



The Positive Impact of Fear Free Certification in Veterinary Practices

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List of Abbreviations

| | |
|-------------|---|
| CE | Continued Education |
| EMR | Emotional Medical Record |
| FAS | Fear, Anxiety, and Stress |
| KPI | Key Performance Indicator |
| PIMS | Practice Information Management Software |
| RACE | Registry of Approved Continuing Education |
| ROI | Return on Investment |
| RPP | Revenue Per Patient |
| SOP | Standard Operating Procedures |

Overview

Fear Free Certification has gained tremendous traction within the veterinary community over the last few years. For many professionals, Fear Free is the right thing to do; after all, Fear Free helps look after the emotional wellbeing of pets and provides veterinary professionals with the tools and techniques to provide best possible care for patients.

In addition to being the right thing to do, Fear Free also makes financial sense. In a study of 20 Fear Free Certified® Practices, several key performance indicators (KPIs) were identified and measured, such as practice revenue, revenue per patient, revenue growth in different categories, bonding rates, and patient visits. Across the board, Fear Free Certified Practices improved their own performance and significantly outperformed benchmarks as defined in this study after implementing Fear Free.

Given the novelty of the Practice Certification program, the sample size is limited and may not be diverse enough. However, given that the study required hospitals to have been practicing Fear Free for 2 years, the number of practices that qualified for the study was small. Over time, the sample size will grow, and additional analysis will be performed.

These results demonstrate that Fear Free Certified Practices are seeing an increase in patient visits and compliance. The following pages will outline details of this study.

History of Fear Free

Fear Free is an innovative education company serving veterinary professionals, pet professionals, and pet owners to help reduce fear, anxiety, and stress in pets and provide in-home enrichment. 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.

The Fear Free concept originally started for Dr. Marty Becker in 1985 when veterinary behaviorist Dr. R.K. Anderson, the creator of the Gentle Leader and the cofounder of the Delta Society, came to his veterinary hospital in Salt Lake City, UT, and talked about using treats—lots of treats—to make it an “All Treat Veterinary Hospital” rather than “All Pain Veterinary Hospital” for the pets. But this was just the first step.

When Dr. Becker heard famed veterinary behaviorist Dr. Karen Overall talk at a meeting in 2009 about “fear being the worst thing a social species could experience,” he decided that he had an obligation as a veterinarian to create awareness within the profession about the importance of the emotional wellbeing of pets. As a result, Fear Free, LLC was founded with the mission to alleviate fear, anxiety, and stress in pets and to educate and inspire the people who care for them.

Founded on the science of behavior and backed by leading experts in the areas of veterinary behavior, anesthesia, internal medicine, and other specialties, Fear Free is committed to providing best-in-class courses, resources, and benefits to its members.



Reducing fear can greatly improve the welfare of animals. When animals react badly during a veterinary procedure, it is often due to fear. — Dr. Temple Grandin, Ph.D.¹



To bring this concept to fruition, a team of industry professionals, including members of the Fear Free Executive Council and highly regarded board-certified veterinary behaviorists, veterinary nurse behavior specialists, board-certified veterinary anesthetists, veterinary practice management experts, and boarded veterinary practitioners experienced in Fear Free methods, joined forces in 2016 to create the Fear Free Veterinary Professional Certification Program. The program not only provides cutting-edge, science-based education, but it also sets out to combat two of the top three reasons pet owners say they do not bring their pets to the veterinarian²: stress to the pet, money, and stress to the pet owner.

By implementing Fear Free into veterinary practices, the first and third barriers are taken care of. The Fear Free Certification Program introduces a practice philosophy that considers the whole pet, including their emotional wellbeing, and inspires veterinary team members to make the visits to the veterinarian as pleasant and stress-free as possible (for both pets and their owners), according to Dr. Lisa Radosta, a board-certified veterinary behaviorist.

Unlike any other company in the veterinary field, Fear Free has an opportunity to connect veterinary and pet professionals with pet owners, helping to strengthen those relationships and putting emotional wellbeing front and center with professionals and owners alike.

Fear Free Certification Process

The first step to successful Fear Free adoption includes the certification of individual veterinary team members. In order to achieve certification, professionals successfully complete the 8-module online certification course. The course covers behavior basics, body language, core Fear Free concepts, travel to the hospital, waiting room management, exam room setup, common procedures, pre-visit pharmaceuticals, and analgesia and sedation protocols.

Once certified, veterinary professionals have access to a large range of additional RACE-approved CE, training tools, marketing tools, a closed Facebook Group, an online store, preferred pricing on select products and services, and more. Examples of additional courses include:

- Veterinary Professional Certification Course Level 2
- Veterinary Professional Certification Course Level 3
- Analgesic Medications and the Pain Pathway
- Analgesic Protocols for Acute Pain – Case-Based
- Noise Aversion and Nutraceuticals and Behavioral Medicine
- Fear Free Companion Animal Euthanasia Course
- Fear Free Dentistry and In-Clinic Sedation
- Feline Destructive Scratching Solutions
- The Vital Role of Client Service Representatives
- Emergency and Critical Care

Practice Certification takes Fear Free to the next level by not only getting individuals certified but also implementing Fear Free across all areas of the practice, including standard operating procedures (SOPs), medical records, and team culture and training. By fully embracing Fear Free, a Fear Free experience can be provided consistently to all patients.

To achieve Practice Certification, practices need to:

- Meet the required number of certified team members in the practice (25% of the team, which must include 50% + 1 of the DVMs and 100% of the leadership team, is required to have individual Fear Free Certification and an active membership).
- Complete the online self-assessment of Fear Free standards and successfully pass all mandatory and the minimum percentage of optional standards outlined to achieve certification status.
- Complete and pass the onsite visit by a Practice Certification Veterinarian.

Worldwide & Cross-Professional Reach

Today, more than 36,000 Fear Free Certified Professionals can be found across the United States, Canada, and more than 40 other countries, and over 60,000 professionals have registered for the program. Fear Free Certified Practices are 110 strong and growing.

In addition to veterinary professionals, other pet professionals are also getting certified (Fig. 1). Trainers, groomers, and shelter personnel and volunteers are also working toward reducing stress in every part of a pet's daily life.

