

Vicky-Lynn Spencer Brastad

Between Two Worlds

- Identification of Perception Gap between
Customer and Veterinarian

Master's thesis in Master in International Business and Marketing

Supervisor: Njål Sivertstøl

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Abstract

This research is the first conducted research on the perception gap between customers' expectations towards veterinary services in Norway. Through in-depth interviews with both customers and small companion animal veterinarians practicing in Norway, primary data have been collected on the topic. This research shows that there is a perception gap between customers' expectations and veterinarians offered service. The gap is dependent on the customers knowledge, willingness, and managers organizational strategy. A theoretical model of the perception gap is made and can be used as a tool for clinic managers to map out gaps in their own clinic. Further, theoretical implications on theory gap, such as high-pressure drivers, managerial impact and customers' expectations have been identified.

Keywords: Customer perception, Perception Gap, Veterinary Industry, Pressure, Management

Sammendrag

Denne forskningen er den første utførte forskningen på persepsjonsgapet mellom kundenes forventninger og veterinærtjenester i Norge. Gjennom dybdeintervjuer med både kunder og praktiserende smådyrveterinærer i Norge, er det samlet inn primærdata på forskningsområdet. Denne forskningen viser at det er et gap mellom kundenes forventninger og tilbydde veterinærtjenester. Gapet er avhengig av kundenes kunnskap, vilje og klinikkleders organisasjonsstrategi. En teoretisk modell av persepsjonsgapet er blitt laget og kan brukes som verktøy for klinikkledere til å kartlegge egen klinikk. Videre er det identifisert teoretiske implikasjoner på teorigapet, som drivere på høyt arbeidspress, leders innvirkning og kundenes forventninger.

Preface

This thesis is the last step on my study programme International Business at Norwegian University of Science and Technology (NTNU). With guidance and positive feedback from my supervisor Professor Njål Sivertstøl, this thesis has become a product of which I am proud of!

As this thesis represents the final brick of my master's programme, it has also become the first stone of a new adventure. I wish to give a big thank you to my husband and kids for all their support.

Vicky-Lynn S. Brastad

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1 Introduction

The domestic pet's role in society have moved from a mutual benefit relationship between animal and human (BoehringerIngelheim,2022) towards family member status. A survey conducted by American Veterinary medical Association (2018), showed that 99% of dog owners and 96% of cat owners in U.S see their pets as either members of the family or close companions. The shift from mutual benefit relationship to family member requires a new sort of demand of care for companion pets. Veterinarians meet an increased demand for their services, and medical procedures is getting more advanced. Medicine advancement and a global society that surfs on the wave of internet, increase awareness among owners of treatments, and can complicate the relationship between veterinarian-customer communication.

The veterinary industry is a market-driven service industry, providing health care to their patients and meeting the owners' needs. The relationship between owner and veterinarian is often a long-term relationship over the span of the companion animals' lifetime, often in the range of 10-20 years (Pert,2001; Bluecross,2022). Operating in a market-driven industry it is important for organizations to build relationship to their customers, securing trust and knowledge about previous experience and present needs. This way of operations aligns with marketing literature that describe market-driven strategy as the process of firms that acquire, process, and distribute customer- and competitor information and act upon the information (Sarin,2003).

Veterinary profession consists in large degree of communication and interaction between veterinarian and customer, in addition to the examination and treatment of patient. The communication skills required of the profession mirrored in the World Organisation for Animal Health (2013), OIE, recommendations in core curriculum guideline for veterinary education. The guidelines suggests that veterinary students shall throughout their studies develop communication skills, in addition to traditional subjects such as anatomy and diseases, with the argument of: "Oral and written communication skills are essential to the delivery of National Veterinary Services, and should be practiced, assessed and improved upon throughout the veterinary school curriculum." However, the guidelines do stress out that it is not needed to create separate series of classes focusing on communication skills alone. (OIE,2013).

The focus veterinarian's ability to communicate with their customer, owner, have gained an increased focus in the research the last decades and is recognized as a core competence in

veterinary medicine (Gaida et.al.,2018). An increased status of the pets, the demand for high skills and good service, in addition to treating conditions, creates elevated expectations from the veterinarians in form of providing the best treatment of the pet and customer. To manage this, communication and collaboration between veterinarian and owner is essential to secure animal welfare.

Previous conducted research in the client-veterinary interaction is focusing on the veterinarian's capability and skills to collect and share information to the customer (Adams&Frankel,2007; McDermott et.al.2017; Shaw et.al,2010). Research found around the client's perception and experience at a veterinary clinic is mainly conducted as quantitative research (Dassanayake&Weerasiri,2017; Küper&Merle,2019). The use of surveys to understand the client's perspective creates some difficulties when there is a lack of qualitative research in the field. Surveys are developed by researchers and build upon assumptions of what the clients see as important during a consultation. The overload of quantitative- versus qualitative research, can provide an fragmented picture of customers' wishes and needs.

Previous findings on veterinary communication skills shows that veterinarians have harsh work schedules, compassion fatigue Kottke,2022), and face an increased pet population with owners that expect availability, kindness, and capacity to listen (Moreau,2003). Lack of research on customers perceptions, indicates that there is little knowledge of the customer perspective in the veterinary industry. This research aims to shed light on the two perspectives that appear in a consultation room in companion animal clinics in Norway. First, is the customer perspective and customer expectations toward veterinarian skills and capabilities in consultations. Second, is the perspective of the veterinarian and their experience from customer's expectations. When both perspectives are represented, it is possible to compare them and identify if there are any gaps between the two perceptions. According to Hill (1996), the difference between customer performance perception and the service provided can be defined as a perception gap. Understanding customer expectations of the veterinarian in terms of interaction between veterinarian-patient and veterinarians' capabilities to meet customer expectations, is the key to map out skills needed by a veterinarian. According to Grigoroudis and Siskos (2010), customer satisfaction is a measurement that may reveal potential differences in the service quality perceptions between the customer and management of the business organization. By comparing these perspectives, it is possible to identify if there is a perception gap in the veterinary industry in Norway and reveal factors that impact customer expectations and perception.

This explorative qualitative research will focus both the customer and the veterinarian perspective with goal to identify the perception gaps that may occur during a visit on a companion animal clinic. Through in-depth interviews with participants representing both customer- and veterinarian group, it is possible to create a nuanced picture of expectations and perceptions. Because perception impact actions, understanding the perception gap and factors impacting expectations provide practical implications for strategic- and marketing decision-makers. Knowledge of customers' needs, and expectations allow managers to implement measures that can adjust expectations and reduce the perception gap. The understanding of customer relations toward a company is fundamental for successful marketing strategy.

Veterinary industry operating in a market-oriented industry, make the customers relation and expectations of their service important for all strategic decisions at marketing-, resourcing-, and operational level. Moreover, contribution to theory by asking customers about their expectations toward veterinary services, as perceptions are important for customer behaviour (Kotler&Keller,2016), identification of needs can provide new knowledge to marketing theory. In addition, will future needs, as customers explain what they see as important characteristics of veterinarians (service provider), provide theoretical foundations for further research on the veterinarian industry marketing and veterinary clinic management.

In addition to theoretical and practical contributions to the veterinary industry, this research contributes to marketing theory, by investigating the importance of customer-organization relationship. Moreover, this thesis will investigate which core contributors that needs to present to build relationship and gain trust in a highly competitive service industry. Further, will this research identify if the customer needs and claimed expectations are align to the service provider experienced expectations. At last, mapping out customers believed expectations and providers experienced expectations can unveil unconscious customer needs and at what situations these needs are coming up to the surface.

2 Theory

2.1 The industry and market

Market-driven organizations is defined as organizations that analyse its market capabilities and provides products and services to satisfy market needs. It considers its customers as the final judges who determine product and service satisfaction level, delivery, price, and performance (Edosomwan,1993). The veterinary industry is a market-driven industry, where the customers are aware of price, availability, and outcome of the service. Veterinarians who

start up their own clinic are not expected to be marketing experts, however, some strategy of how to position themselves are needed. The competition in veterinary industry in Norway is medium high (MordorIntelligence,2022), with local variations in number of actors providing their service in the area, the competitive intensity. Differentiating themselves is necessary to gain a position, using the marketing mix and the 7P's: product, place, price, promotion, physical evidence, people, and process. According to Kottler and Armstrong (1989), the marketing mix is a set of controllable marketing variables that the firm blends to produce the response it wants in the target market. Veterinarian clinics can by using the tools of the marketing mix steer the expectations to their customers and achieve higher customer satisfaction.

Another variable the clinics need to take into consideration is the reputation of the clinic. Reputation is intangible and difficult to control. Benjamin Franklin said:

“It takes many good deeds to build a good reputation, and only one to lose it”

Reputation is defined as the sum of the expectations that the public places on the future behaviour of an agent or institution – based on the public's direct or indirect experiences (Klewes&Wreschniok,2009). Veterinary medicine involves risk and there is never a guarantee for success on even standard procedures, such as vaccination. Veterinarian service relies on intellectual capital, in addition to equipment such as x-rays. Organizations that rely on intangible assets are especially vulnerable to anything that damages their reputation (Eccles et.al.,2007). The use of internet and communication sharing today can make or break an organizations reputation. The availability of information on digital platforms such as google, combined with higher education makes customers today more aware of what they can expect and create a picture of what the problem is before visiting (Kotler&Keller,2016) the veterinary clinic. This might also be one explanation for the public have become more demanding and have higher expectation toward the level of care than the veterinarians are able to provide (Magalhães-Sant'Ana et.al.,2017).

Veterinary industry being a market-driven service industry, the expectations of their customers should be met to increase customer-satisfaction and secure a good reputation. Marketing is an efficient tool to steer expectations of an organization's customer pool. Based on this theory following research question on veterinary industry and market can be drafted, Q1: *How do veterinary clinics use marketing tools to steer their target market, in terms of demand, price and service?*

2.2 Customer Satisfaction and Expectation

Customer satisfaction is considered as the most reliable feedback, it provides an effective, direct, meaningful, and objective way of customers' preferences and expectations (Griouroudis&Sikos,2010). By understanding customers' expectations, needs and desires, organizations can increase their customer satisfaction. To achieve customer satisfaction, it is important to understand the customer perception and needs. To understand what they need, effective questioning and active listening is needed (Cathcart,2007). This is supported in studies aimed toward veterinary business, where customer satisfaction impacts the veterinary practice income (Cron et.al.,2000). Further study also shows that building relationship with clients is identified as a pillar of business success within the veterinary industry (Volk et.al.,2005). In marketing, perceptions are more important than reality because perceptions impact the customer behaviour (Kotler&Keller,2016).

Sometimes, reality do not align with the customers' expectations and hopes toward services. This gap between reality and expectations is called a perception gap. Hill (1996) define the perception gap as the level of service perceived by customers differs from the service provided. Perception and expectations that are not met, can from a customer's perspective, become perception of a problem that represents the initial cause for upcoming dissatisfaction (Garding&Bruns,2015). Dissatisfaction can lead to negative reputation and can turn into a stress factor for the service provider.

Veterinarian profession consist of high amount of communication between veterinarian and customer. Communication is defined as the process where information is shared by two or more persons (Kincaid,1987). Communication skills are not necessarily a natural skill but can be trained. In human medicine communication skills are trained, and key elements to perform effective communication are establishing eye contact, encourage of information sharing from patient, active listening, and summarization of information given from patient (Maguire&Pitceathly,2002). It is natural to draw a line between veterinarians and human doctors, both professions are medical trained, and both need communication skills go gain relevant information about their patient. However, there might be a deviation between the veterinarian and customers perception of effective communication. Studies show that "while the scientific, technical, and clinical skills of the veterinary profession remain high, there is evidence that veterinarians lack management and communication skills necessary for success in private practice (Brown&Silverman,1999). Even though World Organization for Animal Health, OIE, recommend communication learning in their veterinarian curriculum guidelines,

Findings in previous studies shows mixed feelings of the outcome of the communication learning at universities, while senior veterinarians feel that they do not see the benefits of learning new skills because it is “too late” (McDermott et. al.,2017).

RQ: This thesis main goal is to identify if there is a perception gap between customers and veterinarians.

Communication being a core skill for veterinary service, it is natural to have an additional research question on the subject.

Q2: How do communication impact on the perception gap between customers and veterinarians?

2.3 Pressure

Looking at how veterinarian profession is presented on tv-shows such as “veterinærene,” the viewer sits with the impression of the profession being the cosiest job in the world. The high-pressure veterinarians face in their job is poorly shown. High workload and little time, combined with considerable risk of emergency patients arriving during the opening hours is the everyday life for veterinarian clinic. Workload can normally be divided into operator level, team level and organizational level. For veterinarians, tasks will be addressed at operator level, and bigger procedures, such as operations, at team level (Lenox et.al.,1998). This means that most tasks must be solved by one operator, the veterinarian. No research is found around topics of time management and pressure in the veterinary field. However, research around veterinarians committing suicide is well documented, where long hours working days, work stress and work overload is variables that can contribute to the high suicide rates (Fink-Miller&Nestler,2018; Bertram&Baldwin,2010).

High number of tasks and high individuality in the veterinary profession, in addition to work stress and work overload being suggested as contributors to high suicide rates, it is interesting to see if pressure factors can be identified. Because no research on high pressure among veterinarians is found, following research question is formulated:

Q3: Which contributors that put pressure on veterinarians, can be identified?

2.4 Leadership in veterinarian clinics

Leadership and management are two concepts that are similar in several ways, but still far from each other. The search of finding a proper definition including both would be a thesis for itself. Instead, manager and leader will be the same for this thesis. A clinic manager is the

person who possess the role of manager who carry out position responsibilities and influence commitment (Yukl,1989). Leadership is a behaviour with goal to influence other people's thinking, attitude, and behaviours (Yukl,2013).

Companion animal veterinarian clinics consists normally of mixed staff of veterinarians, veterinary nurses, assistants, and receptionists. The mix of academic background, personalities and nationalities demand different leadership styles from the clinic manager. Leadership of veterinarians means leadership of individuals with high academic background, with individual differences. Studies show that individuals choosing the veterinary profession often have personal characteristics such as perfectionism, high achievement, and empathy (Waters et.al.,2019). Further, leadership of veterinary clinics demand a greater understanding of customer service, healthy human resource management and the medical aspect of the profession.

Managers in companion clinics in Norway are at high degree veterinarians that have started up by themselves. This means, that managers do not necessarily hold educational- and/or work experience background of business operations on how to optimize marketing tools, procurement, and human resources management.

Q4: What role do the manager play in the perception gap between veterinarians and customers?

3 Methodology

This research will be performed as qualitative research with a holistic view of the perception of customer needs, owner, and the service performer, veterinarian. Qualitative research is seen as a fit method when the main purpose is to understand and gain insight, especially in a field of research with scarce data (Ghauri&Grønhaug,2010). The lack of research and data in the thesis' problem statement, in addition to a holistic view of the problem, the research will be conducted as an explorative multiple-case study (Yin,2014).

