



A White Paper on attitudes to online usage in veterinary business

Survey findings and recommendations for development of
Internet strategies for the veterinary profession from
Vetmart & Companion Consultancy



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As the Internet constantly evolves, it's having an ever increasing impact on both our personal and professional lives. An impressive 76 % of UK adults are regular Internet users and 36 million adults in the UK access the Internet every day,¹ so it's not surprising that a top priority for many businesses is tapping into that market.

In our capacity as Directors at vetmart® an owner's site for 'everything animal' and veterinary communications agency, Companion Consultancy, we are self-confessed 'Internet enthusiasts', using a variety of online tools and platforms to communicate with vets. As a result we have become increasingly interested in observing how veterinary practices are using the Internet.

There is a dearth of studies that really look at the online behavior of veterinary businesses. Although there has been much discussion of the dangers inherent in the Internet as a source of veterinary information, there are very few reports that look at how these businesses are using the Internet day-to-day and the positive and negative aspects of that involvement.

The survey that has been developed is very much an exploratory first step to find out some base line information. And because data only tells us so much, throughout this White Paper you will also see narrative comments from the respondents to help give a voice to how veterinary business sees the current state-of-play.

We were extremely pleased to see that the responses we have gathered demonstrate how quickly veterinary businesses are embracing online opportunities and how positive they are about their experiences.

Based on our interpretation of the findings, this White Paper describes how we think veterinary businesses could use the Internet more effectively. We very much hope that others will share their opinions too and we invite feedback to info@companionconsultancy.com. This is very much a starting point – there is clearly much more to explore and the dynamic is changing rapidly but we hope that you find this document useful.



Caroline Johnson,
Director Vetmart



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Contents

About the survey

Survey findings

- Beliefs about the Internet
- Online platform usage
- Attitudes to social media
- Attitudes to engagement
- Conclusions

About vetmart

About Companion Consultancy



“ WITH SO MUCH HAPPENING IN THE ONLINE WORLD AND SO MANY OPPORTUNITIES OPENING UP, IT CAN SOMETIMES BE DIFFICULT TO DECIDE WHERE TO INVEST RESOURCES. NOW'S THE TIME TO TAKE A STEP BACK AND EVALUATE OUR ONLINE ACTIVITIES TO PAVE THE WAY FOR PROGRESS IN THE FUTURE - SOMETHING WE'RE REALLY PLEASED TO BE ABLE TO KICK-START WITH THIS SURVEY. ”

Caroline Johnson,
Director of vetpol and vetmart

About the survey

Of the 126 businesses that took part, 73 % were vet practices, 14 % non-veterinary animal therapies such as farriers, 13 % animal services such as groomers and 2 % were pet shops. As the majority of respondents answered on behalf of veterinary practices, this report will discuss the findings with reference to practices, even though other businesses responded – the results of course apply to all. The respondents also represented differing business sizes; 28 % had just one employee, 29 % had over 20 and 43 % had an intermediate size of between one and 20 employees.

The survey was carried out online, so it is anticipated that there could be some bias towards those who are already actively using the Internet. However, the survey appears to have captured a wide range of responses and views about online activities.

Although it is clear that veterinary businesses are readily embracing the challenges that come with being online, there are some interesting pointers from this survey that suggest where additional development is likely to be beneficial and some well-defined needs are expressed by the profession.



Survey Findings

BELIEFS ABOUT THE INTERNET

The overwhelming majority of vet practices have an extremely positive attitude towards the use of the Internet which does not seem to be dampened by even the most commonly cited disadvantages of 'being online'.

97%

feel online activities are of **value** to their business

87%

believe the Internet has **positively** affected their relationship with their clients

77%

feel that social media and online activities are **NOT** too intrusive for clients

73%

feel that they do **NOT** have to take a defensive approach online

“ I WOULD BE LOST WITHOUT ONLINE USE AND HOPE TO UTILISE IT TO CONTINUE TO GROW IN THE SAME WAY MOVING FORWARD. ”

“ EVEN THOUGH OUR SERVICE IS SOMETHING TANGIBLE, THE INTERNET IS WHAT ALLOWS PEOPLE TO FIND US IN SUCH A VAST MARKETPLACE. ”

The Internet and 'Dr Google'

Contrary to the widely held belief that the Internet has made vets' jobs harder due to owners using 'Dr Google' to diagnose their pets' problems, 89% of the respondents feel pet owners still take their expert advice more seriously than that which they find online. This is despite 81% believing that over 40% of their animal-owning clients have already consulted the Internet before seeking advice, 76% of respondents actually feel that the Internet has resulted in customers who are better informed and the majority disagree that employees feel undermined by owners who think they are better informed based on knowledge from the Internet. In fact, 74% use their own online aids to enhance owner education.

