

Regional and Business Studies (2019) Vol 11 No 2, 41-47
Kaposvár University, Faculty of Economic Science, Kaposvár
doi: 10.33568/rbs.2407

MARKETING IN GERMAN VETERINARY PRACTICES ARE RURAL VETERINARIANS KEEP PACE WITH TIME?

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ABSTRACT

The veterinary profession in Germany changed significantly in the past 20 years, and nowadays it can be categorized according to the specializations with a high emphasis on the target species (e.g. dogs, cats). Furthermore, the veterinary practice owners and managers are facing challenges of the fast-growing vet market, as well as the digitalization and its new marketing instruments and tools. The aim of our study was to survey if the German rural mixed animal veterinarians were keeping pace with time and investing in the marketing of their practices. A survey amongst pet owners and mixed animal veterinary practices was conducted regarding the marketing activities in the veterinary practices by using questionnaires in the district of Cloppenburg, Lower-Saxony, Germany, between February and June 2018. The questionnaires were spread through a Facebook group for pet owners and via email to the vet practitioners and we received 60 answers from pet owners and 21 answers from vet practices. The results show that the German mixed animal veterinary practices do not only lack marketing knowledge but the marketing strategies and tools as well. The surveyed veterinary practices neglected to improve their marketing communication activities, therefore, failed to analyze their customers' needs. They usually did not invest in vet marketing services that would otherwise generate new customers or keep the existing clients. It can be concluded that the marketing trainings for the veterinary practice managers and owners working in the German rural areas would be a major need.

Keywords: veterinary medicine, marketing, business, management

INTRODUCTION

The veterinary profession in Germany changed significantly in the past 20 years, and nowadays it can be categorized according to the specializations with a high emphasis on the target species (e.g. dogs, cats). Furthermore, the veterinary practice owners and managers are facing challenges of the fast-growing vet market, as well as, the digitalization and its new marketing instruments and tools (Wessels *et al.*, 2014). The core focus of the veterinary profession still relies on delivering good and quality care for animals. But, as a business, the veterinary practices must also focus on the affordability and economic feasibility of their services. The problem is that the undergraduate veterinary education in many countries still lacks the teaching of economics with all its facades, e.g. controlling, organizational behaviour, marketing

and human resources management (Coke et al., 2016). Furthermore, the postgraduate education of veterinary graduates rarely focuses on developing business, communication and marketing skills, it is rather solely based on the development and specialization in clinical and medical competences (Bachynsky et al., 2013; Blättner and Matzner, 2010).

Additionally, in the last decade the way the vets communicate with their clients changed drastically from a monologue, where the vet is giving orders, to the vet in dialogue with the client (Blättner and Matzner, 2010; Brown, 2018). The client is not exclusively relying on the education or position of a veterinarian any more. Clients nowadays appear to know the diagnosis even before entering the practice and like to be more closely involved in the decision-making process of the treatment of their animals. Through research on the web, the client relies on non-professional sources, blog articles or solely on google, to find a diagnosis for the pets' problem (Wessels et al., 2014). Furthermore, via new ways of communication, e.g. whatsapp, facebook, youtube, etc., any business has "new media" channels to communicate with their clients or potential clients (Molhoek and Enderburg, 2009; Wessels et al., 2014).

Despite the ways of communication and marketing tools have changed, the basics of marketing have not. As already pointed out by Clarke and Chapman (2012), marketing is not only about the advertisement, the promotion and the special offers, it is also about the clients, the customers, as well as, the staff in the veterinary practice. The customer relationship has to be balanced out with the knowledge of the staff and the veterinary surgeons. A veterinary surgeon can be high class but if he fails to communicate efficiently with the customer, the animal owner could perceive the value of the vet's services in a different way than perceived by the veterinary professional (Brown, 2018; Clarke and Chapman, 2012). Corporate companies know about the importance of marketing and employ specialists in marketing to analyse the market trends and to develop new services and products to promote their sales. Veterinary practices generally do not employ specialists in marketing nor they actively engage in it. However, it is essential to know what the customer wants or needs and to adapt to the changes in the customers requirements. It is the key to the success of the veterinary practice (Blättner and Matzner, 2010; Thiele, 2009).

