VetsSurvey 2020

The Independent Global Veterinary survey since 2013

Part 2 report: Understanding the Veterinary Industry

WSAVA
Global Veterinary Community

CM Research

Vetspanel

Thank you to all our partners, who helped make this study possible

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CM Research

Vetspanel

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CHAPTER 01

INTRODUCTION

At Vetspanel we are committed to understanding the veterinary industry so that we can help build a better future, both in terms of animal health and the wellbeing of veterinary professionals.

This report marks the second release of our VetsSurvey 2020 data. Part one focused on the impact the pandemic has had on staff, patients and practices. This report, part two, has a focus on you, the veterinarians, without whom this wouldn't be possible.

In the following pages you'll find an overview of where the veterinary industry is today and where we hope to be in the future.

We thank each of the 5000 veterinary professionals from Brazil, to Poland, to Australia and everywhere in between, who took the time to share with us their thoughts and views in this, the 9th annual VetsSurvey.

With gratitude,

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Vetspanel

5,000
veterinary professionals

91
countries represented

6
continents covered

Overview of methodology

WHAT? Online quantitative survey run among WSAVA members, readers of veterinary publications and Vetspanel members

WHEN? Interviewing from the 1st until the 30th of November 2020

WHERE? 91 countries, covering six continents

WHO? 5,000 veterinary professionals (veterinarians, veterinary nurses, veterinary technicians & practice managers)

Countries covered in this report & sample sizes

Wherever possible we show results by country. Where sample sizes are below 50 veterinary professionals we have grouped regions. An overview of the individual countries and regions is below.

All countries	United Kingdom	France	Germany	Spain	Italy	Portugal	Belgium	Netherlands	Nordics (Net)	Poland	Russia	Canada	United States of America	Central America & the Caribbean (Net)	Argentina	Brazil	Colombia	Australia	Asia (Net)
4995	1285	430	277	380	355	74	66	60	69	90	48	130	685	102	55	267	65	236	132
								Denmark (n=29) Finland (n=12) Iceland (n=1) Norway (n=6) Sweden (n=21)					Bahamas (n=1) Barbados (n=1) Belize (n=4) Costa Rica (n=7) Cuba (n=1) El Salvador (n=1) Guatemala (n=17) Jamaica (n=5) Mexico (n=40) Saint Vincent and the Grenadines (n=1) Trinidad and Tobago(n=24)					Bangladesh (n=2) China (n=4) India (n=29) Indonesia (n=30) Iran (n=1) Israel (n=1) Japan (n=1) Kazakhstan (n=1) Malaysia (n=17) Nepal (n=3) Pakistan (n=1) Philippines (n=10) Singapore (n=12) South Korea (n=4) Sri Lanka (n=1) Syria (n=1)	