While there are always going to be clients who rely too heavily on the Internet for information – with the potential for delay in bringing animals forwards for prompt and necessary veterinary attention, it is good to see that practices are primarily focusing on the positive educational possibilities of the Internet, rather than the negatives.

ONLINE PLATFORMS USAGE

Respondents were asked to rate the benefits of the online tools they use – either tangible or intangible – using a 1 to 10 scoring system with 10 as highest importance.



Internet banking

When it comes to the online activities that vet practices feel to be most beneficial Internet banking came out on top with 42 % of respondents awarding it the highest 'importance' score of 10/10. However, 21 % do not use Internet banking at all demonstrating polarised attitudes to managing finances online. Consumer registrations for digital access to banking peaked in 2012² and 50 % of consumers use Internet banking in the UK, rising to 76 % in younger age groups³ so it is perhaps surprising that so many businesses are not using Internet banking.

Website

The practice website was rated as the second most beneficial online tool, making it the TOP promotional tool. Almost 40 % of practices gave this a 10/10 rating for its benefits. Many practices are likely to have invested significantly in their websites and it is great to see that they feel this is working for them.

The practice website is often the preliminary port of call for potential and current clients. In future surveys it would be useful to explore how practices drive traffic to these sites, or whether they still rely on organic search.

Interestingly, a higher percentage (83 %) graded their website as being 'very beneficial' (defined as having a score of $\geq 7/10$) when compared to Internet banking (70 %) even though Internet banking came out on top overall, indicating that a website is more useful to the larger majority of vet practices.

Facebook and other social media

Participation in social media is high with 88 % of practices using Facebook. The majority are also active on Twitter (65 %), LinkedIn (78 %) and even Google Plus (60 %), demonstrating just how popular social media is becoming. Considering the comparatively recent evolution of these social media platforms, it's astounding how highly-rated Facebook is, with 24 % giving it the 10/10 rating. In comparison with the 83 % rating as 'very beneficial' for the practice website, Facebook attains an impressive 65 %, indicating that social media is rapidly catching up with more traditional online tools.

Interestingly, more vets are using LinkedIn than Twitter, with a slightly greater percentage rating it as 'very beneficial'. Many people perceive LinkedIn to be industry-led, yet engagement by vets in practice is good and there are a plethora of veterinary specific groups on the platform.

A majority (53 %) of respondents don't use any other kind of social media than those listed above, which suggests that platforms like You Tube and Pinterest are not popular with the profession – despite their usefulness in hosting multi-media content. This is especially relevant when we look at how highly respondents rate multimedia content in increasing engagement.

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THE PRACTICE WEBSITE MAY BE VALUED AS THE NUMBER 1 PROMOTIONAL PLATFORM BUT WITH 30 TRILLION UNIQUE URL'S WORLDWIDE, IT'S NO LONGER ENOUGH TO JUST HAVE A WEBSITE, YOU HAVE TO BE FOUND. A SOCIAL MEDIA PRESENCE HELPS WITH THAT BUT IT'S ALSO ONE OF THE MAIN REASONS WE SET UP VETMART AS A HUB FOR PRACTICES LISTINGS. WE KNOW THIS CAN ALSO BE A SIGNIFICANT DRIVER OF REFERRAL TRAFFIC BACK TO THE PRACTICE WEBSITE.

”

Caroline Johnson,
Director of vetpol and vetmart

Online retailing – a missed opportunity?

Although the majority of vet practices value online banking for their businesses and see the relationship building potential for social media, the fact that they haven't extended this to online retailing is perhaps surprising. Some 57 % of respondents do not offer online retailing but of those that do, 23 % rate it as very beneficial (score $\geq 7/10$). This could mean that for those rating it lower that online retailing is not of genuine value, or it's not of value because of inadequate implementation (difficult to negotiate site, delivery failure etc.).

Internet retailing continues to grow in the UK, being accelerated by the use of Smartphones and mobile devices. In fact, 82 %⁴ of all Internet users purchased goods or services online in the UK last year - something which vet practices are likely to have to accommodate to remain profitable and grow business.

