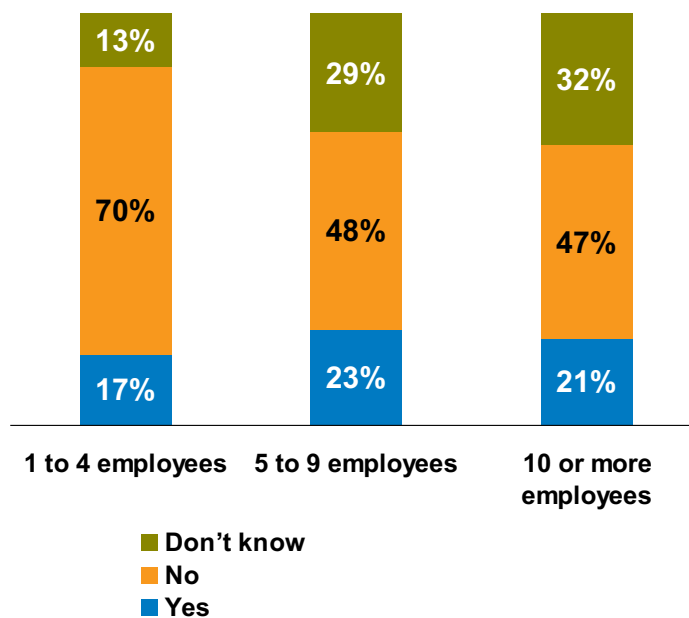
Base = Those whose clinic, hospital, or practice has a Website (N=1,202)



Practice online marketing

Base = Those whose clinic, hospital, or practice has a Website (N=1,202)

“Does your clinic or hospital use search engine marketing or online advertising to promote its website?”



