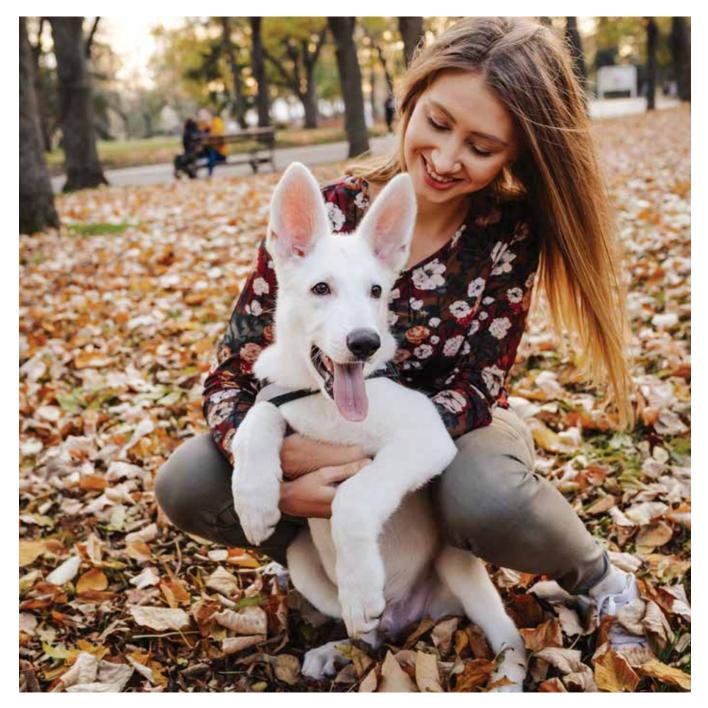
2022 AVMA PET OWNERSHIP AND DEMOGRAPHICS SOURCEBOOK





Veterinary Economics Division American Veterinary Medical Association May 2022

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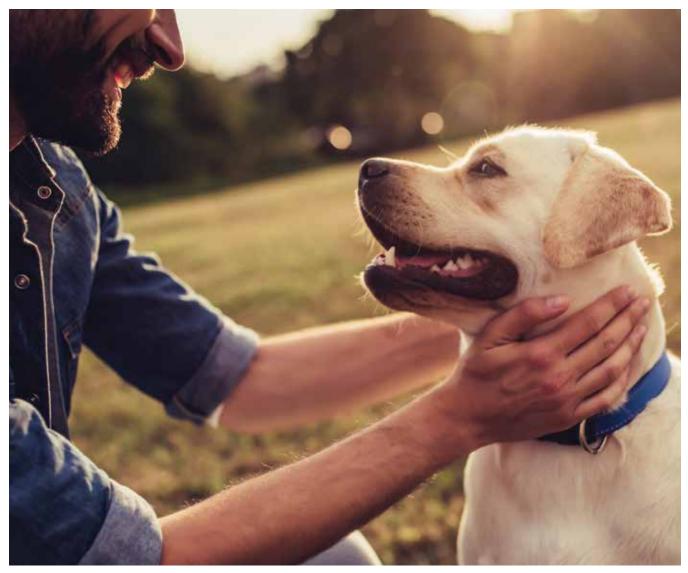
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INTRODUCTION

The American Veterinary Medical Association (AVMA) is committed to advancing the science and practice of veterinary medicine, and a key component of that mission is understanding pet populations and ownership. This report provides updated information on pet-owning households, including demographics and behavior information. It analyzes pet owner data through an economic and social lens to better understand who pet owners are, how they behave, and what their impact is on pet populations. In this edition of Pet Owner Trends, readers will find valuable insights on pets and their owners, plus information on the impact of COVID-19 on pet ownership and behaviors, such as adoptions.

This report is based on a survey conducted in early 2021 via online opt-in, reflecting 2020 data. The data were sampled, weighted, and screened to eliminate potential sources of bias and provide accurate estimates and insights. A total of 2,011 respondents completed the online survey and were included in the final analysis reported here; the margin of error is 2.2% within a 95% confidence level.

Both demographic and behavioral characteristics of respondents were compared to the general population for weighting and estimations. Logistic regression and difference in means test were performed to see which characteristics influence whether a household adopted a pet, how likely they were to see a veterinarian, and how likely they were to delay seeing the veterinarian. More information is available in the methodology section.

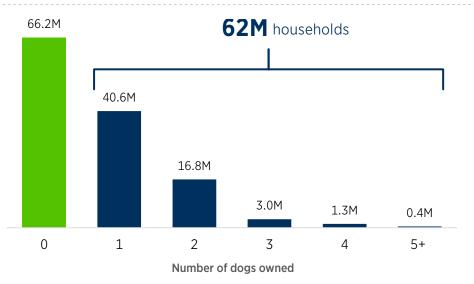
PET POPULATION			
2020	2016*		
83,739,829 - 88,853,254	76,811,305		
dogs	dogs		
1.46	1.6		
dogs per household	dogs per household		
45% of households own dogs	38% of households own dogs		
50,217,861 – 61,910,686	58,385,725		
_{cats}	cats		
1.78	1.8		
cats per household	cats per household		
26% of households own cats	25% of households own cats		

DOG POPULATION INCREASED BY 6.9 – 12 MILLION*

Dog ownership **increased by 6%** from 38.4% (2016) to 44.6% (2020), although the average number of dogs per household decreased from 1.6 to 1.46 dogs per household. Although the number of dogs within households declined, more households owned dogs and this led to an overall increase in the total population of dogs owned. It's important to note these are estimates based on a sample size of 2,000. Advanced weighting techniques were used to enhance the accuracy of these estimates, and a range is provided for a more accurate representation of population estimates. However, given the total US population of 128 million households in 2020 estimations, projecting pet populations from a limited sample size of 2,000 has difficulties that need to be considered even with the best weighting techniques (see methodology section for additional information).