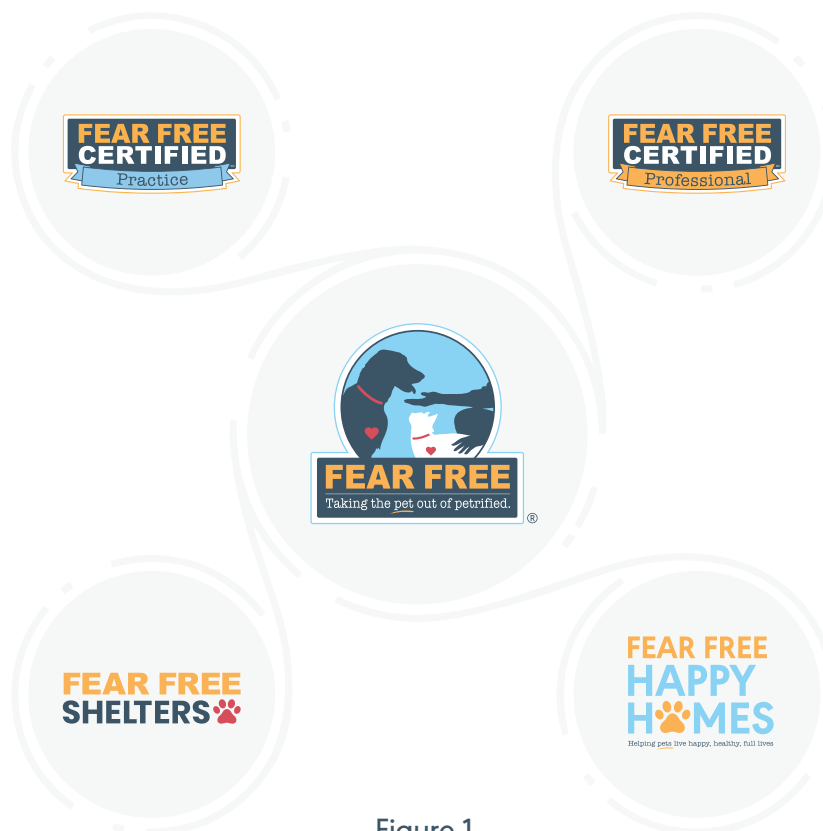


Figure 1

Fear Free Eco-System

In order to successfully affect the emotional wellbeing of pets, the entire eco-system of a pet needs to have access to Fear Free resources and education.

Thus, Fear Free Happy Homes (www.fearfreehappyhomes.com) was launched in 2017 to better educate pet owners about the emotional wellbeing of pets. This entirely free resource offers an extensive video library featuring a variety of topics, including fears and anxieties, exercise and enrichment, veterinary visits, and the human-animal bond. In addition, pet owners have access to downloadable handouts, an online directory to locate Fear Free Certified Professionals in their area, and deals on pet products and services.

Worldwide & Cross-Professional Reach

In the summer of 2019, the highly anticipated Fear Free Shelter Program launched (www.fearfreeshelters.com). This new program was written by leading experts in shelter medicine and behavior and is available at no cost to shelter professionals and volunteers, with the intent to provide education and resources on how to alleviate fear, anxiety, stress, and frustration in shelter pets.

Fear Free is also invested in the next generation of veterinary professionals. The Fear Free Veterinary Professional Certification Program is complimentary to all veterinary medicine students, veterinary nurse students, veterinary assistant students, as well as faculty and staff members.

Methodology

In order to complete this study, 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 identify survey participants, VetSuccess matched existing clients to the list of Fear Free Certified Practices. All practices showing up on both lists were enrolled into the survey. In addition, Fear Free reached out to all other Certified Practices to encourage participation. From these two lists, 20 veterinary practices in the United States and Canada participated in the survey.

The Practice Certification program launched in April 2018. In order to achieve an appropriate time period (2 years) for a meaningful study, the inflection point (day 0) to determine the “before” and “after” periods was determined to be 9 months before a practice applied for Practice Certification. The reasoning being that in order for a practice to successfully become certified, it is necessary to have implemented and practiced Fear Free for at least 9 months prior to application. The “before” period is thus 12 months prior to 0, and the “after” period is 12 months after 0. Picking this inflection point also allowed for a full 12-month “after” period to be assessed. (Practice Certification launched April 2018, so the earliest practices will have had an inflection point of July 2017—resulting in July 2016 to July 2017 as the “before” period, and July 2017 to July 2018 as the “after” period). This means that many of those 20 hospitals were newly certified and only a couple of months of their data in the “after” period reflects certification status. It is therefore anticipated that when this analysis is repeated to capture the next “after” period, even stronger results will be reflected.

Methodology

Demographics of Survey Participants

Fear Free techniques can be used for many species since key concepts and tools, such as the EMR (Emotional Medical Record) and FAS Scale (Fear, Anxiety, and Stress Scale), are the same or very similar. The survey respondents primarily treat canine and feline patients (Fig. 2). The location of the practice as compared to a rural or urban area is noted in Fig. 3.

