

The effectiveness of marketing concepts in veterinary practices

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SUMMARY

What makes pet owners chose one veterinary practice and not another? This survey was performed to gain insight into what factors influence new clients' choice of veterinary practice, and consequently the most effective way to promote veterinary practices. To this end, a questionnaire was completed by 129 pet owners who became new clients of one of eight selected veterinary practices in January 2005 or later. All selected practices are members of the Dierenartsen Dienstgroep Domstad, Utrecht, the Netherlands.

This survey showed word-of-mouth referral to be the most effective way to increase a practice client base: 32.8% of all respondents first heard of their practice of choice through a fellow pet owner. Other pet owners first 'heard' of their practice by passing the practice (17.2%), seeing an advertisement in the Yellow Pages (14.1%), visiting the veterinary practice website (13.3%), and looking in the phone book (10.9%). These information sources should be considered for promotional activities. However this is not the case for advertisements in newspapers or magazines: none of the respondents became acquainted with the practice through these media. Respondents primarily based their choice on personnel and product (the total package of services and its quality) and less on location, but many prospective clients also based their choice on promotional activities and prices. Because pet owners apparently take so many aspects into consideration when choosing a veterinary practice, the marketing orientation (focusing on the client with her/his wishes and problems) is crucial.

SAMENVATTING

De effectiviteit van marketingconcepten in dierenartsenpraktijken

Veel eigenaren van dierenartsenpraktijken vragen zich af op welke criteria huisdiereigenaren de keuze voor een bepaalde dierenartsenpraktijk baseren. De doelstellingen van dit onderzoek zijn inzicht te verschaffen in de manieren waarop potentiële klanten een dierenartsenpraktijk kiezen, de marketingconcepten waarop hun uiteindelijke keuze is gebaseerd en de benadering van de markt die

dientengevolge voor dierenartsenpraktijken de meest effectieve is. Het keuzeproces is onderzocht middels een vragenlijst die is ingevuld door 129 diereigenaren. Deze diereigenaren zijn allemaal in januari 2005 of later klant geworden van één van de acht geselecteerde dierenartsenpraktijken. Al deze dierenartsenpraktijken zijn aangesloten bij de Dierenartsen Dienstgroep Domstad te Utrecht.

Dit onderzoek toont aan dat mond-tot-mondreclame de meest effectieve manier is om het klantenbestand te laten groeien: 32,8 procent van alle respondenten hoorde voor het eerst van de praktijk van hun keuze via een andere klant.

De overige respondenten hoorden voor het eerst van de praktijk door toevallige passage van het praktijkgebouw (17,2%), een advertentie in de Gouden Gids (14,1%), de website van de praktijk (13,3%) en het telefoonboek (10,9%). Op basis van deze resultaten kan gesteld worden dat deze promotie-middelen de investering waard zijn. Dat is niet van toepassing op advertenties in kranten en tijdschriften: geen enkele respondent maakte kennis met de praktijk via deze media.

De respondenten blijken hun keuze voornamelijk gebaseerd te hebben op personeel en product (het totale dienstenpakket en de kwaliteit ervan) en in mindere mate op plaats, maar veel klanten hebben hun keuze ook gebaseerd op promotieactiviteiten en prijs.

Omdat huisdiereigenaren blijkbaar zoveel aspecten in overweging nemen bij de keuze van een dierenartsenpraktijk, is een werkwijze volgens de marketingbenadering (de klant met zijn/haar wensen en problemen staat centraal) cruciaal.

INTRODUCTION

Veterinary practice owners recognize that they need to market their services: everybody does it (3). According to Meyers, American practice owners spend up to 1% of their total practice income on recruiting new clients (12a). This is necessary because on average 20% of existing clients are lost annually (12b). This substantial loss of clients makes it necessary to review the marketing options of veterinary practices.