FACT

In Britain there were **40 million mobile and Internet transactions a week during 2013²**

For 'destination' practices that clients choose not on the basis of proximity but for the quality of the service, an online retail offer is likely to be even more important. By not offering this, practices that have invested in marketing and enhancing the client experience, are not harvesting the full benefits of these efforts.

ATTITUDES TO SOCIAL MEDIA

26%

agree that some or all of the people that work in their business think they need to do more when it comes to social media

22%

would like to do more social media but believe there are barriers for their business

26%

feel they are using social media successfully

25%

do lots of social media but are not convinced they are doing it well

ONLY 2%

of businesses do not use social media at all

The vast majority of vet practices see the value in social media but a large proportion feel there are even more benefits to be gained. This is supported by the widespread use and high ratings of Facebook and other social media outlets for usefulness to businesses. Increased education and staff training surrounding the successful implementation of social media is likely to be a worthwhile investment as almost half of all respondents feel they could benefit from, or feel more confident, using social media.



Barriers to participation



Time

Confidence

Skills

Clearly, if there are barriers, most respondents feel they are not of enough significance to stop participation. Although 97 % believe that their online activities are beneficial for their business, 51 % feel they have **insufficient time** to spend on it, while 47 % feel they lack the expertise to do it well. Thirty one per cent also reported that they **lack confidence** in managing negative comments and 45 % feel similarly about handling legal issues. Over half of respondents also feel they have problems generating enough, or the right kind of content.

Clearly, the key issues for businesses are not financial but related to **time, expertise** and **confidence** in handling contentious issues.

Overcoming the obstacles

In contrast to the 22 % that felt there were barriers stopping them from attaining their online goals; a higher percentage identify specific challenges but importantly don't allow these to become prohibitive. The fact that vets carry on with their online activities despite not feeling fully confident is perhaps testament to the perceived benefits of doing so and the proactive, capable attitude of members of the profession.

Specific training in areas such as reputation management and identifying time-efficient methods of achieving the objectives are likely to have the most impact for vet practices. A common mistake made by businesses of all sizes is that they often try to generate the majority of their own social media content, which can end up being inward facing and is ultimately not engaging for the end user. Sharing and interacting with external information, newsfeeds, or content and images produced by clients and other veterinary organisations, can be extremely effective and make the process less labour-intensive.

Implementation

- The manager or owner looks after social media activities in 74 % of vet practices
- Only 2 % delegate to the most junior or youngest person

These results are somewhat surprising as it is often the younger employees who are regarded as being more 'social media savvy' but this senior management involvement supports the extent to which owners value social media for their business.

Utilising the time and skills of younger members of the business can be another prudent way to decrease the time burden. Interestingly, 8 % of practices are already using an agency to take care of their social media activities, which is a sensible way of overcoming some of the time- and expertise-related obstacles. This also demonstrates that businesses are prepared to invest in having a more professional face to their social media; something that is likely to increase as Internet use evolves.

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IT HAS TAKEN SOME CAREFUL TIME MANAGEMENT TO GET THE BALANCE RIGHT BETWEEN KEEPING A STRONG ONLINE PRESENCE AND ENSURING IT DOES NOT TAKE OVER EVERYTHING BUT IT IS EXTREMELY USEFUL WHEN YOU DO.

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Social media policies in business

Forty two per cent of respondents have no social media policy at all, while 11 % provide protection by producing a policy that covers ethics, permissions and clients only. Another 6 % confine their policy to protecting the business from comments by employees – in many cases this is likely to be included in contracts of employment. Another 23 % have a policy that covers employees, clients, ethics and permissions. Only 20 % produce policies that cover all of these issues AND brand values, to determine what is said and how it is said.

It may be that owners and managers are happy to take control of social media and therefore feel they do not feel the need for a defined policy. We know that in many practices that is indeed the case. A significant proportion are however taking the view that negative events need to be avoided through use of a policy but have forgotten to include positive advice that relates to the practice brand. Social media is not without its challenges and training could also improve confidence in this area.

ATTITUDES TO ENGAGEMENT

So when it comes to engaging customers online, what works and what doesn't? Respondents were asked to rate the impact of activities on animal owner engagement using the 1-10 scale, with 10 being most important.



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A COLLEAGUE OF MINE WAS SUBJECTED TO UNFAIR AND BIASED NEGATIVE COMMENTS, WHICH APPEARS VERY DIFFICULT TO MANAGE EFFECTIVELY AND IS POTENTIALLY EXTREMELY DAMAGING. THIS CONCERNS US AS A SMALL BUSINESS.

