

Fear Free: The Long-Term Benefits for Pets, People, and the Profession

October 1, 2021

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List of Abbreviations

- FAS Fear, Anxiety, and Stress
- KPIs Key Performance Indicators
- RPP Revenue Per Patient
- YoY Year Over Year

"Fear Free is not a fad or a movement. Fear Free is ultimately better care for our patients we love, and it is extending our love in a fashion that provides a more pleasurable visit for our furry friends."

Jason W. Johnson, DVM, MS, DACT, Vice President, Global Chief Medical Officer, IDEXX

Introduction

Since the inception of Fear Free in 2016, more than 70,000 animal care professionals and 148 veterinary practices have become Fear Free Certified[®], showing their wholehearted commitment to preventing and alleviating fear, anxiety, and stress in pets.

Fear Free is uniquely positioned to consistently improve the lives of pets, their owners, and their caregivers. Fear Free Certified Professionals continue to develop new techniques and find unique benefits to the continued use of Fear Free techniques–adjusting their approach to each patient's visit as they notice changes in the fear, anxiety, and stress (FAS) response.

There will always be a number of operational changes and strategic moves to improve business metrics—and Fear Free is one of them. According to the following data, the implementation of Fear Free education has continued to positively impact key performance indicators (KPIs) and—most importantly—pets.

The Impact of the COVID-19 Pandemic

The year 2020 will go down in history as the year the world came to a virtual stop. The COVID-19 virus caused a pandemic that crippled many industries and brought business to a halt, with a few exceptions.

The veterinary industry not only saw an uptick in appointments, but clinics also had to make significant adjustments in workflows and protocols to keep everyone safe from the spread of the virus, which in turn negatively impacted productivity.¹ With the pandemic crisis carrying well into 2021, veterinary professionals are as overworked as ever.

To support professionals and their practices, Fear Free launched an online COVID-19 resource hub, which both members and non-members could access at no cost. Professionals could find webinars, blogs, and handouts addressing topics like curbside appointments, separation anxiety, and compassion fatigue.

A 2020 survey of Fear Free Certified Professionals showed that not only did professionals utilize these free resources, but they also found that their Fear Free knowledge of body language and FAS helped set their patients up for success and their effective usage of pre-visit pharmaceuticals and sedation protocols enabled better patient experiences throughout the COVID-19 pandemic.²

Fear Free continues to be a valuable resource for practices and professionals struggling to get back to a "new normal." The focus on emotional wellbeing of pets, clients, and team members enables professionals to create a more enjoyable working environment at their practice and a more conducive environment for positive client interactions. Leveraging Fear Free tools, techniques, and protocols empowers professionals to stick with the COVID-initiated changes that serve them and continue to improve on the overall experience and efficiencies for all involved.

Fear Free and the Post-Pandemic Profession

It goes without saying that studies will ensue to determine what worked well and what did not during the pandemic. Veterinary teams will need to sort through all this new data as they map out a new post-pandemic strategy for veterinary care.

For starters, where does veterinary education go from here? Eleanor M. Green, DVM, DACVIM, DABVP, Senior Advisor and Consultant, Animal Policy Group and Professor Emerita and Dean Emerita of the College of Veterinary Medicine & Biomedical Sciences at Texas A&M University, provides clarity on what is needed.

"A 2009 survey of fifth graders asked what they considered the most important issues in the world. Their number one issue was animal welfare, followed by protecting the environment and caring for people. This survey puts into perspective how people value animals and their wellbeing. That survey was 12 years ago, and the phenomenon has done nothing but intensify, as described in Mark Cushing's book *Pet Nation*, which underscores the love affair Americans have with their pets. These populations include pet parents, other animal owners, veterinarians, and the entire veterinary healthcare team. In concert with these positive views of animals has been a groundswell of data documenting the vast, tangible benefits of animals to people. In short, we owe our beloved animals the best care.

Veterinary students today, as do graduate veterinarians, live in a world exploding with new information. As the volume of data becomes increasingly vast, it is essential that students concentrate more on accessing, managing, and assessing information, with a razor-sharp focus on applying that information within society. There is a distinct societal obligation to care for animals in the broadest sense, beyond medical care alone. Veterinary students must be exposed to Fear Free as an important cog in the wheel of caring for our beloved animals through preventing and alleviating fear, anxiety, and stress by inspiring the people who care for them. This inspiration should start with veterinary students and follow them and their healthcare team and clients throughout their professional life.