The veterinarian industry is like human healthcare in terms of procedures executed and how to diagnostic and treat the patient. However, national- and local differences occur in terms of national laws and regulations, such as medication availability, cultural differences, e.g., pet's status, populations wealth and willingness to pay for treatment. Local differences such as availability of resources (e.g., employees, educated assistants, location, equipment) and competitors can contribute to higher competition among operating competitors. To minimize

local differences, interviews is conducted with customers and veterinarians from different areas in Norway.

A structural and systematic research with one researcher and several participants and interviewees, can create strong bias and challenges in terms of being structural and systematic. To avoid these difficulties and reduce risk of bias, a case study protocol is developed, appendix I. This protocol contains an overview of the case study, data collection procedures, data collection questions, and guide for the case study report, as proposed from Yin (2014). The protocol works as a recipe for all interviews, where all interviews will be held in a standardized way, with a set of open questions and a decided themes that must be discussed during the interviews. The explorative nature of this research means that semi-structured interviews are seen as an appropriate interview method.

3.1 GDPR

This thesis aims to secure GDPR of the participants of the study. According to NSD (2022), personal data is any data that can be linked to a person such as e-mail/IP-address, national ID-number, and audio/video recordings. To secure the anonymity of participants in this research, all recordings have been deleted after transcription of the conducted interview. Participants have not signed any documents on acceptance of recording or interview transcripts. Before starting to recorder on zoom, researcher welcomed the participant and asked if they accepted to be recorded. Recording was not started until participants had confirmed their acceptance orally. Combinations of data that can be linked to a participant will be carefully considered, this is especially important for the veterinary groups, where age, location and specialization can be narrowed down to one individual.

3.2 Recruiting Participants

The recruiting process of veterinarians was executed through social media, Facebook, where information of the research was added, see appendix II. To recruit veterinarians, the published post was shared to relevant groups such as “VetForum,” which is a private Facebook group for veterinarians practicing in Norway with around 2700 members. In addition, mail with information was sent to random small animal practices in Norway and Veterinærhøyskolen in Oslo. 5 participants from veterinary group who worked in companion animal clinics was recruited. Requirements for veterinarians was practicing with small animals, such as rodents, cats and dogs, for a minimum of one year.

Recruitments of customers was executed through Facebook and posted in relevant groups such as “Kelly’s Håp” and “Kelly’s Håp-katter.” Friends and friends’ friends shared the post, and through social media, 9 customer participants were interviewed. Requirements for interviewees for the customer group was that they have companion animal and have some experience with veterinary visits.

3.3 Interview Method

In depth interviews gives the advantage of a more accurate and clearer picture of the respondent’s position or behaviour, through open-ended questions and the freedom of answering what the respondents think about given situation. This also applies for sensitive and complicated issues (Ghauri&Grønhaug,2010). Due to the lack of research on the topic and this research being an explorative research, in-depth interviews are seen as fit data collection method to increase the knowledge on the research topic.

Participants in both veterinarian and customer group have reached out to the researcher through Messenger on Facebook or email, as requested in the information document. Time for interview have been agreed and link for the zoom meeting has been sent to the participant.

During the interview, the researcher used the case study protocol, as a guideline for data collection, questions that may arise under the interview was asked continuously during the interview to uncover or highlight topics appearing during the interview. The opportunity of going outside of the beforehand decided questions have given the research more depth and greater understanding of how both groups experience a consultation before, during and after the visit. All interviews have been recorded, scripted and the finished script have been approved by the interviewee. Participants in both groups comes from all parts of Norway.

3.4 Coding the Data

Coding qualitative data is the key to understand and gain insight on the research problem (Ghauri&Grønhaug,2010). Data analysis is the process of bringing structure and meaning to the data collected (Marshall&Rossman,1995) from both targeted groups.

Qualitative data collected from the client group was divided into eight categories: (1) Expectations, (2) positive experience, (3) negative experience, (4) client’s preferred skills of veterinarian, (5) pricing, (6) insurance, (7) trust in veterinarians and (8) improvements/missing in/from the veterinary services.

Data collected from the veterinarian group was divided into 11 categories: (1) Veterinarians experienced expectations from customers, (2) Pricing, (3) Prices in veterinary industry, (4) Owner's role, (5) Relations, (6) Skills needed in the veterinary profession, (7) Veterinarians wish of change in the industry, (8) Veterinarians expectation of their profession, (9) Difficulties, (10) management and (11) Role of owner.

The coded data was then sorted and placed into categories that answers the main research question of perception gap and research questions drafted from theory.

4 Results

4.1 Demographics

	Customers	Veterinarians
n =	9	5
avg. Interview time (min)	20,8	59
average age (years)	32,56	44,8
percentage female/male	88,9 % / 11,1 %	100% / 0
Pet insurance yes/no	88,9% / 11,1 %	

Figure 1 Demographics of Interviewees

Demographic data of the interviewees in this study is presented above. As illustrated in table I, female is overrepresented in this study. The skewness of sexes in the costumer group and lack of male at all in the veterinarian group can create a fragmented picture of the reality.

The number of customers interviewed in this study compared to veterinarians can create some disadvantages for one group compared to the other. However, looking at the average interview time from the two groups, the average time of interviews of veterinarians are almost three times longer compared to the customer group. The customer interview time had a span from 12-31 minutes, while the veterinary group had a span from 28-80 minutes.

All participants in the customer group have Norwegian citizenship, see their pet as a family member and the majority of the interviewees have insured their pet. All participants in the customer group have visited veterinarians regularly, and most of them have visited more than one clinic.

When conducting the interviews of the customer groups, the data collected showed some similarities with individual differences. After conducting nine interviews with participants of the customer group, and difficulties in getting reach of male participants, the researcher see the amount of data as sufficient for this research. Data collection from the veterinarian group, with 5 participants created a sufficient picture with cultural nuances. From both groups, data is collected till the point where no added information or themes occur, in align with qualitative data sampling theory (Guest et.al.,2006). From the veterinarian group, most of the veterinarians originally have different citizenship than Norwegian. All veterinarians took their education in another country than Norway. It is important to outline that none of the veterinarian participants had any form of communication or customer service as a topic during their studies, except for one. One veterinarian had a three-hour long session at school on how to manage owners and children during euthanasia, what to think about and how to follow up afterwards. All participants of the veterinary group are practicing with companion animals in Norway and have done so for more than two years.

4.2 Expectations

Prior expectations towards the clinic-visit may be influenced by marketing from the clinic, Google search and -reviews, and stories heard by others. Owners observed symptoms on their pet may have been googled in advance and reviews of the clinic may affect customer expectations. Reputation and recommendations from others can influence the customer and create expectations for how they are met and treated. Further, will googled symptoms and previous experiences have an impact of outcome expectations before entering the front door of the clinic. By asking customers what they expect from their veterinarian and letting them describe in their own words their expectations, provides first-hand information what customers really expect from the veterinarian.

4.2.1 Customers

One of the core elements for this research is to uncover what Norwegian companion animals' owners expects from their veterinarian. Three elements were repeated several times from most customer participants regarding expectations of the veterinarian, (1) Communication skills – Listen to the customer and explain what, how and why, (2) How pet and owner are met and respected, (3) Value of the pet is more worth than money. In addition, veterinarians should love animals, most of the participants said this, but they quickly added that if they did not like animals, they would not become veterinarians. The service of fixing problems, which is the main reason for veterinarians existing, was not mentioned by any of customer interviewees.

All participants defined their pet as a family member, when asked what status the pet has in the family, descriptions such as: Diva, centre of attention, everyone's favourite and Queen was used. These descriptions illustrate the high-status companion animals have in Norway. One of the participants answered when asked about insurance:

“He is a member of our family, I insure myself and my children, then I must insure my dog as well”

Value and role of companion animals in the family also creates concerns when the pet shows symptoms of illness or injury. For many animals, a veterinary visit can be a stressful experience, to reduce stress for the animal, for the owners expect short waiting time, adapted waiting area and uncrowded waiting rooms.

Customers expect that their concerns and questions they have are taken seriously and answered properly, their pet should be met with respect and examined properly by the veterinarian. Furthermore, the veterinarian is expected to explain what is being examined and why it is examined. Follow-up questions and explanation of identified problems and issues must be communicated in an understandable way.

4.2.2 Veterinarian

Interviewing participants in the veterinary group, the question of customer expectations was answered with frustration and despair. Most veterinarians responded that listening to the customer and solving their problem was main expectation of the customer. The expectations of the veterinarians are just as high after opening hours. When veterinarians were interviewed, one thing quickly became clear, there is no "I" when you are a veterinarian. Availability 24/7 was expected from customers and the limit for contacting veterinarians privately is low

“I have been contacted on Facebook, been called on Messenger, been called on my private phone, got questions on Snapchat, got questions from my friends of friends... My private life as a veterinarian, and people I know who works as a veterinarian, our privacy is not respected”

Customers' expectations of veterinarians' availability, and the lack of constraints to approach veterinarians in private, such as at the grocery store, may be connected to the veterinarian's skills to create relations. A strong relation between two individuals can evolve to a friendship. Veterinary clinics are dependent on a good reputation, and a good reputation is created through customer satisfaction. Through customer satisfaction and close relations, loyalty is developed between veterinary and customer. High customer loyalty is dependent on previous

physiological and affective attachment toward the organization (Khan et.al.,2021), improvements on customer relationship will retain customers to an organization for a longer period (Ngai,2005). Veterinarians that are able to develop close relations toward their customers, will create a stable customer pool with loyal customers with high level of trust to their employer. However, close relations do come with the price of privacy disturbance. This means, that the closer relationship the customer develops with their veterinarian, the higher risk for privacy disturbance the veterinarians. If a customer feel they got a friendship with their veterinarian, the limit of approaching the veterinarian in private with their pet's issues will be lowered.

Fixing the problem or condition of the patient is a natural part of the veterinary job. However, fixing a patient's condition is not necessarily a simple procedure. Information must be collected, tests performed and interpreted, a diagnosis must be set, and a treatment plan made. As in human medicine, not all conditions can be treated, but expectations of the veterinarian's ability to treat pets are high. Some customers lack understanding and knowledge of what is possible to treat and not.

“Sometimes I feel like too many expect me to snap my fingers, or give a pill, which will solve all the problems”

Ignorance, organization or veterinarians' reputation or previous experiences can all contribute to the unreasonably prominent level of expectations of veterinarian's treatment skills. Customers' previous experiences can contribute to high expectations due to poor communication from earlier visits. Illness with similar symptoms, but with various treatment and prognosis can, with poor communication between veterinary and customer, lead to dissatisfaction or glorification. Veterinarians aiming to build relations and meet the expectations; veterinarians must use time on explaining why there is no such magic pill. The quality of communication- and inter-human capabilities of the veterinarian will be determining of the customer experience. Veterinarians successful in explanation of reality can contribute to lower customers' expectations down to a realistic level.

Expectations of treating self-made diagnosis based on Google, forums and/or groups on social media before visiting their veterinarian create challenges for veterinarians

“It is a problem here, where owners come with a self-made diagnose and expect us to treat the animal based on the owners self-diagnose. When I tell them that the diagnose is incorrect and there is something else wrong with the pet, the owner becomes suspicious on me”

Self-diagnosis can have several causes, one can be lack of trust toward the veterinarian, another is to keep the costs down. According to Animal Health Personnel Act §17-18, authorised veterinarians are the only personnel who can perform diagnostics and prescribe medication for treatment to animals in Norway (Lovdata,2021). This means, that veterinarians are the only one who can set a diagnosis on animals and decide which treatment that is sufficient. Customers aiming to spare costs through self-diagnoses can be a potential dissatisfied customer. Because customers are not aware of the legislations that veterinarians must comply with, there is a risk for veterinarians being accused of being greedy by the customer. However, veterinarians being successful in their communication and explaining of why treatment cannot start immediately, can create a satisfied customer. Assurance toward the customer that their concerns are listened to, and tests are performed to confirm and exclude other issues, may be one way to deal with self-diagnosis and Google.

Veterinarians feel customers' expectations are higher than what they can provide. The level of expectation can be a mixture of ignorance, desperation, and hope.

“Owners expect more from us than what’s possible to give, owners without knowledge of what they are doing”

The elevated level of veterinarian’s experienced expectations indicates that there is unsuccessful marketing of the veterinarian industry. Reduction of expectations of the “magic pill” and self-diagnosis is possible through information sharing and measurements to change the attitude.

4.2.3 Meeting the expectations

Meeting customers' expectations, the customer gets an enjoyable experience at the clinic. The positive experience can be both positive and negative for the individual veterinarian and for clinics. Positive ripple effect for the clinic is increased profits, customer activity and good reputation. For a veterinarian, a positive experience for the customer is a contribution to a positive reputation, -trust, and -demand. Increased negative ripple effects for veterinarians are workload and high expectations work quality. The demand for veterinary services raises with a growing pet population and change of status in society. Meeting expectations provides good stories for the customer who willingly shares their positive experience with others. Likewise, negative experience will lead to a negative reputation for the clinic or veterinarian, where dissatisfied customers will warn others to visit certain clinics due to bad experiences. Asking

the participants in the customer group about both positive and negative experiences and what factors contributed to the given experience identifies the contributors to the said experience.

4.2.3.1 Positive Experience

When interviewing participants in the customer group first question was about what experience they have from previous veterinarian visits. Most of the customer participants stated that they have mostly positive experiences. The similarity in what contributed to the positive experience was when veterinarians' meet customers' concerns seriously and both owner and animal were met with respect. A customer had a positive encounter with a veterinary clinic after the cat got injured by the collar while the owner was on vacation. Customer explains:

“I came to the veterinarian and was extremely emotional and crying. I didn't want to leave her. I think it becomes a good experience when they take their time to explain what's going on and that everything is going to be ok. I think they need to comfort the owner more than the pet”

Owners are in a vulnerable situation when they enter the clinic with a sick or injured pet. The feeling of not being a good owner can take over, and it is easy to feel guilty about the pet's condition. Veterinarians who meet their client with empathy, care and understanding are therefore crucial to create a valuable experience when in a vulnerable situation. At the same time, the veterinarian's main task is to treat animals, for many owners their pet is as valuable as children. Time used on owners and meeting the emotions of the customers are a valuable resource investment for the veterinarian. Meeting customers' emotions with understanding and care strengthen the relation between customer and veterinarian. Deep, often unconscious desires are fulfilled when customers are emotionally connected (Magids et.al., 2015), an experience of empathy toward own emotions can connect customers emotionally to their veterinarian. Treating animals well and with respect, the positive experience for the owner strengthens. Owners follow the pet into the consultation room and are present during the examination of the pet. In addition to examining the patient, the veterinarian must hold a dialogue with the owner regarding the pet, ask questions and show interest in animal welfare

“A veterinarian who manages to become a friend of my pet and create a relation to me as an owner creates good communication”

When customers talk about their positive experience in the clinic, presents the veterinarian as a warm and loving person, who cares about both the owner and the pet's well-being. Time,

communication, comfort, and care when emotions take over for the customer, while the veterinarian shows respect and creates a relationship of trust with both pet and owner creates a positive experience for the customer.