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■ Attention grabbing photos

The age old saying 'a picture is worth a thousand words' appears to hold true in this case as attention-grabbing photos were rated as the most important online engagement tool, with 22 % rating them 10/10. This demonstrates that the majority of businesses appreciate the power of the visual medium - only 7 % don't use photos at all.

■ Keywords and content

Although Keyword searches and deliberate content use were rated second most important for increasing engagement, interestingly businesses don't prioritise tagging to the same extent (30 % don't tag their content). This is despite tagging being an important and relatively easy way of getting content found, which likely reflects a lack of basic technical 'know-why'.

■ Multimedia content

It's perhaps surprising that as many as 87 % of businesses use multimedia content, when a few years ago this was almost unheard of. However, this hasn't yet translated to an equivalent widespread use of multimedia-specific platforms such as YouTube and Pinterest, as 53 % report not to use such 'other' forms of social media. Development of these channels could unlock many benefits for vet practices looking to make the most of their social media..

■ Connecting with clients

The power of posting emotional or 'fluffy bunny' stories has not gone unnoticed, with 53 % rating it as 'highly useful' (defined as having a score of 7 out of 10 or higher). This suggests that vet practices appreciate the importance of connecting with their clients on a more personal level, which is something the Internet facilitates.

■ Sourcing external contents

The fact that sourcing external content was not more highly rated has consequences with regards to the use of time. As mentioned previously, self-generation of content can be too inwardly focusing while sourcing, integrating and interacting with external content can actually be more engaging and relieve some of the time burden.

■ Online offers

While 17 % of respondents don't offer special deals or gift vouchers, 51 % of those that do, rate them as 'highly important' for increasing engagement. The relatively low usage of promotions may be symptomatic of the small percentage of businesses offering online retailing and perhaps concerns as to the best way to implement these online.

FACT

Customers are now making more than 5.7 million transactions a day using Smartphones and other Internet-enabled technology.²

■ Competitions can generate content

Online competitions perhaps come further down the list than expected which may in part be due to lack of confidence or expertise. Running a competition, especially on social media sites such as Facebook, is often subject to a whole host of rules, regulations and restrictions which can be daunting. In addition, a third party app is often needed, requiring a certain level of technical expertise. This is a situation in which hiring a professional agency can be helpful, even if it is just to run a one-off competition. Successful online competitions can be a great way to encourage users to generate engaging content or images and boost engagement: a big advantage is that participation is measurable.

■ Commenting on controversial issues

This was not seen to be of high importance for increasing engagement, with 18 % not doing so at all. Being able to promptly and confidently address issues that arise online is a must for any business and can be achieved through having specific training, putting a social media policy in place, or consulting a professional agency that can advise or help manage the situation.

■ Paid-for promotion

Paid for search engine optimisation (SEO) followed by online advertising/promotion were rated lowest in terms of engagement which may have been largely a result of perception as a high percentage of respondents reported they did not use either. Considering the importance vet practices place on the success of their online undertakings, it is unlikely that the value of promotion itself is underrated. With most paid-for online activity being simple to measure and therefore a clear cost-benefit analysis being possible, this resistance is interesting. These days, there is often a level of promotion to suit any budgets, which can be extremely targeted and a totally legitimate way for many businesses to boost their engagement if implemented in a strategic manner.

The value of being online

Practices were asked about what they most wanted to achieve as a result of online activities and to rate importance on a 10 point scale.

56%

respondents said that generating new business was the most (10/10) important

46%

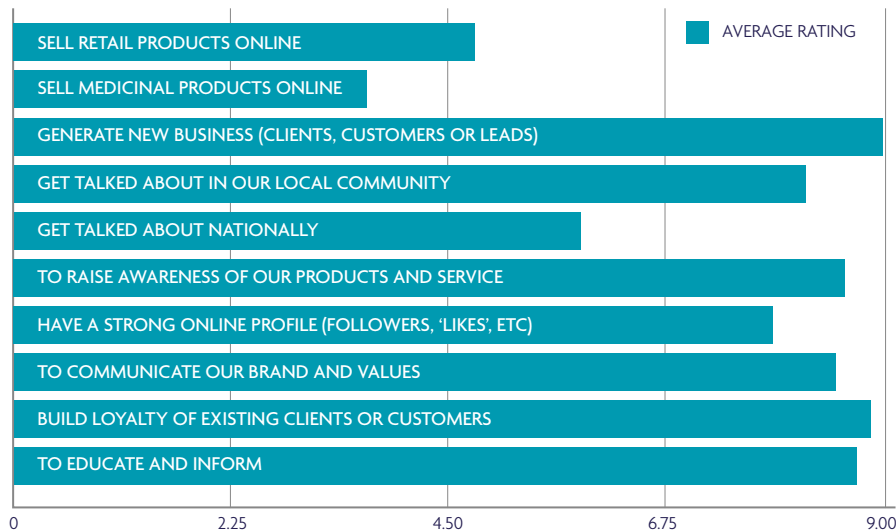
said that building loyalty of existing customers had a 10/10 importance rating