In this world of passion for animals exists a spectrum of perspectives and opinions about what constitutes optimal care and what constitutes suboptimal care or even abuse. Veterinarians are well-positioned to be the go-to animal welfare experts. Veterinary students must be made aware of this opportunity and obligation. Gandhi's famous quote always comes to mind: 'The greatness of a nation and its moral progress can be judged by the way its animals are treated.' The quote can be applied to each individual as well as the entire nation."

The world changed during the pandemic, but one thing that didn't change was the profession's obligation to the human-animal bond. Many of the new opportunities in providing veterinary care during the pandemic (i.e., curbside and virtual care) will most likely become the standard of care taught in veterinary programs moving forward.

Fear Free and the Post-Pandemic Profession

Where does the profession go after implementing so many changes? What should be continued, and what should be stopped? While some changes are short-lived, others deserve exploring and assessing the positive long-term effects. Like Dr. Green said, the world is exploding with information and data. Moving forward, veterinary practices will want to see data showing the impact of changes implemented during the pandemic.

This white paper presents data on the performance of a specific group of veterinary practices: Fear Free Certified Practices. These practices made changes during COVID, but one thing they did not change was their commitment to using Fear Free techniques on every patient. As previously mentioned, practices will want to see data as they make their strategic plans for the next few years, and the data in this white paper shows that Fear Free benefits both pets and the business of providing veterinary care.

Founded on the science of behavior and backed by leading experts in the areas of veterinary behavior, medicine, and handling, Fear Free is an innovative education company serving veterinary professionals, pet professionals, the shelter community, and pet owners to help prevent and alleviate fear, anxiety, and stress in pets. By looking after both the physical and emotional wellbeing of pets, Fear Free is uniquely positioned to improve pets' lives and strengthen the human-animal bond.

Kathryn Primm, DVM, CVPM of Applebrook Animal Hospital, Ooltewah, TN, knows first-hand the long-term effect of the Fear Free program on her and her team. "I saw half a dozen cats today, and absolutely none of them hissed at me," she said. "The biggest tip I have is to train your whole team. Every point of contact must be singing the same song. It has changed my practice and my life."

Because of the many positive, life-changing reports from veterinary healthcare professionals and multiple years of data, Fear Free is becoming part of the strategic plan for many veterinary practices.

Worldwide & Cross-Professional Reach

Today, more than 70,000 professionals have become Fear Free Certified[®], and more than 110,000 professionals have registered for the various Fear Free certification programs. They can be found across the United States, Canada, and more than 50 other countries. Fear Free Certified Practices are 148 strong and growing. In total, more than 175,000 veterinary professionals, pet professionals, shelter professionals, and pet owners have registered to benefit from Fear Free's education, tools, and resources.³

Growth has been a constant. In May 2020, Fear Free launched the Fear Free Avian Certification Program, which teaches veterinary professionals how to use Fear Free concepts to ensure that avian veterinary visits go as smoothly as possible. And in November 2020, Fear Free launched the flagship Fear Free Veterinary Certification Program in Spanish at esp.fearfreepets.com. 2021 offered even more expansion with the launch of the Fear Free Equine Certification Program and Pet Sitter Certification Program.

Fear Free has made such a difference in the welfare of pets that it is now a required part of the curriculum at:

- Colorado State University
- Louisiana State University
- Michigan State University
- Purdue University
- University of Florida Shelter Medicine Program
- Tufts University
- Washington State University

In addition, other veterinary colleges highly encourage Fear Free certification of their students, including:

- Cornell University
- Lincoln Memorial University
- North Carolina State University
- Texas A&M University
- University of California, Davis
- University of Georgia
- University of Tennessee
- Western College
- Western University

Worldwide & Cross-Professional Reach

Additionally, Fear Free is in close collaboration with Penn Foster to incorporate Fear Free into the veterinary technician/nurse curriculum.

Bryan K. Slinker, Dean of the College of Veterinary Medicine at Washington State University, sees the future of Fear Free as becoming increasingly important in the education of veterinary students. "The design principles underlying Fear Free are tailormade for inclusion in curriculum," he said. "It provides high-quality, modular, and up-to-date content that can be incorporated at various points in the curriculum, spanning all years. Its modularity and expanding topic coverage facilitate integration in the wide variety of curricular structures across the different vet schools. Its ready availability to students allows review on their own schedules to supplement the formal curriculum. Everybody wins—students, faculty, and the profession."

The Fear Free program provides up-and-coming veterinary professionals with the tools and techniques needed to deliver the best possible care for pets as well as participating in an ever-growing community of like-minded professionals. Fear Free is not a fad; it's here to stay.