Although, some studies show that a large percentage of veterinarians across Europe use sufficient marketing and market analysis tools for their practice, the aim of our study was to survey if the German rural mixed animal veterinarians followed this trend or not.

MATERIAL AND METHODS

A survey amongst pet owners and mixed animal veterinary practices was conducted regarding the marketing activities and tools in veterinary practices by using questionnaires in the district of Cloppenburg, Lower-Saxony, Germany, between February and June 2018. A questionnaire consisting of 17 questions was made for pet owners by using Microsoft Forms and its link was spread via the facebook group "Cloppenbürger", which currently has almost 14,000 members. The questions aimed at the pet owners' satisfaction with their veterinarians, their marketing communication

and the services that they would like to get offered by them. This questionnaire was answered by 60 clients. A second questionnaire consisting of 12 questions was made for veterinary practice owners/managers by using Microsoft Forms and its link was sent to 16 mixed animal veterinary practices working in the district of Cloppenburg. 21 answers were received. This questionnaire mainly focused on the marketing activities, tools that are used in the rural mixed animal vet practices. Both questionnaires were based on previous veterinary marketing surveys that were conducted in Hungary, Cyprus and Israel (Ley, 2014; Michaelidou, 2012; Ózsvári, 2007, 2014).

RESULTS AND DISCUSSION

Pet owners' questionnaire

Out of the 60 surveyed pet owners 78.3% had dogs, 23.3% cats, 10% horses, 6% birds, 6% pigs and 5% cattle (every respondent owned at least one pet animal, but could have more animals). Half of the participants changed their veterinarian at least once in their lifetime and 25% of these cases were due to communication difficulties and/or not effective consultations. 95% of the pet owners would choose their veterinarian on the basis of competence (95%) and only 21% according to the price level or location of the vet clinic.

In Germany it is forbidden to advertise the vet clinics or practices actively, so the best way of promotion is still word-of-mouth, since most of the respondents found their veterinarian through this way (68.3%). Only 8.3% of the pet owners found their vet through social media or the internet or when they passed by in front of the clinic. Concerning the available parking facilities, almost half of the participants (48%) were neutral towards the sufficient number of parking lots, whereas 23.3% thought that it was very important and 18.3% it was not important at all. Only 5% of the pet owners care about the sufficient public transport to the practice. Albeit, 80% of their veterinarians had a webpage according to the surveyed pet owners, only 13.3% of the clients checked the content for news and received any information from it.

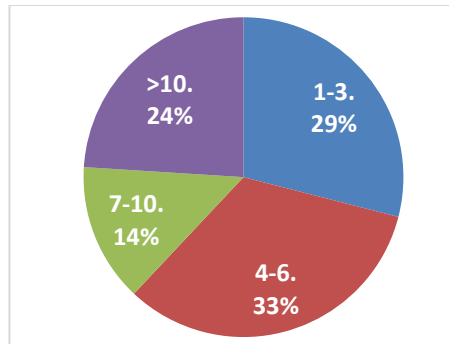
70% of the surveyed customers usually fix an appointment before seeing their vet and 70% of them make it through a phone call. 67% of the owners did not receive any vaccination reminders, 25% of them were reminded by phone calls, 7% had reminder emails and 1% of the vets used SMS to remind their clients of vaccinations. Only 26.6% of the clients were given workshops or lectures by their vets concerning topics like nutrition, breeding or tips for raising pets. The pet owners were asked whether they would attend such an informational event for a small charge and 46.6% would do so. Only 5% of the pet owners buy petfood regularly at their veterinarian. Finally, participants were asked which extra services they would like to get offered by their veterinarian and 33.3% of them would like to have physiotherapy and nutritional consultations, 31.6% seminars on their pets' health and 16.6% dog trainings.