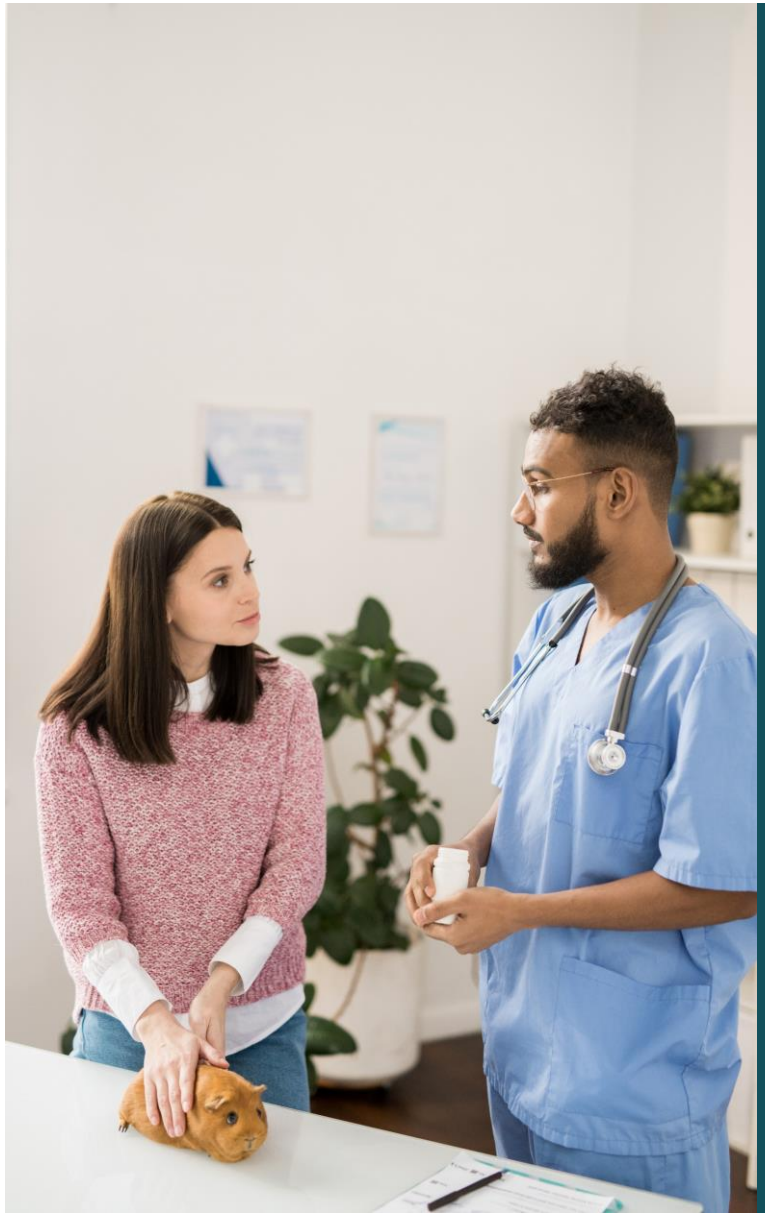
CHAPTER 02

EXECUTIVE SUMMARY

CM Research

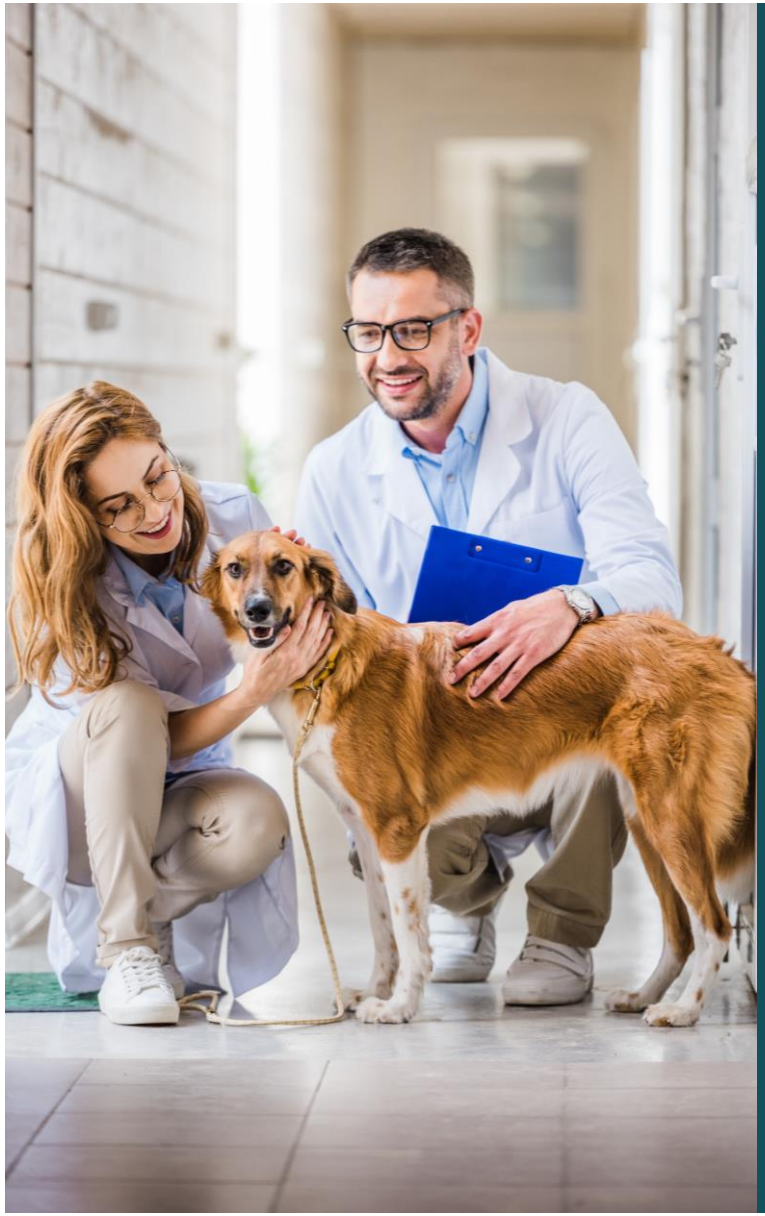
Veterinary & Practice Profiling

- Over the past five years we have seen a continued feminisation of the industry; Belgium and Asia (as a region) are currently the only male dominated countries.
- Nurses and technicians are overwhelmingly a female role.
- Overall, most veterinarians work in independent/privately owned practice. However, corporatisation in English speaking markets continues to grow, with the UK still far out in front. In the UK, 48% work in corporate practices.
- There are some signs of increasing corporatisation in the EU4, though we are yet to see corporates take hold of any of these markets.



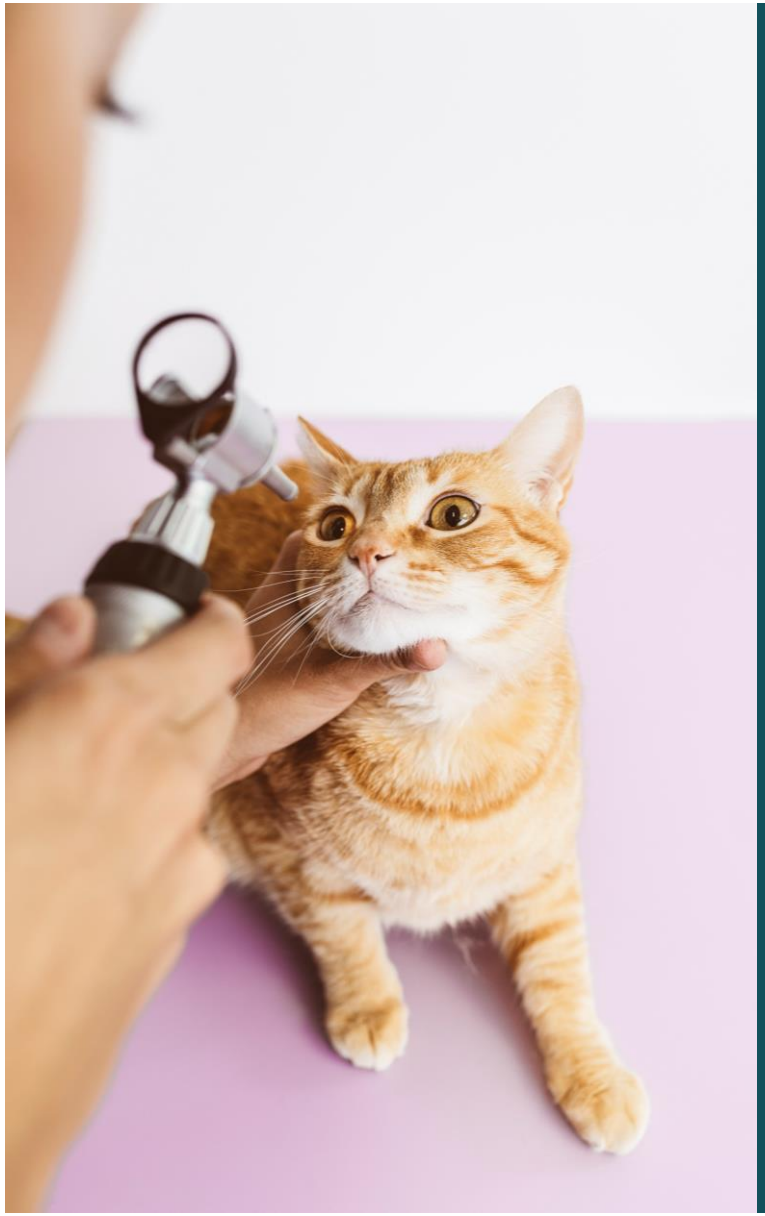
State of business

- The financial impact of the pandemic has been noticeable, with a sharp rise in clinics claiming to be doing worse financially year-on-year. Clinics in Italy and Russia have been hit the hardest.
- In contrast, a majority of Argentinian, Australian and Dutch clinics report an increase in year-on-year revenue.
- Despite the reported increases in client numbers, the focus for most clinics is still on engaging existing clients and getting new ones – or taking no action with regard to either increasing or reducing client numbers.