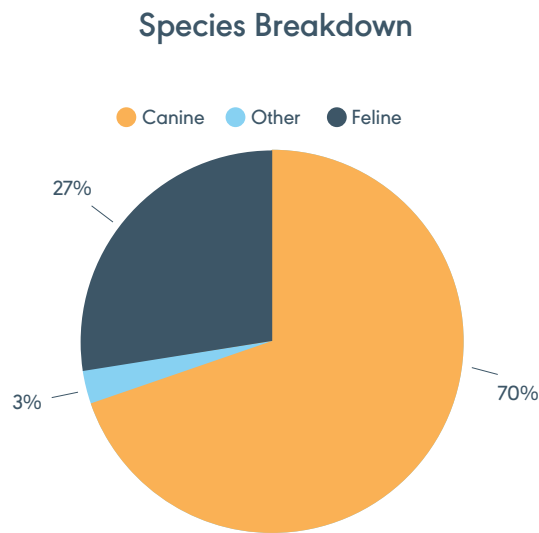


Figure 2

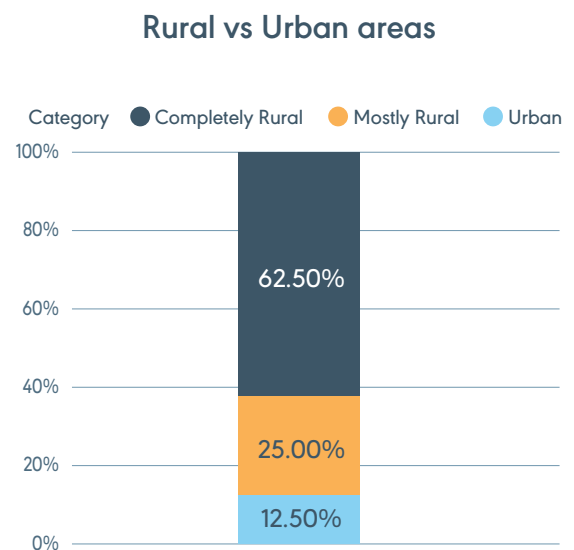


Figure 3

The Effects of Fear Free - Breaking Down the Data

The study was designed to generate two sets of results. The first set is a quantitative analysis on how the 20 Fear Free Certified Practices' performance changed from the "before" period to the "after" period. Looking at the financial performance of those practices in isolation showed impressive improvement across key KPIs: a 6% growth of patients, 12% growth in overall revenue, and 5% growth in revenue per patient.

Second, the study set out to compare the 20 Fear Free Certified Practices against industry benchmarks. In this study, benchmarks are defined by a subset of 320 VetSuccess clients in the US and Canada. For the sake of an accurate comparison, the time periods measured are the full calendar years of 2017 and 2018.

Patient Visits & Revenue Per Patient



40% of dog owners report their dogs are scared while being examined by a veterinarian. Globally, up to one in seven dogs show severe or extreme fear during an examination.³



The Bayer Veterinary Care Usage Study (2011) discovered two key issues affecting patient care. Namely, pet owners felt that the pet hated going to the vet (58.2% feline and 37.5% canine pet owners) and that just thinking about going to the vet was stressful (37.6% feline owners and 26.2% canine owners).²

Pet owners are clearly stating that fear, anxiety, and stress (FAS) is a priority issue affecting the pet owner's decision to take the pet to the veterinarian. Stress, real or perceived, negatively impacts veterinary visits (with feline patients making less frequent visits, according to the Bayer Veterinary Care Usage Study²).

Knowing the hurdle does not make action by the veterinary team easy. How can a team trained in animal medicine treat stress experienced by the pet owner? How can the team prevent FAS in a pet that has not even been treated yet? How can the veterinary team "friend" the cats in the practice and make it easy for clients to keep appointments (as recommended by the Bayer Veterinary Care Usage Study²)? Fear Free helps to answer the "how."

To tackle FAS experienced by both the pet owner and the pet, Fear Free provides the veterinary team with:

- Techniques to promote safe, friendly handling of the pet (gentle control and touch gradient).
- Techniques to advise when to utilize pharmaceuticals or stop the procedure and reschedule the appointment (the 3-second rule).
- Tools to acclimate the pet to the carrier, the car trip, and the exam room.
- Tools to promote cat- and dog-friendly reception areas and entrances.

In 2018, a survey sent to Fear Free Certified Professionals showed the most popular Fear Free implementation tricks—cheese sprayed on the wall, towels treated with pheromones, touch gradient, considerate approach, pre-visit pharmaceuticals, working with less restraint, and involving pet owners in the process.⁴

These tools are not just for a trained veterinary team; these are tools and techniques for the team to teach to pet owners—and an empowered pet owner can overcome his/her personal stressors related to getting the pet to the veterinarian.

The study results show that using Fear Free tools and techniques makes a difference in patient visits. Looking at the “before” and “after” periods of the 20 Fear Free Certified Practices, positive growth can be reported across all measured KPIs (Fig. 4):

- Visits per patient: 2% increase
- Exams per patient: 2.2% increase
- Patients with multiple visits: 0.9% increase
- Progress exams: 3% increase
- Notably, feline visits show both an increase in progress exams (3.5%) and multiple visits (1.3%)