Veterinary practice questionnaire

62% of the patient turnover in the surveyed mixed animal vet practices were dogs and cats, 19% horses, 15% farm animals and 4% others. The number of veterinarians working in the surveyed practice is shown in *Figure 1*.

Figure 1

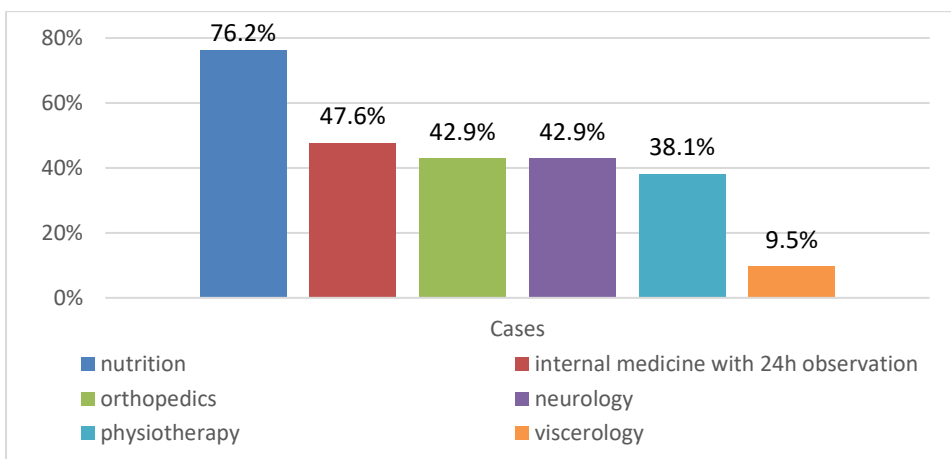
The number of veterinarians working in the surveyed practices (n=21)



43% of the practice owners employed 1-3 vet technicians, 29% 4-6, 10% 7-10 and 19% had more than ten veterinary technicians being employed. 86% of the surveyed vet practices work together with external specialists, mainly on nutrition (*Figure 2*).

Figure 2

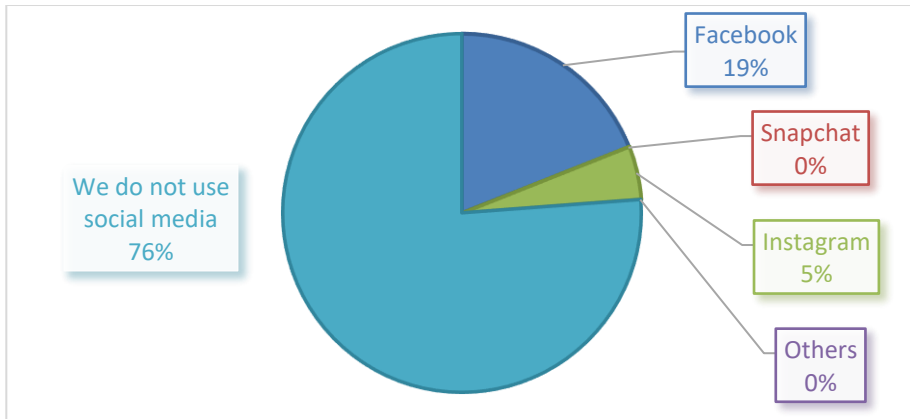
The type of cases when the surveyed vet practices work with external specialists (n=21)



Concerning the promoting activities, 85.7% of the participating vets had a homepage and 14.3% updated the website weekly, whereas 52.4% have never renewed or updated it. 57% of the webpage updates were done by one employee or the owner of the practice, but 23.8% of them outsourced this duty to a professional webdesigner or IT specialist. *Figure 3* shows the social media usage of the surveyed practices, and only 19% of the respondents used Facebook and 76% did not use social media at all.