Respondent profiles

DIGITAL CLINIC STUDY



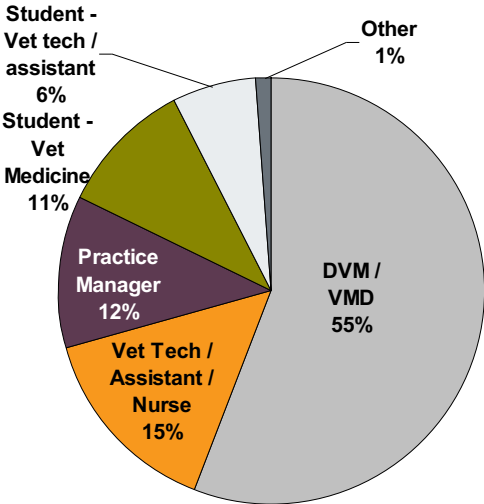
FLEISHMAN HILLARD



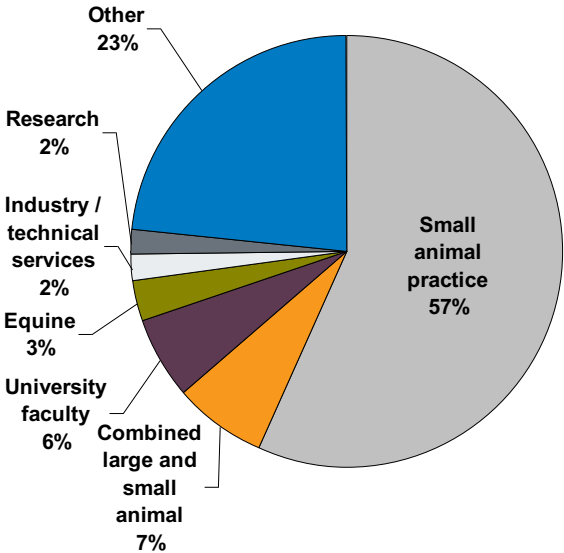
Respondent profiles

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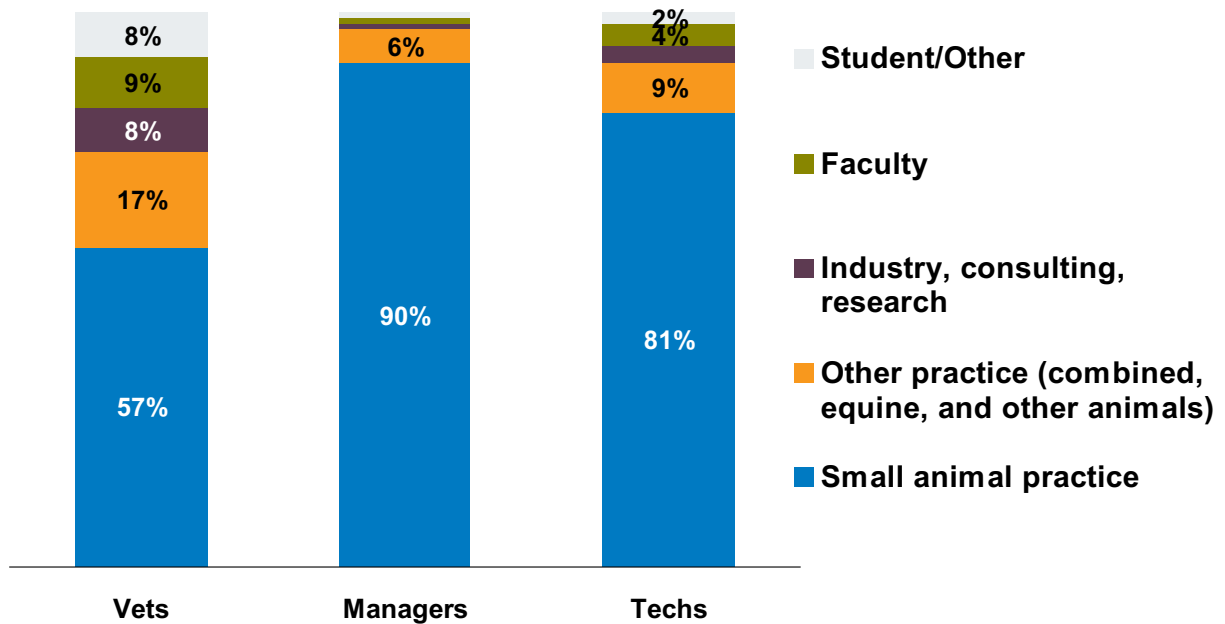
Position