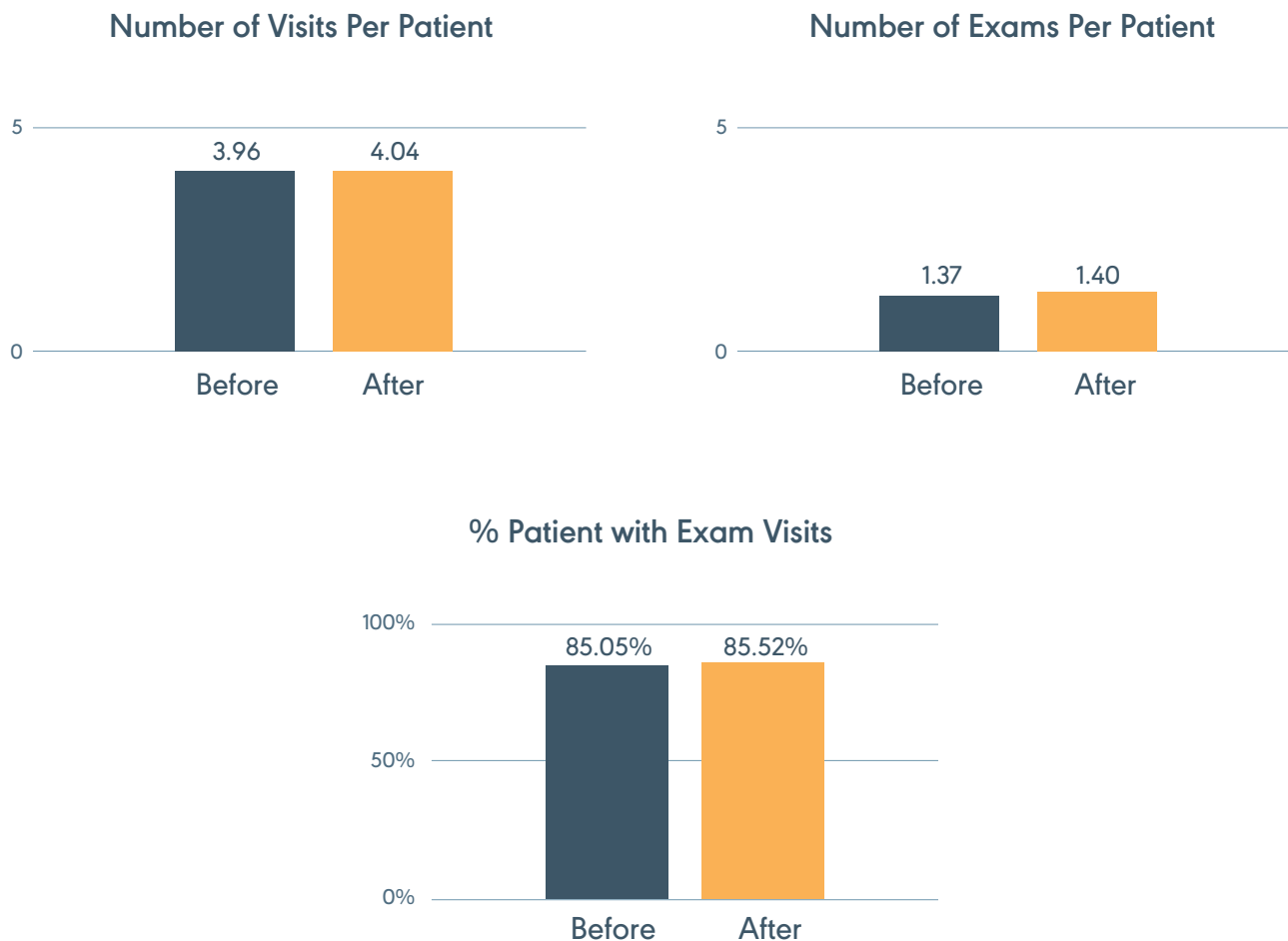


Figure 4

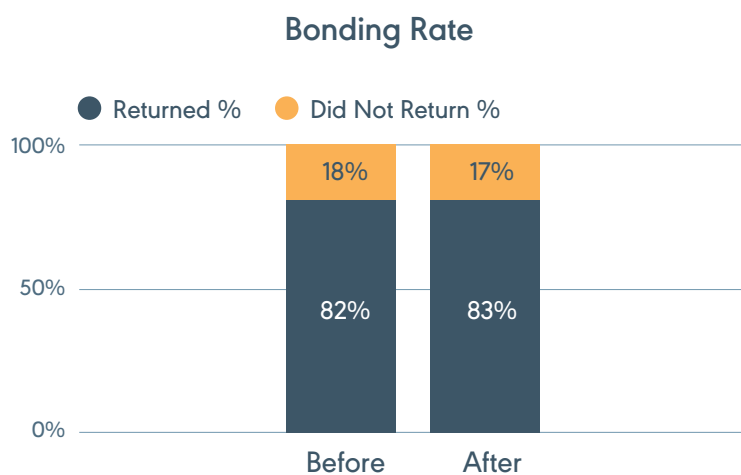
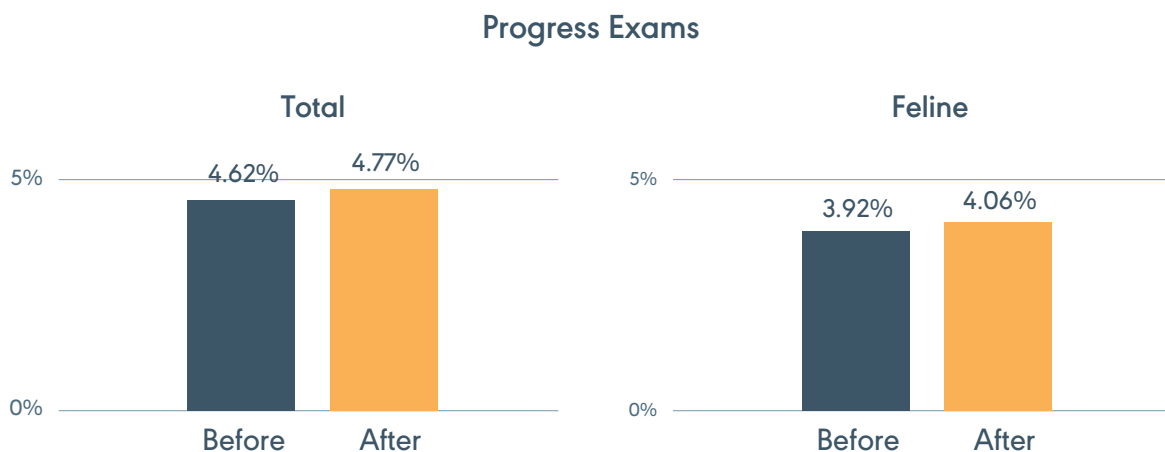
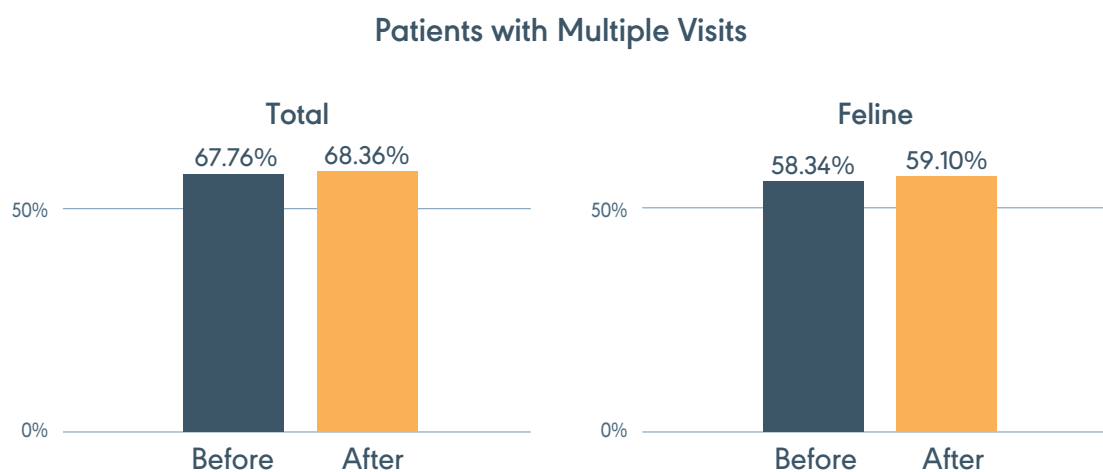
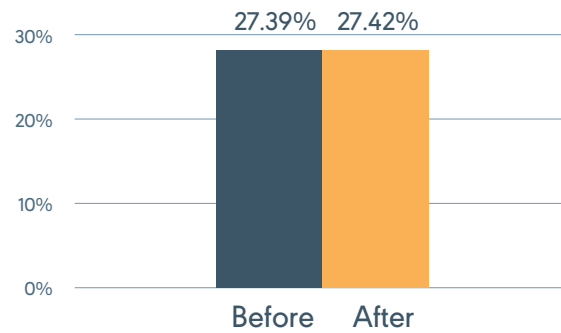