According to the production-oriented approach, price is the client's main selection criterion (14a). The product-oriented approach emphasizes the importance of the quality of the medical practice (14a). The third orientation, the sales approach, assumes that clients need to be urged to buy through sales- and promotion activities (14a). The fourth and last orientation type, the marketing orientation, focuses on the client's needs and wishes (14a). According to the survey by Schuurmans and Smidts, Dutch veterinarians primarily follow the product-oriented approach (14b). Practice owners can use six tools (the so-called marketing mix) to pass on the practice strengths to the target group (2, 6, 14a, 15):

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Product	This is the total package of services
Place	Offering a service on demand
Price	Costs for the client
Promotion	Advertisements in newspapers and magazines, articles in newspapers, websites, etcetera
Personnel	Communicative skills, animal-handling skills, etcetera
Presentation	Appearance of the practice building inside as well as outside

Schuurmans and Smidts asked 166 Dutch veterinarians on which criteria they thought potential clients judge veterinary practices (14b). Some answered 'no good ones' (18%); others mentioned a trial consultation (visiting the practice to take a closer look at the building and the way animals are handled; 41.3%). Word-of-mouth referral was also mentioned frequently. When asked for criteria a pet owner should use to choose a veterinarian, 15% of the veterinarians mentioned 'local accessibility' as the most important criterion and 9% mentioned 'professional competence/experience' (14b). However, clients may assume that a practice provides good veterinary medicine, so that other aspects of a practice's services will determine their choice (14a).

In 1996 the American Veterinary Medical Association investigated which factors actually influenced the selection of a veterinary practice by pet owners (10). 'A practice nearby' was mentioned by 65% of the interviewed pet owners as an important factor. Word-of-mouth referral was mentioned by 42% of the respondents, prices by 39%, practice opening hours by 31%, and having a road sign by 7%. Pfizer investigated the motivational aspects of practice selection in 31,000 clients (12a) and found that word-of-mouth referral was the most important determinant of client choice: 53% of the respondents had been referred to the practice by an existing client. Of all respondents, 45% set store by the location of the practice, and 7% found a Yellow Pages advertisement important. Of less importance were road signs (2%), advertisements in newspapers (1%), and personal mailings (1%).

According to McCurnin, pet owners do not base their choice of practice on the veterinarian's knowledge or professional expertise (8), but instead on the location of the practice, followed by the veterinarian's personality and animal-handling and communicative skills. Although word-of-mouth referral was important, McCurnin was of the opinion that practice choice is usually based on the personality of the veterinarian and the other personnel rather than their knowledge and professional skills. Messonier found that a satisfied client on average tells five other people about his or her positive experiences regarding the veterinary practice of choice (9). Although prices were important, Messonier considered pricing to be the least effective tool of the marketing mix (9). Dooley, a management consultant, agreed with him (4): 'Except that 10 to 20% of the consumers who only pay attention to the lowest prices, pricing is not an important motivating

factor in most purchasing decisions provided that the quality of the products and the service justify the price'.

A survey of the wishes of 37,000 American pet owners regarding veterinary services (11) revealed the availability of an emergency service to be the most important, followed by the availability of diagnostic testing (blood tests). The respondents considered radiology, dental care, and distribution of leaflets to be the least important. When asked about practice opening hours, 36% of the respondents preferred Saturday morning opening, 23% were in favour of weekday evenings, and 14% of Saturday afternoon consultation.

In 1989 a study performed in the United States investigated the effectiveness of advertisements in the Yellow Pages (7a, 7b). About 60–70% of new clients chose their veterinary practice by word-of-mouth referral (7a), and only consulted the Yellow Pages to look up the practice telephone number rather than using the Pages to look for a veterinarian (9). For this reason, Levoy concluded that a Yellow Page advertisement has little or no influence in selecting a veterinary practice (7a). A questionnaire sent to American veterinary practices (7b) showed that 71.1% of 135 responding veterinarians reported that 0% to 30% of their clients used the Yellow Pages to choose a practice. A small majority (55.1%) of 227 responding veterinarians thought a Yellow Page advertisement was not worth the investment. In contrast, Bernstein and Freiermuth's survey among several medical practitioners (not only veterinarians) revealed that many practitioners think that an advertisement in the Yellow Pages is worth the investment (1).