Type of Work

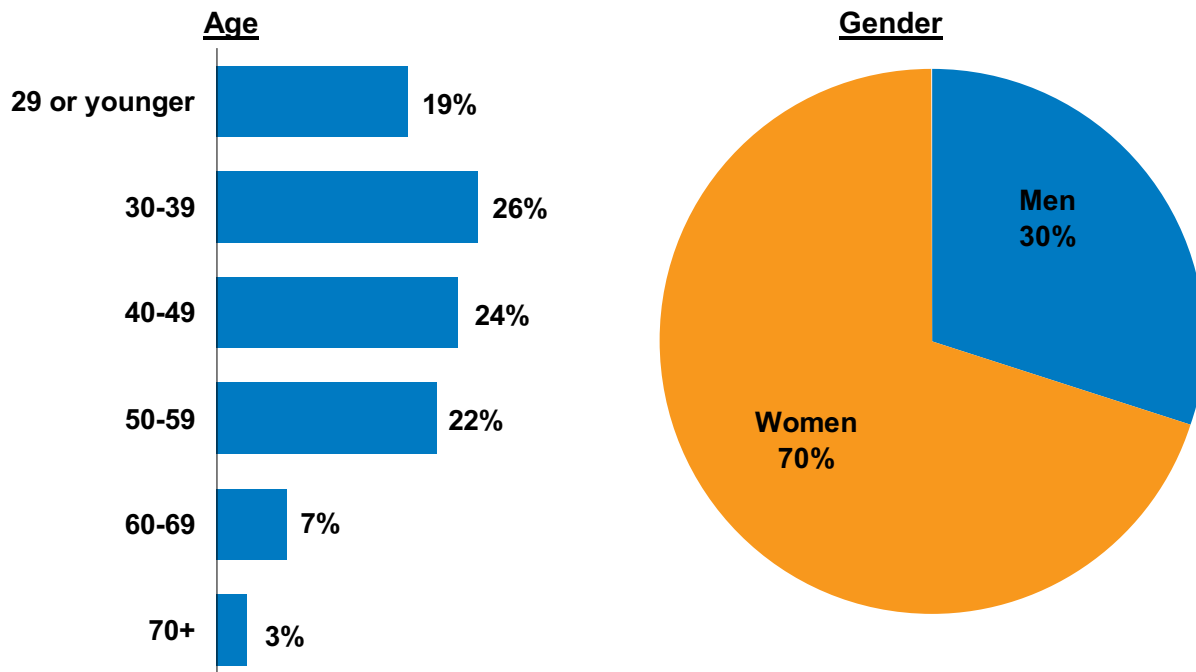


Type work by position

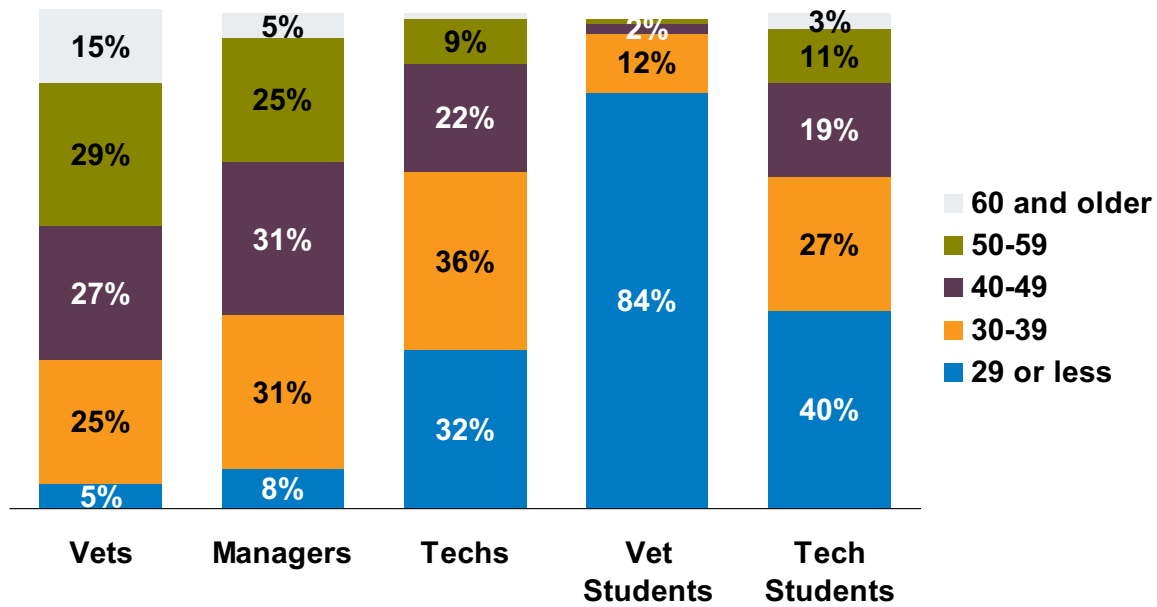


Unlabeled bar segments = 1%

Respondent profiles



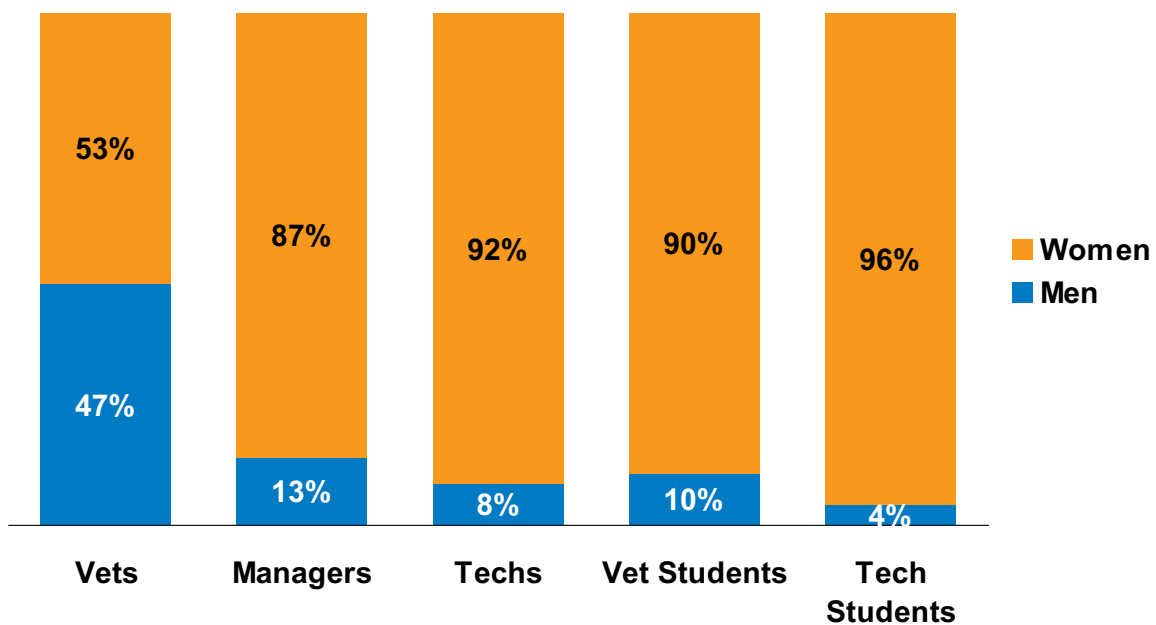
Age by position



Unlabeled bar segments = 1%

