



American Veterinary Medical Association

2023 PET OWNER ATTITUDE SURVEY: KEY FINDINGS

November 2023

Methodology

- TRUE Global Intelligence fielded an online survey of 1,000 U.S. pet owners from September 8 to 14, 2023. The survey had an average completion time of 11 minutes.
- To qualify for the survey, respondents had to:
 - Live in the U.S.
 - Be between 18 and 99 years old
 - Own at least one cat or one dog
- Quotas were used to ensure the data are representative of U.S. adult pet owners.



Summary of Findings

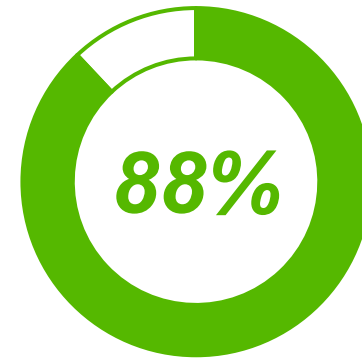
Pet owners prefer and recognize the importance of an in-person relationship with their veterinarian

72%



Agree that they **prefer to meet a veterinarian in-person** before allowing them to care for their pet(s)

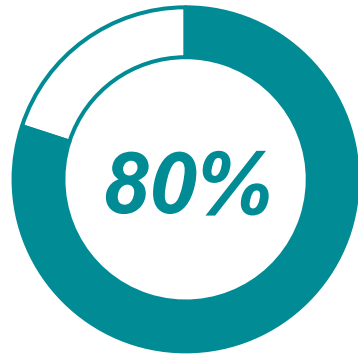
Q: To what extent do you agree or disagree with each of the following statements? n=1,000



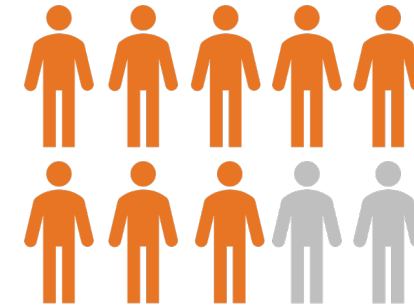
Agree that having the **veterinarian physically examine their pet** and talk to them in person is what **leads to the best care**

Q: To what extent do you agree or disagree with each of the following statements? n=1,000

Pet owners have a strong preference for veterinarian-led care as opposed to delegating responsibility for care decisions to non-veterinarians, including a proposed mid-level employee



Agree it would be **dangerous** for anyone other than a licensed veterinarian to make recommendations about life-or-death decisions for their pet



8 in 10 (79%) agree they **want a licensed veterinarian**, not a veterinary technician or mid-level employee, to be in charge of their pet's care

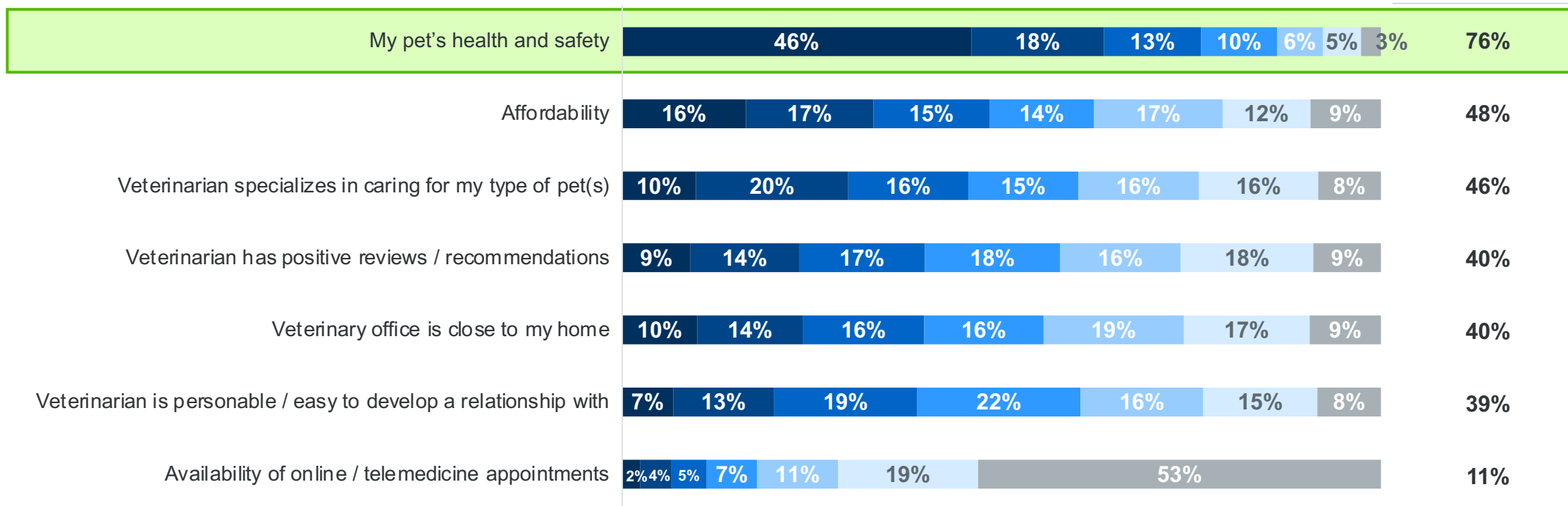
Q: To what extent do you agree or disagree with each of the following statements? n=1,000