In 2003 Van Os investigated the experience of Dutch veterinary practices with their websites (13). Of the 44 responding practices with their own website, 20 (45%) stated that every now and then new clients were attracted through the website and 7 (16%) stated that this happened frequently. According to 30% of the respondents, new clients attracted by the website differed from existing clients by being less concerned about pricing. Although opinions differed about the cost/benefit ratio of a website, almost 50% of respondents thought that having a website was cost effective. It should be mentioned here that many practices kept website costs low by designing and maintaining the website themselves instead of using professionals.

Van Os confined himself to practice-owned websites, but many Dutch veterinary practices would like to know to what extent this and other aspects play a role in pet owners' decision to choose a particular veterinary practice. This is also the case with the Dierenartsen Dienstgroep Domstad in Utrecht, the Netherlands. The members of this foundation were especially interested in the effectiveness of the Yellow Pages in recruiting new clients. For this reason, they agreed to participate in this pilot study, which aims to determine how potential clients become aware of a veterinary practice, and in particular the marketing concepts on which their final choice is based, knowledge of which would help veterinary practices to position themselves in the market.

MATERIALS AND METHODS

The population of this pilot study consisted of pet owners who became a client at one of the eight member practices of the Dierenartsen Dienstgroep Domstad for companion animals in January 2005 or later. During 6 weeks in September and October 2006, each client who came to one of the practices was asked if he or she had become a client in that particular period (or if necessary the patient file was checked). If the selection criteria were met, the client was asked to fill in the questionnaire on the spot before or immediately after the consultation took place and to return the form before leaving the building. The questionnaire consisted of three parts and was accompanied by a letter explaining the purpose of this pilot.

The first part of the questionnaire asked about the client's sex and age, and species of the pet(s). The second part consisted of one question: 'How did you *first* hear about the practice of your choice?' The third and largest part of the questionnaire dealt with specific aspects of veterinary practices (product, place, price, promotion, personnel, and presentation) that were important to the decision-making process, scored as unimportant, slightly important, important, or very important. The statistical software program SPSS, v.12, was used to process the results.

RESULTS

General

All clients approached agreed to participate and complete the questionnaire. Some of the participating practices allowed the clients to take the questionnaire home with them. The response rate among these respondents was not clear but was very low. A total of 129 pet owners who became a client in January 2005 or later actually responded. Most respondents were younger than 40 years (69.5%) and most were women (69.9%).

Practice familiarity in general

All but one respondent filled in the way in which he or she first heard of the practice of choice. Most respondents (32.8%) first heard of the practice of their choice through another pet owner (figure 1). The proportion of respondents who chose the practice for another reason did not differ significantly, ranging from 10.9% to 17.2%. None of the respondents first heard of their chosen practice through an advertisement in a newspaper or magazine, although all practices regularly advertised in local newspapers and magazines in the period in question (January 2005-October 2006). Fifteen respondents first heard of the practice in another way. Three respondents who became client were familiar with the practice from childhood on.

Practice familiarity per age group

More pet owners aged 41 years or older than younger pet owners (<40 years) first heard of the practice from another pet owner (53.8% versus 23.9%, respectively). In contrast, younger pet owners used the Yellow Pages and the practice

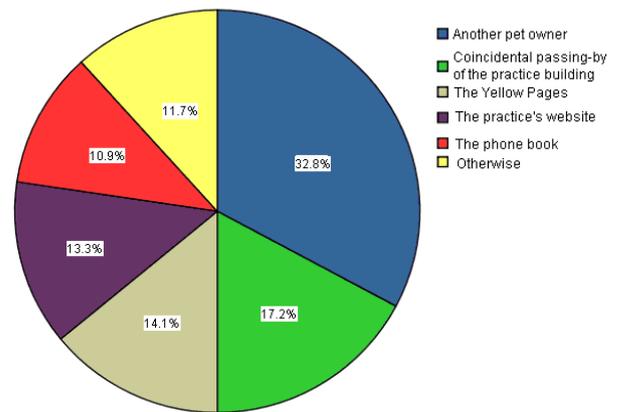


Figure 1. First heard of the practice through... (n=128).

website more often than the older owners (Yellow Pages 18.2% versus 5.1%, respectively, website 18.2% versus 2.6%, respectively). This relation between age and practice familiarity was statistically significant ($\chi^2=15,689$; $df=5$; $p=0.008$).