Figure 3

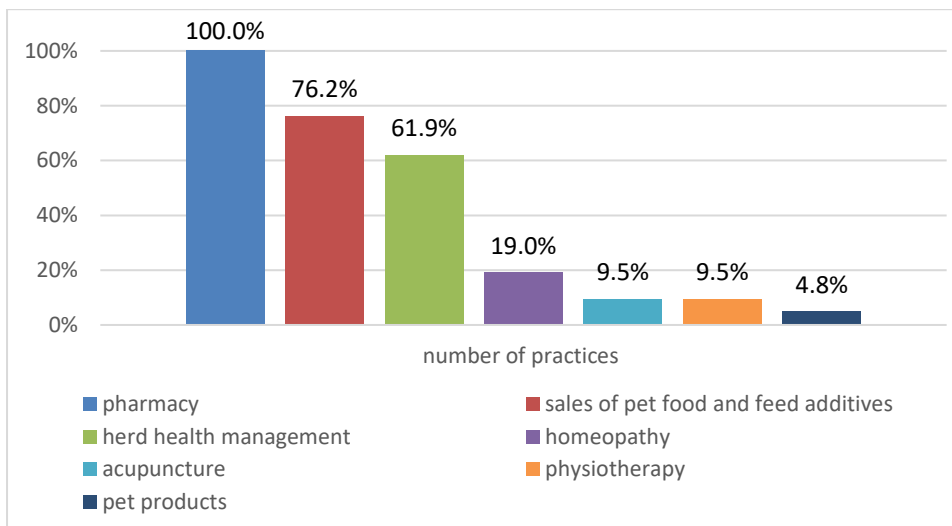
The use of social media in the surveyed vet practices (n=21)



More than half of the responding vet practices (52.4%) used newsletters or vaccination reminders for their clients, whereas the rest did not use any of the reminder services. The most preferred way of the vet practices to communicate with their clients was the phone call (53.8%), the second one the email (30.8%), but 7.7% of them still used postal letters. Most of the surveyed vet practices offered for sale pharmaceutical products, pet food and herd health management services (*Figure 4*).

Figure 4

Special and/or additional services being provided by the surveyed vet practices (n=21)



CONCLUSIONS

This study introduces the idea that marketing in the veterinary practice differs between the urban and rural areas in Germany, which is very similar to the Hungarian situation (Ózsvári, 2007, 2014). The results show that most of the mixed animal veterinary practices in the rural areas do lack marketing knowledge and strategies. The data show that marketing communication tools in the rural vet practices are used inadequately or insufficiently, which further yields the question whether the participants would actively engage and improve their marketing activities in the future. Several rural German veterinary practices have neglected their marketing communication activities so far. The study identified differences between the clients' needs and the services offered by the veterinarians. Therefore, it can be concluded that the surveyed rural practices fail to survey and analyze the market and customer needs.

The results showed a lack of investments in marketing services that could generate new customers or keep the existing clients; only 8.3% of the clients had information about their potential veterinarian through social media, whereas over 68% through word-of-mouth, which is still the most effective way of promotion in rural areas. 83.3% of the surveyed vets did not use these social media at all, which is an unexpectedly high rate even compared to findings of surveys made in Cyprus and Hungary (Michaelidou, 2012; Ózsvári, 2014). Furthermore, most of the rural vet practices had a webpage, but more than half of them did not update them regularly. This suggests that there was investment into the internet activity, but most of the mixed animal practices neglect to use it and communicate through it with their current and/or potential clients, although it would be important for the new generation of clients. The data highlights the need for improvement in the marketing communication, promotion activities in the rural German veterinary practices, especially when they try to attract the younger generation of clients.

The findings show that almost all of the surveyed veterinarians work with external specialists on different fields, such as orthopedics, neurology, nutrition and physiotherapy. Furthermore, most of them offered additional or special services, mostly pharmacy, herd screening, sales of feed additives, pet food and pet shop products, but there is a lack of physiotherapy, acupuncture, homeopathy and nutritional consultations, which would be more requested by the pet owners according to the survey results. These outcomes are parallel with the Cypriot and Hungarian vet practice features (Michaelidou, 2012; Ózsvári, 2014).

To sum up, it can be concluded that the marketing trainings for the veterinary practice managers and owners working in the German rural areas, as well as the improvement of undergraduate veterinary education on marketing and management, would be a major need.

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