Fear Free Ecosystem

To successfully affect the emotional wellbeing of pets, the entire ecosystem of a pet needs to have access to Fear Free resources and education. Figure 1 shows the current touchpoints of the Fear Free ecosystem.



Figure 1

Fear Free Ecosystem

The ecosystem developed over time, adding skills and knowledge as well as expanding the scope of pet professionals. Figure 2 shows the growth of Fear Free programs over the past five years. Fear Free, like others in the veterinary profession, maintained the commitment to improving the lives of pets and honoring the importance of the human-animal bond for all pet professionals.

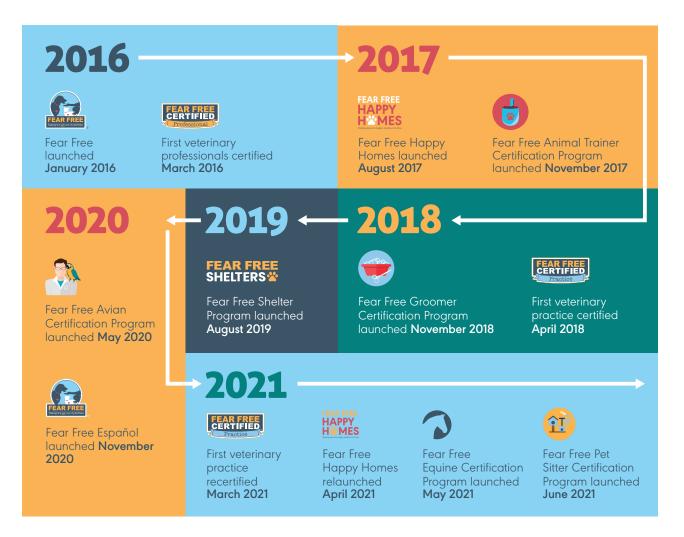


Figure 2

Methodology

Fear Free partnered with VetSuccess—a data and analytics company specializing in the delivery of data-driven practice management solutions, including monthly practice performance reports, dashboards, and automated marketing solutions—to run the data analysis and assist with the development of this study.

To identify survey participants, VetSuccess matched existing clients to the list of Fear Free Certified Practices. All practices showing up on both lists were enrolled in the survey. In addition, Fear Free reached out to all other certified practices to encourage participation. From these two lists, 41 veterinary practices in the United States and Canada participated in the survey.

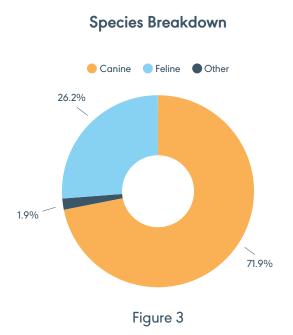
The Practice Certification program was launched in April 2018. In order to achieve an appropriate time period (2 years) for a meaningful study, the inflection point (day 0) to define the "before" period was determined to be nine months before a practice applied for Practice Certification. The reason being that, in order for a practice to become certified successfully, it is necessary to have implemented and practiced Fear Free for at least nine months prior to application. The "before" period is thus 12 months prior to day 0, the year one (Y1) period is 12 months after day 0, the year two (Y2) period is 24 months after day 0, and the year three (Y3) period is 36 months after day 0.

It is important to note that the data from this study does not build on the previous years' results (see "The Positive Impact of Fear Free Certification in Veterinary Practices" and "The Continual Business Growth of Fear Free Certified Practices"). Rather, each year's study needs to be analyzed independently, as the addition of new practices (as well as the removal of some due to inability to access their data) creates new data points for Y1 in the study.

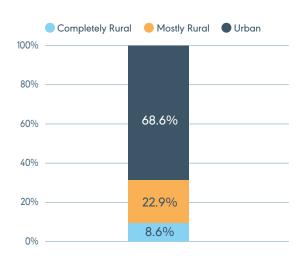
Data from three practices was significantly different than the rest of the sample and was purposely omitted in the benchmarking.

Demographics of Survey Participants

Fear Free techniques can be used for many species since key concepts and tools, such as the Emotional Medical Record (EMR) and FAS Scale, are the same or very similar. For the 2020 survey, the species breakdown is noted in Figure 3.



The location of the practices as compared to a rural or urban area is noted in Figure 4.