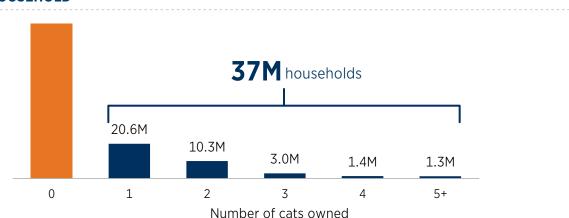
*All data on pets only include pets as reported by respondents who indicated they own pets. Pets without homes (those in a shelter, store, or feral) are not included in these estimates.

» DOGS PER HOUSEHOLD



CAT POPULATION INCREASED BY 1.8M IN 2020*

The overall owned cat population **approximately 3% each year between 2016 and 2020**, ending the trend of declining cat populations observed in both 2011 and 2016. Cat ownership increased slightly from 25% in 2016 to 26% in 2020, although the number of cats per household decreased slightly from 1.8 to 1.78.

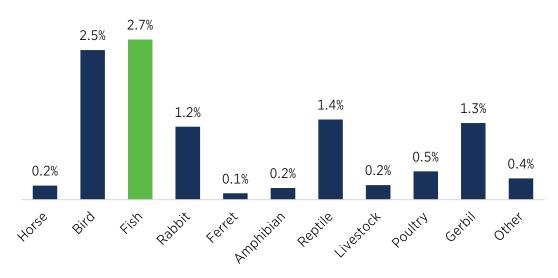


» CATS PER HOUSEHOLD



OTHER PETS

As with previous years, fish continue to be the third most popular pet (2.7%) behind dogs and cats, although 2016 had a much higher rate of ownership at 8.3%. Birds are not far behind at 2.5%. Pet ownership outside of dogs and cats consists of a small population so greater variability in the data is expected.



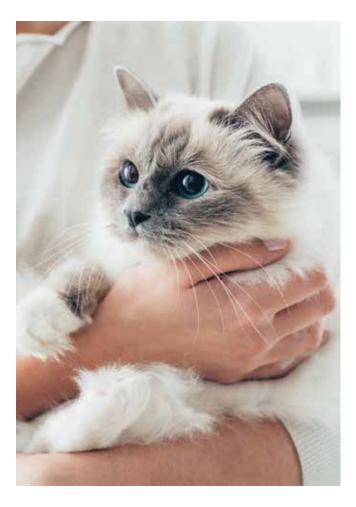
FUN FACTS - MOST POPULAR PET NAMES

DOGS	CATS
1 Max	Tom
2 Bella	Tigger
3 Rocky	Bella
4 Daisy	Jack
5 Jack	Tommy
6 Molly	Lilly

» LEVERAGING THESE DATA

- There were increases to both cat and dog populations, and moderate increases in the percentage of households owning dogs or cats.
- The number of dogs and cats per household decreased from 2016, indicating a larger increase in single-pet households.
- Practices might consider targeting services and

- marketing messaging to new pet owners.
- As the average number of dogs and cats per household decreases, practices may consider expanding their client base to maintain adequate patient caseloads.





EXPENDITURES AND VISITS

» VETERINARY CARE

Veterinary care—as measured by veterinary services delivered plus medication—had an average cost of \$326 a year per household, which comprised 33% of total annual spending on household pets. The amount households spent on veterinary care varied by species and the number of animals owned. For example, households with one cat spent an average of \$248 a year on veterinary care, while households with two or more dogs spent an average of \$391 a year on veterinary care for all household pets. Medications comprised approximately 30% of total dollars spent on veterinary care, making medications an important component of practice revenue.

EXPENDITURES ON VETERINARY CARE		
Cost of last visit	Households with no spending	
(per pet)	on veterinary care	
Dog owners:	Dog owners:	
\$195	11%	
Cat owners: \$162	Cat owners: 19%	

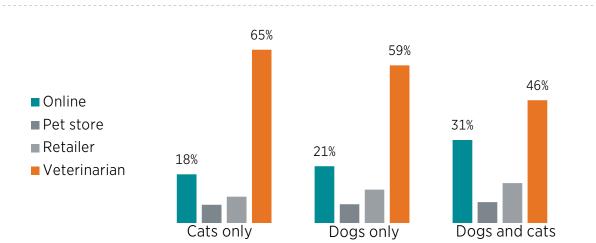
Veterinary care accounted for the largest proportion of household spending for dog owners at \$367 per year, while cat owners spent more on food (\$310 per year) than veterinary care (\$253).