“If my pet is getting stressed, I will also stress”

To be empathetic, build trust and relationship with both pet and owner, in parallel with trying to find out what the problem is and how to solve the problem, the veterinarian must have self-confidence. The patient's condition can have many causes and varied ways of treating the condition based on the pets' general health, the owners' ability to follow up at home and the owners' wishes. Presentation various treatment options, risks associated with the alternatives and prognosis for the pet's health, must be given to the customers in an understandable way.

Not everyone is an experienced pet owner, and it can be difficult to manoeuvre in the landscape of recommendations on animal care and which veterinarian to use. First-time owner of a pet can be compared to having a baby, several books have been written, everyone has their opinion on what works and what does not, and everyone has an opinion on which veterinarian to see and not. For one of the interviewees, the pet they have now is the first pet they own, and their first experiences with veterinarians are positive

“We have been to different veterinarians, and I experience them as very meeting. Everyone is different, but for us who are young and unexperienced, we have been taken really good cared of and I think that is really nice. We have received good and understandable messages”

Why a happy customer use several veterinarians and clinics can be explained to availability when help is needed, trying out different service providers before deciding or convenience. A “fresh” customer to the market may have lower expectations than an experienced customer. Age, experience, academical background and personality are all variables that can have an impact on expectations and experience. However, there are none of the customers who have claimed that successful treatment of their pet has been a contributor to the positive experience. This indicates that treatment outcome of the pet is less important than owners experience.

4.2.3.2 Negative Experience:

Looking at the skills needed to meet the expectations of the customer, it is surprising that the positive experiences outweigh the negative experiences of the participants. As discussed earlier, veterinarians must deal with life and death situations. These situations occur at any time of the day at any time of the year. Accidents and illness do not consider working hours, weekends, and holidays. When situations arise outside opening hours, veterinarians who wish

to do so can be part of the municipal emergency service. This is a service that is supported by the government and municipalities collaborate on the service. According to law, the service is an offer of satisfactory access to veterinary services outside opening hours (Landbruksdirektoratet,2022). In addition to this service, clinics are free to have their own schemes and offers after opening hours. A situation where you are sitting with a sick pet and no one wants to help, creates despair and desperation. One participant shared one of their bad experiences:

“My first meeting with a veterinarian was when my cat became sick and died. I called the emergency phone on a Sunday evening and was told that it was only a cat and there were probably little the veterinarian could do anyway, so I had to sit and wait for my cat to die a long and painful death. It was only one emergency veterinarian in the area at that time and I felt this was unnecessary, at least the cat could be putted down. Instead, we had to sit and watch him die”

Unfortunately, this is not the only story of pets entitled to help by law, not getting the care they need. Stories of pets dying at home because the service provider did not take the owner’s concerns seriously given several participants. There seem to be higher demand than providers in the veterinary industry, this leads to high pressure on the providers existing in the market. Because of the unbalanced market, the existing providers cannot always meet the demand in a sufficient way, leading to negative experience for the customer. This unpleasant experience can be demolishing on the providers reputation. Dissatisfaction, with death as a result, create elevated level of emotions for the customer. It has earlier been discussed how valuable it is for veterinarians to meet the emotions of the customer. When lack of interest, condescending attitude or burst capacity is the provided response toward someone in despair, distrust and repulsiveness toward the provider can be the result.

Respect for the owner and pet, care and listening to concerns regarding their pet was criteria fulfilled when customers had a positive experience. Happy pets having an enjoyable experience with the veterinarian assure the owner that they have made the right choice of veterinarian. Veterinarians who fail to meet expectations or have difficulty balancing subjective opinions and professionalism can create negative experiences when meeting clients and their pets

“My first bad experience with veterinarian was when my male dog needed surgery for HD (hip dysplasia), the vet told me that there was no need for surgery and I should rather put him down, because my dog was not purebred”

All animals have the right to get the same respect no matter age, breed, or size. Veterinarians favouring purebred over mixed breeds lack the ethical foundation of patient equality. Veterinarians’ personal preferences shall not decide the treatment of neither patient nor owner. Execution of segregation of patients and owners, veterinarians do not follow Animal Health Personnel Act §12 to work for the welfare and health of animals (Lovdata,2021). When surgery is an option, but due to veterinarians’ preferences of breed, makes that option insignificant, the veterinarian fail to act upon law and put own interests first. Customer participants have expressed their expectations of veterinarians respect their pets value, despite breed and size. Telling a customer that their pet is of no value due to the breed, the lack of respect can be painful for the owner.

Veterinarians are individuals with different personalities and veterinary education requires high academic skills. The admission requirement for the only veterinary education in Norway at NMBU was 64.0 in 2020 (Tilley, 2020). The score is calculated based on the average grade from upper secondary school (1-6) and multiplied by 10. Additional points can be obtained if certain courses are taken, in addition boys get two points due to gender bias, 80% of applicants to NMBU were girls in 2010 (Kjensli,2010). Professionally competent veterinarians do not necessarily have to be socially competent. Furthermore, does not high academically skills mean that the veterinarian knows how to handle animals in the best way. One of the respondents had poor experience due to several factors, including social incompetence and poor handling of patient

“One of the veterinarians was afraid of the cat and did not know how to handle the animal. It almost seemed like she did not know how to handle the cat and did not want to touch it. I had a veterinarian who was extremely skilled in the profession but did not have the capability to communicate or handle the cat. That turned into a bad experience”

Pets can act unpredictable in the consultation room, and some breeds are more unpredictable than others. Stressed cats and dogs can make severe damage on humans, and veterinarians are specially exposed to injuries from teeth and claws. Risk of injuries raises if the animal is in pain, the owner is stressed, or the pet gets exposed for high sounds or sudden movement. Veterinarians gain on a calm presence with predictable movements and confidence. Self-

confidence can stress down owner and patient, and signs to customer that there is nothing to worry about. If a veterinarian can, through their presence keep animal and owner calm, it is room for veterinarian to start a dialogue with owner. A person in stress, or with uncertainty of the veterinarian's capability, may lead to withholding of vital information. The customer needs time to process what is going on and information given during a consultation, and veterinarians must take the time to explain to the customer what has been done, findings, and possibly what the owner must do when they return home. Veterinarians not successful in communication makes it harder to build a relation to the owner and increases the risk of uncertainty and dissatisfaction in the customer.

High demand for services, limited veterinary resources and time shortage can all contribute to the impression that veterinarians do not care and have less patience for the owners' well-meaning actions for their pets. Despite euthanasia is a common procedure that is executed daily for veterinarians, for many owners, the last goodbye is an emotional experience. Even though veterinarians execute euthanasia often, veterinarians often choose their profession to help animals, but find themselves killing the animals (Rollin,1986). Owners' reactions and emotions combined with the paradox of "helping-by-killing" can lead to distancing from veterinarians' own emotions. Through distancing, veterinarians can be precepted as cold and cynical during a euthanasia procedure. Time shortage and strict schedules can quickly crash with owners overwhelmed by emotions and heartache after saying goodbye to their best friend

"I was lying on the floor, crying my heart out, when I was leaving the clinic, one of the employees asked me if they should put my cat in a box. It was all very cold. I do experience in the bigger clinics that they do not have time for the same care and empathy compared to the smaller clinics. On the bigger clinics I get the feeling of a production line"

Time shortage, high number of work tasks and demand higher than providers, combined with high expectations seems to be decisive factors for negative experiences from a customer perspective. When these factors is seen on the veterinarian, the job of building relation and trust becomes difficult for veterinarian, and lead to customer dissatisfaction.

4.2.4 Key Findings – Perception Gap

In addition to the customer's stated expectations for time, empathy and inter-human social skills interviews with veterinarians show that customers have grand expectations for availability after working hours and -cure of incurable conditions. There seems to be a distance between the customers 'stated expectations and the veterinarians' perceived

expectations. Glorifying veterinarians as creators of miracles, leads to high unconscious expectations from customers. Meeting expectations creates a pleasant experience for customers, on the contrary, when customers' expectations and emotions are not met as expected negative experiences are made. Veterinarians capable to build relation and gain trust provide a positive experience for the customer, while unsuccessful the probability of dissatisfaction increase. It seems like the outcome of their pet's treatment and recovery are less significant as long as owners' personal expectations are satisfied.

4.3 Steering Expectations – Market and Industry

Identifying changes and future needs for customers is in line with market-driven strategy. At the end of the interview with participants got asked if there is anything they miss or want to change in the veterinary industry. At this stage of the interview, positive and negative stories had been shared and most aspects of the customer experience discussed

“I wish that other vets had the same capability to understand that for the owners we come to the clinic to put down our family member. A hamster is equal to a horse and there is no difference in how they get treated. The veterinarian I use today take paw prints of the animals that are put down, and this is something I have missed in other clinics”

Empathy and understanding, presence and a veterinarian who sees the person, the owner, as well as the patient, in other words, human interaction skills, were more important than costs. As discussed earlier, lack of these skills contributes to a negative experience. Patients receiving unusual way of care and treatments based on breed or presence, is a problem within the industry when customers wish this to be changed. Employees who have a difficult day, lack of time, or distancing themselves from emotions are something the customer notices and impact the perception negatively. Emotions not met with understanding can be devastating for customers in an emotional state of mind. Such an experience can be the reason for the customer never to return to that clinic. Respect for the pets' value to the owner weighs heavily for customers interviewed. A veterinarian does not know the pet's value and should therefore always assume that the pet is a worthy member of the family until anything else is stated from owner.

Time, availability, and information are also something customers want to see more of in the veterinary service

“I wish they could have the opportunity to have more time during consultations. I feel as a customer that they are sloppier when they (veterinarians) are stressed, and I don't get the

chance to ask about the things that I might wonder about. I am bringing notes to the consultations, so I don't forget anything"

Higher risks of errors during examination, tests, interpretation, and diagnoses can lead to incorrect medication of animals that can have fatal consequences. Veterinarians experienced as stressed from the customer, can stress both customer and patient. Stress can impact the communication leading to poor relations and lack of trust. Customers do need time to understand what they are agreeing upon when accepting veterinarians' recommendations. When customers must bring a note to the consultation, just to avoid that no questions are forgotten, should be an indicator of time shortage in consultations over several visits.

Overall, individual social competence is important for customer participants, where respect, time, and empathy are the core wishes for customers if anything could be changed.

4.3.1 Customers Thoughts on Prices of Veterinary Services

In Norway, the veterinary industry has free competition without government regulations or rules for how to price or perform procedures. Prices in the veterinary industry are a hot topic, and the Norwegian media examined the price differences between clinics as late as March 2021. The price for ordinary services such as ID tags had a difference of NOK 974 between the cheapest and most expensive clinic. Pricing depends on geographical location, competition, available resources (veterinarians and pet nurses) and fixed costs (Pettersen&Yildirim,2021). Price awareness in the Norwegian society is reflected on social media, the Facebook page «veterinary costs in Norway» (veterinærkostnader i Norge), discuss prices' customers have paid at their last veterinary visit, and is an arena for sharing their experiences, recommendations and discussing prices (Facebook,2022). Because pricing of veterinary services is a discussed topic among customers, the question had to be asked to the customer participants in this research. One customer used human medicine as a basis for comparison when pricing veterinary services

"Compared to the human health service in Norway, veterinary services are expensive. However, veterinarians' services do not get covered by the government like the human health service. Thinking about the equipment needed for the veterinarian to perform their job, the pricing is ok. But it is expensive owning a pet"

The Norwegian healthcare system is highly subsidized by the Norwegian state, due to which patients pay only a small part of the total bill for doctor visits. There is not given any subsidy for veterinary services. Customers must pay the full cost of tests, time, medications, and

materials used. Expensive equipment such as X-ray-, ultrasound- and laboratory investments must be covered by customers. Not all procedures are advanced or require expensive equipment, in these cases, price difference between the clinics is more difficult for the customer to understand

“The veterinarian I use today take less payment in accordance with what she does compared to other clinics in the area. I understand partially that clinics with advanced equipment and specializations costs more and price is reflected on this. However, I do not understand how one clinic in the area charges an insanely amount of money for cutting claws and fur around the paws. This service does not bring a high cost for the clinic”

Free competition gives clinics the freedom to decide how they price their services. This leads to large local differences between clinics in a small geographical area. Free competition causes larger price differences between cities and smaller communities. Internal economic variables such as rent, equipment investments, number of employees and qualifications can contribute to an increased price on services. External variables such as customer base, competition, and material availability (Drugs, masks, syringes etc.) can impact prices within a geographical area. Differentiating strategies between clinics to gain customers can be another contributor for prices on services. Clinics can choose higher prices with argumentation of e.g., heart specialist, which requires specialization and expensive courses. Other clinics can choose a lower price range to gain customers with lower ability to pay, just to provide treatment for pets. No matter where clinics choose to put themselves on the price scale, it is important to keep an eye on their competitors and their prices. Several procedures in the veterinary industry are standardized, such as vaccinations, parasite treatments, spay of cats and yearly check-ups. Due to Norwegian drug legislations, parasite treatments against ticks, fleas and intestinal worms are prescription-only and must be collected at a veterinary clinic.

The pricing of veterinary services is high compared to human medicine. Surgery of a bone fracture can easily cost 20 - 30 000 NOK. Bitches with uterine infection, pyometra, is expensive for owners, where examination, diagnosis and surgery end up with a bill of 30 - 60 000 NOK. Not everyone can afford such sums when illness occurs, and pet insurance have been a saviour for many companion animal owners. Insurance is a good safety net to have for owners who want to offer the best option for their pet in case of accidents and illness. However, one customer experiences that the insurance drives the pricing of the services even higher

“Some clinics takes extra charge and run extra tests when the animal is insured, which I think is wrong”

Veterinarians are obliged to treat animals to secure good health, however, overtreatment of pets are not an unfamiliar phenomenon in the veterinary business, which is discussed later in this research. However, owners who have insured their pet may be more inclined to perform tests suggested and recommended by the veterinarian because the insurance company partially covers the bill. Based on the veterinarian’s knowledge of the pet being insured or not, the knowledge can impact the veterinarians to recommend more expensive tests and treatments. In the end, customers do decide which tests they wish the veterinarian to perform and what treatment to choose. Even though insurance may lead to higher bill in some cases and at some clinics, owners do have a role in the decision-making-process in more advanced cases.

Customers participating in this study, experience that busy and larger clinic with a high customer base and activity are reflected in the prices of the services

“My opinion and experience are that it’s getting expensive quickly when you have that assembly-line feeling, it is more focus on money than execution. When you have the assembly-line feeling it becomes more expensive”

The assembly line feeling is mentioned by several participants during the interview. Clinics with a high number of patients per veterinarian and little time for each have been a contributing factor to negative experiences. Lack of time and high expenses combined can exacerbate the negative emotions after a visit. Tight time schedule may be a strategy of clinic manager where the main goal is to produce as much as possible with the available resources. All clinics have human resources constraints, as it is a service industry, through a high productivity level, the costs of treating one patient are reduced, when veterinarians can treat many patients during a working day (Jacobsen&Thorsvik,2016). Customers can experience a productivity strategy as being on an assembly-line. Due to high patient-per-veterinary ratio, time used on each patient will be differ, based on the problem the patient is in for. This means that standardized procedures such as vaccinations, can be pushed through the clinic faster than a dog with vomiting or skin issues. Soaring prices and decreased cost-per-patient will increase the clinics profitability. Customers experienced quality of the service and satisfaction of the service provided can move toward a negative direction when clinics are operated with this strategy.