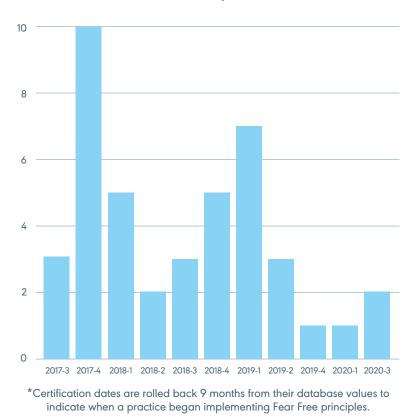
Rural vs Urban Areas



Demographics of Survey Participants

Due to the different participants in this year's survey, the percentage of urban practices increased from the previous survey (from 47.62% to 68.6%), and the mostly rural practices decreased (from 42.86% to 22.9%).

A new demographic for this year's survey is the "Certification by Quarter" data showing when a practice began implementing Fear Free principles (Fig. 5).



Certification By Quarter*

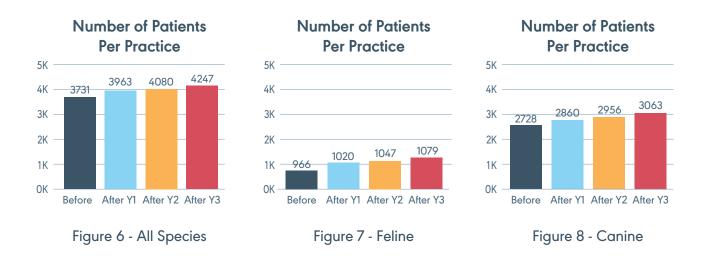


Of the Fear Free Certified Practices participating in the survey, 13 began implementing Fear Free principles in 2017, 15 in 2018, 11 in 2019, and 3 in 2020. (Please note: There are instances in the report where a practice or practices were removed from the data due to complications with obtaining the data or the timing of 2020 certification). We are encouraged to see some long-running practices in the dataset.

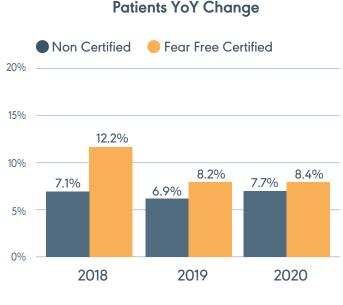
Thus, the data collected is not merely an effect of novelty, where team members get the proverbial "rush" from being involved with something new, but rather a cultural change that becomes a habit when it comes to how the veterinary healthcare team interacts with their patients.

Patient Numbers

The year of COVID brought about more people welcoming new pets into their homes and the veterinary industry reporting more appointment requests.¹ Fear Free Certified Practices were no different. They too experienced an increase in patient numbers (Fig. 6, 7, 8).



An important difference for Fear Free Certified Practices becomes apparent when compared to practices that are not Fear Free Certified (Fig. 9). Year after year, Fear Free Certified Practices show strong growth in patient numbers.





Practicing Fear Free protocols does not limit a practice in the number of patients it can see (contradicting those opponents who feel that Fear Free takes up too much time and thus limits the available time for seeing more patients). On the contrary, many Fear Free Certified Practices are able to attract and retain clients and their pets—even outpacing benchmark practices in patient year over year (YoY) change.

Penny Stanley, a client service representative at Hanging Rock Animal Hospital, in Roanoke, VA, sees the long-term benefits when the team makes the effort to practice Fear Free techniques. "A Fear Free clinic will see the biggest benefits with puppies and kittens that have started out with a Fear Free clinic," she said. "They will be easier to handle, getting services done faster. Taking the time, each time, will pay off in the future. Every time we make an appointment we say, 'Let me look at your pet's emotional medical record to see how they do when they visit us.' Keeping an up-to-date record of what works, what triggers fear, and what helps to alleviate it is vital to reducing the time needed for future appointments."

Fear Free is a tool that, when used properly, can help a practice improve patient care and reduce client churn. And when the practice markets itself as a Fear Free practice, curiosity from pet owners will provide an opportunity to highlight the benefits, which helps the practice acquire and retain clients as well as provide the services needed by the pet.

Patient Visits & Care

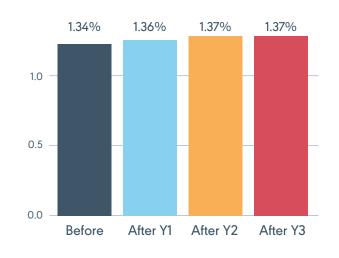
One of the benefits of implementing Fear Free procedures is changing the dynamics in the exam room when the pet is not exhibiting FAS. This change in dynamics is like a ripple on the pond; other pet owners in the waiting room feel the effect with each pet that enters the space.