Pet owners feel strongly about in-person relationships with veterinarians because they prioritize their pet's health and safety above all else when seeking veterinary care

Veterinary Care Priorities

■ 1 - Top priority ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 - Lowest priority

Among Top 3

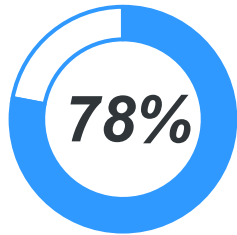


Q: Please arrange the following in order of priority to you when searching for veterinary care for your pet(s), with 1 being your top priority and 7 being your lowest priority. n=1,000

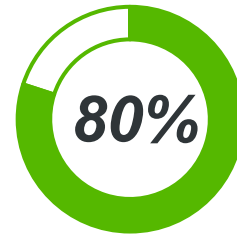
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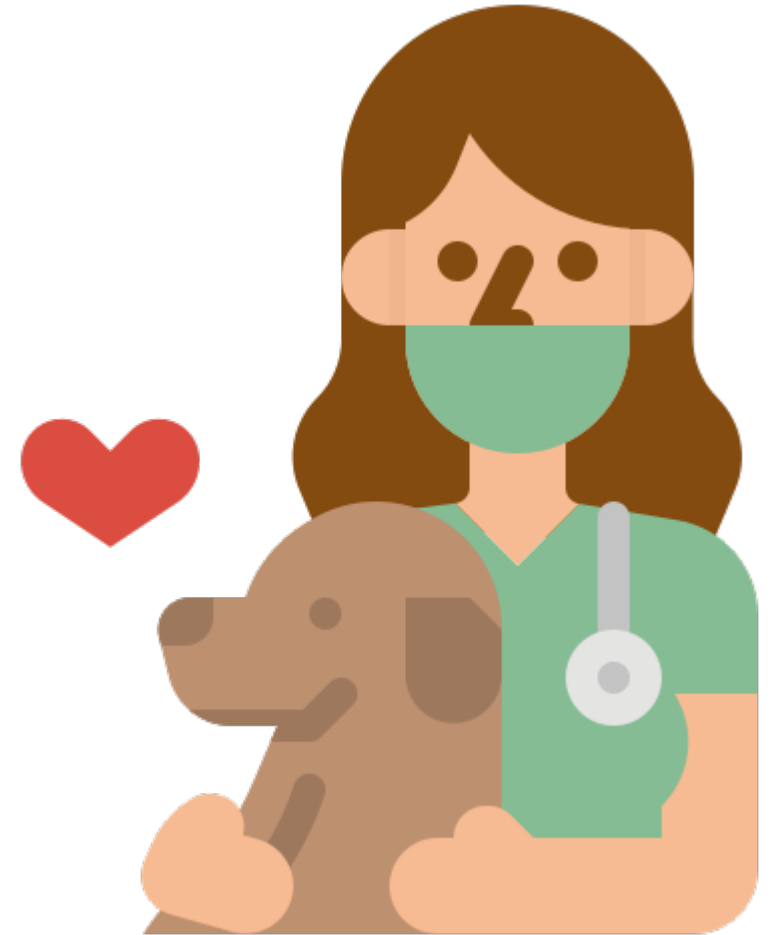
Most pet owners have high expectations of the medical professional overseeing their pet's health and safety



say they expect a veterinarian who they would allow to treat their pet to maintain a current veterinary medical license



say they expect a veterinarian who they would allow to treat their pet to be personable and friendly