Another customer points out that medications for chronic diseases such as epilepsy are high. Medicines drugs are bought at pharmacies with a prescription written by a veterinarian. There are strict laws about which medicines veterinarians can prescribe, regulation of the use of medicines for animals §4, says that veterinarians can only use medicines approved for the current species and indication (Lovdata,2007). Pricing of medicines is done by pharmacies and, veterinarians cannot make profit on medicines used in treatment in clinics (Legemiddelverket,2022).

Despite the overall high prices on veterinary services, the costs are to some degree understandable for the customers. Drugs used in treatment can not be sold with profit, in addition, drugs for animals are often more expensive compared to human medicine. The fact that customers must pay for investments of clinic, drive the prices up when expected demand for complex procedures rise. Clinics with large customer pools, create assembly-line feeling for customers, and provide less time per patient, which makes it more challenging to build relations with customers, to cover investments and costs.

4.3.2 Insurance

The prices of veterinary services combined with increased social status for companion pets in Norway, have led to an increase in sold pet insurance with 25% from 2015-2016 alone (Skarsgård,2017). Based on the interviews from both customers and veterinarians, there seem to be a trend in the market where soaring prices for services and an increase in sold insurances drive prices up. Owners who have insured their pet want the veterinarian to do everything they can that leads to a high final bill. Customer participants were asked why they insured their pet

“If anything should happen to my pet, she shall receive the help needed. Veterinary costs can be expensive”

The issue of pet insurance highlighted the pets' exalted position in the family and the value they have for the owners in combination with excessive costs of veterinary services. Pet insurance allow owners to provide needed care with extended economic constraints. Some customers who have pet insurance may accept tests and procedures they normally would not agree upon, because of their insurance. Because owner's level of emotional attachment to animals drives the nature of decisions on veterinary care (Brockmann et.al.,2008), there might be an increased willingness of executing all procedures and treatments possible, no matter of costs. Due to increased willingness to expensive treatments, increased pet population in

Norway and increase of pet insurances, combined with higher costs on resources such as drugs, power and labour, are all variables that force prices on insurance up.

Insurance companies in Norway have different terms and restrictions regarding the maximum price paid during a year, matters that are covered by the insurance and the validity of the insurance. Companies such as Agria, If and Gjensidige offer insurance for cats and dogs, but diseases and ailments that are typical of the breed are not covered, allergies are an example of an exception that has a price limit for treatment (Gjensidige(1)(2),(2022); If (1)(2),(2021); Agria (1)(2),(2022)) Despite insurance, customers risk high expenses when going to the veterinarian.

“Last time I was with the veterinarian, it became really expensive, I had insured her for 30 000 NOK and had to pay 24 000 myself after a pyometra”

One of the veterinarians raised the issue where some owners must make the decision to put down their pet due to the veterinary costs. Insurance can help the customer with the financials with expensive procedures. As the customer explains above, there is a risk of the owner paying large sums despite their insurance. There might be a fake safety to pet insurances when the insurance premium may only cover half of the expenses. Insurance premium is dependent on the insurance chosen for the pet, the higher insurance premium, the higher will the monthly costs be.

One of the veterinarians, who has international experience, said this about the pricing of veterinary services in Norway

“Veterinary prices are high here (Norway), compared to other countries. You need insurance.”

4.3.3 Key Findings

From theory on industry and market, research question 1 was: *How do veterinary clinics use marketing tools to steer their target market, in terms of demand, price and service?* Increase of sold pet insurance and customers justification of insurance indicates that customers are aware of high expenses on veterinary service. There seem to be an inconsistent quality in customer service, where time pressure, high demand, and lack of communication- and empathy skills affect negatively. Because customer's expect proper care of own emotions and miss this from the veterinary industry, there seem to be insufficient use of marketing tools to steer customer expectations. The high demand for veterinary services puts pressure on the service providers, and there seem to be higher demand than providers in the market.

4.4 Communication

Communication is the foundation of relation- and trust building between veterinarian and customer during a consultation. Building relations with customers is identified as a pillar of business success within the veterinary industry (Volk et.al.,2005), and can be a contributor to customer satisfaction.

4.4.1 Customer's Preferred Skills of Veterinarians

Because positive experiences are a product of fulfilled expectations, personal skills and personality can contribute to the customers' experience during a consultation. Asking the participants of the customer group what characteristics they considered to be essential for a veterinarian. One of the participants described the following

“Academically strong, a veterinarian who can answer my questions without looking in a book. It is also important that the veterinarian can create relations and that they love animals. Personal characteristics are important. I go where I feel safe, where I am welcomed and taken care of”

Customers do emphasize veterinarians' ability to build relations and create a safe environment for the customer. The coherence between interpersonal- and academically skills places grand expectations on the veterinarian. Being academically strong do also include that the veterinarian knows their own limits on what areas they are not that strong in. Customers' expect that a veterinarian informs the customer if the issue is on topics, they are less professionally strong in. To address own weaknesses shows self-confidence and awareness of own capabilities, which can contribute to a customer trusting their veterinarian.

“Caring, serious, and confident in what they are doing. However, knowing their own limits and dare to say, “I am unsure about this topic, let me discuss it with a colleague,” is important to me, because it shows that the veterinarian knows what they are good at and not. Also, that the veterinarian is calm and are not afraid of the pet's reaction if they pinch on a painful spot”

It cannot be addressed enough the importance of communication. Self-confidence, being calm and communicate are essential skills the veterinarian needs to possess. These characteristics are aligned with customer expectations from the veterinarian. With these characteristics present, the veterinarian has all prerequisites to build relations with their customer.

4.4.2 Relations

All veterinary participants agreed that building relationships with the customer is an essential part of the job. The importance of building relationships could not be stressed enough among veterinarians.

“Building relations are important. That they (owners) trust us, and that they can trust that they can come back if they are uncertain on something or have questions. If the customer doesn't trust us, they will not feel safe to return in fear of being blamed or made suspicious, then the animal will not get the help that it needs”

Sharing information between the veterinarian and customers is fundamental to ensuring that the animal receives the care and treatment it needs. The veterinary participants expressed genuine interest in building relationships with their client during the consultation. Owners may have essential information about the patient in terms of habits, behavioural changes, routines, and incidents. To build relations, veterinarians must have effective communication and act in a way that show respect for both patient and owner. Reverence of the trust the owner gives the veterinarian leaving their pet in the veterinarian's care is an act that help on building relations. Concerns or frequent questions that the owner may have, is met seriously, and answered in a good and understandable way.

Customers have expressed that they experience that time is short during a visit. Even though veterinarians work with a tight schedule they need to take their time to listen, ask questions, explain to the owner findings, and further treatment. All veterinarians confirmed that they rarely had enough time with their patients, however, all veterinarians participating in this study emphasised that time was something they tried to give despite their tight schedule. With time shortage, veterinarians need to work efficient, without giving the customer's feeling of rush.

When animals are entering the clinic, variables such as stress, smells, sounds and other animals can have an impact on the behaviour. Veterinarians know that the animal's behaviour at the clinic does not necessarily match the behaviour at home. And veterinarians express that customers stress because their pet, who will not eat and do anything at home, is waiving its tale and seems fine at the clinic. Giving the owner time to explain what they observe home and give reassurance, that this is normal for many pets, helps the customer to calm down and create credibility of their experience and concerns. Sedation and operation are often making owners concerned (Englar&Myers,2018), because there always is a risk for something to go

wrong. Veterinarians using time to listen to the owner's concerns and get an update on the condition of the patient before planned surgeries, can reveal new and relevant information to the vet, while reassuring the owner

"I always let the owner tell me how things are going before a scheduled operation, because it is the owner who knows their pet best. How the animal behaves when it is with me might be something totally different than reality"

Veterinarians do try to meet customers concerns and expectations in a way that can help them to build relation to their customer. Investing time on communication and show empathy for the owner's situation create a foundation for a relation between veterinarian and customer.

4.4.3 Trust

Defining trust is like counting grains of sand on the beach, Lewis and Weigert (1985) called trust a very complex and multi-dimensional phenomenon. Trust in the veterinarian is based on professional- and social competence, integrity, honesty, and reliability in a safe and understanding environment (McKnight&Chervany,2000). One veterinarian explains how gaining trust is done in a consultation

"It is very important that the owner have good contact with the veterinarian, and he understands what the veterinarian says, what the veterinarian is doing and what the owner must do. It is important to cooperate with the owner. I feel that owners have a lot of trust towards us veterinarians"

From a veterinarian perspective, gaining trust occurs when good communication creates relations which opens for collaboration between veterinarian and customer. Close collaboration can lead to higher chance of full recovery for the patient and strengthen the relationship between customer and veterinarian. Veterinarians express that they feel they have trust from their customers.

But is it so? Do the customers really trust the veterinarians? When asking the participants from the customer group if they trust their veterinarian, the majority answered "yes." A couple of customers said most of the time and one answered no. One of the customers explained the lack of trust like this

"I do have some difficulties in trusting the veterinarians when I visit different clinics with the same problem and get different ways to examine my pet, diagnosis, and treatments. I find it hard to choose whom I shall believe in and what veterinarian is right. However, I do trust the

veterinarians. I understand that veterinarians have different experiences and that there might be different ways to interpret results of the blood tests. Either way, it creates doubt for me, if there are different perceptions from different veterinarians on one problem”

As discussed earlier, there are many steps between welcoming the customer and the pet to a complete diagnosis with an agreed treatment plan. Customers who are not satisfied with the diagnosis and treatment plan are free to get a second opinion. Clinics in Norway do not have a common medical journal system and customers rarely have the animals' complete medical history with test results and X-rays. When customers seek a second opinion, the veterinarian only knows the information provided by the customer and the customer's understanding of the information provided by the first veterinarian. There is no standardized procedure for examining an animal. Veterinarians rely on a high degree of previous experience, knowledge and information provided by the customer. Another customer explains the answer of trusting veterinarians

“Mostly. The reason for not trusting the veterinarian is when I feel like the entire examination of my pet is done in haste. Sometimes they (veterinarian) have been so quick that I haven't got the chance to ask the questions that I have. The veterinarian act in a way that they have their hand on the doorknob and is ready to kick us out and bring in the next”

Tight schedule goes on behalf of building relationships with the customer. The feeling of being "kicked out" leads to mistrust of the vet. Customers who do not get the chance to ask questions increase the risk of the veterinarian losing relevant information. However, most participating customers trust their veterinarian.

4.4.4 Owners Role

Veterinarians experience expectations of being God, who has a magic pill that solves all problems. The reality, however, is that the owner plays a crucial role in the outcome of treatment. A veterinarian explained the symbiosis between veterinarian and owner as

“50% of offering, communicating, and giving my experience as a vet. The role of owner has 50% of giving the medications, observing the pet, giving med feedback, communicating, looking at symptoms. We cannot solve the problem without the owner or the vet ... I don't know if they are aware of their role, but whenever I have clients and patients in, I always tell them that they need to help me. I try to consider them as part as the team”

The veterinarian's role is to diagnose and come up with the correct treatment plan based on the findings of the animal. Owners' role is just as important as the veterinarians, but owners

may not be aware of the equality of roles. For the owner to fulfil its role, it is important for the veterinarian perspective to have gained a relation and some trust from the customer, to ensure that owner provide feedback and communicate. Owners are speaking on behalf of their animal, and it is crucial to provide feedback, and address issues at an early stage. Because there is no magic pill, owners must stand for the medical treatment at home. To ensure that the owner understands his part, communication is the key to success for the patient's recovery.

Owners can take preventative measures before buying a pet to reduce veterinary costs and increase the chance of having a healthy pet. Understanding what you are getting, what diseases you can expect, and the costs associated with the diseases, instead of buying pets on impulse is crucial for not only the animal you buy, but also for future companion animal generations. One veterinarian explains

“If you are going to be a pet owner, first, you need to gain information about what you are getting. If you think things are expensive, get a Danish-Swedish farm hound and not a pug. Know and investigate in what you are getting, see what problems you can expect on the breed you are getting and what the animal demands of you. If you know that, you will also be more prepared on the costs, you will also be more prepared on the veterinary costs”

Veterinarians have expectations of the owner. Although the veterinarian is there to ensure that animal welfare, they must also ensure that owners make animal welfare decisions

“Many owners don't understand that animals have the same sicknesses as humans. When owners says that their pet don't have pain, because the animal haven't told the owner it is in pain. That is a role a lot of owners are bad on. The role is to know that the owner is responsible for an animal and animals feels the same pain when its sick as we do. Just because the pet doesn't tell the owner it is in pain, it does not mean that the animal is healthy. If a cat loses 3 kg, the cat is sick, it is not on a diet because it is soon bikini season”

Ignorance of own role, grand expectations of the veterinary, and low willingness to pay for the treatment of their pet, are frustrating for those who try to help. The experienced lack of understanding from the owner from the veterinary perspective made it important to ask customers if they had any role in the pet's well-being and what this role consisted of.

From a customer perspective, it seems like there is coherence between the veterinarian- and customer perspective of the customer role. Some owners may be more aware of their role

because of previous experience. Others may just be more dedicated than others, while others again care less. Another customer had the following thoughts on the question of roles.

“I play the biggest part in treatment. It is my responsibility that my dog is kept healthy, do not injure himself and is in good physically and mentally condition. Owner has the biggest role from a preventive perspective”

Based on the participants replies on their role, it seems that some owners are aware of their role from both a preventive and treatment perspective. However, consideration must be taken, based on difference of owners are variances of perception on their role. Veterinarians experience that some customers are ignorant and careless, while others are more aware of their role. Despite various levels of awareness of own roles, the increased pet status and awareness shows a positive development of animal welfare from a veterinarian perspective

“The animal welfare has improved dramatically the last 8 years; people have improved themselves and react on an early stage of sickness”

4.4.5 Key Findings

Marketing theory claims that relations between organization and customer is essential for service industries and is essential in market-driven service industries. From theory research question 2 was stated:

How do communication impact on the perception gap between customers and veterinarians?

The high focus of building relations to customers show that veterinarians are aware of the importance of relations and trust. Veterinarians need prominent level of social capabilities to gain trust and build relations in a time span of 15-30 minutes, combined with performing examinations. Quality of examination and treatment are dependent on the established relationship and communication between veterinarian and customer. The high dependency of communications, relation, trust, and collaboration between veterinary and customer, makes communication a contributor to the perception gap. If communication skills are not at a satisfying level, dissatisfaction from customer can be achieved, which will be a breach of expectations, and make the expectation gap larger.