Households	Households	Households
with dogs only	with cats only	with dogs and cat
Food	Food	Food
\$339	\$310	\$321
Veterinary care \$367	Veterinary care \$253	Veterinary care \$311
Toys	Toys	Toys
\$79	\$50	\$83
Grooming	Grooming	Grooming
\$99	\$18	\$64
Other	Other	Other

VETERINARIANS ARE THE MOST TRUSTED PROVIDERS FOR MEDICATIONS

Most pet owners (46% to 65%) rely on their veterinarian for purchasing medications. This is true for both dog and cat owners. Pet owners with both cats and dogs were the most likely to purchase medications online (31%)*. Pet owners who purchased medications from their veterinarian were most likely to cite **expertise (59%)** as a reason for choosing their veterinarian. Ease of access also was a relatively strong reason for this group (45%). Compared to the other sources, price was the least cited reason for purchasing from the veterinarian (20%). Those who purchased from an online store or retailer were most likely to cite price (54%) or ease of access (57%) as the main reason. Owners who used a pet store (Petco, Petsmart, feed supply, etc.) were most likely to state availability of medication as the main reason (68%).

*Online was described as "Amazon, chewy, or other online."



» WHERE DO YOU BUY MEDICATIONS?

*Online was described as "grocery store, Target, Walmart, or other superstore." Pet store is reported as "Petco, Petsmart, feedstore, etc."

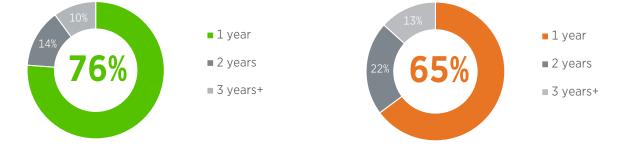
» REASONS FOR CHOOSING MEDICATION PROVIDER





» WHEN WAS THE LAST TIME YOUR DOG SAW A VETERINARIAN?

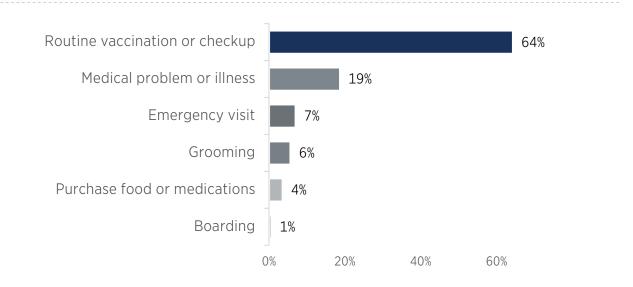
» WHEN WAS THE LAST TIME YOUR CAT SAW A VETERINARIAN?



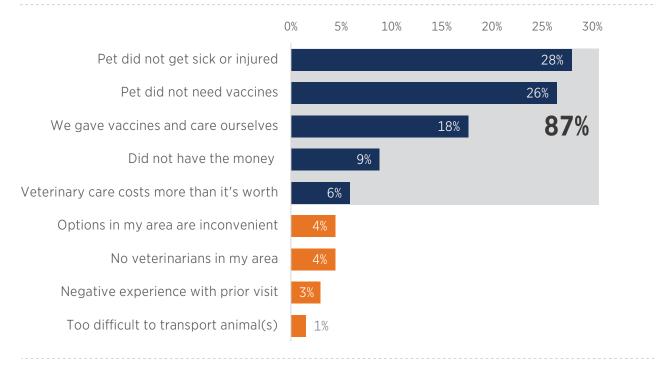
REASONS FOR VISITING THE VETERINARIAN

The most cited reason for visiting the veterinarian was routine vaccinations or checkups at **64%**, followed by medical problems or illness at 19%. Similarly, respondents whose pets had not seen a veterinarian in the last two years were most likely to state that the pet hadn't needed a vaccine, they gave vaccines themselves, or that the pet was not ill or injured. Overall, 87% of respondents cited perceived value and affordability as primary reasons for not seeing a veterinarian. Issues such as convenience and access (location, hours, etc.) accounted for less than 10% of responses.

» REASON FOR LAST VISIT



» REASON FOR NOT SEEING VETERINARIAN



26% of pet owners reported not seeing the veterinarian between March and December in 2020.

Dog owners	Cat owners
86%	87%
waited 30 minutes or less	waited 30 minutes or less
How quickly were you abl	e to get an appointment?
27%	29%
same day	same day
39%	33%
less than a week	less than a week
27% within two weeks	30% within two weeks
7%	8%
three weeks or longer	three weeks or longer

Only **3%** of pet owners had to wait four weeks or longer to book an appointment and **65%** were able to see a veterinarian in less than a week.



KEY TAKEAWAYS

- Pet owners spent a significant portion of their overall pet spending on veterinary care, second only to food.
- Most pet owners saw the veterinarian primarily for vaccinations and routine care.
- Lapsed clients were most likely to cite value-related reasons for not seeing a veterinarian in the last two years (services not needed, cost too high, etc.).
- Convenience (location, hours) and availability of veterinarians did not significantly influence lapsed patient care.
- Communicating the overall value of veterinary care, and providing cost options that align with client budgets are key to ensuring pets see a veterinarian at least once a year.