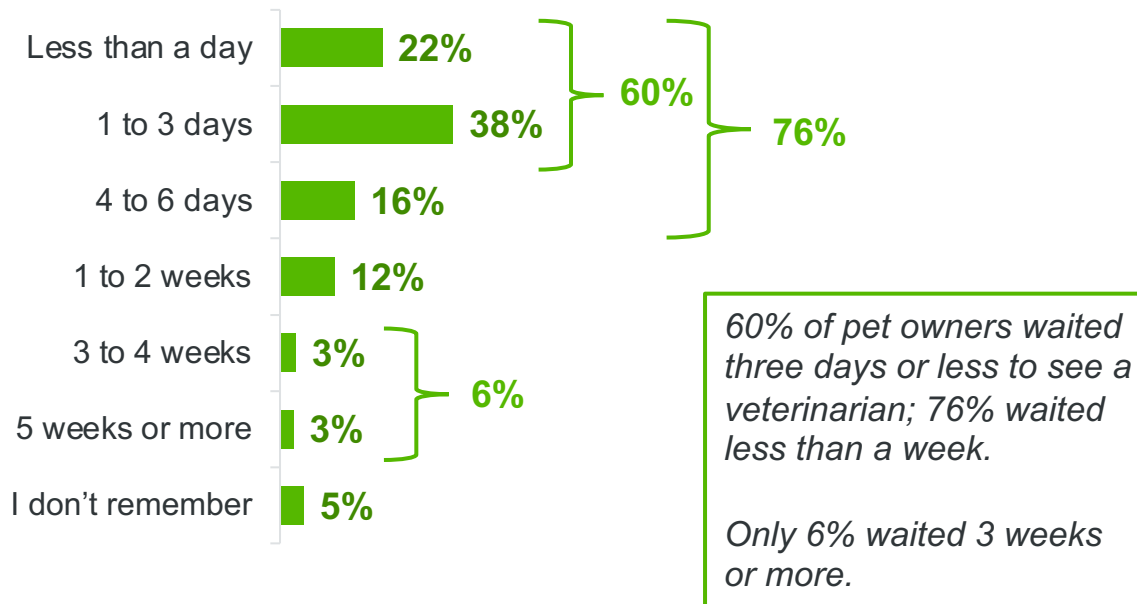


Q: Which of the following are expectations you have of a veterinarian that you would allow to treat your pet(s)? n=1,000

Pet owners have not experienced long wait times to see a veterinarian

For Routine Care or an Injury

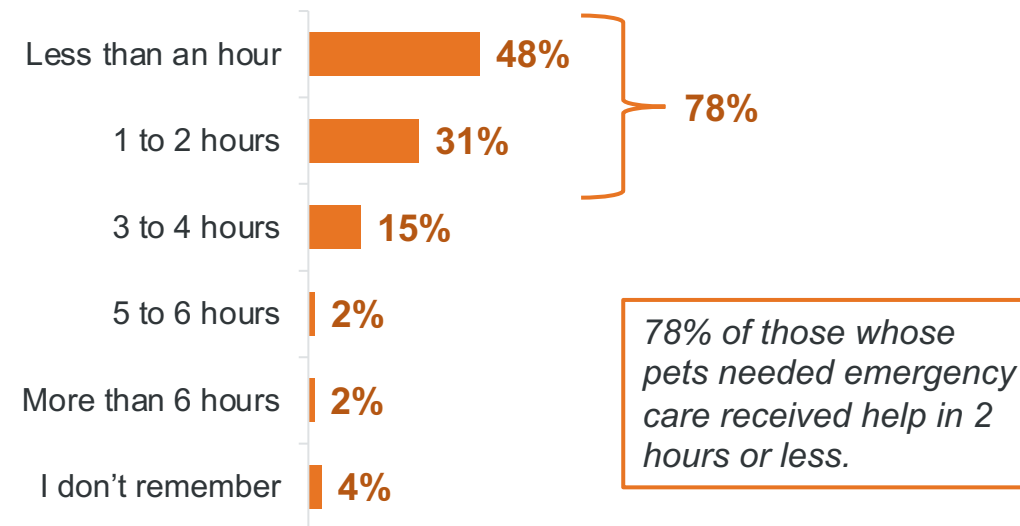
Length of Appointment Wait Time (Non-Emergency)
(n=976)