4.5 Pressure

Accidents and trauma can be experienced as an emergency from an owner's perspective but are only a small injury from a veterinarian's perspective. Working hours for a veterinarian are not an 8-16 job and veterinarians cannot move out after opening hours every time a customer call. Because the perspective of the owner and veterinarian is so different and the customer's

negative experiences have been discussed, it is interesting to hear what makes the job of the veterinarian difficult. Difficulties in the job can be a contributing factor to perceived pressure. When asked about the difficulties in the consultation room, the veterinarians often referred to the "difficult owner". A difficult owner can be a very individual definition and is defined by the situation and the actors involved. Previous research has defined experience in general as a reflection of components involved in the experience (Godovykh&Tasci,2020). Pine and Gilmore (1998) define experience as inherently personal and exist only in the mind of an individual who has been engaged on an emotional, physical, intellectual, or even spiritual level. Customers who share their stories and experiences in interviews have all been emotionally affected, owning a pet brings boundless joy and deep sadness when the last day comes. Veterinarians meet clients from all social classes, with different values and preferences, some more intellectual than others and some with more experience than others, all with pets, who also have their preferences for handling and personality. A veterinarian described their difficult owner as follows experience than others, everyone with a pet, who also have their preferences of handling and personality. One veterinarian described their difficult owner as following

“A difficult owner is: First not willing to spend money on the things I need. Also, if they are verry stubborn or if they think that the pet has a problem, because they have been looking at google or heard from someone. The ones who do not want to listen, are rude, not trusting, or willing to pay. You as a veterinarian tend to lose hope and want to help the animal but sometimes the owners do not want or do what you agreed upon is frustrating”

It is no secret that people today tend to Google themselves to find solutions and information. Doctors in the health care system worry about incorrect information when patients google symptoms and conditions, these patients also spend more time and have more questions (Herrman-Werner et.al., 2019). Google issues were a factor that was raised by several veterinarians when asked about difficulties in the consultation room. Customers who google symptoms and self-diagnose their animal before taking the animal to the vet can be a sign of distrust of veterinarians. Customers with self-diagnoses can create an illusion of the sickness, where the veterinarian is the actor who need to break the illusion with the reality. Some conditions, such as cancer, can be difficult to process for owners, instead of facing the reality, owners choose to live in denial. Veterinarians who try to provide right care for their patient with a customer who denies the conditions, can lead to ethical animal welfare challenges. The balance between welfare and customer expectations can be challenging for veterinarians.

Googling symptoms in preparation for the consultation can serve as a safety line or checkpoint for the client that the veterinarian has done the job properly. Distrust can also lead to demanding and abusive behaviour, where the customer tries to get the "upper-hand" in the consultation room.

“I expect customers to behave. The worst thing I know with customers are when they come into the consultation room and are a little offensive but not necessarily aggressive”

Google and offensive behaviour are both factors that can create difficult consultations for the veterinarian. Offensive behaviour can also be a survival mode due to previously experiences creating negative emotions for the customer. Offensive behaviour should be seen as uncertainty and distrust and must be dealt with early in the consultation. Creating relations with someone who put up barriers can complicate the veterinarian's job to treat the patient. That said, negative mood or attitude have larger probability to find a solution to a problem (Kaufmann&Kaufmann,2015). Veterinarians must try to see negative mood as an opportunity to regain the trust and provide a positive experience. Handling a negative customer in a way that the service provided overextend the expectations, can create a loyal customer for many years. Another veterinarian pointed to communication as a factor in a difficult consultation. Communication is a process of sharing and receiving information between two individuals, if one of the individuals has less competence in communication, it becomes more difficult for the other party.

During Covid-19, the demand for companion animals became rocket high, prices on puppies and kittens was driven up, and many saw the opportunity to get a pet when they had more time at home. Not everyone is aware of what care the pet needs, what problems and diseases are normal with the breed they have acquired and what their pet needs of physical and mental stimulation

“I believe many owners knows too little about how sick some of the cute breeds are. They have no idea what they are purchasing. This about brushing teeth, it begins to become a known phenomenon, but there are people who looks weird on you. It is little understanding for how much pain the animal has when they have tooth ache”

Increased demand for pets, with a high willingness to pay large sums for certain breeds, leads to some breeders prioritizing money over health. Unethical breeding is steered by demand, and many became first time owners for a new furry friend. Customers who buy a puppy or kitten may not be aware of the health problems their new family member may risk having.

Many breeds do have increased risks of medical conditions such as heart failure, allergies, and mouth diseases. Buyers must do some research on conditions future pet may be in risk of getting and what breeders to buy from. However, owners may not be aware of their role in the preventative measures of animal welfare.

Pets have a positive effect on humans, research has shown that serotonin and dopamine are released when we pet our dog (Abrams,2008). Studies also show that pets provide benefits to people struggling with mental illness (Brooks et.al.,2018). Unfortunately, pets rarely survive their owners, and for some, the news of the end may hit harder for some than others.

“People who is dependent on their animal to cope with life and you see the condition of the animal and the right thing is to put it to sleep. But the owner doesn’t see it. And I know that if I tell the owner this, the owner itself may go under as well... It can be challenging when the pet needs a procedure to feel better, but the owner doesn’t have the money. I try to find veterinarians who can execute the procedures without the owner losing their home or starve to death. For there are people who can be in that situation”

Veterinarians face the dilemma of animal welfare and human welfare. There is no collaboration between veterinarians and human doctors, and euthanasia of a pet, can in some cases lead to deterioration of psychological diseases. Pets can provide confidence and safety for humans, and for some owners, their pet may be the only reason to get up in the morning. High personal value and low economical capability can, in some cases, force owners to put pets in front of themselves. As pricing of veterinary services can cost 30 000 for a procedure, owners may face lack of basics, such as food, just to provide care for their pet. Even though owning a pet is not a human right, the pets can have crucial roles in many lives.

4.5.1 Pricing

As customers have mixed feelings about the pricing of veterinary services, it was interesting to listen to the veterinary perspective of pricing. It is easy to understand that customers want to get services as cheap as possible, but the focus on the price tag can be at the expense of the service itself

“I feel like I am trapped between the why I need the tests to do my job and the prices connected to tests. I do ask if they (customer) want a price estimate before doing any tests. and if they have limited with money, we need to prioritize what’s most important. But I do find pricing challenging...”

Pricing of their services presents many difficulties for the veterinarians whose main job is to ensure that the pet receives the care they need. When asked about the difficulties veterinarians encounter during consultation, the balance between proper treatment and price was difficult to meet. Customers have high expectations to the veterinary service, however, there seem to be a misdistribution of expectations and willingness to pay, ending with veterinarians standing in the middle of proper care and customer willingness. To tackle the challenges of pricing, an estimation of costs can be a helpful tool for veterinarians to create awareness and prepare the customer of what costs to expect. However, price estimation can also be a pitfall, as customers can perceive the estimation as an offer. If the total costs are below the price estimation, the customer is satisfied, because the service becomes cheaper than expected. Total cost above price estimation, due to unforeseen complications or undetected issues, can create dissatisfaction because of the expectation of price is the estimated price. Price estimation can be difficult to develop because the veterinarian must take into consideration what they need of tests and what they think the customer's will to pay. If a price estimation is too high compared to the willingness to pay, crucial tests and treatments may risk rejection from customer due to price. Rejection of tests and treatments can go on behalf of animal welfare and may be a source of conflict between veterinarian and customer.

The veterinary dilemma between sound animal welfare and care and customers' willingness to pay will always be present. However, it is important to emphasize that veterinarians have a stronger position and professional background to determine whether it is responsible to send the animal home without treatment. Information and time to consult the owner about tests, treatment and prices associated with these is a time consuming but necessary discussion. Veterinarians also experience that customer's care less about pricing when their animal is insured

“About pricing I have been notorious, also previously and on emergency duty, on informing on price. Experience shows me that customers who have insured their pet want to do anything needed, no matter the price. Cats are normally not insured, even though the owner says that I need to do whatever necessary, I always bring up the costs connected to it, because they do not always understand what the tests actually costs”

Owner's wish of providing the best care is not always in align with their financial capabilities. Ignorance of prices can lead to a shock when presenting the bill, and accusations of over-treatment can be thrown out as a result.

One veterinarian has structured the consultation so that an additional test and treatment plan comes with a price offer. By doing so, the customer gets the chance to decide based on willingness and ability to pay for service and animal welfare is secured. When the customer is not involved in the decision-making process for examination and treatment, or receives limited information about the costs associated with the tests, the customer becomes less understanding of what he is paying for and can lead to dissatisfaction

The price differences in the industry are also something the veterinarians find difficult. As mentioned earlier, there can be large local deviations for the same procedure between clinics. Many customers investigate who can perform a procedure for the lowest cost, standard and common procedures, such as spaying cats have large price differences, where money can be saved by the customer by doing price shopping. This is something veterinarians also experience

“I think it is sad that there are so huge differences in pricing and some customers do price shopping. I understand that customers ask questions on why the same procedure have such a difference in price between two different clinics. Of course, a procedure will cost more the more “professional” you execute the procedure, even though the outcome can be the same. Veterinarian industry is not supported by the government but is 100% private, so it must cost. A veterinarian has a lower income compared to a doctor even though we have the same amount of education, and it is cheaper to go to the doctor. There can be major price gaps in short distances. I understand that some owners choose to price shop”

Local differences between clinics and price-conscious customers lead to high competition in the market. Customers rarely understand why one procedure can have such a variation in price. Pricing can be determined by costs and strategy of clinics, in addition to how execution of procedure. In the example of spaying cats, contributor to higher price is monitoring anaesthetics by a pet nurse, when the veterinarian spays the cat. Instead of having one human resource in the operation room, double use of resources impact the costs. Customer's do not see this extra safety in the finished service, a spayed cat, but can if informed, understand why the price is higher from one provider compared to another.

Pricing can in worst case lead to unethical practices where the animal is the losing part in the quest to retain customers and increase revenue

“Sometimes it becomes so expensive that the owners can't afford it. Owner stands between the choice of an operation to NOK 50 000 and putting their pet down and the owner are not

aware of their rights. I know there are some clinics that put down pets immediately to prevent the owner to go to another clinic who could have executed the same procedure for 1/3 of the price”

This type of practice should not be present at all, but large investments, rapidly rising purchase prices combined with a lack of qualified human resources in the market can lead to less ethical practices to prevent customer leakage. Unethical operations where customers are denied searching for alternatives is alarming. Even though the competition is hard, clinics must follow Norwegian laws and legislations. Operations that are against the law can put high pressure on veterinarians forced to follow organization guidelines and protocols.

The dilemma of cost and care is something veterinarians feel is thorning on their personal values and beliefs

“The financial pressure is one of the big things and I don’t think I am the only one who thinks it... It quickly turns into a bad conscience when I tell a customer that I cannot proceed the examinations if they don’t have the money to pay for it. We need salary too”

In addition to the customer and patient, veterinarians are, by law, obliged to help animals and provide treatment that prevent unnecessary suffering (Lovdata,2021). When examination and treatment is constrained between customers willingness or ability to pay and organizational guidelines, the pressure is taking it’s tall on the veterinarian.

4.5.2 Veterinarians wish for change

What we find difficult is normally something we want to change. Pricing has been discussed with the perspective of both customer and veterinarian. Although the customers did not want the prices to change, the veterinarians see the problem on a much larger scale than the individual customer. There are 3700 veterinarians in Norway, they practice in pets, livestock, and government positions (Hauge, 2020). With an estimated 1.57 million pets in Norway, divided into cats, dogs, rodents and birds, there will be 423.8 pets per veterinarian in Norway. If the livestock with a population of 69.3 million animals (State Administrator, 2022) were added to the equation, each veterinarian would theoretically have 19,154 animals each. Asking veterinary participants what they wanted to change in the profession, pricing was repetitive

“I would change so all clinics got supported by the government because I believe that would increase veterinary visits, because people didn’t hold back or be afraid to go because of the expenses. It would maybe lower the bar for people to come without risking eating oatmeal for

the next three months. In addition, we (veterinarians) did not have to have the pressure of being greedy”

Self-diagnosis and google were also factors that will be valued as a non-existent problem in their daily lives. As previously mentioned, Norway has strict drug rules, these rules also make it difficult for veterinarians to practice their profession. All the interviewed veterinarians have studied abroad. This means that medicines and procedures learned abroad are not necessarily possible to carry out in Norway due to a shortage of medicines.

“It would be nice to delete Google... Medicine availability is poorly. And the process of getting medicines became easier for veterinarians compared to today’s arrangements. It is difficult, strict, and circumstantial on what drugs we are allowed to use and not”

Self-diagnosis have also been discussed previously where lack of trust, checkpoint or cost-saving can be drivers of customers need to self-diagnose. Due to law, veterinarians must set own diagnose and make a treatment plan based upon what allowable drugs they have available. All purchases of drugs are heavily regulated and can only be purchased through pharmacies in Norway. Neither veterinarians nor medical doctors are allowed to purchase drugs directly from drug companies. In addition, all drugs must be registered and approved by Legemiddelverket (The Norwegian Drugs Agency). Due to the heavy regulations and supply chain, all drugs purchased from pharmacies is registered and monitored to prevent misuse of drugs.

Poor management can contribute to an unpleasant experience for the customer, for example when the focus on income is prioritized above animal welfare. Customers who have been to larger clinics have talked about the feeling of being on an assembly line, where the focus seems to push as many people as possible through the system. A veterinarian pointed out this problem

“I would definitely change what I was told several times, just propose what has to be done for money”

The high focus of income and profit from some managers does not seem to take their employees wellbeing into considerations. When leaders and managers in veterinary clinics are presented as above, the interest of the animal wellbeing is of no interest. High profit strategy can lead to a high stream of employees, where key resources, such as specialists, is burned out due to high pressure on productivity from management. This problem would not be discussed

as an issue, if it was a rare phenomenon, however, several veterinarians, with different background and working areas, have pointed out the same problem.

4.5.3 Veterinarians Expectation to their Profession

The expectation of human interaction competence from the customers made it interesting to hear from the veterinarians themselves how they expected their profession to be and whether the job met expectations. The answers received can be an indicator of the high pressure that veterinarians experience and why many veterinarians experience fatigue and quit

“I didn’t expect the veterinary profession containing this amount of human treatment and it makes me exhausted. The fact that you need to relate to all these people, and everyone is different... You are getting tired, mentally tired of taking care of and communicate with the owners, you are supposed to give to the owner. In reality you are there to fix the animal, but it is the owner you need to spend your time on”

When someone chooses to become a veterinarian, it is natural to assume that they do so out of love for animals and that they want to make the animals' lives better in some way. It becomes clear that the veterinary curriculum does not cover reality well enough when it comes to dealing with customers and what they can expect in the real world

“We should definitely have psychology as a subject, cause the owners are, well we have the whole spectre. Some are crazy and some are super arrogant, and we need to handle everyone”

How to communicate with customers in different states of mind, the most repeated word when interviewing both veterinarian- and customer group is something veterinarians missed during their studies, communication.