Familiarity with practices with or without their private website

There were two main differences between practices with their own website and those who shared a website with other practices. First, none of the clients of a practice with a shared website heard of that practice through the website. Second, the percentage of clients that first heard of the practice through another pet owner was higher for the practices that shared a website than for practices with their own website, namely 53.3% versus 26.5%, respectively ($\chi^2=7,485$; $df=1$; $p=0.006$). Owning or sharing a website was not associated with the proportion of clients that first heard of the practice through an advertisement in the Yellow Pages or the phone book. Consequently, a Yellow Pages advertisement and the phone book proved to be equally important to both practice types.

Importance of marketing mix aspects

Product

The importance of this marketing mix aspect is outlined in table 1. The importance of the quality of treatment in the choice of veterinary practice was only evaluated among respondents who heard of the practice from existing clients (the only way for potential clients to get an impression of the quality of treatment). Respondents who found their practice of choice through the Yellow Pages or the phone book set significantly less store by the quality of treatment than those respondents who found their practice in another way ($U=1110,500$; $p=0.024$).

Place

The importance of place is outlined in table 2. The way a client first heard of the practice was significantly associated with the importance ascribed to a distance as short as possible to the practice ($\chi^2=14,657$; $df=5$; $p=0.012$). Clients who heard of the practice first through the practice

website set the greatest store by a distance as short as possible, followed by clients who found the practice in the Yellow Pages, clients who found the practice in the phone book, and clients who walked or drove passed the practice. Respondents who first heard of the practice through another pet owner considered the distance less important, and those who heard of the practice in another way considered the distance to the practice to be least important.

Price

The importance of prices (consultation fee, surgery fee, and product prices) was evaluated. As the results were very similar, only those for the consultation fee will be discussed. The consultation fee was considered 'very important' by 17.3% of respondents, 'important' by 38.6% of respondents, 'slightly important' by 33.9% of respondents, and 'unimportant' by 10.2% of respondents. A Kruskal-Wallis test showed there was no statistically significant correlation between the way people first heard of the practice and their cost-awareness.

Promotion

The importance of promotional activities is outlined in table 3. All respondents who first heard of the practice from another pet owner (n=41) got a positive impression

of the practice by talking with these and/or other pet owners. When asked to indicate the importance of this impression all respondents chose 'important' (53.7%) or 'very important' (46.3%).

Personnel

The results in this category are outlined in table 4. The respondents considered the veterinarian's animal-handling skills to be more important than his/her communicative skills when choosing a practice ($\chi^2=9,529$; $df=1$; $p=0,002$). When choosing a practice, the respondents considered the veterinarian's communicative skills to be as important as the quality of treatment provided. Only 7.9% of respondents expressed a preference for a male or female veterinarian.

Presentation

Many veterinary practices invite potential clients to come and have a look at the practice and its facilities. In this survey, 62.4% of the respondents accepted this invitation (n=78) and in this way received a positive impression of the practice. This positive impression contributed to the selection of a practice by 96.2% of these respondents. Some pet owners received a positive impression of the practice by talking to existing clients and also by visiting the practice. They considered talking to existing clients to be as important as visiting the practice.

	Quality of treatment (n=81)	Diagnostic possibilities (n=129)	Specialist services (n=31)
Unimportant (%)	1.2	17.2	22.6
Slightly important (%)	0	16.4	22.6
Important (%)	39.5	40.6	41.9
Very important (%)	59.3	25.8	12.9

Table 1. Importance of the marketing mix aspect 'product'.