Figure 4 (continued)

Feline Patient Share



Feline Revenue Share

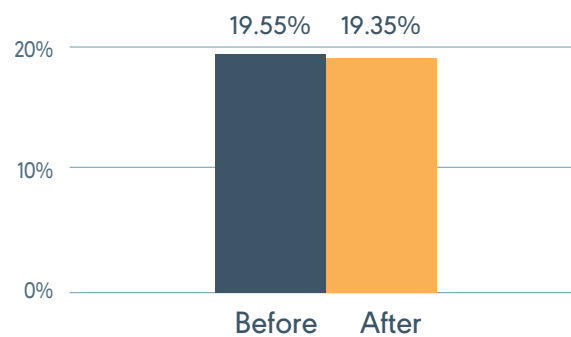


Figure 4 (continued)

The mission of the veterinary industry is to improve animal and human health (as stated in the AVMA mission statement as well as numerous practice mission statements). It is difficult to improve animal health if the animal does not come in for that initial exam or if the animal is not seen for follow-up care or progress exams. As noted in the Bayer Veterinary Care Usage Study², feline patients were not coming for veterinary care, and suggestions were made in the study for increasing feline visits. With Fear Free, patients (including felines) are coming to the veterinarian.

Pets no longer lack medical care, and those who require additional follow-up visits actually come back. Even client bonding rates improve when Fear Free is implemented.

When comparing Fear Free Certified Practices to benchmarks, we find that in 2017 Certified Practices were 54% above the benchmark for patient visits and improved to 221% above the benchmark in 2018. This differential can be attributed to new patient growth in Fear Free Certified Practices, along with additional visits from the existing client base. (Fig. 5)

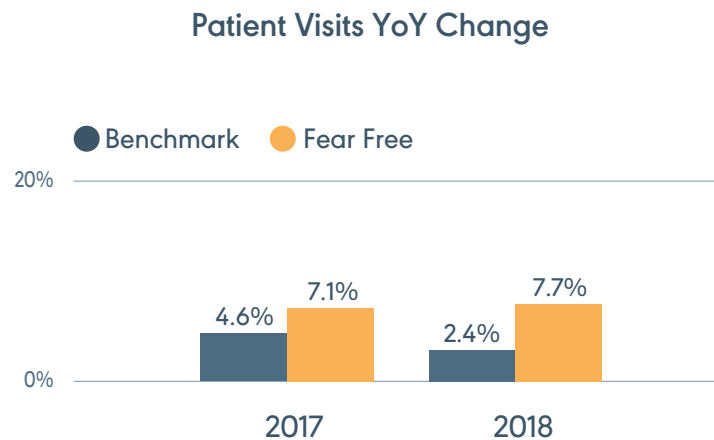


Figure 5

In addition to increasing exam visits, other services also show positive trends (Fig. 6). The study results show growth in drugs and medications dispensed (6% RPP, 14% transaction growth), exams (5% RPP, 19% transaction growth), anesthesia (12% RPP, 10% transaction growth), laboratory (5% RPP, 6% transaction growth), vaccines (7% RPP, 9% transaction growth), and even nail trims (1% RPP, 3% transaction growth). Incorporating Fear Free techniques enables the veterinary team to treat more pets and to treat those pets more thoroughly since the pets and pet owners are more comfortable with staying to receive those services, which might contribute to the increases seen in Fig. 6.