Denise L. Tumblin, CPA, President of WTA Veterinary Consultants, shared her personal experience: "During a recent visit to my veterinarian, another client arrived with her dog. Oscar literally bounced in the door with a huge smile on his face. He was so happy and excited to visit the practice. Oscar's joie de vivre was absolutely delightful and a clear example of the beauty of a Fear Free approach."

It is one thing to strive to help relieve pets of FAS, and it is even better when humans experience a FAS-free veterinary visit, too. Just imagine the relief other pet owners experience when they see relaxed pets entering and exiting the exam rooms. Relaxed humans can connect with the veterinary team and build the bonds necessary to ensure proper care of the pet.

"I truly believe that the client experience impacts their willingness to continue to visit a practice and pay the fees," Tumblin said. "I also believe that a Fear Free approach provides a better experience for everyone-patients, clients, and veterinary team members. Anxiety-free visits for clients and patients help ensure repeat visits. Continuing to educate people who share their homes with animals of all kinds about the value and benefits of a Fear Free approach is a win-win."

Pet owners can turn their focus to the medical recommendations and agree to specific services. According to data from VetSuccess, the number of line items per visit expanded in 2020 along with a notable increase in the volume of new patients.¹ Figure 10 shows that Fear Free Certified Practices are also showing an increase and thus are not hampered by performing Fear Free techniques.



Services Per Invoice

Figure 10 - All Species

Being able to treat a pet does make a difference—no matter if the service is a vaccination, laboratory test, or surgery. One species that has experienced the most significant benefit is the feline. Fear Free Certified Practices are showing a continued improvement in the number of services they perform on their feline patients (Fig. 11).

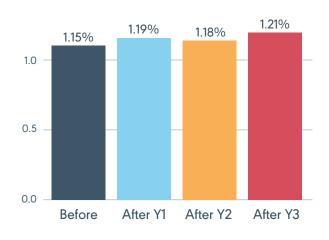
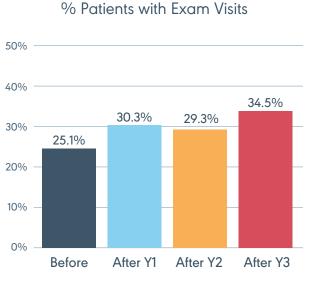




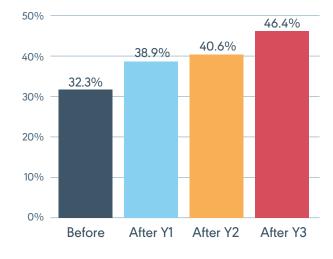
Figure 11 - Feline

Providing more services extends beyond the current visit to include future visits. Forward booking is strong for both feline and canine patients (Fig. 12 and 13).



Forward Booking

Forward Booking



% Patients with Exam Visits



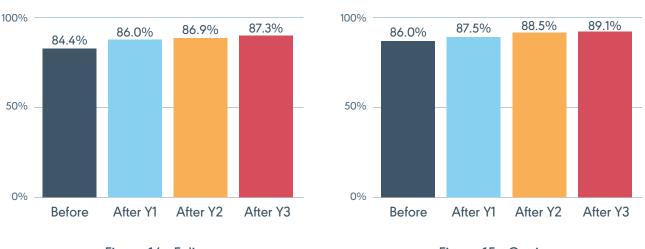
Figure 13 - Canine

Fear Free makes an impression on clients. When a client has a positive experience in the exam room, it can become easier to schedule the next visit. Forward booking is not always easy; it requires work by the veterinary team to build a bond with the pet owner as well as deliver a good exam room experience.

"We get clients excited from the first phone call, which I think helps with compliance," Stanley said. "With young puppies and kittens, we ask about their personalities to see if we should prepare for a fearful, timid, social, or rambunctious pet. This allows us to make suggestions for ways the owner can prepare the pet for that first visit. We have had clients go to another clinic because it was closer to home and then return because they could see the difference in coming to a Fear Free clinic versus one that is not. Clients need to see Fear Free in action and compare it to what they have experienced previously. Once they see that the entire staff is dedicated to being Fear Free, their decision is made, and you begin to build a lifelong bond."

It may take some pet owners trying out another non-Fear Free veterinary practice to realize the impact. However, upon witnessing the effect on the pet, pet owner compliance with medical recommendations and scheduling subsequent visits become less of a wrestling match and more of a trusted agreement with regards to the pet's needs.