	24-hour emergency service (n=129)	Consultation without appointment (n=48)	Evening consultation (n=129)	Distance to the practice building (n=129)
Unimportant (%)	16.4	14.6	10.2	10.2
Slightly important (%)	28.1	10.4	8.6	22.0
Important (%)	32.1	50.0	41.4	33.9
Very important (%)	23.4	25.0	39.8	33.9

Table 2. Importance of the marketing mix aspect 'place'.

	The website (n=129)	An article in a newspaper/magazine (n=43)	Experiences of existing clients with the practice (n=83)
Unimportant (%)	15.7	41.9	8.4
Slightly important (%)	29.2	25.6	12.0
Important (%)	40.9	20.9	49.5
Very important (%)	14.2	11.6	30.1

Table 3. Importance of the marketing mix aspect 'promotion'.

	The veterinarian's communicative skills (n=129)	Animal handling skills (n=129)	An orientating phone call (n=75)
Unimportant (%)	4.0	0	2.7
Slightly important (%)	1.6	4.0	16.0
Important (%)	36.5	25.4	60.0
Very important (%)	57.9	70.6	21.3

Table 4. Importance of the marketing mix aspect 'personnel'.

Arrangement of discussed aspects in order of importance

These aspects were ranked in order of importance for choosing a veterinary practice, using the Friedman test (table 5). Thirty-five cases were evaluated because 35 respondents filled in the complete questionnaire and/or all aspects applied to them. All aspects were ranked from high to low scores and successive aspects were compared using a Friedman test to detect a significant difference in the rank score. Then the mean rank score of aspects that could be grouped in one marketing concept was calculated. The results of this test showed that pet owners primarily based their choice of practice on personnel and product.

DISCUSSION**Research method**

Although participants were asked to indicate what they considered important when they chose a veterinary practice, it is inevitable that many respondents were influenced by their current ideas and opinions about the practice. In this respect, it would be better to interview

Aspect	Rank	Mean rank
1. Personnel		
Way of handling animals	1	
The veterinarian's communicative skills	2	
Positive impression of the practice through a phone call	11	7.0
Male or female veterinarian	14	
2. Product		
Quality of treatment	2	
Quality of aftercare	3	
The practice's diagnostic possibilities	4	
Providing leaflets	12	7.7
Specialist services	12	
Experience and competence with species other than dogs and cats	13	
3. Place		
Evening consultations	5	
Emergency services	6	
Short waiting time	6	
Distance as short as possible to the practice building	7	
The veterinarian's willingness to make a round	8	9.6
Consultations without appointment	12	
Saturday consultations	13	
Accessibility by public transport	13	
Enough parking facilities nearby	13	
Free parking facilities	13	
4. Promotion		
Word-of-mouth referral	9	
The website	12	11.3
Positive impression of the practice through an article	13	
5. Price		
Surgery fees	10	
Consultation fees	12	11.8
Product prices	12	
Possibility to pay on account	13	

Table 5. Ranking of the marketing mix aspects.

clients when they come for their first consultation but this may be time-consuming and might not be feasible. In retrospect, the wording of the introduction of the questionnaire about marketing mix aspects should have made it clear that respondents could choose 'unimportant' if they did not know anything about this aspect. Uncertainty about this might have led respondents not to complete the questionnaire. However, we do not think this will have led to unreliable results because when we selected respondents who would be expected to know about these specific aspects, results deviated by less than 5% from those for the complete sample. This potential problem could be avoided by asking how people became informed about each item, but this would lead to a longer questionnaire, which in turn might lead to diminished willingness or too little time to complete the questionnaire. We observed that the response rate was poor if clients were allowed to complete the questionnaire at home.