42%

said that educating and informing had a 10/10 importance rating

Respondents clearly saw that there was a multitude of equally important benefits to being on-line – only three of ten potential benefits were rated by less than 30% of respondents as being of top (10/10) importance. This came out quite clearly in average ratings which looked at the average overall score given by respondents.

Average ratings



The majority of practices are focused on the bigger picture in terms of their overall objectives and value many benefits more or less equally. Interestingly, despite the Internet being a 'worldwide web', businesses are more interested in creating local impact, presumably with a view to capturing clients within travelling distance to the outlet or practice.

Perhaps the most striking finding here is the low percentage of businesses whose main objective is to sell products online, with 31% rating this as a 1/10 in importance. This may not be as surprising in the context of the number of practices which actually offer online retailing facilities, although it seems incongruous that vets have embraced every other aspect of being online but not something which directly generates revenue - especially when creating new business is prioritised so highly.

What might be the reasons for this resistance to online retailing? It may be the case that vet practices have decided not to compete with online pharmacies. Many believe that they cannot compete with Internet pharmacies on price, yet at least one buying group has evidence to show that they can. Another possibility is that they perceive there to be legislative or technical obstacles to setting up such a facility, or perhaps feel that it's not a service that requires 'professional' expertise or offers enough opportunities to supply guided recommendation, which is an intrinsic benefit of buying from a practice. Or maybe veterinary businesses have always been locally focused and are resistant to thinking beyond those boundaries.

Establishing a business as a 'destination' that people will go out of their way to travel to, the increasing importance of brands and even the growing field of telemedicine, suggests that in the future fewer and fewer businesses will be exclusively local. Let's not forget that other types of business responded to this survey so this resistance is either not limited to practices and extends to all different animal-related businesses, or practice resistance is even higher than it appears from this survey.

The resistance to selling services and products online is an area where specific barriers need to be explored in light of increasing consumer desires to shop online and the repeated appearance of online retailing as low priority throughout this survey. What we also need to note is that attitudes are polarised - verging from deep resistance by those who don't retail and positive feedback from around a quarter of those that do.

There are risk-free ways for practices to embrace online retailing. vetmart offers veterinary practices the ability to list products and services on-line without the need to modify the practice website. This meeting of products and services clearly offers practice lots of potential, while not taking away from professionalism.

Clients will always seek to buy goods where it is convenient, so integration of payment management systems, automatic reminders and online booking facilities should all be offered online to facilitate this.

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I WAS REALLY INTERESTED IN THE FINDING THAT SUGGESTED PRACTICES COULD BE FOCUSING PRIMARILY ON THEIR LOCAL AREA. IN MANY WAYS IT MAKES PERFECT SENSE – PEOPLE WILL ONLY TRAVEL SO FAR TO VISIT THE VET. BUT AS A CUSTOMER OF OTHER BUSINESSES IN MY OWN LOCAL COMMUNITY I HAVE ORDERED ON-LINE BECAUSE IT'S CONVENIENT – PURCHASES CAN BE MADE OUT OF HOURS AND I HAVE ITEMS DELIVERED TO MY DOOR. WE ARE ALL POTENTIALLY MULTI-NATIONAL BUSINESSES ONCE WE ARE ON-LINE.

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Susan McKay,
Companion Consultancy

CONCLUSIONS

This White Paper has shown that there is much to celebrate with regard to how positively veterinary practices have embraced the opportunities to increase openness and communication. The reported wide-spread fear of 'Dr Google' and the threat to veterinary professionals is not apparent and most practices seem to welcome the opportunity to contribute to client education and interact with well-informed animal owners.