In addition to receiving more services during a visit, felines are also making regular visits to their veterinarian. Figure 14 shows the increasing percentage of feline patients with exam visits each year–something the industry has noted as a lagging metric.⁴ It is encouraging to see feline patient visits catching up to canines (Fig. 15).



% Patients with Exam Visits

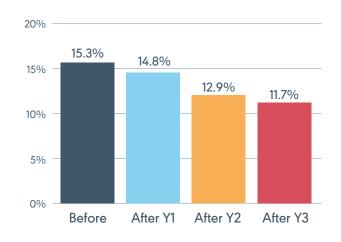
% Patients with Exam Visits





The most recent AVMA Pet Ownership and Demographics Sourcebook reported that just 47% of cat owners brought their pets in for wellness compared to 79% of dog owners.4 Hence, a continual increase in the percentage of feline patients having regular exam visits is a welcomed improvement. This increase highlights the efforts of the team to interact with both the patient and the pet owner, and Fear Free is one tool to help the team improve this interaction.

The survey result for Share of Progress Exams (Fig. 16) shows a decrease. However, how much can be contributed to COVID and how much is an alert to the industry to work on this aspect of patient care?



Share of Progress Exams*

The decline certainly brings about the need to discuss the impact COVID had on following up with patients and the continued care provided to those patients with long-term illnesses. The profession needs to encourage more progress exams, which requires a change in culture at the practice. When a cultural change occurs, the desire to explore alternative ways to make it easier to schedule progress exams will become more urgent—perhaps exploring the benefits of virtual progress exams or a change in the role of veterinary technicians in legally conducting progress exams.

When it comes down to it, most people enter the veterinary profession to provide care to animals. Fear Free is one technique to reduce FAS and positively impact the ability of the veterinary healthcare team to provide exceptional patient care. Felines, in particular, can benefit from Fear Free techniques. And let's not ignore the potential effects on pet owners. A better experience at the veterinary visit encourages a better relationship with the team and lays a pathway for compliance with recommendations and scheduling progress exams.

Veterinary Revenue

As much as the industry dislikes talking money, the "elephant in the room" deserves a look. After all, the inability to keep the doors open means not providing necessary veterinary care. Nevertheless, the past year did affect KPIs, and it will be necessary to monitor trends in subsequent years as the industry recovers from the pandemic.

Figure 16

"At the 40,000-foot level, the business of veterinary medicine has been consistently outstanding for decades, growing about twice as fast as America's GDP," Fritz Wood, CPA, CFP, and Founder of H.F. Wood Consulting, said. "But most of the growth is with the average transaction and not so much volume-related. Veterinary fees have increased at twice the rate of inflation this century. Today, a veterinarian's number-one cost, labor, is skyrocketing, so fee increases are warranted. And with demand for veterinary care exceeding supply in many geographies, fee increases are warranted. Anecdotal evidence points to practices making 5-10% fee increases year to date."

It is essential to follow industry benchmarks while, at the same time, studying the effects of a new program on the practice's KPIs. Critics of Fear Free bring up the cost of items in the Fear Free Treat Ladder or the cost of time spent working with a pet. While assessing cost is a good thing, proving that KPIs are not severely affected is equally important. Fear Free Certified Practices should continue to show revenue growth—and they do. Of course, there is a caveat when looking at revenue production.

"There are many factors that drive revenue increases in practices, and it can be hard to determine what revenue changes are attributable to what factors," Karen Felsted, DVM, MS, CVPM, CPA, Founder and President of PantheraT, said. "For example, annual fee increases are seen in almost all practices, and we have some limited data for what that looks like each year. According to the VHMA Insiders' Insights report, 35% of practices increased their shopped services by 3% in 2020, 19% increased these fees at less than 3%, and 46% increased shopped services at more than 3%. Non-shopped services generally increased at a slightly higher rate than shopped services."

While not all the factors involved in revenue production are studied in this survey, it must be noted that Fear Free Certified Practices are not financially suffering from implementing policies and procedures to reduce FAS in their patients. Figures 17 and 18 shows the continued revenue growth of Fear Free Certified Practices.