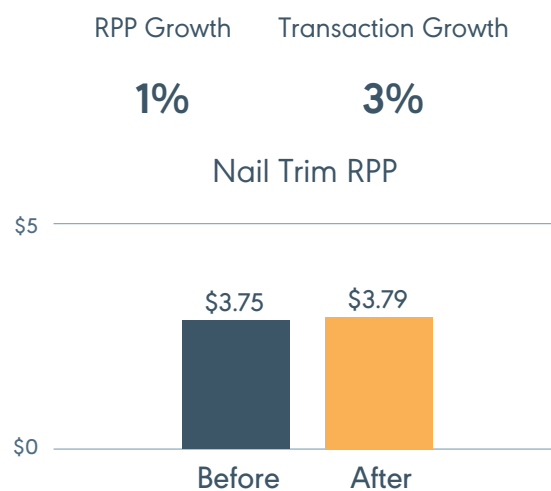
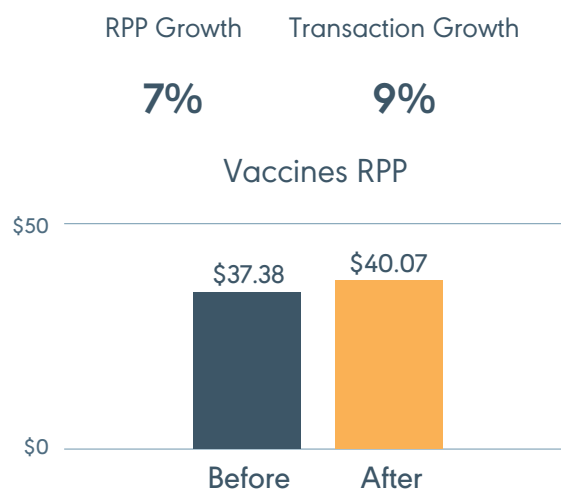
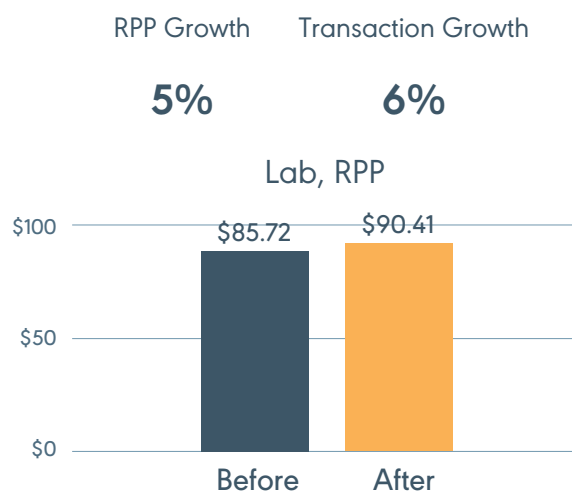
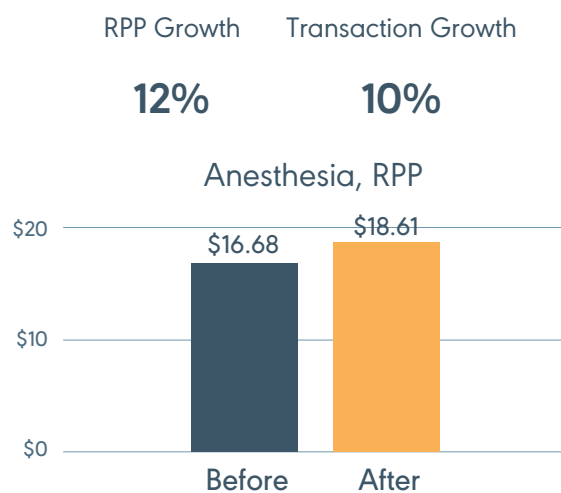
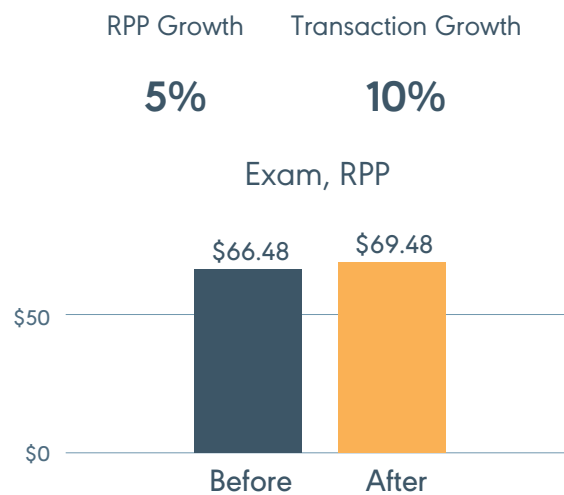
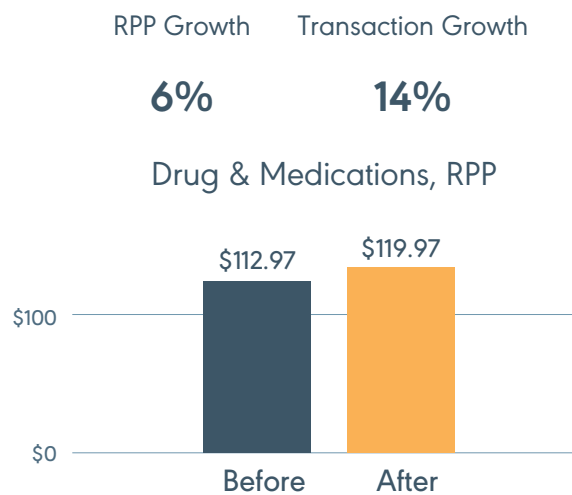


Figure 6

“

I had a great experience bringing Macaroni in! We both felt very comfortable, and I appreciate all the distraction treats given to him when he received his shots. — Client of Fear Free Certified Country Oaks Animal Hospital in Sacramento, CA

”

Think about those medical cases in the veterinary practice that never came back for follow-up care. What if just a percentage of those not returning are due to FAS—something the veterinary team can actively address? Not only are the patients helped (follow-up visits, diagnostics, medications), but also the team and the business benefit when Fear Free is implemented. The team now has the tools to make a difference in a segment of the practice’s patient population, a segment that previously disappeared from follow-up care or active patient status. Fritz Wood, CPA, CFP, founder of H. F. Wood Consulting, points out: “The key to a healthy practice is client retention—repeat visits. The data supports Fear Free to that end.”

Pet Owner Value & Compliance

“

Some pets, especially cats, never make it to the veterinary office due to the owner’s perception of the pet’s reaction to the visit, as well as the client’s own stress about dealing with the situation. — Dr. Lisa Radosta, DAVCB⁵

”

Read any one of the reports from AAHA Financial & Productivity Pulsepoints, Bayer Veterinary Care Usage Study, AVMA Pet Owner Sourcebook, or VHMA Insiders’ Insights and the same trend is presented: the continued decline in patient visits.

The August 2019 VHMA Insiders’ Insights reports: “Total visits for year-to-date 2019 are down by 0.3% compared to a 0.6% decline in 2018; and new client numbers for year-to-date 2019 are down by 13.5%. This continues to be a discouraging trend as these [new client] numbers have declined almost every month of the last four years.”⁶

What can the veterinary team do to increase patient visits, increase active clients, and show pet owners the value of those visits? For one, the team must be on top of their game in communicating the value to pet owners. This means communicating current treatment plans and future needs, when the pet should be seen and for what procedures and tests, and how much the recommended services will cost and payment options available. One of the things to consider in communicating treatment plans is discussing how best to deliver treatments without causing fear, anxiety, or stress.