Q: Thinking of the last time your pet needed to see the vet (not for an immediate medical emergency), how long did you have to wait before you could get an appointment with a veterinarian? Of those who have taken their pet to a veterinarian for routine care or injury, n=976

For Emergency Situations

Length of Wait Time to Receive Emergency Help
(n=480)



Q: Thinking of the last time your pet had an immediate medical emergency, how long did you have to wait before your pet received help? Of those who have taken their pet to a veterinarian for an emergency, n=480

Residents in rural areas and cat owners are not as receptive to telemedicine; middle-income pet owners have the highest positive opinion of telemedicine



Urban pet owners have more experience with—and are more open to—telemedicine than pet owners who live in suburban or rural areas.



Positivity towards, trust in, and consideration of telemedicine is lowest among cat only owners. **Cat only owners are more likely to prefer in-person treatment and are less likely to have used telemedicine.**



Though both **middle income and higher income** pet owners have high expectations for veterinarians, it's the higher income owners who most believe in-person examinations deliver higher quality of care than telemedicine. Middle-income pet owners are the most positive towards telemedicine; lower-income and higher-income are nearly tied in terms of their perceptions.

Veterinary Care Preferences and Experiences

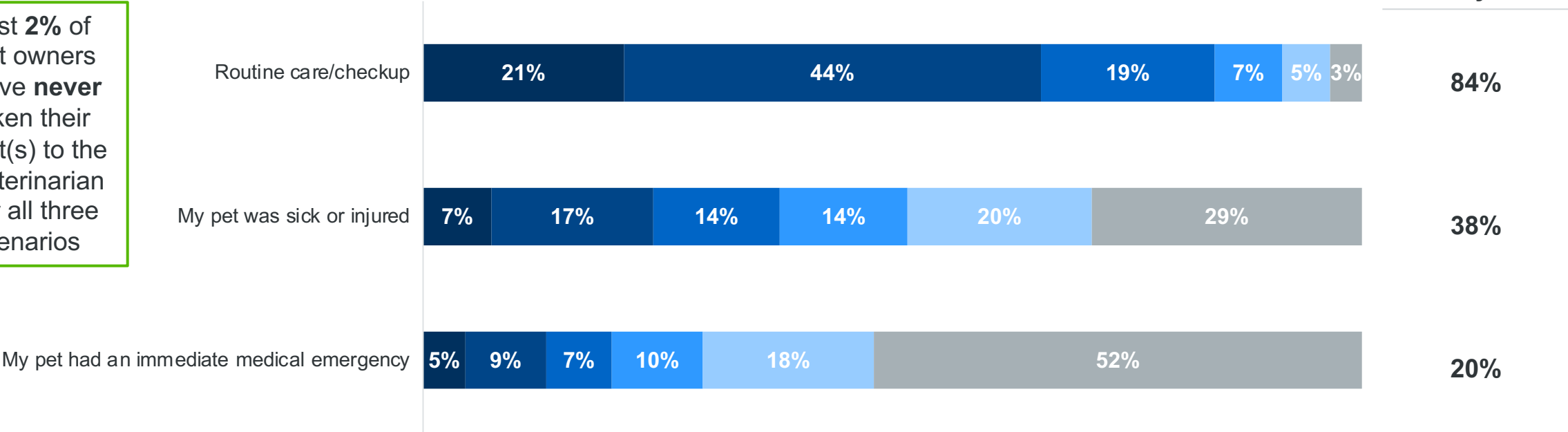


Most pet owners regularly take their pets to routine checkups; two-thirds have taken their pet to a checkup in the last 6 months

Most Recent Veterinary Visit

- Within the past month
- Between 1 and less than 6 months ago
- Between 6 and less than 12 months ago
- Between 1 and 2 years ago
- More than 2 years ago
- I have never taken my pet to a veterinarian for this reason