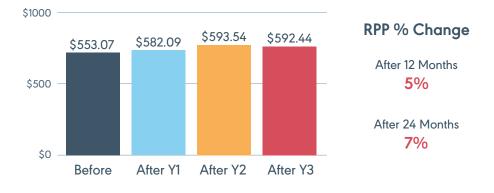
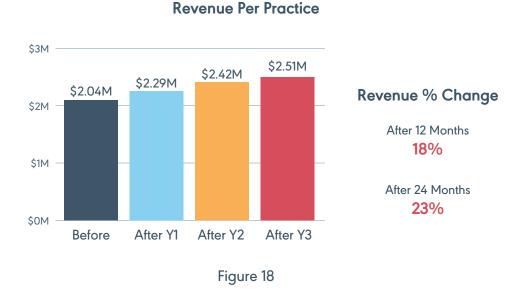




Figure 17



The exact fee changes of the practices in the survey are not known; however, the revenue changes reported by the survey participants exceed what is commonly reported in the industry.

Compared to benchmark practices, Fear Free Certified Practices have held their own, outperforming benchmarks in some areas. Figures 19 and 20 show the percentage change YoY. 2018 and 2019 data demonstrate a good performance; however, the 2020 pandemic year gives mixed results in percentage change. The data suggests that Fear Free Certified Practices perform well.



Fear Free vs. Benchmarks



Geographic Area:

All

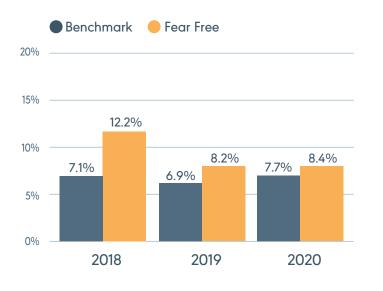
Fear Free Certified Practices: **38**

Benchmark Practices: 3428

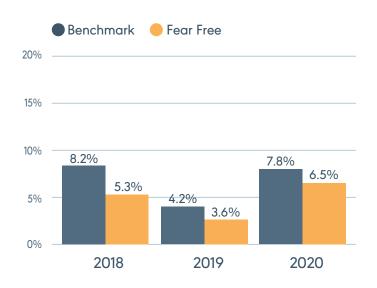
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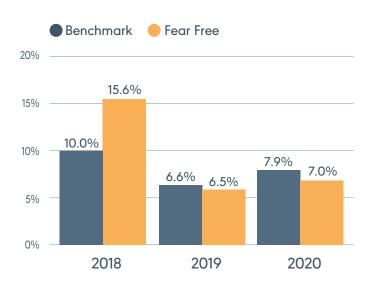
Patients YoY Change



Revenue Per Patient YoY Change



Patient Visits YoY Change





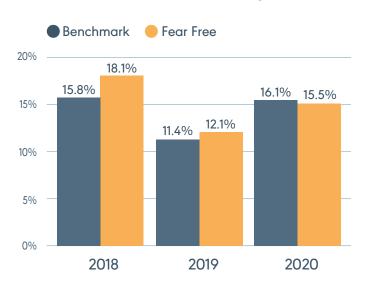


Figure 19



Fear Free vs. Benchmarks

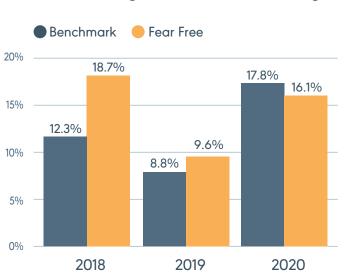


Geographic Area:



Benchmark Practices: **3428**

All

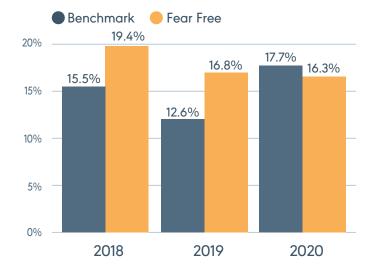


Revenue Drug & Medication YoY Change



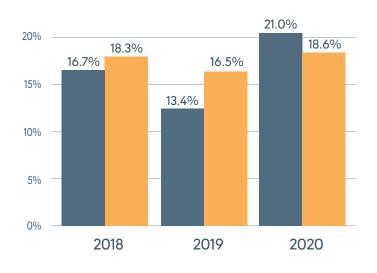
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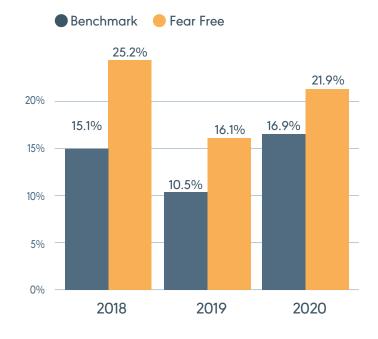