“

I would like to say how much I appreciate the care, effort, and patience everyone at the clinic has put into working with Murphy. I think the Fear Free approach really shows dedication to the total wellbeing of my pets. Murphy has gone from being extremely nervous, defensive, and almost biting to being relaxed and excited and wagging his tail. I am truly thankful that Murphy can have positive experiences through Victory Visits so he doesn't have to be afraid of going to the vet.
— Client of Fear Free Certified Gamble Pet Clinic in Fort Collins, CO

”

Fear Free not only gives veterinary teams the tools to perform FAS-reducing techniques, it also gives teams the means to communicate what the techniques are and how they help pets. Fear Free Certified Professionals have access to marketing materials and downloadable forms, including client communication materials as well as practice promotion aids. Using these materials makes it easy for the team to inform pet owners about the extra measures the practice takes to make the visit less stressful on the pet owner as well as the pet. When the pet owner witnesses the effects on the pet, it eases the pet owner's mind and makes going to the vet less of a hassle.

Practices using Fear Free techniques not only saw an increase in patient visits (increasing 8.4% from 2017 to 2018) and visits per patient (increasing 1% from 2017 to 2018), but they also outperformed the benchmark practices for the same time frame. (Fig. 7)

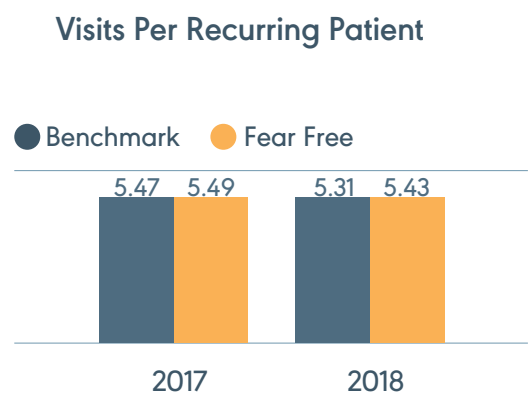
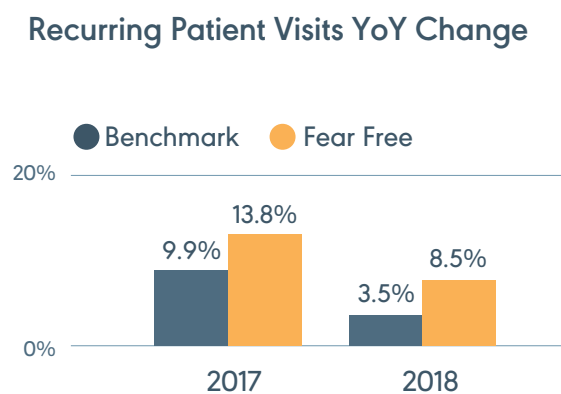
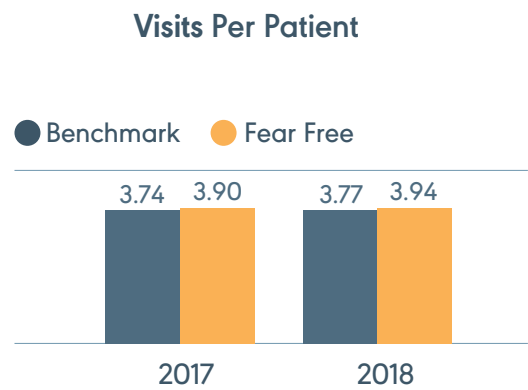
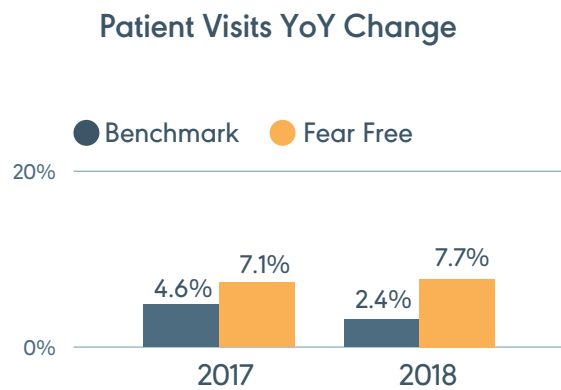


Figure 7

The proof that Fear Free improves patient visits was noticed back in a 2018 survey of Certified Professionals conducted by Fear Free. Of the 905 respondents, 82% noticed an increase in client visits.⁴ The current study has the numbers to prove what those earlier survey respondents felt was certainly true: Fear Free practices see an increase in the number of patients per practice (Fig. 8) and in the number of patient visits (Fig. 7). In survey responses and testimonials received, Certified Practices report that pet owners are noticing the difference in their pets, and they are not afraid to bring their pets in as recommended by the veterinary team.

Patients YoY Change

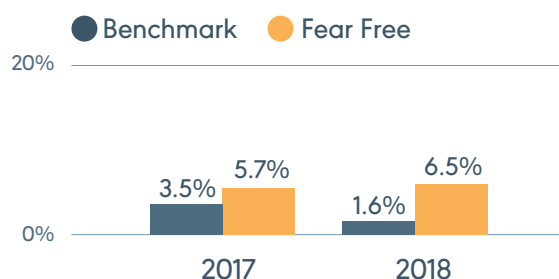


Figure 8

Veterinary Revenue



It's very exciting to see hard evidence confirming what we know intuitively: What's best for the pet and client is also great for the business. — Fritz Wood, CPA, CPA, Founder of H. F. Wood Consulting



According to AAHA's Financial and Productivity Pulsepoints 10th edition, gross revenue grew an average of 7.7%, yet revenue from medical services fell (from 70.1% to 68.0%)³. Veterinary practices are facing additional assaults on revenue production from:

- Online sales of pet medications
- Encroachment from low-cost retailers
- Declining patient visits
- Shortage of veterinarians and veterinary nurses

Implementing new medical services is a way to enhance revenue and improve profitability, in addition to managing expenses and operating in an efficient, productive manner. Not every new service must be provided by a veterinarian; the team can also provide certain services that pets need and pet owners want. Fear Free techniques can be performed by any member of the veterinary team.

The Bayer Veterinary Care Usage Study identified stress as a barrier to visits, especially among feline owners, with 38% of cat owners saying that just thinking about the visit to the vet is stressful and a whopping 58% of cat owners say their cat hates going to the vet.² And don't think you can make up the shortage in feline visits with dogs: 26% of dog owners feel stressed about vet visits and 38% think their dog hates going to the vet.² Utilizing Fear Free tools and techniques can change the narrative.