69

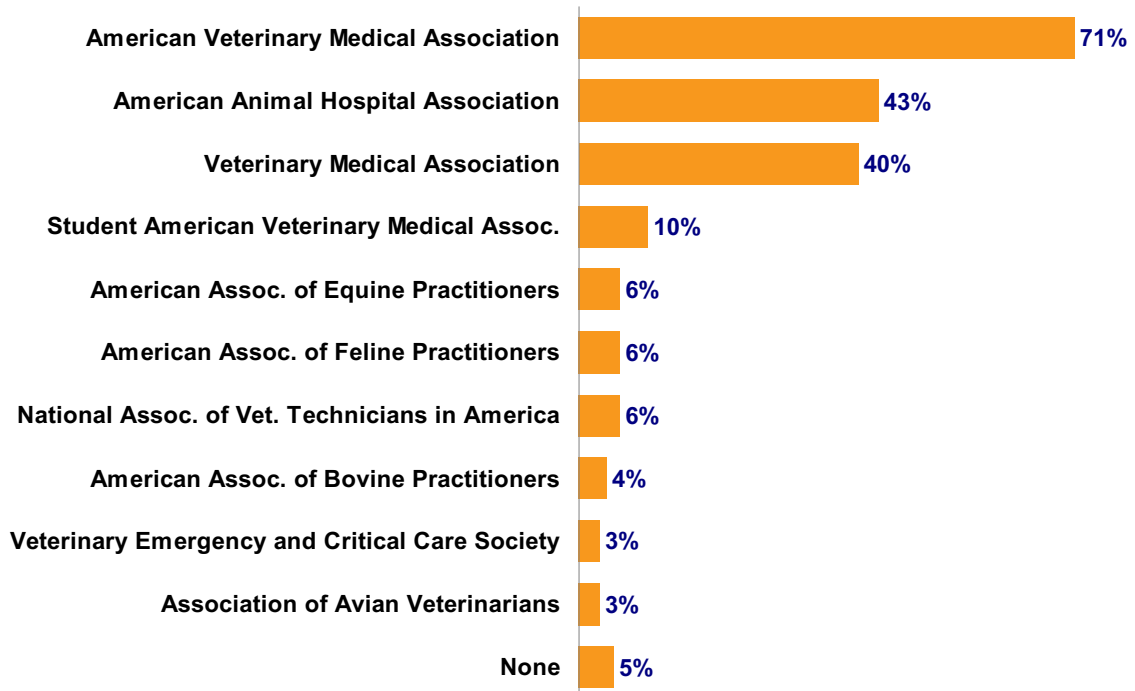
Gender by position



70

Respondent profiles

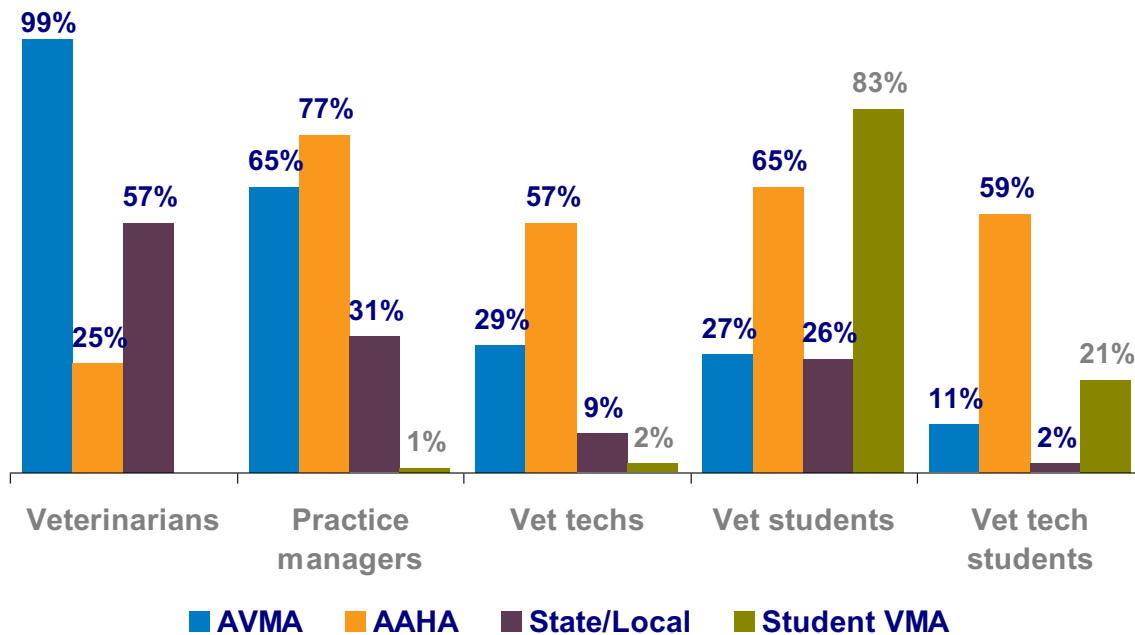
Top 10 Associations



Total exceeds 100% due to multiple responses

71

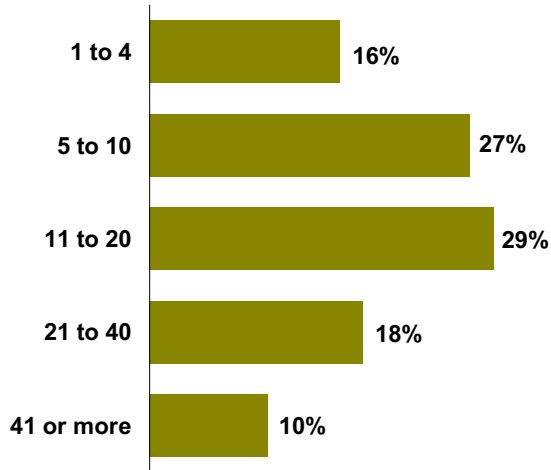
Associations by position



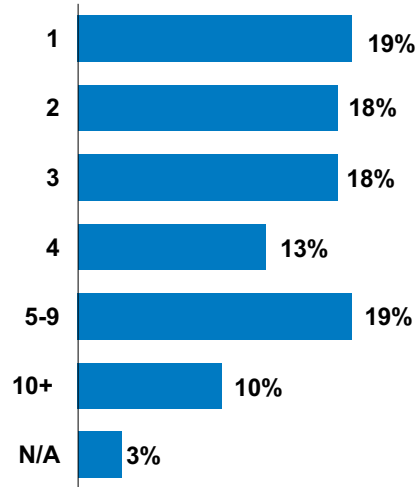
72

Practice profiles: Employees

How many people are employed in your practice?*



How many veterinarians are in your practice?*



*Base = Those who say they work in a veterinary practice (N=1,505)