PET OWNER DEMOGRAPHICS

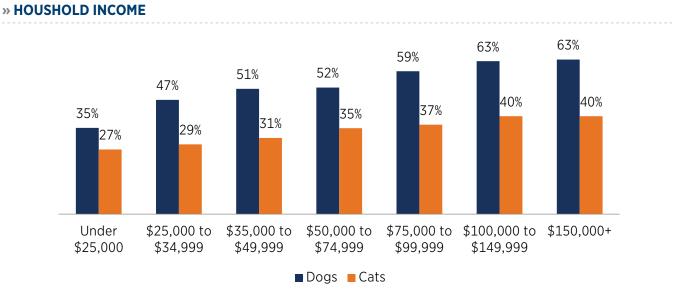


WHO IS MOST LIKELY TO OWN PETS?

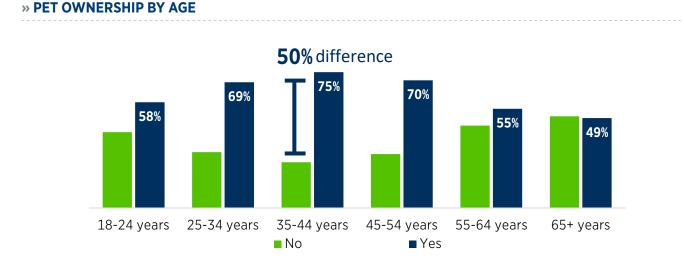
As with previous years, higher income and home ownership were associated with higher rates of pet ownership. However, this relationship was more pronounced in 2020. Comparing 2020 to 2016*, rates of pet ownership were **11%** higher for those making more than \$75,000 and were **25%** higher for people living in a house. People who own their own home had pet ownership rates 5% higher than 2016. When compared to an overall increase in pet ownership of less than 1%, we can see a trend of wealthier Americans comprising a higher percentage of pet owners.

*2017-2018 AVMA Pet Ownership and Demographics Sourcebook

Households with incomes over \$100,000 were most likely to own pets:

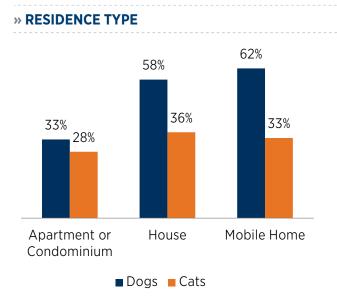


63% own dogs and 40% own cats.

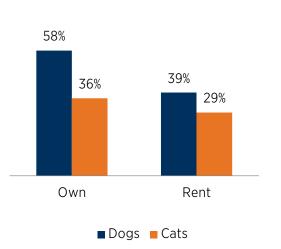


People in the 25–54 age group were most likely to be pet owners. 35-44-year-olds had the highest rate of ownership at 75%.

Homeowners—including those in houses and mobile homes—were more likely than apartment dwellers to own dogs, while cat ownership did not vary significantly by home ownership.



» HOME OWNERSHIP



PET OWNER SEGMENTS



TYPES OF PET OWNERS

Taking a deeper dive into pet ownership, we examined types of pet owners, specifically those who own dogs, and those who own dogs along with other types of animals (cats, birds, etc.). We identified five types of pet owners: low key and child free; pampered pets; casual caretakers; occupied owners; and enthusiastic families. Each of these groups vary in their demographics, behaviors, values, and needs. Understanding each type of pet owner can help practices increase engagement and loyalty among their client base.

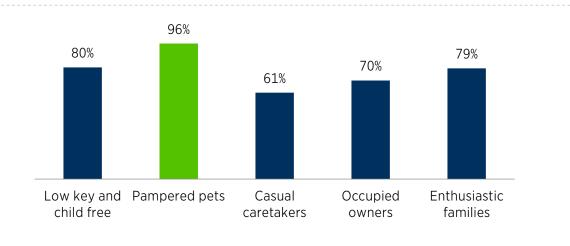
PET OWNER SEGMENTS				
Pampered pets My pets are my world, so I value high-quality service.	Less likely to own cats	Single, no kids	Under 35 or 45-54 years old	More likely to make under \$25k or over \$200k
Enthusiastic families Convenient location and hours are great for my busy family, but overall value is most important to me.	Own dogs and cats	Likely to have children	25-54 years old	Income most likely between \$50k-\$200k
Low key and child free My pet is a close family member, so I want quality services at the right price point.	Less likely to own cats	No children	Age 55+	Income between \$25k-\$50k
Occupied owners I may not take my pet to the veterinarian each year, but when I do, I want my pet to receive quality services from knowledgeable staff.	More likely to own dogs	Married or divorced	Under 45 with children under 5 years old, or 65+ without kids	More likely to make under \$150k
Casual caretakers My family has several pets to care for so when we go to the veterinarian, we need valuable services at the right price.	Own dogs and cats	Married with kids, own a home	25–44 years old	More likely to make \$75k-\$200k



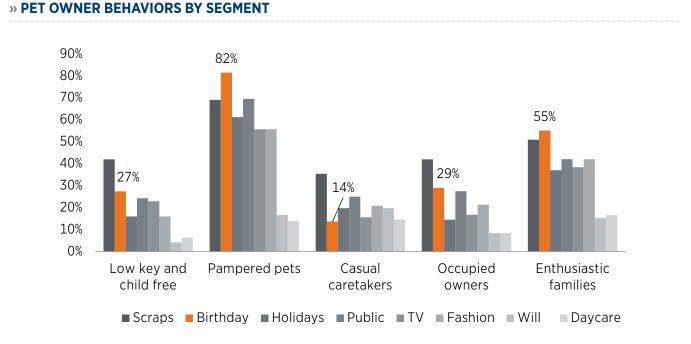
CARING FOR PETS

Each segment differs in how they care for pets. Pampered pets and enthusiastic families were the most likely to be highly involved in their pets' lives. This includes celebrating birthdays, holidays, talking to their pet daily, and dressing their pet in fashionable clothing and/or accessories. Casual caretakers have the lowest level of involvement, although 61% of respondents in this group consider their pets a family member.