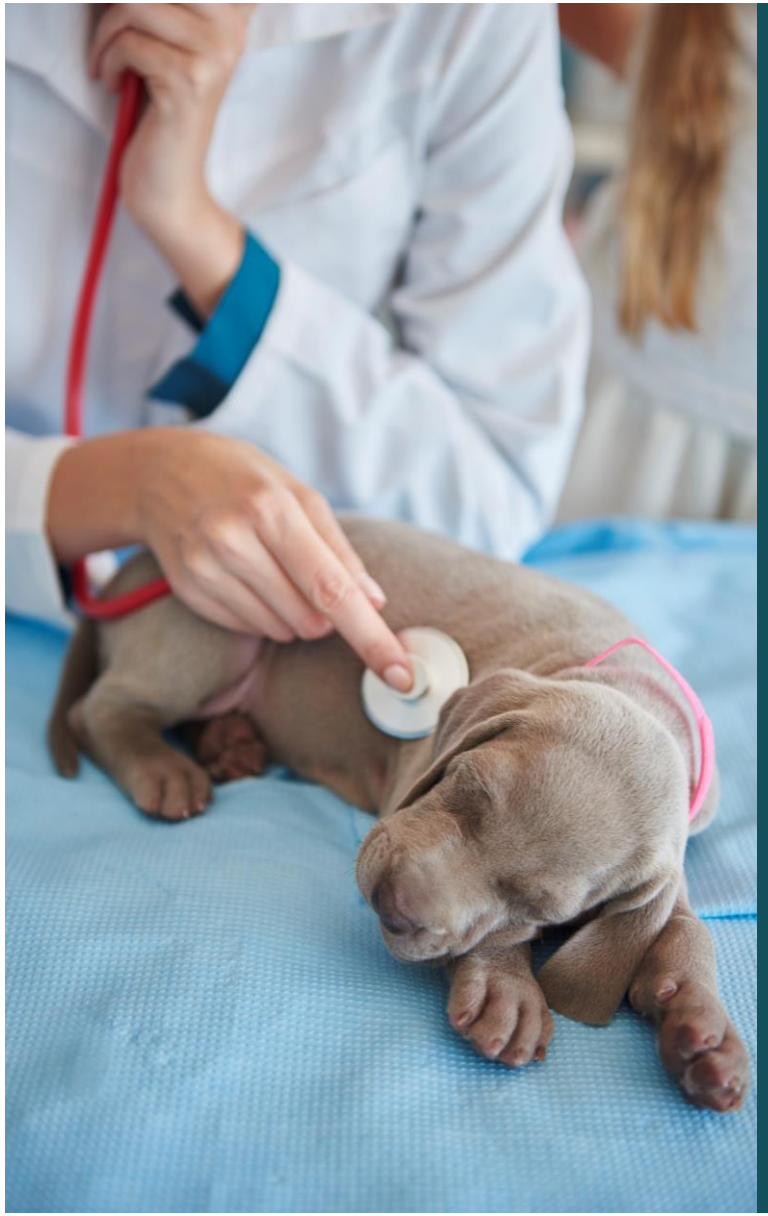
Communication & CE

- Communication with clients and manufacturers via phone and digital routes (e.g. email, webinars) have increased in the wake of the pandemic.
- Social media, online advertising and ordering products via manufacturers' websites or via the phone – remain stable.
- Areas of speciality remain the most popular CPD topics, while sessions on pet behaviour and imaging featured at the bottom. 37% of veterinary professionals have also attended CPD focusing on COVID advice during the pandemic.



Current Challenges

- Vet practices have seen an increase in workload and issues with time management and recruitment of suitable staff/vets.
- There has been an increase in unhappy staff. The UK (49%), Canada (40%) and US (39%), reported significantly higher levels of job dissatisfaction among staff compared to the global average (17%).
- Argentina (72%) is facing the highest increases in cost of products / medications.



The Future

- Asia, CA and the Caribbean, and Brazil are the most hopeful countries. Colombia, Spain and UK are the least hopeful.
- Over half of vet practices are expecting more demanding pet owners.
- Around half are expecting an increase in the cost of treatment, influence of the internet and specialisation. Specialisation is expected particularly in Southern Europe, the Nordics, Argentina and Brazil.
- Around 4 in 10 veterinary professionals expect better diagnostics and more online consultations & telemedicine; the Nordic region expects the most changes in the technology area.
- Colombia and Central America & the Caribbean are expecting the biggest increases in mobile vets (around 5 in 10).
- Changes in attitudes to animal health and welfare and pet owners further valuing the veterinary services they receive are the two things that veterinary professionals think would make the most positive difference to the future of veterinary medicine.

Wellbeing

- Job satisfaction levels dropped during the pandemic in all countries/regions. The UK and Russia are the countries with the highest decreases (-28% and -30%), while the Nordics, Argentina, Brazil and Australia are the countries/regions with the smallest decreases, ranging from -2% to -8%.
- Stress levels also saw an increase, particularly among nurses and technicians. The least stressed groups are part timers, males and professionals with 30+ years of experience.
- Burnout is also on the rise, particularly in the US. Germany, Italy and the Netherlands meanwhile reported the lowest levels of burnout.