Familiarity with the practice*Word-of-mouth referral*

Word-of-mouth referral was higher in this survey than in other surveys (7a, 10, 12a). In this survey, 32.8% of respondents first heard of the practice of their choice through fellow pet owners and all of them gained a positive impression of the practice by talking to these and/or other pet owners. Moreover, this was experienced as 'very important' or 'important' in choosing the practice. In addition, many respondents talked with other pet owners about the practice after they first heard about the practice: 66.4% of all respondents got a positive impression of the practice by just talking with other pet owners and 91.6% of them set store by it in actually selecting the practice. This means that 33.6% (=66.4 - 32.8%) of the respondents later spoke with other pet owners about the practice and gained a positive impression.

McCurnin also recognized the importance of word-of-mouth referral, but he believed this is mostly based on the marketing tool personnel rather than on the marketing tool product (8). However, we found both personnel and product to be very important (table 1). It should be remembered that respondents were not informed fully about all aspects by talking with existing clients. Earlier surveys did not evaluate the type of clients that primarily decide to select a particular practice based on word-of-mouth referral. We found word-of-mouth referral to be more important for respondents older than 41 years than for younger participants. Interestingly, word-of-mouth referral recruited significantly more clients to practices with a shared website than to practices with their own website. Thus word-of-mouth referral is the most effective way of promoting a veterinary practice.

Passing-by the practice

The practice's exterior (sometimes with a road sign) is an effective way of promoting the practice (figure 1), and in this study attracted more clients than reported in earlier studies (10, 12a).

The Yellow Pages

The effect of a Yellow Pages advertisement has only been evaluated in the United States (1, 7b, 12a). In contrast to those surveys, we explicitly asked respondents how they first heard about the practice of their choice. The proportion of respondents who answered 'through the Yellow Pages' was twice that reported in the Pfizer Animal Health Study (12a). However, the results of this survey regarding the effectiveness of the Yellow Pages are consistent with those of the American studies, which showed that most (71.1%) American veterinarians reported that 0% to 30% of their clients had based their choice on an advertisement in the Yellow Pages (7b). In this survey, we found a Yellow Pages advertisement to be significantly more effective in attracting young clients (age 40 or younger) than older clients (age 41 or older). The Yellow Pages advertisement was the third most effective promotional means (figure 1). In addition, the Yellow Pages advertisement was equally important for practices with or without an own website. Thus a Yellow Pages advertisement is a worthwhile promotional activity, confirming the results of earlier surveys (1, 7b).

The website

In this survey, own websites attracted relatively many new clients whereas shared websites attracted few clients. For practices with their own website, the website was the third most effective promotional means. When using Van Os's quantification (13), it is fair to presume that practices with their own website regularly attract new clients in this way. In fact, only 5.9% of the respondents who first heard of the practice through the website found this unimportant in selecting a practice. Even if respondents did not at first hear about a practice through its website, many visited the website later on: 84.3% thought the practice's website important. Thus an own website, rather than a shared website, is effective in attracting new clients. Although we did not calculate the cost/benefit ratio of a practice website, it is probably positive and possibly even to the extent that a more professional approach is advisable.

A practice website, like the Yellow Pages advertisement, attracted especially younger clients (40 years or younger). Moreover, according to 30% of the practices that participated in Van Os's survey, clients who are attracted via a website differ from existing clients by being less concerned about pricing (13). We did not detect a statistically significant relationship between the importance ascribed to pricing and the way respondents first heard of the practice.

The telephone book

The phone book was the least effective way of attracting clients, but its importance must not be underestimated. Many respondents subsequently used the telephone book to look up the phone number of the practice they chose.

Advertisements in newspapers and magazines

Earlier surveys showed advertisements in newspapers and magazines had little or no effect in canvassing for clients (12a). We also found that no clients first 'heard' of the

practice through an advertisement in a newspaper or magazine.

The six marketing mix tools

Product

Even though some veterinarians think pet owners should base their selection of a practice on the veterinarian's competence (14b), many experts are not convinced this actually is the case (8, 14a). We found that 98.8% of the respondents who gained a positive impression of the practice by talking with other pet owners found the quality of treatment important or very important in their choice of practice. If respondents really talked with existing clients about the quality of treatment is hard to verify. On the 'aspects' ranking (table 5), the quality of treatment finished second together with the veterinarian's communicative skills, but at the same time it is impossible to verify if respondents really knew about the quality of treatment.