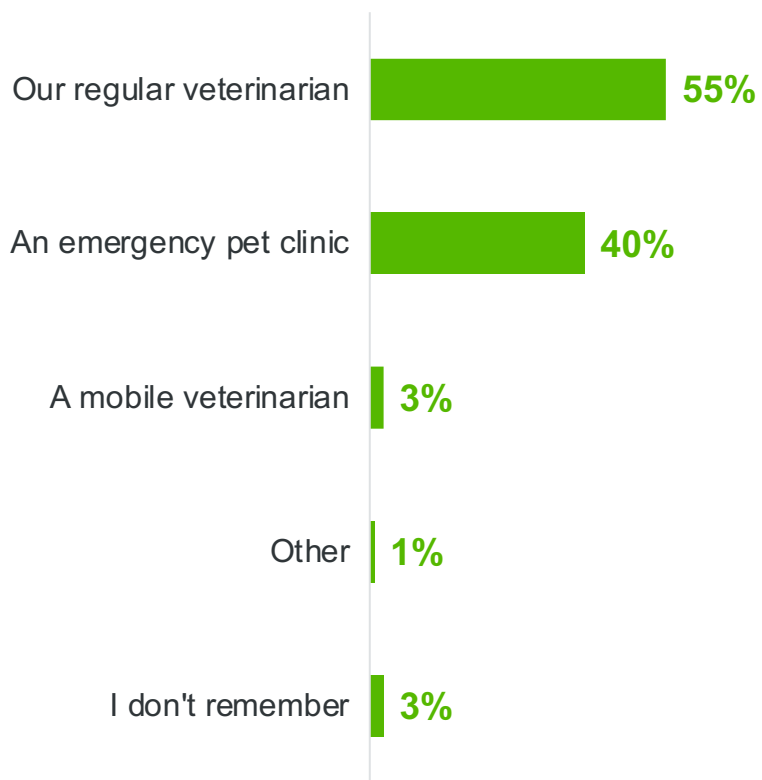
 Just **2%** of pet owners have **never** taken their pet(s) to the veterinarian for all three scenarios



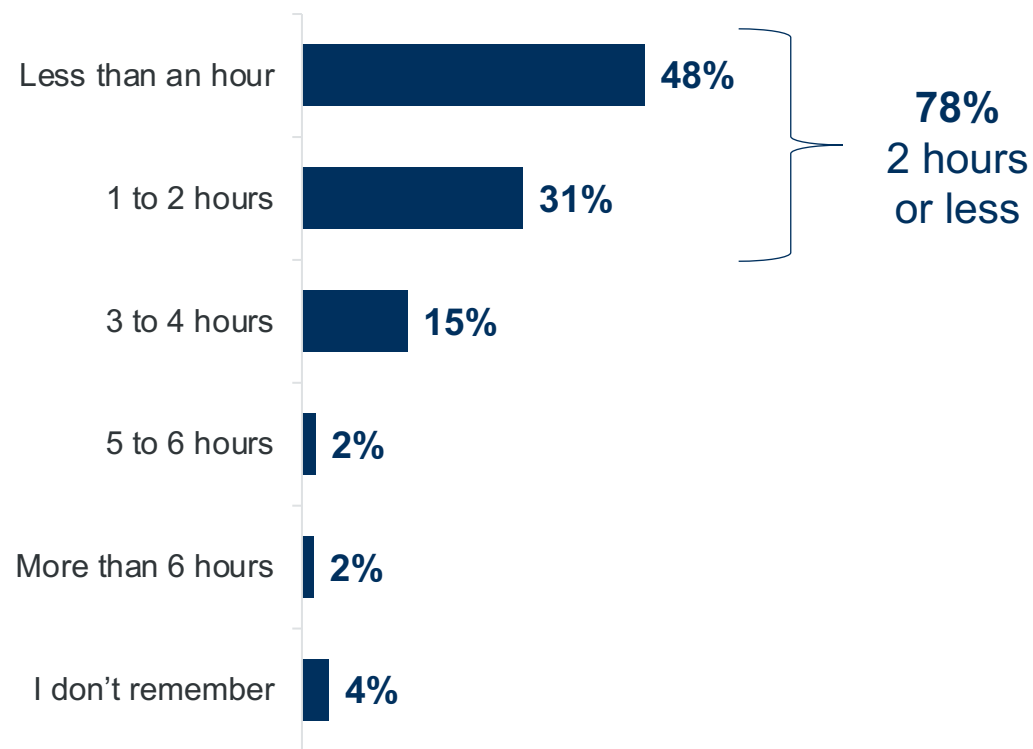
Q: When was the last time you took your pet(s) to the veterinarian/to get medical care for the following reasons? n=1,000
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Nearly half who have taken their pet in for a medical emergency waited less than an hour; more than half took their pet to their regular veterinarian

Source of Emergency Care



Length of Wait Time to Receive Emergency Help



Q: Thinking of the last time your pet had an immediate medical emergency, where did you take your pet to get help?