Career aspirations

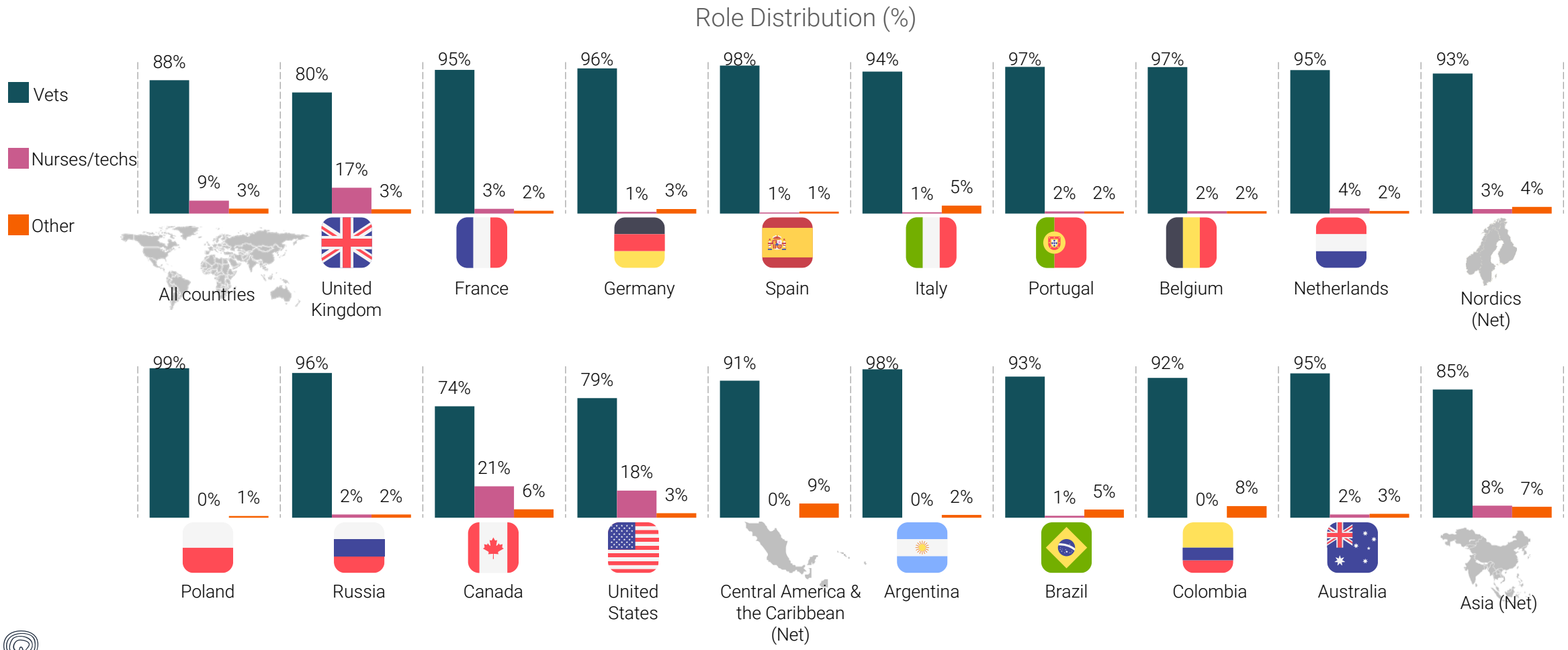
- 9% of veterinarians globally claim to want to leave the profession altogether. In Portugal, this number is well above the global average at a staggering 17%.
- An interest in attaining further qualifications or investing more time in research is particularly high in South American countries like Colombia, Brazil and Argentina.
- Despite reporting higher stress levels, females are more likely than men to want to remain employed vets. Overall, however, roughly 1 in 4 regardless of gender reported a desire to reduce their hours through e.g. part time or locum work

CHAPTER 03

VETERINARY PROFILES

Role distribution by country/region

Across the industry we spoke mostly to veterinarians. In the UK, US & Canada we reached a higher proportion of veterinary nurses and techs. This is not representative of role distribution across each country, but of our Vetspanel membership.

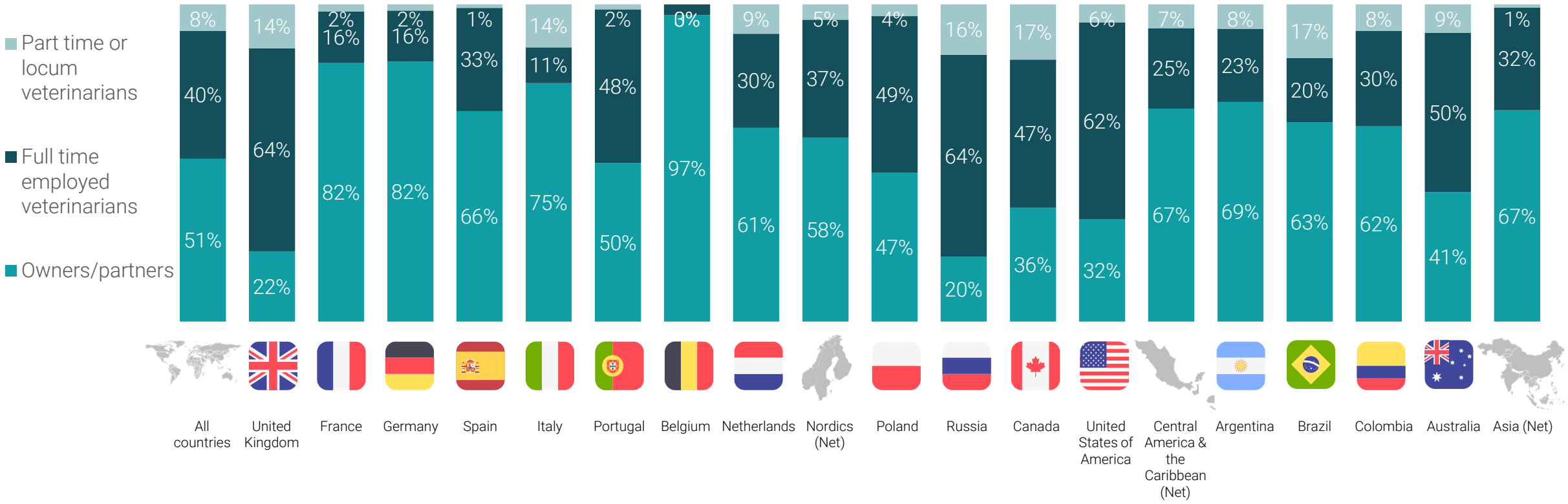


Qrole: Which of the following best describes your current role? All answering (4760) United Kingdom (1244), France (418), Germany (267), Spain (368), Italy (339), Portugal (66), Belgium (63), Netherlands (57), Nordics (Net) (67), Poland (185), Russia (46), Canada (797), United States of America (447), Central America & the Caribbean (Net)(93), Argentina (43), Brazil(257), Colombia (42), Australia (129), Asia (Net) (99)

Owner partner vets and employed vets distribution

Countries where there are higher levels of corporatisation, such as the UK and US have a higher proportion of employed vs. owner/partner veterinarians. Countries with more independent practices have higher numbers of owner partners. No surprises here and, again, this is reflective of Vetspanel membership.