The importance ascribed to specialist services and leaflets is consistent with the results of an American survey (11). However, we found the importance ascribed to the practice's diagnostic possibilities much higher than in the above-mentioned American survey.

Place

The importance of the location of the practice has been demonstrated earlier (8, 10, 12a, 14b). We found that 89.9% of the respondents considered the practice location to be important, although it was not the most important decision-making criterion (table 5). Just like American pet owners (11), Dutch pet owners valued a 24-hour emergency service, with 83.6% of all respondents considering it important when choosing a practice (table 5). As in earlier surveys (10, 11), we found opening hours to be important, and particularly evening consultation hours (89.9% compared with 23.0% in an American survey (11)) and consultations without an appointment (85.4%) (see table 5). Just like American pet owners (11), the respondents expressed a preference for visiting the practice on Saturdays. Moreover, even though their present practice was closed on Saturdays, 74.3% of the clients still reported a preference for Saturday consultations-hours as a practice selection criterion.

Price

The proportion of respondents who based their choice on price was higher than the 39% found in an earlier survey (10): in all three categories (prices of consultations, products, and surgery) over 80% of the respondents chose 'slightly important', 'important', or 'very important'. However, the 'mean importance' ascribed to price was relatively low (table 5), confirming Dooley and Messonier's opinion that price is not a really effective marketing tool (4, 9).

Personnel

The results of this survey are consistent with McCurmin's hypotheses that pet owners attach considerable impor-

tance to animal handling and the communicative capabilities of the veterinarian when selecting a practice (8). These were ranked the two most important aspects (table 5).

Promotion

See 'Practice familiarity' earlier in this survey.

Presentation

In Schuurmans and Smidt's survey, 41.3% of the participating veterinarians considered a trial consultation a good way for potential clients to assess a veterinary practice (14b). The results of this survey support this outcome: 62.4% of the respondents visited the practice before making their final decision, and 96.2% considered this important when choosing a practice. On average, a positive impression was equally important as talking with existing clients.

CONCLUSIONS

Although word-of-mouth referral is the most effective way of promoting a veterinary practice, other promotional means, except advertisements in newspapers or magazines, are also worth investing in. Pet owners base their selection primarily on personnel (especially animal handling and the communicative skills of the veterinarian) and product (in particular the quality of treatment) aspects, but the practice location is also important. Promotion and price were less important but should not be underestimated.

On the basis of our findings, we conclude that the production (price is the only selection criterion)- and sales (client is urged to buy through sales- and promotional activities)-oriented approach towards the market are unsuitable for veterinary practices. The product-oriented approach used by most Dutch veterinarians (14b) is also no longer appropriate for the situation as sketched in this survey: pet owners do not only and/or primarily pay attention to quality. The marketing approach focussing on the client's wishes and problems is thus the only suitable approach for veterinary practices.

Although only external marketing strategies (aimed at regaining lost clients and attracting new clients) were evaluated in this survey, it should be emphasized that internal marketing techniques (aimed at maintaining clients) are much more important to veterinary practices because they are more cost beneficial (6, 9). According to Myers, attracting a new client is up to five times more expensive than keeping an existing client (12a). Furthermore, 20% of existing clients provide 80% of the total income of a practice (9).

According to communication expert Kroone, the basic definition in marketing is still: 'What would you like ? (5)' Kroone is convinced that veterinarians who really want to market their practice should ask their clients' opinion about the practice's services. In this way, they can optimize services, increasing client satisfaction (internal marketing). Given that word-of-mouth referral was the most effective promotional means in this survey, this approach would also improve a practice's external

marketing too, without any extra effort. After all, a satisfied client on average tells five other people about his or her experiences (9).

The message of this survey is that veterinarians should make sure that their existing clients are satisfied. They should regularly evaluate their clients' satisfaction and wishes, because satisfied clients will bring in the majority of new clients. Investment in personnel and product is the most effective way to improve client satisfaction.

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