Fear Free practices also have an advantage when it comes to revenue production (Fig. 9). There is a return on investment (ROI) for making the effort to use techniques that reduce FAS. Looking at the performance of Fear Free Certified Practices in the "before" and "after" period:

- The number of patients per practice increased by 6% and was 306% over benchmark, and, even more impressive, feline patient visits increased after implementing Fear Free.
- Practice revenue, revenue per patient, and invoice value all increased and were above normal increases expected from raising prices with a revenue change at 12%.

When comparing Fear Free Certified Practices to benchmarks (Fig. 10), they outperform across almost all measured revenue categories:

- Overall revenue year-over-year grew from 42.5% to 57.1% above benchmark in 2018.
- Revenue per patient is the only KPI that showed a decrease in rate of growth, going from 23.5% over benchmark to 19.2% below. However, the decline in per patient revenue growth was offset by increased patient count.
- Drug and medication, exam, laboratory, and vaccine revenues are all higher in 2018 for Certified Practices as compared to benchmarks, some of them considerably.

"While the motivating factor behind Fear Free will never be the bottom line, it is additive," according to Wood. After implementing Fear Free tools and techniques, practices see an increase in patients and revenue.

Low-cost retailers may offer inexpensive vaccine packages, but if the pet stresses out while there, it is doubtful the pet will be going back, regardless of how cheap that stressful visit was. On the other hand, if practices use Fear Free techniques and the pet shows signs of being relaxed and calm during the visit, it would not take much to convince the pet owner to return for the next visit.

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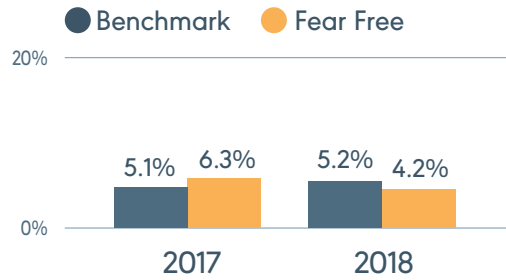
I truly like that clients can pay their bill in the exam room. It totally cuts down on the animal's anxiety. I was unsure how the 'no fear' model would work, but both of my dogs seem to be responding in a positive way. Thank you." – Client of Fear Free Certified Country Oaks Animal Hospital in Sacramento, CA

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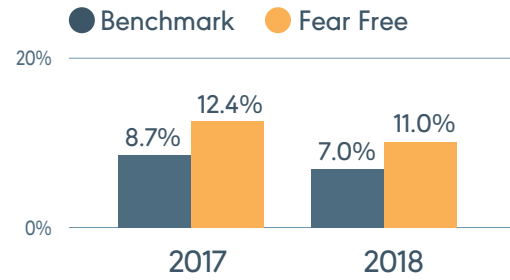


Figure 9

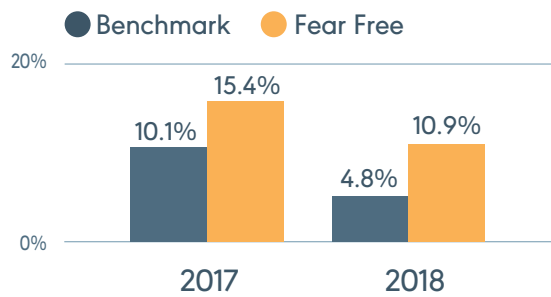
Revenue Per Patient YoY Change



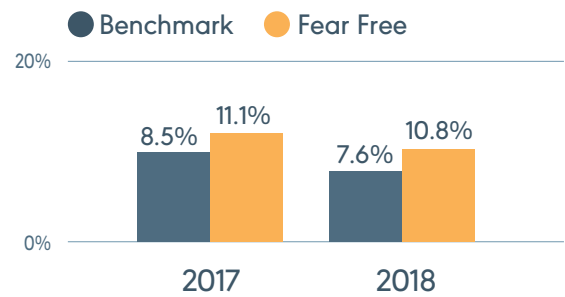
Revenue YoY Change



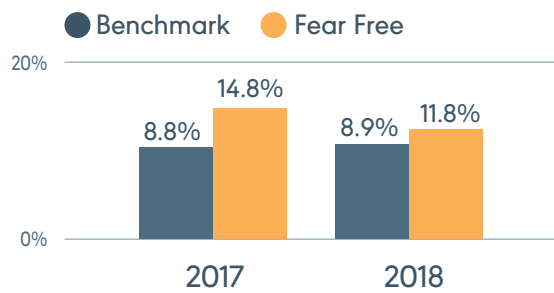
Revenue Drug & Medication YoY Change



Revenue Exam YoY Change



Revenue Lab YoY Change



Revenue Vaccines YoY Change

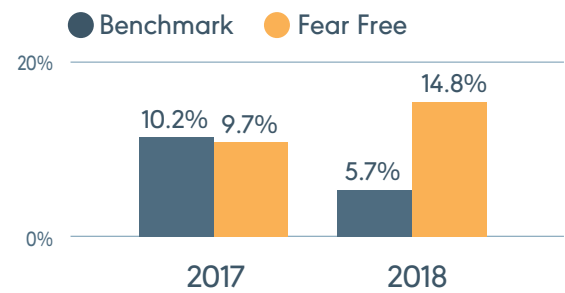


Figure 10

Conclusion



Think more about how we can reduce the prevalence [of fear] and make visiting the veterinarian a more positive experience for dogs instead of accepting fear as a given.³



Looking at the data at hand, the results are clear: Practices adopting and implementing Fear Free are poised for growth. Not only are their teams happier at work, their clients and new potential clients also appreciate the fact that their pet's emotional wellbeing is front and center during each veterinary visit. Improved communication with pet owners strengthens the bonding rate and increases the level of trust pet owners place into their veterinary team—a crucial element to the ongoing success of a veterinary practice. With trust come referrals and increases in visits and compliance, all of which are reflected in this study. There only remains one final question: Why would you not want to implement Fear Free in your hospital and achieve certification status?

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