One of the core one tools to deal with the job is something that must be learned from scratch as practicing veterinarian, it is no wonder many quits after few years due to elevated expectations from the customers

“When I have had a really crappy day at work and if I knew how difficult some days could be I am not so sure if I would choose the veterinary profession. I had no idea about this before I started, no one could tell me, and none of my fellow students knew nor talked about it. It was never a topic, even though it is a big part of our everyday work life, that handling customers, the economical side, and treatment of the sick animal came as a number three. It is the sick animal we have studied for six years”

The taboo of how hard the veterinary profession is in veterinary universities is surprising. When OIE recommend communication development throughout the veterinary studies, the topic of why communication is important should be addressed. The lack of information of customer expectations may be grounded in fear of losing applicant and students. Many choose the veterinary profession because they want to help animals (Rollin,1986), when studying veterinary medicine, the focus is on how to treat animals. When graduated students enter the real world, they quickly realise that customer need are first, economic issues second, and the animal as number three. This problem could be easily avoided if the issue was addressed by veterinary university and can cause unnecessary pressure on graduated veterinarians.

4.5.4 Key Findings

There is little theory that address contributors to the issue of high pressure on veterinarians. Because of the lack of knowledge on the topic, research question 3: *Which contributors that put pressure on veterinarians, can be identified?* was formed.

From interviews, pressure contributors seem to hit veterinarians from three distinct levels: (1) Customer-veterinary-level, (2) veterinary-management-level, and (3) personal-level

On the customer level, veterinarians are stuck in a paradox of customer willingness/ability to pay for treatment and costs for their service, despite their obligations to provide treatment. Customers willingness to pay is not align with the lofty expectations of veterinary service. Expectations on communication- and relations capabilities, in addition to care for customers emotion indicates that veterinarian's priority is treatment customer before patient.

On management level, veterinarians must follow organizational guidelines which can conflict with ethical- and personal values. This issue is specially illustrated of managers seeking profit on behalf of animal welfare, and their expectations of optimizing productivity during working hours.

On the personal level is the awareness of interpersonal- and communication capabilities needed and what the individual have. Personal characteristics such as shyness or introvert can complicate the task of communication and building relations. The gap of expectations toward the veterinary profession and reality is also a contributor to pressure on veterinarians.

4.6 Management

Veterinarians operate in a service industry. In the service industry, organizations have a direct relationship between people, where knowledge and skills are put at the centre. In service-producing organizations, people and social interactions become key factors

(Jacobsen&Thorsvik,2016). Operating in a highly competitive market with difficult access to veterinarians and high expectations from customers makes it difficult to balance profits and ethical practices. Ethical values are developed and strengthened through management. Value-based management is a relationship between a manager and employees who share the same strong inner values, which are made visible and handled by the manager (Kaufman & Kaufman, 2015). Presentation of the findings so far shows that unbalanced management is noticed by customers. Veterinarians see management in veterinary clinics from a different perspective than the customers, and not everything is joy in the veterinary clinic's management world

“The manager decided how we price. I understand that it is business, and everything is about the money, but I am not a fan of assembly-line-clinics. I am not a fan of over-diagnose to earn money... I have seen and heard a lot about over-diagnose. Where it has become a demand from management where routine replace logic. Some places want blood-tests for sedations, which is included in the price, even though running blood test may not be necessary”

Value based management is a relation between manager and employees that share the same strong inner values, which are made visible and handled by the manager (Kaufman&Kaufman,2015). Because many choose the veterinary profession to help animals, combined with law and regulations, unethical management occurs when values between manager and veterinarian conflicts. Unethical operations and guidelines that overruns the veterinarian’s professional position, do more than just pushing the prices up. A veterinarian who is forced to execute procedures they see as unnecessary, such as running blood tests, put unneeded stress to their patient and increase the risk of dissatisfaction of the customer. The veterinarian can question its own position in the organization when protocol overruns academic background. In worst case, the guidelines can make personal inner conflict, resulting burnout of employees. One of the participants in the customer group mentioned overtreatment as a problem with pets that were insured. A veterinarian who talks openly about this issue in the industry and has colleagues who also talk about managers who are pushing to increase revenue, shows that this is a problem.

Managers who push their employees to the limit of fatigue because customers expect treatment no matter what, enforce the customer's expectation of availability

“I missed from my managers the thing that they did not understand that we also have a life next to the veterinary business. You are a vet (veterinarian), and you should be available 24/7

- 7 days a week, because you love animals and it's not work but a way of life and you should always be ready to save a life"

It is in the manager's interest to protect his employees to avoid fatigue. The pressure in the industry is high. Veterinary clinics are often small in terms of staff, more than three veterinarians are rarely at private clinics. Larger chain clinics, such as Anicura and Evidensia, have larger clinics and often combine clinics with animal hospitals, which in turn requires more staff to ensure that the hospital is staffed 24/7. For the smaller clinics, however, the working environment is smaller, which makes well-being important for all employees to be able to meet the challenges they face during the day.

"It is bad communication that gives a challenging workplace. Clinics are small environments.

If you cannot bring up problems or doesn't feel that you are heard, it creates a small uncertainty. It doesn't help to be told off all the time, you need something positive too. I as a person see communication as super important if conflict arise. This with support, and the most important skill of my manager, is that they have my back and supports me. If I have done a mistake I will admit it, we can discuss that in the backroom, but the manager must have my back in front of the customer"

It is important for veterinarians that they feel safe and have a good working environment, as Maslow and his hierarchy of needs suggest (Kaufman & Kaufman, 2015). The veterinary profession, like human medicine, is constantly changing, where new treatments, medicines, equipment, and procedures are developed, and old procedures are discarded.

Personal skills should suit the clinic's leadership style. The style should be adapted to the employees' academic background, a veterinarian requires a different leadership style than a receptionist. Nevertheless, everyone who works at a clinic must work towards the same goal and have the same values and norms (Jacobsen&Thorsvik,2016).

"I think it is positive when the leader gathers all employees and tell us what he expects from us, and we can discuss openly and ask questions. It is important that we share our thoughts with each other and don't keep it to ourselves. It is important that if there is something, I will say it. It includes both other employees and leader. Communication. As a leader it is important to read the human. As a veterinarian in Norway, I feel more important as an individual. As a human being and individual, you are important for the society in Norway"

It is also important to emphasize that many managers in veterinary clinics are veterinarians. Running a clinic is expensive and the impression of a veterinarian's salary can be higher than it is. High competition in the veterinary market and difficulties in recruiting relevant qualified staff can also lead to unethical management. Literature suggests that the lack of competent, academic staff is more difficult to obtain due to the reduced class sizes examined from upper secondary schools (Nordhaug,2002, p.271). A good manager can be a ventilator for the frustration and emotions employees have in their working day. Clear guidelines on expectations and a clear framework on values and ethical- and moral behaviour can help employees to face challenges they meet. It can be difficult for veterinarians to be motivated when facing owners who do not want to spend money, do not understand why tests need to be performed, or expect a magic pill to make all problems to go away.

4.6.1 Key Findings

As the role of the manager is to influence commitment, safety and motivation for their employees, the findings from pressure contributors makes research question 4 more important:

What role do the manager play in the perception gap between veterinarians and customers?

Management prioritizing profit and high productivity on the cost of customer service and animal welfare gives the manager a leading role in the perception gap. Because management productivity demand is linked to time used on each patient, customers perception of the veterinarian's execution will be influenced by management. Contribution to unethical practice and expectations of employees being available 24/7 strengthen the customer unconscious expectations of veterinarians being always available. Managers with high profit strategy, impact the customer-veterinary relationship, which put pressure on veterinarian and increase customer dissatisfaction due to lack of relations and trust.

5 Discussion

The veterinary industry is a market-driven service industry. To be able to succeed in an industry with locally high competition, it is essential that veterinarians at private clinics can meet the expectations of the customers. In addition, the focus for veterinarians is to keep the animal welfare at a satisfying level, in thread with Norwegian laws and regulations. Because of the dependency of customer satisfaction of offered services, the individual pressure on veterinarians is high.

This thesis aimed to identify the gap between the customer- and veterinarian perception of consultations in companion animal clinics. Through in-depth interviews with participants of both groups, where the goal was to identify the border lines of the perception gap. This research being an exploratory, qualitative research, there were some indicators of what was expected from previous research.

5.1 The Perception Gap

Hill (1996) defined the perception gap as the level of service perceived by customers differs from the service provided. Through interviews of customers, negative experiences shared have been illustrations of the gap between expected service and service provided. When customer expectations of social capabilities from veterinarians were high. The capability of treating animals were not mentioned by any of the customers, however, the way of handling their patients and work on the premises of the animal was important. Customers also expect that their pet is respected and handled with care no matter the size of the pet, a hamster is equal to a dog. Further, customers expect veterinarians to have forceful communication skills, show interest in the pet and customer, and meet the customers concerns seriously. Time is essential for the customer, and it is important that the veterinarian do not rush the consultation but take their time and show interest for both customer and patient present in the consultation room.

Asking veterinarians about expectations from customers, there were some similarities of customers explained expectations. Communicate in an understanding way and build relation with the customer was essential for the veterinarians. Further, they tried to take the time needed to make sure their job was executed properly, even though they did not have that time available. Meeting patient and owner with understanding and interest, in addition to take the owners' concerns seriously was prioritized from the veterinarians. Furthermore, veterinarians experience high expectations on availability and capabilities to heal. Veterinarians do experience customers intrude their private life and contact them on different medias such as phone, text message, Snapchat, and Facebook. Veterinarians are not able to go to the grocery store without customers seek out and ask questions, which also contribute to pressure. Veterinarians experience a general customer perception of veterinarians are never off duty, and their affection of animals should make them available 24//7. This expectation can be further strengthened through poor management, where veterinarians are called in to perform surgery at all times of the day, with the argument of you love animals, therefore you need to help it. Veterinarians also meet high expectations on the capability to heal sick and injured

animals. When veterinarians interviewed talked about this issue, they always referred to God. The sentence: "I am not God," was said several times from most of the veterinarians. The veterinary profession seems almost glorified by the customer, and therefore the expectation of fixing their pet is elevated.

Findings of this research indicates that there are two levels of expectations towards veterinarians from the customers. First level of expectations is the conscious level of expectations. This level involves the customers aware expectations, such as the veterinarian's capability to communicate, build relations and gain trust through friendly behaviour and attitude, which is in align with previous research such as Moreau (2003). Building relationships with customers is identified as a pillar of business success in the veterinary industry (Volk.et.al.,2005), and is supported by the importance of customer-organization relationship in marketing theory. The importance of building relations is also confirmed from veterinarians to secure proper healthcare for their patients. On the first level of customer expectations, there is consistency between customer, veterinarian, and previous research of the veterinarian industry and marketing theory.

On the second level of customer expectation is the unconscious expectations, where availability, interest outside of working hours, and the glorified image of the veterinarian is. Customers beliefs of the veterinarians' capabilities of healing can be a complex picture of hope and desperation, positive stories shared on different mediums, and ignorance. Of course, sometimes veterinarians can be lucky and succeed on a case that in theory had poor prognose. These "happy-stories" can contribute to customers glorified picture and elevate expectations veterinarians. When participants of the customer group were asked about preferred capabilities of veterinarians, all customers said in one way or the other that they (veterinarians) should love animals, but quickly corrected themselves with the argument, "if they don't love animals, they wouldn't become a veterinarian." This attitude is quite interesting from the perception perspective. The general belief from the customers that veterinarians' do love animals, might be a contributor to the intrusion of the veterinarians' private life. The argument of, veterinarians love animals, justify customer's reasoning of veterinarians will therefore always help. One veterinarian interviewed also pinpointed one general issue they meet, and that is the customers lack of knowledge of the health risks and general health issues their animals can be in risk of getting. This ignorance led to grand expectations on what the veterinarian can be able to fix. However, ignorance can also lead to suspiciousness toward veterinarians when they address issues the owner did not expect.

When customers shared their stories, positive stories were expectations met on the first level, the consciousness-level, of expectations. Prominent level of compassion, empathy, care, and communication skills are all mentioned by veterinarians and customers and emphasized in literature as a core skill (Maguire&Pitceathly,2002; Shaw et.al.,2008). When the unconscious expectations of the customers are not met, the experience becomes negative, however, none of the positive experience shared are unconscious expectations being met. This might be a coincidence and should be tried out in quantitative research. Dissatisfaction, or negative experiences, is defined as perception and expectations not met (Garding&Bruns,2015), this definition aligns well with described expectations from customers and positive and negative experiences.

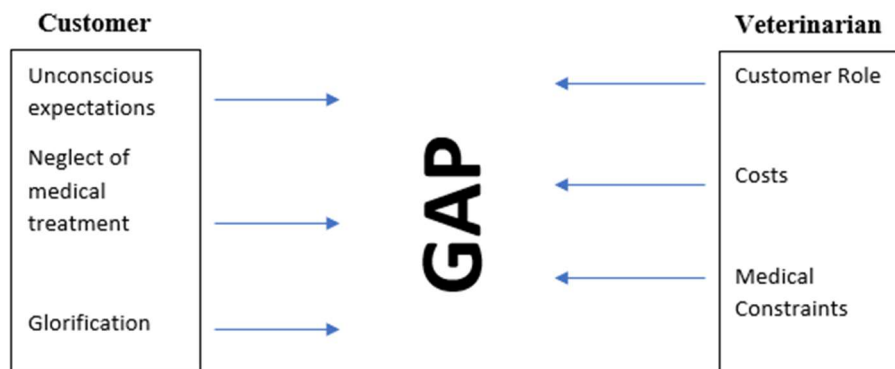


Figure 2 Identified Perception Gaps

The perception gap in the veterinary industry occurs when owner is not aware of own expectations, leading to intruding behaviour of veterinarians' private life. Perception gap can also be a result of customers glorifying the veterinarians because customers believe veterinarians can solve all cases and fix all problems. The glorification leads to grand expectations of the veterinarians' capabilities to fix their pet compared to what's medical possible to do. Customers' ignorance of own role in prevention, discovering and follow-up of sickness and injuries their pet might get or have, also lead to the glorifying of veterinarians and the belief of them fixing their pets issues with a "magic pill."

The general perception of veterinarians loving animals lead to a negligent attitude towards the executed medical treatment and diagnostics of animals. This perception can also be an explanation for the lack of willingness to pay for tests and treatment. Customers perception of veterinarian's executing their job because they love animals and therefore, they should do whatever possible regardless of the willingness to pay of the customer is another contributor

to the perception gap. The distinct types of perception gaps identified and discussed in this research is illustrated above.

The veterinary industry is a market-driven service offering industry. To be able to succeed in an industry with locally high competition, it is essential that veterinarians meet the expectations of the customers. In addition, the focus for veterinarians is to keep the animal welfare at a satisfying level, in thread with Norwegian laws and regulations. Because of the dependency of customer satisfaction of offered services, the individual pressure on veterinarians is high. Customers having two sets of expectations, conscious and unconscious, creates higher expectations on veterinarians than the customer is aware of. These two levels of expectations should also be investigated further from other service industries, as dissatisfaction occurs when the unconscious expectations are not met.