» DO YOU CONSIDER YOUR PET A FAMILY MEMBER?



In the pampered pets segment, **96%** of respondents consider their pet a family member, and **82%** celebrate their pet's birthday.

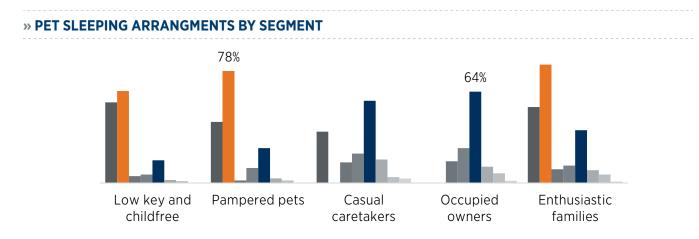


*Holidays refers to celebrating holidays with a pet, public refers to taking a pet out in public places, TV refers to leaving the TV on for a pet while away, and will refers to including a pet in one's will.

PET OWNER BEHAVIORS VARY BY SEGMENT

Pampered pets	Enthusiastic families	Low key and child free	Casual caretakers	Occupied owners
Celebrate birthdays and holidays, and purchase clothing for pets	Mostly likely to have pets in daycare and use a pet monitor	Less likely to take pictures of pets and dress them up	Still consider their pet's mental health but are less likely to think about it daily	Pets do not sleep in bed or bedroom and are not allowed on furniture
Think about happiness and mental health of pets daily	Pets sleep in the bed or bedroom but are not allowed on furniture	Lower levels of involvement than other segments	Least likely to talk to their pet every day	Most will take pictures of their pet at least once a week

Occupied owners are the least likely to have pets sleep in their bed or bedroom. The majority of respondents in this group (64%) have pets sleep in their house.

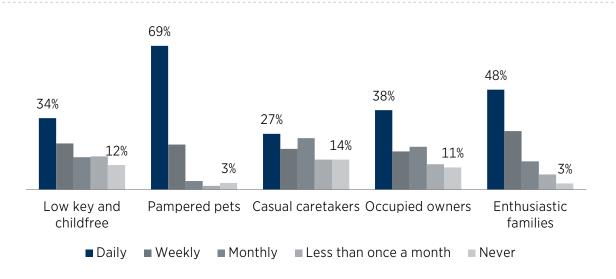


■ Bedroom ■ Bed ■ Garage ■ Crate ■ House ■ Shelter ■ Fenced in ■ Outside



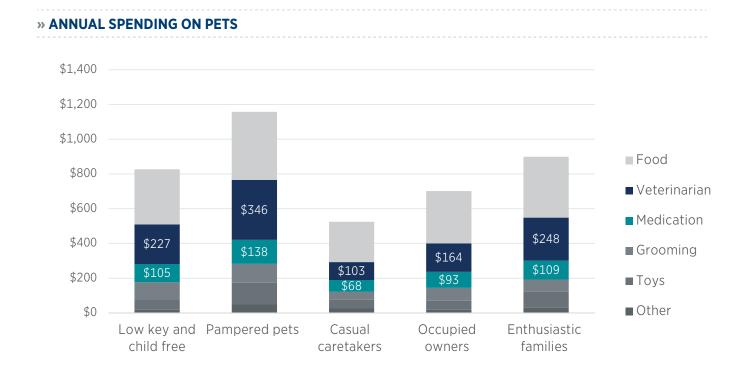
PET'S MENTAL HEALTH

Considering a pet's mental health was another distinction between pet owner segments. Pampered pets and enthusiastic families had the highest rates in this category, with casual caretakers having the lowest rates. It is important to note that the vast majority of casual caretakers (72%) still consider their pet's mental health at least monthly.



» HOW OFTEN DO YOU THINK ABOUT YOUR PET'S MENTAL HEALTH?

Pampered pets spent the most money at the veterinarian, while casual caretakers spent the least.

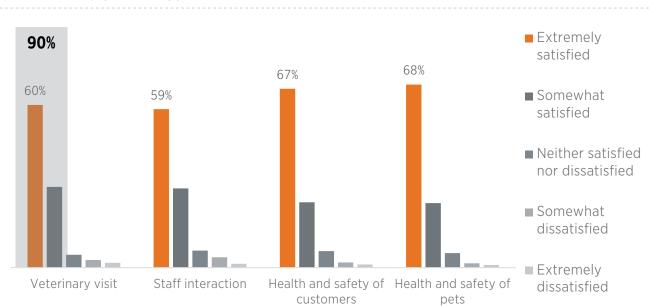


SATISFACTION WITH VETERINARY SERVICES



VETERINARY VISIT SATISFACTION

Most respondents (60%) were extremely satisfied with their veterinary visits and **90% were somewhat to extremely satisfied**. When asked about specific aspects of their last visit, most respondents were extremely satisfied with both concern for health and safety of their pets and themselves, and staff interaction.