Q: Thinking of the last time your pet had an immediate medical emergency, how long did you have to wait before your pet received help?

Of those who have taken their pet to a veterinarian for an emergency, n=480

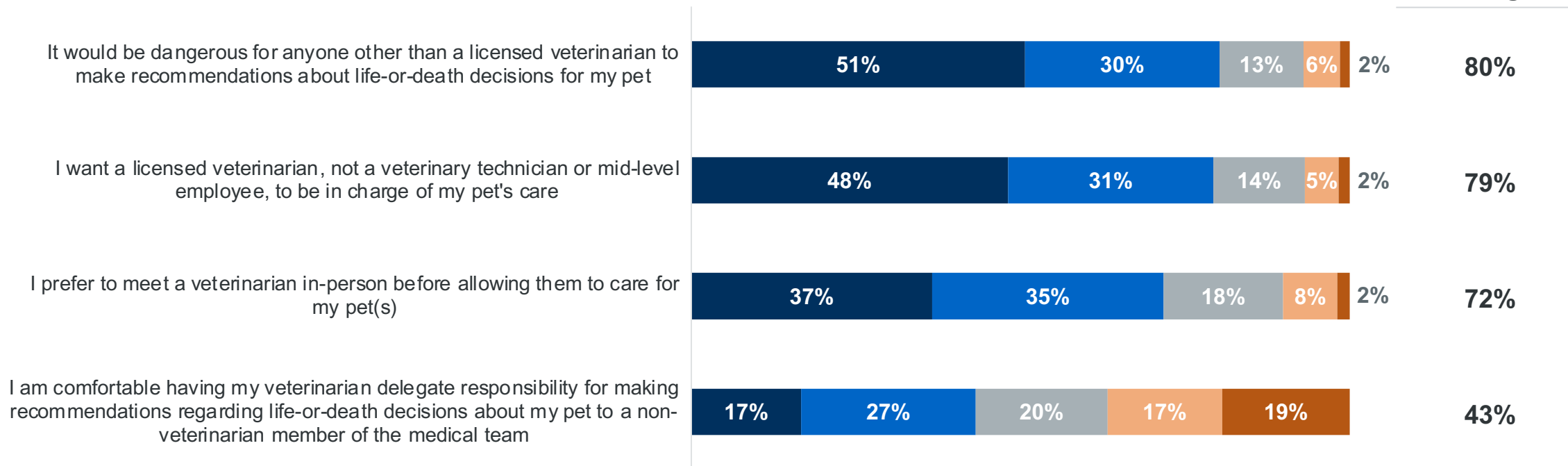
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Four in five pet owners agree it would be dangerous for someone other than a licensed veterinarian to make life-or-death decisions for their pet

Veterinary Care Preferences

■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree

Total Agree



Q: To what extent do you agree or disagree with each of the following statements? n=1,000