5.2 Perception Gap Contributors

Because there is no theory in the topic of perception gap between customers and veterinarians, it was interesting not to only identify if there were a gap, but also what factors that contribute to the gap. Use of marketing-, leadership-, and organization theory have been used as theoretical framework for this research.

5.2.1 Market and Industry

Marketing theory suggests that marketing tools, such as the marketing mix, can be used to produce the response it wants in the target markets (Kotler&Armstrong,1989). If used right, the marketing mix can help the clinics to steer the customer expectations and secure their reputation by giving customers the right expectations of what the clinic can provide of service and pricing of the service. One of the customers felt like there was little information to find about the price of the services. This can be an intentional strategy from clinics as a measurement to prevent customers from price shopping, as one of the veterinarians took up as an issue. There is high demand in the veterinary market, and customers see this demand in the consultation room with stressed veterinarians with time shortage during consultations.

Veterinarians work in a market-driven industry where customers are the final judges who determine product and service satisfaction-, delivery-, price-, and performance level (Edosomwan,1993), the focus of care is shifted from patient to owner. Veterinarians are dependent on building relations with their customer to make sure customer expectations are fulfilled. A cured pet has low value if the owner feels their personal needs are not met. Neglect of owner's feelings and concerns provide dissatisfaction, which again can lead to bad reputation of the clinic. Because veterinarians must use more time on the customer and less

time on the patient, there is a mismatch between customers expectation of price and service compared to what the veterinarians can provide. From theory, the question of does veterinary clinics use marketing tools sufficient to steer their target market, in terms of demand, price, and service was raised. At some degree, the veterinary clinics have room for improvement on this area. Using marketing as a tool to enlighten owners of what role they have, what diseases and issues their pets can get and what to think about before consultations could help reduce the gap between expectation and reality. Further, should managers at veterinary clinics steer customers expectations on veterinary availability to shift the intrusion attitude of their employees. Veterinarians with high success rate on building relations with their customers can generate higher demand through positive reviews and good reputation. A good reputation can provide elevated expectations of veterinary capabilities which again can contribute to the perception gap. The dependency between reputation, relation and expectation is important for marketing- and organizational strategies. A mismatch between the three can provide customer dissatisfaction and damage relations and expectations. Because the veterinary industry is a highly competitive market, reputation and relations is important tools in a differentiating market strategy.

5.2.2 Communication

There have been conducted a fair lot of research on the veterinarian's capability to communicate with owners (Shaw et.al.,2008; Shaw et.al,2010; Gaida et.al.,2018), and there are some evidences that veterinarians lack communication skills necessary for success in private practice (Brown&Silverman,1999). Veterinarians operating in a service industry relates heavily on communication, as communication is seen as an essential part of successful customer service (Abu-ELSamen et.al.,2011) To gain a relation to the customer, communications is the veterinarian's strongest tool. Unsuccess in building relations is illustrated in customers stories of negative experience, because they do not understand tests and results due to poorly communication from the veterinarian. Communication skills have individual nuances and is reliable on both the receiver and sender. One piece of information that is easily understood for some, can be hard to understand for others. Veterinarians having high academic skills and their own professional language, creates prominent level of communication skills to "break-down" the information to an understandable level for owner. Veterinarians interviewed in this study, put high emphasis on taking their time to make the owner understand. Veterinarians also express that the most time-consuming part of their job is the communication part with owner. Communication skills needed in veterinary profession is also stressed out by OIE, who recommend a continuous development of communication skills

throughout veterinary studies. Even so, veterinarians interviewed reports that they did not learn any relevant communication skills during their studies but learned with steep curve when practicing after studies. These findings support previous studies that shows mixed feelings from veterinarians of the outcome of the communication learning at universities (McDermott et. al.,2017).

The customer interviewees also saw communication skills as necessary and preferable from veterinarians. Prominent level of communication skills combined with confidence creates foundation for building relations for the customer. The customer is feeling safe when findings, further treatment, and price is communicated in an understandable way. If the veterinarian fails to communicate in an understandable way, the gap between what the customer expects and what the veterinarian provide will increase.

Research in marketing theory suggests employees with good communication skills impact positively on customer attitude and satisfaction (Abu-ELSamen et.al.,2011). Because communication skills also impact on company image (Smith&Lewis,1989; Marr,1994), veterinary clinics are highly dependent on veterinarians' communication skills. Previous research on communication skills in the veterinary industry shows that veterinary communication skills is of varied quality (Brock&Silverman,1999). From theory, the research question of how communication impact the perception gap was raised. Findings in this research shows that when veterinarians fail to communicate at a satisfying level, customers become dissatisfied, which can damage veterinarian- and clinic reputation. Likewise, findings indicates that successful communication lead to customer satisfaction and -trust. Satisfied customers will be more open for suggestions and recommendations from the veterinarian and will decrease the perception gap. Lack of, or poor communication between veterinarian and customer increase the perception gap. The strong link between communication and customer satisfaction, shows that the perceived service from veterinarian is highly dependable of veterinary communication skills.

5.2.3 Management

Veterinary industry has a dynamic work environment, with patients and owners with different state of minds. Findings in this research shows that the manager, or leader, of veterinary clinics have their part to do in terms of customer expectations, such as marketing. Leadership is a behaviour with goal to influence other people's thinking, attitude, and behaviours (Yukl,2013). Studies show that individuals choosing the veterinary profession often have personal characteristics such as perfectionism, high achievement, and empathy (Waters

et.al.,2019). These individual characteristics means that clinic managers must have a leader style that balance out perfectionism and high achievement goals, through e.g., internal procedures. The empathy and high achievement characteristics of veterinarians means that they easily can be consumed by their profession. Because managers have impact on both customers and veterinarians, research question of managers role in the perception gap was formed.

When interviewing both veterinarians and customers, the topic of over-treatment of patients to increase profit was discussed. This way of running a clinic should be considered as unethical operations, because the terms of profit are put in front of animal welfare. Ethical values are developed and reinforced through management. Value based management is a relation between manager and employees that share the same strong inner values, and these are made visible and handled by the manager (Kaufman&Kaufman,2015). Value based management should be considered as a fit management-perspective for veterinary clinics. Veterinarians take oath to keep the principles of veterinary medical ethic, and the ethical side of the profession should always be kept in mind of managers. Veterinarians express the dilemma between the managers pressure of increased production and the customers' expectations. Because the veterinarians can, in worst case, get fired if not following clinical protocol, the pricing of their services is an issue for many veterinarians.

Based on the framework and assumptions before this research, the assumed contribution of managers on the perception gap was more on the marketing- and administrative part. After the conducted data, managers have a more leading role of the perception gap on two levels. First level is the internal role, where managers push through high expectations of income, meeting demand, and high efficiency of consultations. Decreasing cost-per-patient with high treatment rate per veterinarian is generating more profit for the clinic. Expectations of high patient-rate combined with standardizing of procedures, which can lead to over-treatment, force veterinarians to use less time on each patient. As communication and time have been stressed out many times is important for customer satisfaction, managers risk dissatisfaction on behalf of profit.

On the second level, is the external role of the manager. As managers have the responsibility for marketing and human resources, the communication out to customers are in the managers' power. Veterinarians express the high expectation of availability and issues of privacy intrusion from customers, indicates lack of information regarding these issues out to the

customer. As the marketing mix is an efficient tool to steer expectations, managers are ignorant or careless of the use of efficient marketing.

Elevated customer expectations increase the perception gap, and results indicates that clinic managers have a significant role in the gap between expected service and service provided in veterinary clinics.

5.2.4 Pressure

The lack of data found on pressure contributors on veterinarians, little was assumed beforehand. However, research indicate that harsh work hours and customer expectations have been factors of suicide among veterinarians (Fink-Miller&Nestler,2018; Bertram&Baldwin,2010). It was natural to assume that time and customer expectations would be two variables leading to pressure on veterinarians.

For freshly educated veterinarians the first giant pressure is the reality of their chosen profession. As mentioned by one of the veterinarian participants, the knowledge of the customer expectations and the amount of time used on owners compared to patient is handled as a tabu on university. There is a gap of expectation between the veterinarian's thought of the profession and the reality. This would be a research project, but it is important to mention that veterinarian students are not aware of the hierarchy of their profession, on top is money, second is owner and third is their patient. This alone will create a reality-shock for many and is the starting point for the additional pressure discussed below.

Veterinarians have three main sources of pressure when practicing as veterinarian, first, is themselves, their expectations, individual goals, and personal capabilities. Second, is the customer and their expectations to availability, medical treatment-skills, and inter-human capabilities. Third, is the manager and their expectations of high income, efficiency, and ignorance of marketing tools.

For the veterinarian to deal with first source, a dialogue with the manager of topics such as difficulties and issues in their work, what goals they have for themselves in terms of self-growth and how they can get time after work without disturbance from customers, must be present. Empathy have been seen as an important characteristic of veterinarians by customers in this research, and research show that veterinarians often is empathic individuals (Waters et.al.,2019). Empathy being defined as the feeling that you understand and share another person's experiences and emotions (Lishner et.al.,2011), means that an empathic veterinarian may be at risk of being influenced emotionally when dealing with customers and their

emotions. If the veterinarian never is off because of customers intruding their private life, the chance of work fatigue may increase. Stagnation of self-growth in a high demanding profession may in the end lead to unmotivated veterinarians, this can again lead to errors, such as described by one of the customers interviewed with fail x-ray pictures, or in worst case, causing death.

The second source of pressure is the customer. This research has found that the customer has higher expectations toward the veterinarians than they are aware of. The unconscious expectations create behaviour that neglect the individual person from veterinarian and ends up with disturbance and intruding of private life. Ignorance of own role as a companion pet owner and lack of understanding of the veterinarian's role, create a glorification of the veterinary profession. The belief that veterinarians can fix all problems, or one pill can do the trick, shows the lack of understanding of the profession. Pressure arises from customer when veterinarians need to meet the customers feeling, show compassion and care for owner in addition to their patient. Expectations of service provided that are higher than the willingness to pay, put extra pressure on veterinarians who need to balance the animal welfare and owners' economical constraints, and meet the expectation of fixing the problem.

Third, and final source of pressure comes from the manager. This result is surprising, thinking that managers role is to inspire and motivate employees and operate the organization in a healthy way, in both economical- and culture aspect. This research has revealed that managers in veterinary clinics put unhealthy pressure on veterinarians because the focus is on profits instead of animal welfare. Of course, clinics need to earn money, but when veterinarians says that companion animals have been put down on the spot to prevail customer leakage to other clinics, there is something wrong with the ethical operation of veterinary clinics. Managers pushing through a work culture of over-treatment shows that there is an issue of veterinary clinic management in Norway. Ignorance of marketing tools to steer and inform customers of what to expect, what prices they need to have in considerations and general information on what the veterinarians can do should also be prioritized to reduce the pressure on their employees. High production of veterinary services where the main goal is to push through as many customers and patients as possible during opening hours, is noticed by the customers. Some customers also state that price is driven up in clinics with assembly-line-feeling. Veterinarians working in these kinds of practices, will have time-shortage in consultations because they have to many patients and too little time.

5.3 Summarize

Increased animal welfare awareness, higher status of companion animals and a wealthy population leads to elevated expectations of veterinarian's capability to cure animals when sickness, injuries and accidents occur. The customers' expectations of veterinarians caring of animals leads to harassment of veterinarians' private life. Based on the interviews of the customer- and veterinarian group, there are coherence in factors such as communication, social competence, care, understanding and interest in interaction with customer and pet. There seem to be a gap between the customers conscious expectations and unconscious expectations. Veterinarians meet allegations of not caring, being greedy and ignorant when not being capable of meeting the expectations of the owner. The elevated expectations glorify the veterinarian profession and what they can do. This glorifying may occur when there is little knowledge about the profession and shared happy-ending stories on social media.

Another finding in this research shows that veterinarians stand in the middle of managers expectation of revenue and customers' expectations of care and healing. Veterinarians choose their profession because of the animals; however, the animals are random on top of the priority list. There seem to be a dilemma where costs are one side and proper care on the other. Veterinarians face the two opposite poles, finding themselves in the middle trying to balance both.

Findings in this research shows that measures should be taken toward customers. Using marketing to raise awareness, educate to reduce expectations from their veterinarians, and share information on health issues that can occur with the breed they wish to purchase should be implemented.

From the managerial perspective, managers should communicate with veterinarians about difficulties they meet during their consultations. Mapping out difficulties and take actions toward them can build upon the main reason of their presence, animal welfare. Increasing social skills, role play and scenarios they meet in the consultations to practice on communication skills and common procedures could increase competence and reduce pressure.

Further, veterinarians should have room for ventilate when emotional cases occur, some cases can come closer to the heart than others. High focus on mental health should be high priority for all employers within the industry. Furthermore, time has shown to be a key element for satisfied customers and is a core element for the veterinarian to provide correct care and

treatment plan. Finding solutions on how to facilitate time more efficient should be done in cooperation with veterinarians, to increase time spent with patients. Pressure increases on veterinarians when they are unsuccessful on meeting the expectations, in addition, negative experience makes customers warn others against certain veterinarians and clinics, creating a bad reputation.

Veterinarians should be better at putting border for their private life, which can be done with help from manager. Using marketing to enlighten customers that disturbing the privacy of veterinarians is not ok, is something that needs to be taken seriously.

The assumption before this research was that there was a lack of understanding of the customer perception from the veterinarians and vice versa. This research shows that customers are not aware of own expectations and veterinarians are often stuck between managers and customers. The study also show that animal welfare is down prioritized, and customers personal emotions, feelings and money is central. One explanation for this might be that the animal welfare focus from the veterinarian is taken for granted by both customer and manager.

6 Implications and further research

This research has only one researcher, leading to risk of bias in creating questions for interviews, performing interviews and interpretation of data from the interviews. Participants that volunteered for this research may not be representative for the population on both customer- and veterinary group. There is a risk of male veterinarians have other experiences than female veterinarians. However, based on applicants on veterinary studies at NMBU, where 80% is female, it might be difficult to reach out to the male group among veterinarians.

6.1 Theoretical Implications

Findings in this research support previous research in terms of the importance of communication skills of veterinarians and the lack of communication skills learned at university. Data collected from veterinarian- and customer group show how important it is for veterinarians to meet the expectations of customers to contain their reputation, secure animal welfare and have satisfied customers.

No research found on the topic on perception gap between customer and veterinarian, this research will be a first step on better understand the dynamics of companion animal clinics. Implementation of established theories in research fields as marketing, organisation, and

leadership, creates a framework that can explain and identify gaps in the veterinarian industry. This research has shown that clinic managers, customers lack knowledge of their own expectations, risk diseases their pet may get and general animal husbandry, leads to perception gaps between veterinarian and customer. A model for perception gaps between veterinarian and customer has been created and can be used as a guideline for further research on the topic.