Owner/partners vs. employed vet distribution



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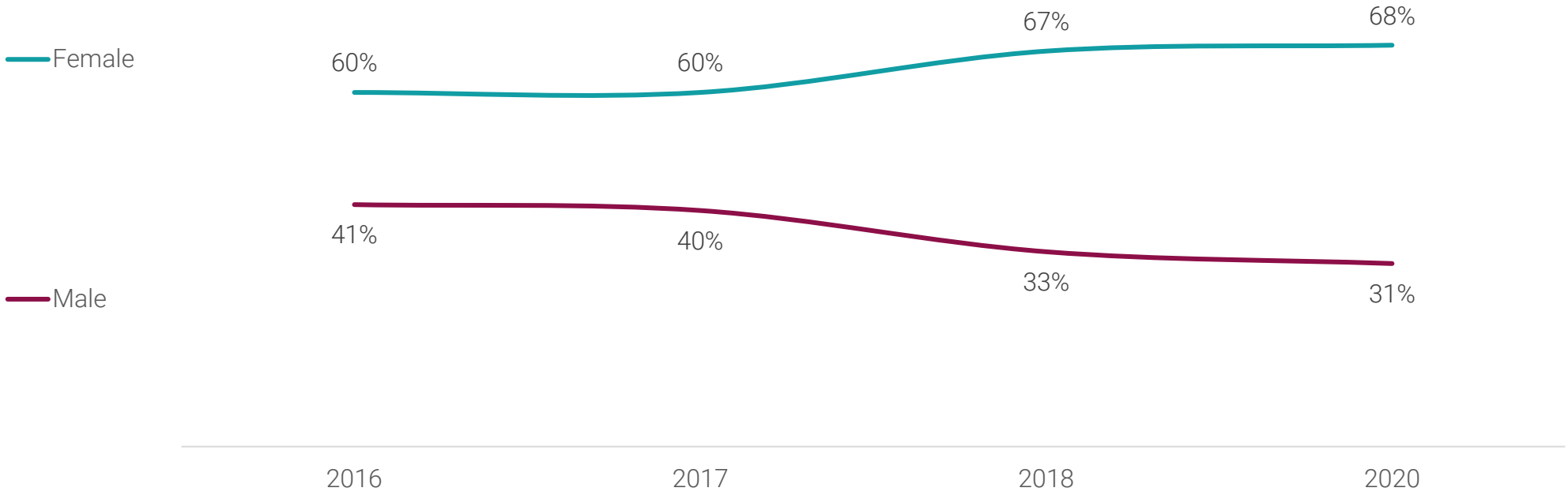
Gender of veterinary professionals over time

In the past 5 years we've seen more women entering the profession. The veterinary field is now overwhelmingly made up of female professionals.

Gender distribution of the veterinary profession over time (%)
Global figures
Prefer not to say & other genders added in 2020 (1% prefer not to say)

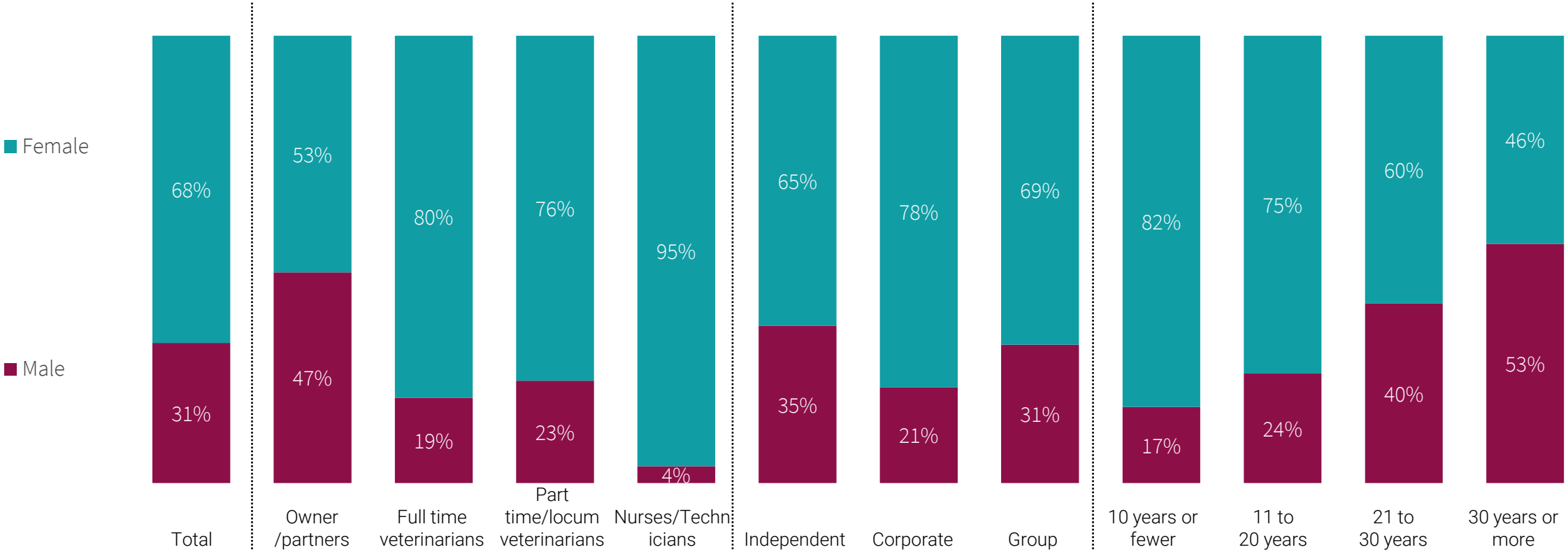


Gender distribution by subgroup

Owner/partners have a more equal gender split compared to the average distribution. The only group where male professionals still outnumber females is among veterinarians with 30 years or more experience. Nurses and technicians are overwhelmingly a female role.