» VETERINARY VISIT RATINGS

PRICE VS. VALUE

Key performance indicators

Overall satisfaction Likelihood of switching veterinary practices Would you recommend your veterinarian to a friend or family member?

Most influential Overall value and quality of services

Least influential Price





Quality services and knowledgeable staff were the most important indicators of whether or not someone would switch practices. Convenience, price, hours, and wait time were not significant predictors of likelihood to switch practices. Focusing on quality services and knowledgeable staff has a higher return on investment (ROI) than price and wait time for many practices.

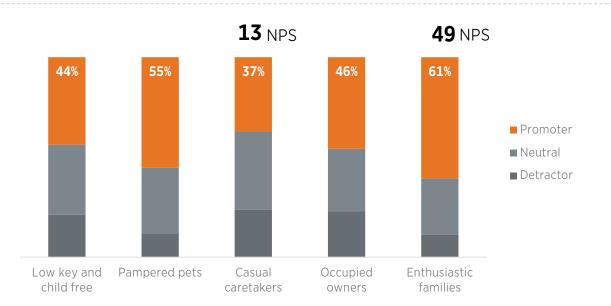
Price was only significant for households with an income under \$75,000. Pet owners in this group were less likely to recommend their veterinarian if they were unsatisfied with the price they were charged.

NET PROMOTER SCORE (NPS)

NPS is used as an industry benchmark for companies to understand where their customer experience ranks within a competitive landscape. Business leaders use this metric for insights on brand strength, customer experience management, and growth. Customers are asked how likely they are to recommend a business to a friend or colleague. Respondents are grouped as promoters (9-10), passives (7-8), or detractors (0-6). The NPS can range from -100 to 100 and varies across industries and companies. The score is calculated by subtracting the percentage of detractors from the percentage of promoters. In general, a score above 0 is good, above 20 is favorable, and above 50 is excellent.

For this survey, respondents were asked how likely they are to recommend their veterinarian to a friend or family member. Promoters are more likely to see a veterinarian regularly, spend more on veterinary care, and promote their veterinarian to others. Increasing the percentage of promoters can help strengthen a practice and the entire industry. To do this, we start by understanding the NPS for veterinary practices in general, and what influences the likelihood a client will recommend their veterinarian to others.

The overall NPS for veterinary practices was **34**, which is considered a good score and is in line with the human healthcare industry at **38**.



» VETERINARY NPS BY PET OWNER SEGMENT

Enthusiastic families had the most promoters (61%) and an NPS of 49.

Casual caretakers had the lowest NPS at 13.

GETTING PROMOTERS AT YOUR PRACTICE

We measured several characteristics to see how they influence a pet owner being categorized as a promoter, neutral, or detractor. **Overall value** and quality of services were most influential on promoter status and convenience was the least influential. In other words, pet owners who rated their veterinary clinic highly on overall value were most likely to be promoters and recommend their clinic to others. Pet owners who rated their clinic low on overall value were most likely to be detractors. Rating a practice low on **convenience** was the least influential on the likelihood to recommend a veterinarian to friends or family members, but for some segments a practice that is highly inconvenient or expensive could be a deal breaker.

WHAT DRIVES	PROMOTERS AND D	ETRACTORS?	
Pampered pets I look for the best service money can buy.	Highest level of spending and satisfaction with veterinary services	Least interested in curbside service and telemedicine	Value quality of services and overall value
Enthusiastic families Convenient services are great, but overall value is most important to me.	Prefer practices with as many conveniences as possible (curbside service, contactless payment, online billing, telemedicine, 24-hour service, etc.)		Value quality of services, knowledgeable staff, and overall value
Low key and child free I look for quality service that's within my budget.	Middle of the road spending and satisfaction	Prefer to make appointments over the phone	Value quality of services and price
Casual caretakers If a practice doesn't have knowledgeable staff with cost- effective options, I'll look elsewhere.	Lowest satisfaction with veterinary care and lowest spending on veterinary services	Least likely to see a veterinarian regularly Value knowledgeabl staff and price of services	
Occupied owners Quality service and knowledgeable staff matter most when finding a practice, but if it's very inconvenient I will switch.	Middle of the r on satisfactio		uality of services and owledgeable staff

19



MILLENNIALS AND GEN Z

Long-term profitability is highly dependent on strong loyalty and revenue from Millennials and Gen Z as they overtake baby boomers in the general population and among pet owners. Millennials and Gen Z are more likely to recommend practices with knowledgeable staff, while Gen X and Boomers are more likely to recommend practices with high overall value. Clients of all ages place a high value on friendliness of service.