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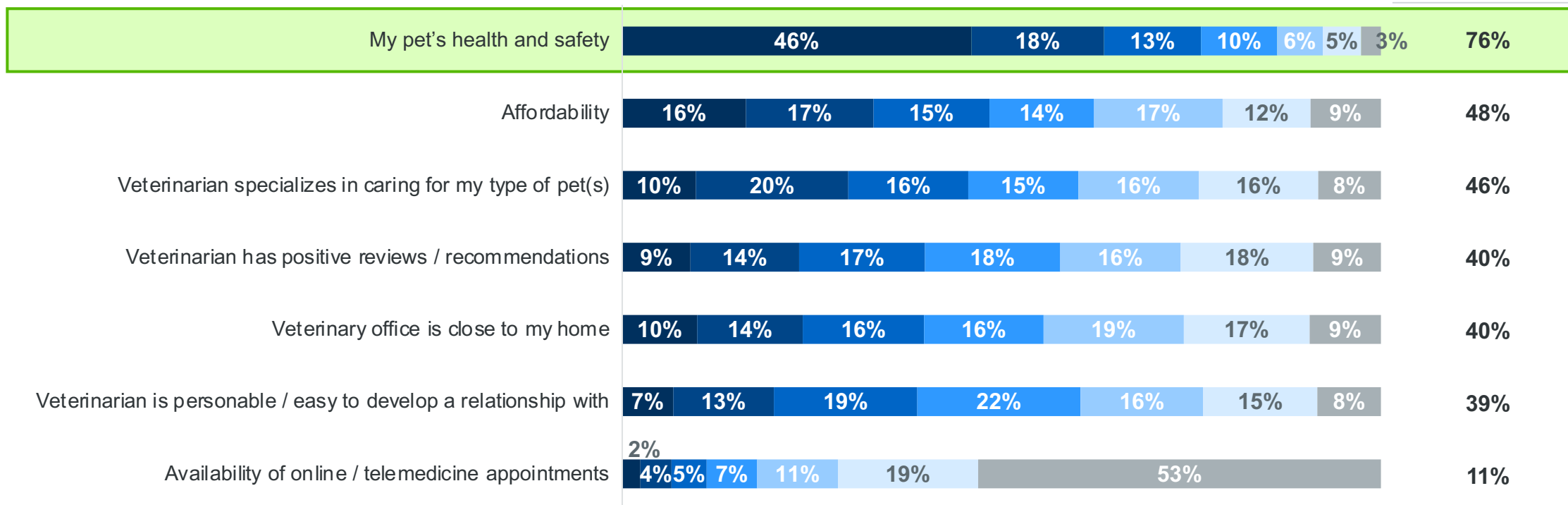


Almost half of pet owners say their pet's health and safety is their number one priority when seeking veterinary care; telemedicine availability is a low priority

Veterinary Care Priorities

■ 1 - Top priority ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 - Lowest priority

Among Top 3



Q: Please arrange the following in order of priority to you when searching for veterinary care for your pet(s), with 1 being your top priority and 7 being your lowest priority. n=1,000

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Respondent Profile

Respondent Profile: Demographics

n=1,000

Generation	
Generation Z (18-26)	11%
Millennials (27-42)	38%
Generation X (43-58)	21%
Baby Boomers (59-77)	29%
Silent Generation (78+)	2%

Region	
Northeast	18%
Midwest	19%
South	40%
West	23%

Gender Identity	
Female	52%
Male	48%
Nonbinary	1%

Race/Ethnicity	
African American/Black	10%
American Indian/Alaska Native/Indigenous	1%
Asian	3%
Hispanic/Latino/Spanish	15%
Native Hawaiian/Pacific Islander	<1%
White/Caucasian	70%
Multiracial/Ethnic	1%
Self-describe	1%
Prefer not to answer	<1%

Living Setting	
Urban	26%
Suburban	50%
Rural	23%
Prefer not to say	1%

Employment Status	
Employed full time	47%
Employed part time	8%
Self-employed	7%
Not employed but looking for work	4%
Not employed and not looking for work	3%
Temporarily furloughed	<1%
Armed forces / Military	<1%
Retired	20%
Homemaker	8%
Student	2%
Prefer not to say	1%

Highest Education Level	
Some high school or less - no diploma or GED	2%
High school diploma or equivalent (GED)	20%
Vocational or technical school	4%
Some college, no degree	19%
Associate degree	14%
Bachelor's degree	28%
Master's degree	9%
Professional or doctorate degree	4%

Annual Household Income	
Less than \$30,000	17%
\$30,000 to \$49,999	16%
\$50,000 to \$74,999	18%
\$75,000 to \$99,999	15%
\$100,000 to \$129,999	12%
\$130,000 to \$149,999	6%
\$150,000 or more	15%
Prefer not to say	1%

Respondent Profile: Pet Ownership

n=1,000

Household Pets	
Dog	77%
Cat	56%
Fish	10%
Bird	4%
Turtle, lizard or snake	4%
Hamster, gerbil or guinea pig	2%
Some other pet	3%

Number of Pets	
One	39%
Two	26%
Three	15%
Four or more	20%

First-time Pet Owner	
Yes	11%
No	89%

Dog / Cat Ownership	
Dog only	44%
Cat only	23%
Dog and cat	33%



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