Gender distribution

Differences by subgroup, global



QGender: Are you? All answering (4760), Owners/partners (1988), FTE veterinarians (1537), Part time/locum (318), Nurses/technicians (348), Independent (2938(, Corporate (854), Group (296), 10 years or fewer (1250), 11 – 20 years (1286), 21 – 30 years (959, 30 years or more (821)

Gender in 2020 by country

Only Belgium & Asia (as a region) have more male veterinary professionals than female veterinary professionals. In Russia, Canada and the United States over 8 in 10 veterinary professionals are female. France, Spain, Italy are the most balanced in terms of gender representation, though still with a female skew.

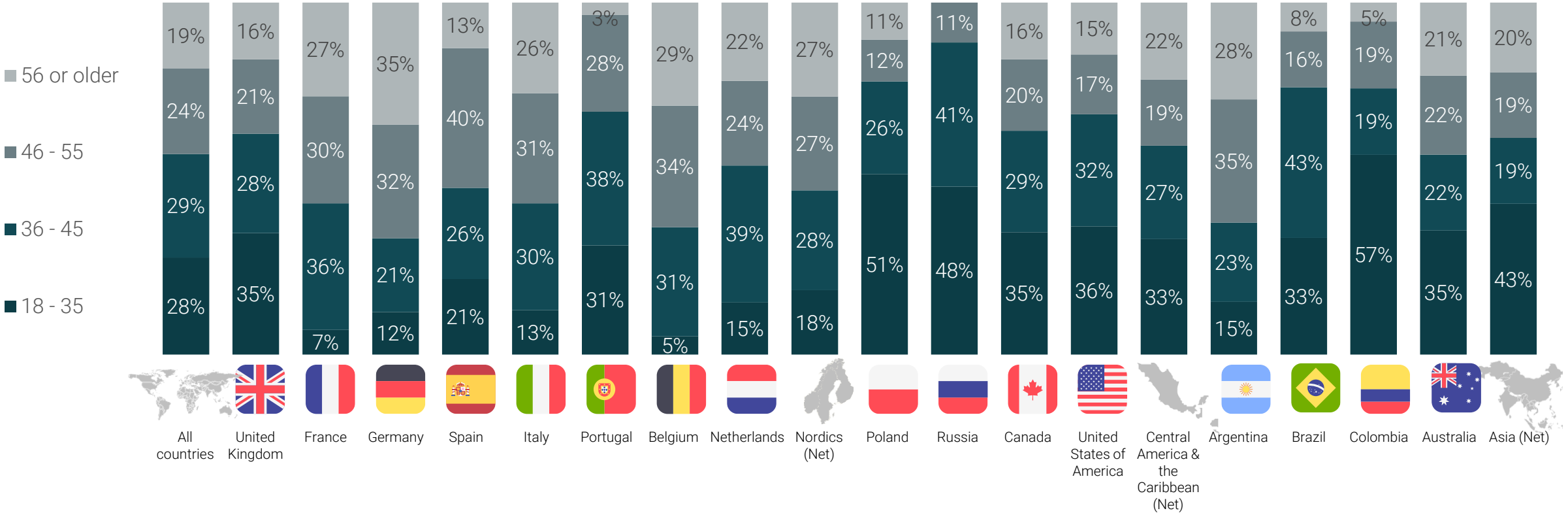
	All countries	United Kingdom	France	Germany	Spain	Italy	Portugal	Belgium	Nether-lands	Nordics (Net)	Poland	Russia	Canada	United States of America	Central America & the Caribbean (Net)	Argentina	Brazil	Colombia	Australia	Asia (Net)
Female	68%	74%	52%	67%	57%	56%	78%	47%	72%	63%	63%	84%	85%	86%	60%	63%	73%	56%	71%	46%
Male	31%	26%	48%	32%	43%	43%	22%	53%	28%	37%	34%	16%	14%	14%	35%	32%	26%	44%	29%	49%

QGender: Are you? All answering (4322), United Kingdom (1072), France (398), Germany (249), Spain (342), Italy (326), Portugal (58), Belgium (58), Netherlands (54), Nordics (Net) (60), Poland (174), Russia (44), Canada (750), United States of America (631), Central America & the Caribbean (Net)(65), Argentina (316), Brazil(211), Colombia (36), Australia (244), Asia (Net) (91)

Age distribution in 2020 by country & region

There is significant variance in age distribution across countries and regions. In Germany, around 1 in 3 veterinary professionals are 56 or older whereas in Spain it is only around 1 in 8 (13%). The UK, Portugal & Poland have the highest proportion of young (under 35) veterinary professionals in Europe, whilst Russia and Colombia stand out as a young veterinary market across the rest of the world.