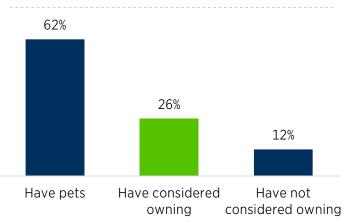
MILLENNIAL AND GE	EN Z PREFERENCES
3 times more likely to value telemedicine and curbside services	Twice as likely to value 24-hour service and contactless payment
$2\frac{1}{2}$ times more likely to value online billing	Less likely to value scheduling appointments over the phone
Actionable	e insights
We identified five key pet owner segments: pampered pets; enthusiastic families; low key and child free; occupied owners; and casual caretakers.	Each segment varies on the demographic makeup, behaviors, values, spending, and satisfaction with veterinary care.
Net Promoter Score (NPS) is a key performance indicator that varies by pet owner segment.	Getting to know your clients and their needs is critical for making sure your practice has a high percentage of promoters and a strong NPS.



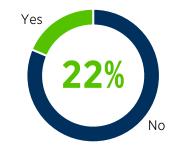
COVID-19 AND ADOPTIONS

Households who acquired pets during COVID-19 were most likely to get a dog (82%), followed by cats (68%). Nearly half of the households who acquired pets during COVID-19 obtained both dogs and cats (47%).

» DO YOU OWN OR HAVE YOU CONSIDERED OWNING A PET?

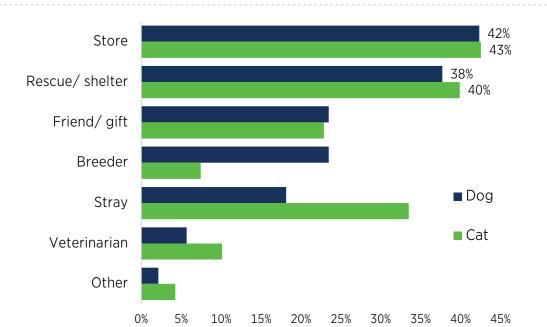


» DID YOU GET A NEW PET SINCE COVID-19 BEGAN?



WHERE ARE PET OWNERS ACQUIRING PETS?

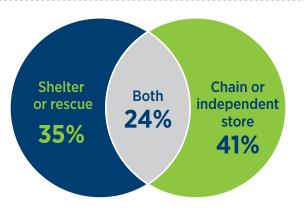
Shelter or rescue adoptions accounted for 38% of dog adoptions and 40% of cat adoptions. Stores accounted for 42% of dog adoptions and 43% of cat adoptions. Rates of acquisition from breeders were more common for dogs (23%) than cats (7%). This is similar to 2016 data that had dog acquisitions from breeders at 22%. Overall, fewer pet owners obtained a pet from a friend, family member, or as a gift. It is important to note that many respondents selected multiple options, meaning they may have obtained their pet(s) from multiple sources. For example, 36% of respondents who obtained a pet from a store also marked a shelter or rescue. This could include pet stores that work with a local shelter or rescue to provide pets with new homes.



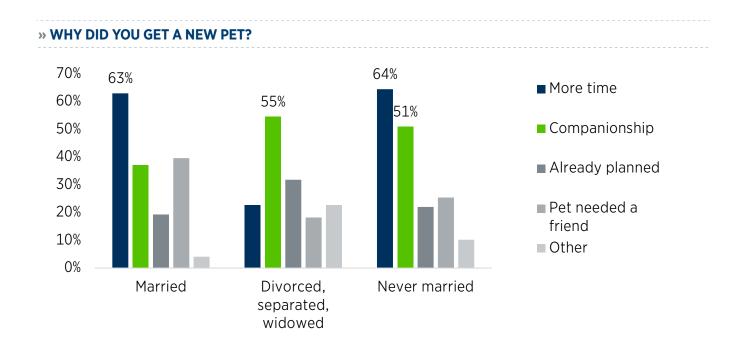
» WHERE DID YOU GET YOUR NEW PET?

Shelters and rescues were a significant source of pet acquisition in 2020. Many respondents reported using shelters and stores, possibly due to stores working with a local shelter or rescue.





Married respondents were most likely to cite having more time as a reason for acquiring a new pet (63%) in 2020. Divorced, separated, and widowed respondents were most likely to cite companionship (55%). Never married respondents cited both having more time (64%) and companionship (51%) as reasons.



THE ECONOMICS OF PET ADOPTIONS DURING COVID-19



ECONOMICS DRIVE BEHAVIORS, INCLUDING ADOPTIONS

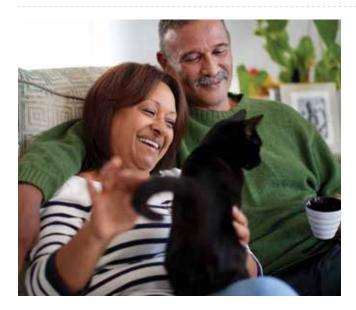
When examining pet ownership and pet owner behaviors, the state of the economy and how it impacts households has a strong influence. During the pandemic, household income, remote work, and changes to financial situations were strong predictors for adopting a pet and visiting a veterinary practice.