Summary findings

- Vet businesses have adopted a wide range of online platforms
- As a general finding, increasing online involvement correlates with increasing positivity
- Vet practices value and have embraced online activities and social media to a large extent but feel there is more to be gained
- There is potential to use a wider range of social media platforms, particularly to host multi-media content that businesses believe is attractive to animal owners
- The focus of most veterinary businesses remains local, despite the potential for broader reach
- It is perhaps surprising that more practices have not embraced online retailing with its capacity to generate additional profit
- Key barriers to full participation online seem to be a lack of time, confidence and expertise, for which there are easily implemented solutions
- Not all practices have a clear idea of what they want to achieve online

Key points

Clearly, most veterinary businesses have, on the surface, more fully embraced the Internet than many people might have assumed and are very satisfied with the results. However, probe further and we can see that there are gaps: the tendency to 'think local', the low level of Internet banking, the lack of online promotional strategies and the resistance to online retailing, all tell a tale. Each business must respond in a way that fits their individual needs but here are some key points that need to be considered.

- Practices need to have a clear online strategy, defining objectives and goals and with an end game in mind. This will allow them to choose the right platforms and to invest in creating a presence on those platforms.
- There is a need for source material that all practices can use and adapt to their purposes – such as social media policies and protocols, and content suitable for use across a variety of platforms.
- Advice on measuring impact within a community as a result of online activities is likely to help practices quantify return on investment – free apps such as Klout allow businesses to do this very simply.
- There is potential to include paid-for promotion to the online marketing mix.
- Other means to drive traffic, such as the use of referral sites, should also be considered, particularly when networking online and in person.
- It may be that veterinary businesses need to shift their thinking as they move increasingly online, from a local focus to a national one.
- A change of direction from exclusively using inwardly generated material, towards increasing adoption of supplementary externally sourced content, offers opportunities for practices.
- To fully utilise social media, practices should consider developing in house expertise through training, or outsourcing elements of their social media that require specific skills (such as competitions, offers and online-promotion).

- There appears to be a resistance to adopting online retailing facilities that warrants further exploration – businesses should reflect on their reasons for avoiding this issue in the light of other positive experiences online.
- Listing products and services for sale can work hand-in-hand with social media, allowing businesses to monetize their presence on these platforms.
- There needs to be greater awareness of the opportunities to retail online without building expensive add-ons to the practice website.
- With so many opportunities available, practices need to ensure that all their efforts work synergistically, keeping the practice website at the core of all activities and using social media, blogs and sites like vetmart as feeder platforms that strengthen and support the core.

Perhaps the most important 'take-home' message is that practices should not be afraid of reaping the benefits of the extended reach offered by the Internet. Online retailing offers an opportunity for profit generation beyond the service-based model that currently drives practice profits. To keep in line with projected trends, embracing this concept is likely to be integral to future prosperity.

About vetmart

vetmart - everything animal

In 2014, vetmart soared past the 1000 practice listing mark and growth is now exponential, hurtling towards half a million views. Creating an online space not just for product listings but services too, vetmart allows veterinary practices to use their combined pull to attract an audience; with each practice benefiting from their share of marketplace traffic back to the practice website. It's the ideal way for practices to boost their online presence with no risk, as listings are free. After testing the water a fully-fledged shopfront can be set up in vetmart for minimal cost, creating a destination for existing and prospective clients without the need to modify a well-balanced practice website.

With millions of pet owners online every day, it's no small challenge to stand out from the crowd and gain search engine rankings. vetmart is a marketplace that delivers online muscle to leverage practice brands.

Showcase, stand-out, reach further: give your practice a boost with vetmart. Register today (for free) at **www.vetmart.net** or contact **caroline@vetmart.net** to find out how vetmart can boost your veterinary business.

About Companion Consultancy

A vibrant veterinary communications company established over a decade ago, Companion Consultancy is perfectly positioned to support veterinary, petcare or agricultural businesses. Owned and run by vets with marketing expertise, the team at Companion Consultancy uses its experience and knowledge of animals and practice life, to deliver relevant and insightful campaigns and projects.

With many big agency resources but a boutique agency feel, the friendly team is great at coming up with ideas that get its clients noticed. Whether you need to achieve a champagne presence on ginger beer money, or see yourself as a small fish but aspire to make big waves, Companion is sure to be able to help.

For further information about Companion visit **www.companionconsultancy.com**, call 01284 761107, or email **info@companionconsultancy.com**.



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