High pressure on veterinarians have been mentioned in many studies and is used as one reason for high suicide rates among veterinarians. This research investigates what contributors creates the high pressure, it is time to put this on the agenda for further research, as this is a major hole in previous research.

6.2 Practical Implications

Using the theoretical model for perception gaps, managers and veterinarians can use it as a starting point for identification of which areas they might have a gap between customer expectations and service offered. Because the model includes both internal and external topics, managers can easier divide into their own priority based upon what is easier to measure. Example, managers focus on income can be reduced and higher focus on animal welfare is increased, veterinarians can in collaboration with manager measure, through for instance anonymous survey, see as a sufficient measure of press relief and increased customer satisfaction.

6.3 Theory Contribution

This research contributes to marketing theory where the synergy between communication-customer satisfaction – perception gap unfolds in a competitive service industry. Further, this research shows evidence that internal, individual communication skills have impact on customer satisfaction and organization reputation. This research also illustrates the importance of clear marketing strategy from management to steer customer expectations.

As manager role have been exploited in this research, some contribution to leadership-theory is also present. Findings suggests that poor management put high pressure on key employees within an organization. Further, it also suggests that wrong leadership perspective and -values can have negative impact on both customers and employees. Findings also implies that unethical leadership is noticed by not only employees, but also customers.

6.4 Further Research

This research can be used as pilot research for further investigations on several topics highlighted in the discussion. Research on customers awareness of own expectations in form of availability and intruding personal life of veterinarians is recommended. This should be performed as a mixed study to get more in depth of the topic and verified by a representative group through quantitative research. Another interesting topic that should be investigated further on the customer side is whether there is a connection between quality and pricing and the experienced quality and price.

From the veterinary side, measurements to avoid difficulties, mapping out the need for communication skills and human-interaction capabilities should be prioritized. It is obvious from both customer- and veterinarian side that time is short in the veterinary industry. There should be investigated further how to create more time for customer and patient.

Another important topic to map out is the expectations on the veterinary profession from the students. Preventive actions that make future veterinarian generations prepared on what they are meeting in the real world could be essential for their capabilities of coping with high pressure and -expectations.

7 Strengths and weaknesses of research

The explorative nature of this research with anonymous participants provides more reliable information and a more colourful picture of customer and veterinarians perspectives.

Voluntary participation from all interviewees also validates the information given, as interviewees share only the amount of information, they are comfortable with. Serious and painful topics around losses of pets and bad experiences from the customer group, and managerial issues, suicide rates, and everyday frustration topics from veterinarians gives a more “right” picture of how the life at companion animal is from both customer- and veterinarian perspective. Before recordings was started the interviewer emphasized for all interviewees that veterinarians, clinics, and names on customers are irrelevant for this study and should not be mentioned nor asked for during the interview. This build trust to both the veterinarian and customer group, as this gave them the comfort of their story and perspective being the research area of interest.

This research has been conducted entirely of one researcher which may lead to increased risk of bias, despite measures against it has been taken I form of a case study protocol. Because this research is the first of its kind to reveal perception gap, as a qualitative study with few

participants, findings cannot be concluded to be applied to the veterinary industry. The skewed distribution between male and female participants from both customer- and veterinary groups is a weakness in this research and should be accounted for. Qualitative research can rarely be generalized to a bigger population and this research relies on subjective perceptions.

8 Conclusion

Veterinarians experience high expectation on human-interaction capabilities and empathy, combined with ignorance of own role from customers. The experienced expectations from veterinarians are higher than customers stated expectations. Lack of understanding of what the veterinary profession requires of inter-human capabilities and communication skills during studies, can lead to shock and work fatigue when entering the real world.

Customers are aware of risk of high expenses of veterinary services. However, there is varied knowledge of own role in preventative and treatment of companion animals. This research indicate that marketing should be prioritized to steer customers' expectations to a more realistic level.

Management in the veterinary industry needs further investigation from both internal and external perspective. Focus should be on how they can facilitate and take care of their veterinarians through internal procedures and personal needs, and external factors such as information sharing, education of customers and sharpened marketing.

Contributors to the high pressure on veterinarians should be taken seriously by managers and veterinarians. Measures to alleviate the pressure on veterinarians should be taken to avoid high pressure over an extended period. To manage this, it is necessary that communication, trust, and relationships are built internally in the veterinary clinic and externally to the customers.

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10 Appendix

Appendix I: Recruitment Information

Vil du delta i forskningsprosjektet

«Forventninger til veterinærer – Identifisering av gapet mellom kunde- og veterinær persepsjon»?

Dette er et spørsmål til deg om å delta i et forskningsprosjekt hvor formålet er å identifisere et eventuelt avvik mellom dyreeiere og veterinærer for smådyr. I dette skrevet gir vi deg informasjon om målene for prosjektet og hva deltakelse vil innebære for deg.

Formål

Formålet med oppgaven er å identifisere hva kunder av smådyrsklinikker forventer under et besøk og hva veterinærer som arbeider på smådyrsklinikker tror kunden forventer. Ved å spørre både veterinærer som arbeider på smådyrsklinikker og kunder av smådyrsklinikker, er det mulig å sammenligne data og finne et eventuelt avvik mellom kundens forventning til veterinæren og hva veterinæren tror kunden forventer.

Innhenting av informasjon er gjort i forbindelse med en masteroppgave hos Institutt for Internasjonal Forretningsdrift (IIF), NTNU Ålesund. All data som blir samlet inn vil være anonymisert.

Hva innebærer det for deg å delta?

Forskningen baserer seg på intervju på teams/zoom og vil bli tatt opp. Etter at intervjuet er blitt gjennomført, vil intervjuet med spørsmål og svar skrevet ned og sendt til deg for godkjenning. Etter at du har godkjent avskrivningen av intervjuet, vil opptaket av intervjuet slettet umiddelbart. Dersom du ønsker å trekke deg, vil også all data samlet inn bli slettet.

Det er viktig å understreke at personer som stiller til intervju er anonyme og data som kan avsløre identiteten din vil ikke bli publisert. Det er kun intervjuholder, som skriver oppgaven, som vil vite hvem du er.

Hvem kan delta i studien?

To grupper skal intervjues for denne oppgaven. Data fra de to gruppene vil bli analysert og sammenlignet med hverandre. De to gruppene er som følger:

1. veterinærer som praktiserer i smådyrsklinikker
2. Kunder av smådyrsklinikker

Er du i en av de to gruppene over og ønsker å stille opp til intervju, tar du kontakt som informert lenger ned.

Det er frivillig å delta

Det er frivillig å delta i prosjektet. Hvis du velger å delta, kan du når som helst trekke samtykket tilbake uten å oppgi noen grunn. Alle dine personopplysninger vil da bli slettet. Det vil ikke ha noen negative konsekvenser for deg hvis du ikke vil delta eller senere velger å trekke deg.

Ditt personvern – hvordan vi oppbevarer og bruker dine opplysninger

Jeg vil bare bruke opplysningene om deg til formålene som er fortalt om i dette skrevet. Opplysninger vil bli behandlet konfidensielt og i samsvar med personvernregelverket.

Deltakelse

Om du ønsker å stille opp til intervju eller har spørsmål knyttet til forskningen vennligst send uforpliktet e-post til:

vickylys@stud.ntnu.no

Mvh

Vicky-Lynn S. Brastad

vickylys@stud.ntnu.no

Appendix II: Case Study Protocol

CASE STUDY PROTOCOL

Overview of the case study

1. Mission and goals effecting the interests of the case study's audience

The increased research of veterinarian-client interaction has raised the focus of veterinary communication skills during consultations. Articles and research found about the subject of communication skills, customer satisfaction and customer interaction have been solely written by veterinarians in different levels of the veterinary industry, from high-profiled veterinarians in the veterinarian community to veterinarian studies. Because of the narrow writer background in the research field, the focus and perspective have been the veterinarian role. This explorative qualitative research will focus both the customer and the veterinarian perspective with goal to identify the perception gaps that may occur during a visit on a small animal clinic.

By understanding the expectations towards the veterinarian from the customers perspective and map out the veterinarian's belief of the customer's expectation, the distance between the two perceptions can be minimized. By getting a deeper understanding of the expectations, the work around veterinarian-client communication can get a better foundation for further research in veterinary communication skills.

Veterinarians with a greater understanding of what is expected of them in a consultation situation can improve their own communication skills and be able to get more correct data from the client by establishing trust. Clients who trust their veterinarian can open up more, be more open for suggestions and information from the veterinarian and get a better understanding of the patient's health condition and treatment.

2. Case study questions, hypotheses, and propositions

Main question is: How are the expectations toward the veterinarians and are there a gap between the customer and veterinarian perception during a consultation? Perception in this case is the whole experience from the two parts in a consultation situation; From expectations of the patient's health and treatment, trust gained during a consultation during the consultation and information sharing between client and veterinarian before, during and after consultation.

3. Theoretical framework for the case study, key readings

- Customer satisfaction – The perception gap Marketing theory
- Customer's experienced value of the service – Marketing theory
- Customer Lifecycle management theory (P. 253 digital marketing).

4. *Role of protocol in guiding the case study researcher*

Be an active listener, build relations toward the interviewee and ask questions that shows that you show interest in the interviewee's experiences. Do not be critical on how the interviewee see the world, and do not interrupt the interviewee when sharing his/her point of view. Stay to the questions in the protocol, unless there is relevant information shared that is not taken into consideration.

A: Data Collection Procedures

1. Names of contact persons for doing fieldwork
2. Data collection plan (Type of evidence to be expected, including roles of people to be interviewed, events to be observed and any other documents to be reviewed on site)

Semi-structured audio recorded interviews will be executed by the writer. Main focus is to identify the borders of the gap between the veterinarian and customer perception of expectation during a consultation. After interviews, the audio record will be transcribed to paper, before analysis. For both the veterinarian and client group, all data collected will be handled with anonymity. This is especially important for the veterinarian group, to make sure that (1) the veterinarian can open up and share their true opinion and (2) make sure that the veterinarian do not experience any consequences of their belief by employer. Expected preparation prior to fieldwork would be to get an overview over the interviewee's, collecting demographical data for the two interview groups:

For Veterinarians:

- Demographical data: Age, sex, practitioner time and main specialization (specialized fields/interests in the veterinarian field of work), work experience
- What are the preparations before a consultation, do you have any expectations toward the customer? What kind of data are you interested to gain during a consult? Do you use any open questions, or do you mainly use yes/no questions? Do you present options for treatment based on economical expectations? Do you prepare the customer in any way for the costs connected to the treatment/treatment options? have you had any training or formal teaching in client communication? what are your thoughts around good client communication and customer satisfaction?
- What do you think are the main expectation from the customer? Do you think costs are important for the customer in terms of deciding treatment plan? Do you listen and act based on the customers concerns? If you discover other issues with the patient during the consultation, do you inform the customer and treat/create a plan for those as well? Do you think your way of when informing about your findings and treatment options is understandable for the customer? Do you think it is important for the customer to understand everything that is wrong with the patient? How important is customer service for you?

For clients:

- What do you think is the most important skills of a veterinarian? What would impact the visit negatively? and what would make a positive impact? Would your perception and experience be impacted if the treatment of your animal would not be satisfying? Do you have any bad experience in previous visits? What contributed to the bad experiences?

- What are the good experiences from previous visits? How does the veterinarian fit into the role of bad/good experiences? Are there any other factors that contribute to the experience during a visit?

C. Data Collection Questions

Based on location, the interview will be held either as a face-to-face interview with interviewee and researcher or digital on teams. Face-to-face interviews will be audiotaped and transcribed. Digital interviews will be recorded and transcribed immediately after interview. During both interviews, the researcher will take notes and be able to come up with follow up questions or ask the interviewee to explain further thoughts where it is found necessary.

Questions Clients

Demographics:

- Age
- Sex
- Location
- Work status
- What animals do you have?
- How long have you had an animal for?
- What kind of role does your pet have in your family?
- Is your animal insured? Why?

Previous Experience

- Do you have any previous experiences with veterinary clinics?
- Where any of these positive experiences? (explain)
 - what contributed to the positivity?
- Have you had any bad experiences? (explain)
 - if so, what contributed to the negativity?

Before visit

- What do you expect before a veterinary visit? Which one?
 - Do you do any research yourself before the visit?
- What is important to you when visiting the vet clinic (in terms of welcoming, service, attitude, communication etc)?

During Visit:

- How does the veterinarian communicate with you?
- From your point of view, how interested is the vet in your pets' wellbeing?
- How seriously does the veterinarian consider your concerns?
- How much do you trust your vet?
 - what do you lay in the definition of trust?
- how do the information around your pet's condition, treatment plan and prognosis communicated from the vet?
 - How does the veterinarian articulate himself? (Does he use an understandable language or is the use of medical terms high and little understandable?)
- How involved are you in the decision of treatment of your pet?

- What are your thoughts of the pricing of the veterinary service?

After Visit:

- How much does your vet follow you after your visit?
 - How does he follow you up?
 - Which improvements could the vet have in terms of followed up after the consultation?

Other:

- Is there anything you miss from your veterinarian?
- If you could change anything, what would it be?
- Do you think the veterinarian meets your expectations in terms of:
 - Treatment
 - Communication
 - Service
 - Equipment and knowledge
- What do you think is the most important skills from the vet?

Veterinarian Demographic:

- Age
- Experience
- International experience
- Education and specialization
- Previous knowledge and/or courses in customer service

Before consultation

- How do you introduce yourself to the client and patient?
- Do you involve the client during the examination?
- Which preparation do you do before a consult?
- Which expectations do you think the client has to you when he/she arrives?

During consultation

- What kind of information do you find valuable for the client to have?
- How relevant is the client's opinion and thoughts around the patient?
- What challenges do you meet during a consult?
- How do you present and involve the client in decisions on tests needed for further exploration of the pets' condition? (Several tests needed, Costs, time, etc)
- Is the owner presented with more than one option in treatment plans?
- What are your thoughts on the pricing of veterinary services?
- How important is communication and relations with the client for you?
- What would you think is enough time for your consultations?
 - Is this something that you can decide yourself?

After consultation

- How are your follow up protocols on your patients after a visit?

Other

- In a perfect world, what would you change in your profession?
- Are there any skills you miss or feel you should have learned about in the consultation room?
- Do you think you have understandable communication that the client understands?
- What do you think are the most important skills as a vet?

Guide for the Case Study Report

1. Audience(s) for the report and stylistic preferences for communicating with the audience

Findings of this research will be presented as a Master thesis for faculty of economics at NTNU.

The relevance of this research is on an international scale for the veterinary industry. The time has come to map out the customer service expectation of the veterinary industry. By doing so, the work can be started on how to meet the expectations, what skills are relevant from the customer perspective, and how to best communicate with the client. By starting to define the borders between the customer expectations and experience, and what the veterinarian believes the customer expect and experience, quantitative research can be held on an international level to verify and validate the data found in this research. When borders of the perception gap are clear, the work to minimize the gap can be executed, giving the veterinary industry a boost on its customer service.