Revenue Lab YoY Change





Revenue Vaccines YoY Change

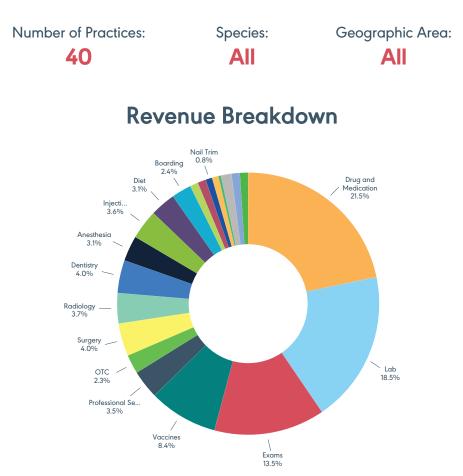


Fear Free practices are currently excluded if they spent less than half the year certified.



Revenue Breakdowns



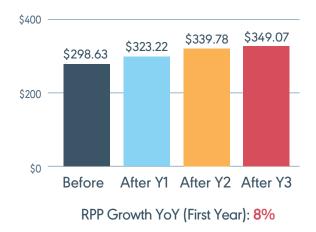












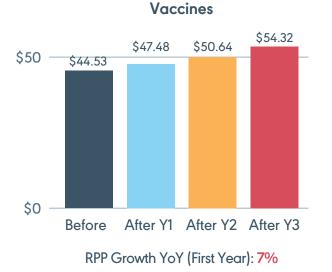


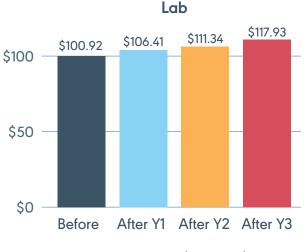


Revenue Breakdowns

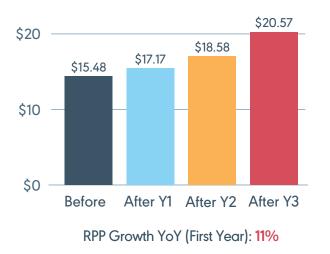








RPP Growth YoY (First Year): 5%



Anesthesia

Drug & Medications



Fear Free Certified Practices document continued Revenue Per Patient (RPP) growth year over year, with strong growth in the early years of implementation.

Summation/Closing Key Points

In addition to the financial study conducted by VetSuccess, a survey of Fear Free Certified Professionals was completed in 2020. Of the 1,429 respondents²:

- 96% agree that patient care has improved since implementing Fear Free
- 92% say that the practice enjoys a more positive image
- 82% have noticed an increase in gross revenue
- 86% have noticed an increase in client visits
- 93% have reported an increase in workplace safety
- 98% would recommend Fear Free to a fellow professional

The reality is that Fear Free makes a difference in the day-to-day operations, be it in patient care or the team's work environment. This reality can also be used to attract and retain quality team members. Bill Bergner, practice manager of Lincoln Heights Veterinary Clinic in Spokane, WA, discovered the power of being a Fear Free Certified Practice.

"A major aspect to managing any clinic is finding the right people," he said. "Although my background was in veterinary practice management, I was new to the area and did not really know how to attract the right staff members and doctors to Lincoln Heights Veterinary Clinic. During my first month of employment, we lost a DVM and the COVID lockdown began. Needless to say, it was not the most ideal situation to start my tenure with the hospital. I initially attempted to attract quality candidates with ads on the various job boards with little success. My first success at finding a DVM for this hospital came from word-of-mouth advertising that we are a Fear Free Certified clinic and that all our staff members are dedicated to practicing with a considerate approach. During the past year and a half, we have grown the practice from four doctors to six without spending money on advertising through traditional methods. While other clinics in the area struggled, we thrived and grew. Veterinary professionals want to work in Fear Free practices, and we are proof that grassroots advertising can work to attract not only quality candidates but the absolute best candidates."

Sometimes, all it takes to win the game of hiring and retention is to have a culture of low stress, anxiety, and fear. Fear Free is not just for pets-it also improves the lives of the humans providing care to those pets (veterinary healthcare teams and pet owners alike).

In today's customer service environment, people reward businesses that provide the best experience with their patronage and their loyalty to the brand. Veterinary practices compete for that business and loyalty with both private and corporate veterinary practices, "Dr. Google," and the perception of great customer service. Fear Free is helping practices stand out from the rest.

Fear Free makes for good medicine and a good experience for the patient, the pet owner, and the veterinary healthcare team. And when everyone is winning, the competition doesn't stand a chance.

References

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