HIGH EARNING REMOTE WORKERS DRIVE ADOPTIONS AND VETERINARY VISITS

There was a distinct trend in who acquired pets during COVID-19. People with more disposable income and the ability to work from home were the most likely to get a new pet. People who worked remotely were **8 times more likely** to get a new pet, and those who worked remotely **and** had a household income of \$100k or higher were 9 times more likely to get a new pet. Additionally, 84% of high earning remote workers cited having extra time as the main reason for obtaining a new pet. This was true for both dog and cat owners. A significant number of pet owners did not see a veterinarian during the last nine months of 2020. These owners were more likely to have lower household income and not work remotely. Demand for services is often cyclical, and temporary changes in COVID-19 restrictions may have caused short-term changes in demand. For example, we observed demand for veterinary services spike in late 2020 and early 2021, then flatten during the last half of 2021 (see <u>avma.org/IndustryTracker</u>).

37% of respondents delayed visiting a veterinarian due to COVID-19 and 26% of respondents reported not seeing a veterinarian in 2020 since COVID-19 began.





SEEING THE VETERINARIAN DURING COVID-19		
Delayed seeing a veterinarian	Saw a veterinarian during COVID-19	
Dog owners	Dog owners	
38%	77%	
Cat owners 42%	Cat owners 75%	
All pet owners	All pet owners	
37%	74%	
Most likely to delay: Remote workers with	Most likely to see: Households with	
children, under 45 years old, under \$75k	\$75k income or higher, and those who wer	
household income	better off financially during COVID-19	

WHAT DOES IT MEAN?

Increases in pet ownership during COVID-19 were driven by economic factors, including increased income and more time spent at home. However, these factors only impacted a small subset of the population (22% of lower income households and 39% of upper income households – see https://www.pewresearch.org/social-trends/2021/03/05/a-year-into-the-pandemic-long-term-financial-impact-weighs-heavily-on-many-americans). Additionally, since this impact was triggered by a pandemic, it isn't likely to be replicated in the near future. Caution is warranted in putting into place permanent solutions for temporary operational changes.



METHODOLOGY

This report is based on a survey conducted by a third-party research panel in early 2021, reflecting 2020 data. There were 5,119 respondents who started the survey (opted in), 723 (or 14.1%) exited on privacy policy, 1,222 (23.9%) were removed for failing validation or having largely inconsistent answers, and 1,163 (22.7%) were removed for duplicates or not finishing the questionnaire. The final respondent count was 2,011 for an actual completion rate of 39.8%.

Several methods can be used to estimate and reduce the nonresponse or coverage bias inherent to opt-in surveys like this one. Such bias can occur when survey respondents are systematically different from nonrespondents in some aspects. One method to minimize this difference is to use statistical adjustments or weightings based on selected demographic, attitudinal, behavioral, or other variables (Dever, Rafferty, Valliant 2008; Mercer et al. 2018). Research has shown that the choice of adjustment technique is not as important as the choice of variables used to make the adjustments (Mercer et al. 2018). We used two separate weighting techniques to ensure the accuracy of pet ownership rates and pet populations. First, we used a range of demographic variables to construct an iterative proportional fitting model. Second, we used a series of behavioral characteristics to weight the data separately. We compared scores and overall opt-in rates with national Gallup polls conducted during the same time period.

Responses to survey questions were also examined for normal distributions. For expenditure metrics, values more than 2 standard deviations above the mean were removed. Data on annual spending pertained to all pets in a single household, whereas data on the cost of last veterinary visit pertained to a specific cat or dog's last visit. It is important to note the previous Pet Ownership and Demographic Survey did not separate medication from veterinary service costs.

Year-over-year comparisons within this study compared 2020 to 2016. The 2016 data came from AVMA's 2017-2018 Pet Ownership and Demographic Survey, which asked respondents about 2016. The current survey was conducted in early 2021 and asked respondents about 2020.

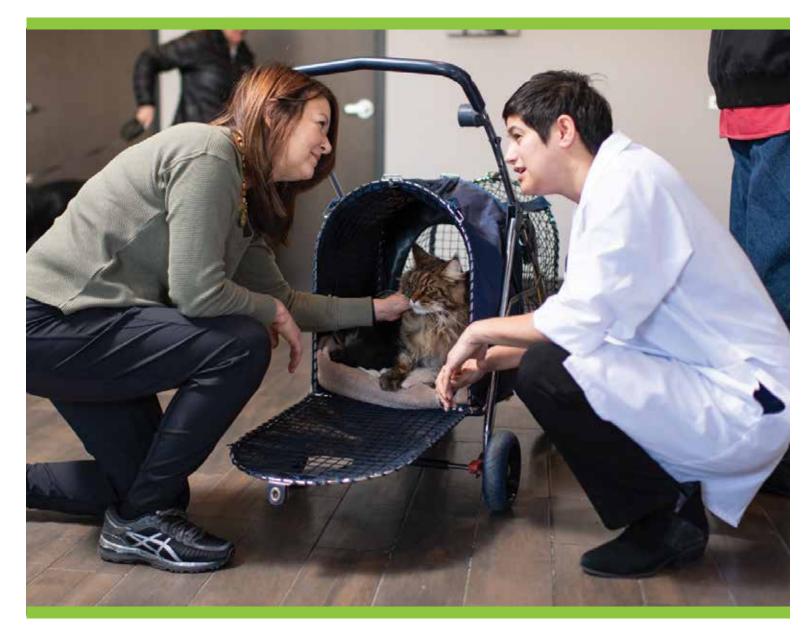
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