Age group distribution
By country & region

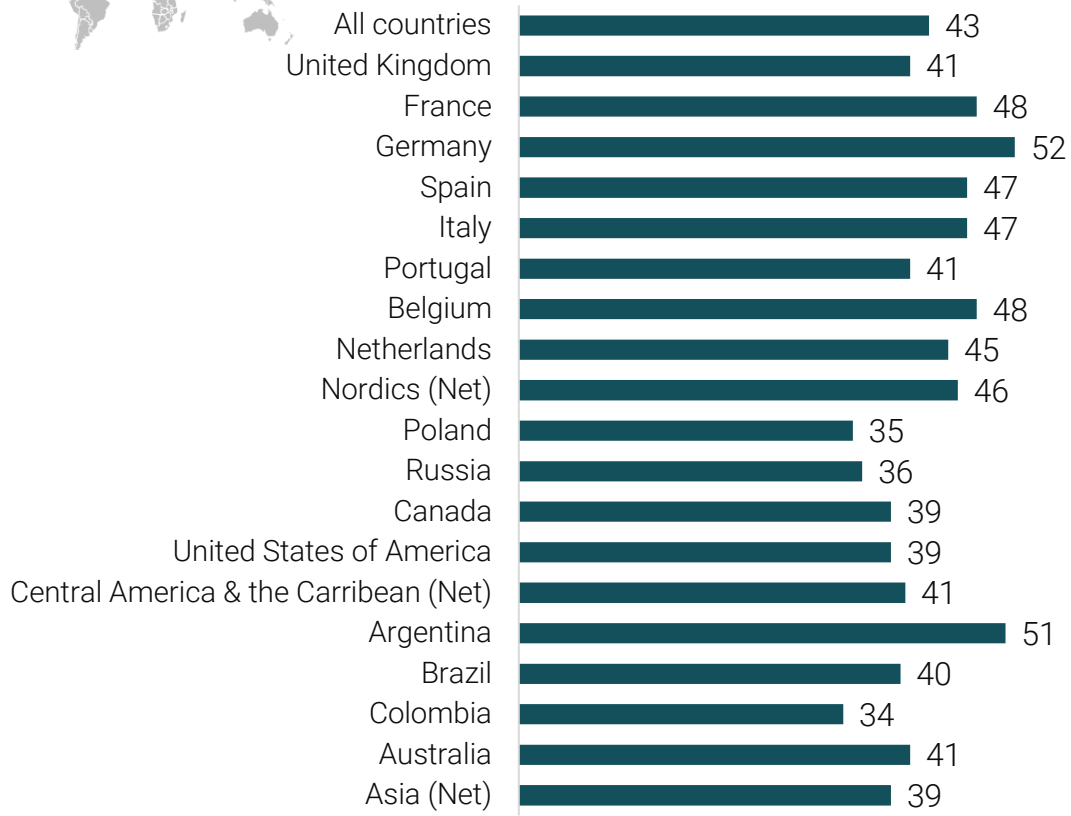


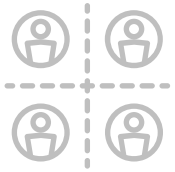
Qage. How old are you? All answering (4322), United Kingdom (1072), France (398), Germany (249), Spain (342), Italy (326), Portugal (58), Belgium (58), Netherlands (54), Nordics (Net) (60), Poland (174), Russia (44), Canada (750), United States of America (631), Central America & the Caribbean (Net)(65), Argentina (316), Brazil(211), Colombia (36), Australia (244), Asia (Net) (91)

Median age

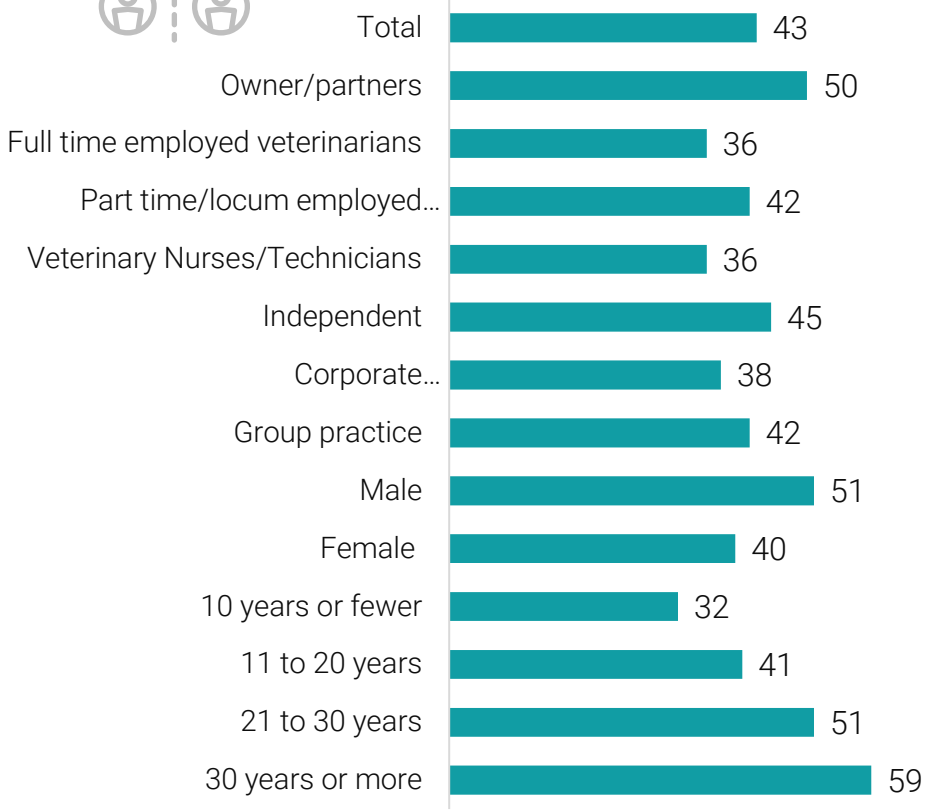
The median age of veterinary professionals across the globe is 43. The oldest veterinary professionals are from Argentina and Germany, whereas the youngest are from Colombia, Poland, Russia and North America. Corporate practice veterinarians are slightly younger and, unsurprisingly, owner/partners are older than FTE veterinarians.

Median age
By country





Median age
By subgroup



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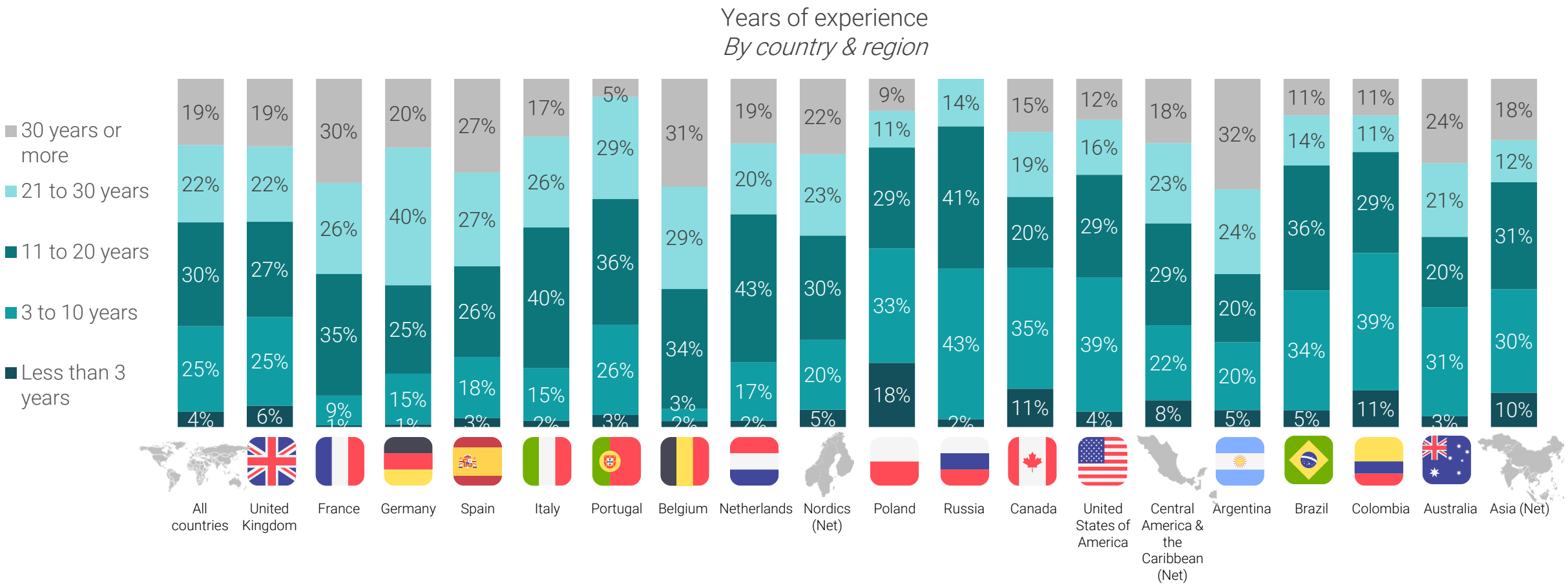
Years of experience by country & region

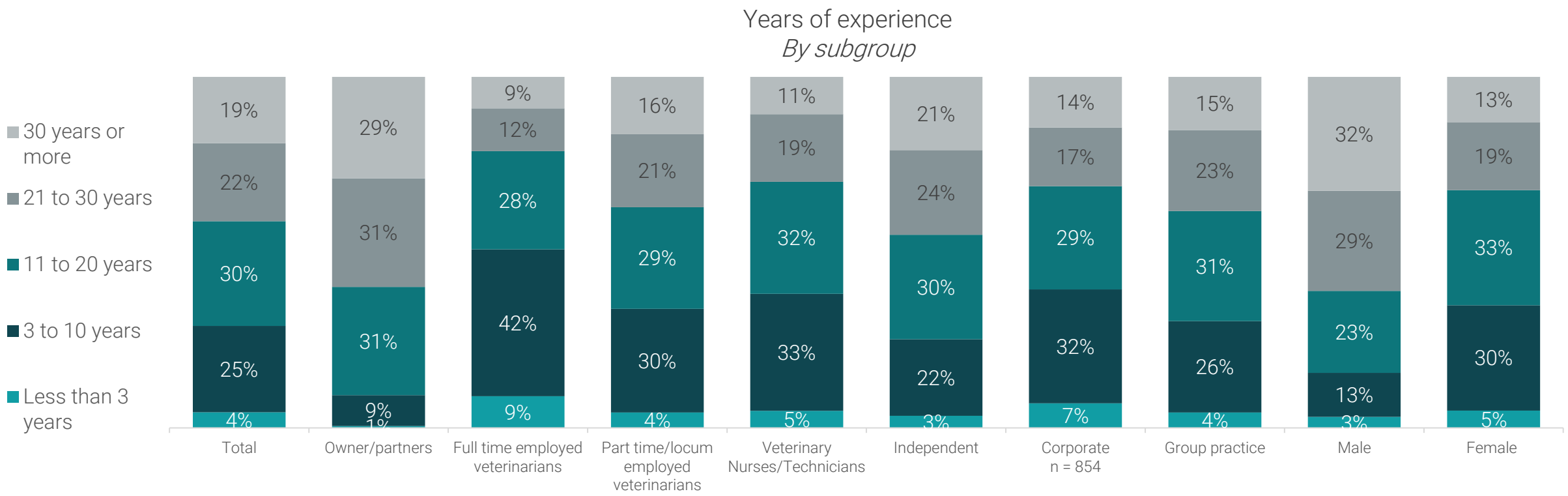
Years of experience correlates strongly with age.



Approximately how long have you been working in the veterinary profession? All answering (4322), United Kingdom (1072), France (398), Germany (249), Spain (342), Italy (326), Portugal (58), Belgium (58), Netherlands (54), Nordics (Net) (60), Poland (174), Russia (44), Canada (750), United States of America (631), Central America & the Caribbean (Net)(65), Argentina (316), Brazil(211), Colombia (36), Australia (244), Asia (Net) (91)

Years of experience by subgroup

Corporate practice workers are one of the most least experienced groups. Part time or locum veterinarians tend to have more experience than full time veterinarians.



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Species treated by country & region

Most of the veterinary professionals in our sample are predominantly small animal focused. France, Germany, the Nordics and central America have more treating large animals.

% vets/nurses/techs treating any.....

	Dogs	Cats	Small furries	Equine	Farm animals
All countries	97%	97%	60%	11%	12%
United Kingdom	98%	97%	84%	8%	8%
France	97%	97%	69%	22%	25%
Germany	93%	91%	83%	22%	16%
Spain	100%	99%	45%	4%	5%
Italy	95%	98%	47%	6%	7%
Portugal	100%	98%	36%	2%	7%
Belgium	98%	98%	90%	16%	16%
Netherlands	98%	98%	94%	11%	13%
Nordics (Net)	98%	93%	75%	25%	23%
Poland	99%	99%	72%	12%	9%
Russia	100%	100%	51%	5%	7%
Canada	96%	96%	32%	11%	8%
United States of America	96%	97%	35%	10%	11%
Central America & the...	95%	94%	58%	16%	23%
Argentina	98%	95%	20%	15%	10%
Brazil	99%	98%	19%	8%	4%
Colombia	100%	97%	19%	11%	19%
Australia	99%	98%	64%	9%	12%
Asia (Net)	98%	97%	67%	12%	19%

What percentage of your professional time consists of treating each of the following? The sum of your answers should equal 100%. All answering (4322), United Kingdom (1072), France (398), Germany (249), Spain (342), Italy (326), Portugal (58), Belgium (58), Netherlands (54), Nordics (Net) (60), Poland (174), Russia (44), Canada (750), United States of America (631), Central America & the Caribbean (Net)(65), Argentina (316), Brazil(211), Colombia (36), Australia (244), Asia (Net) (91)

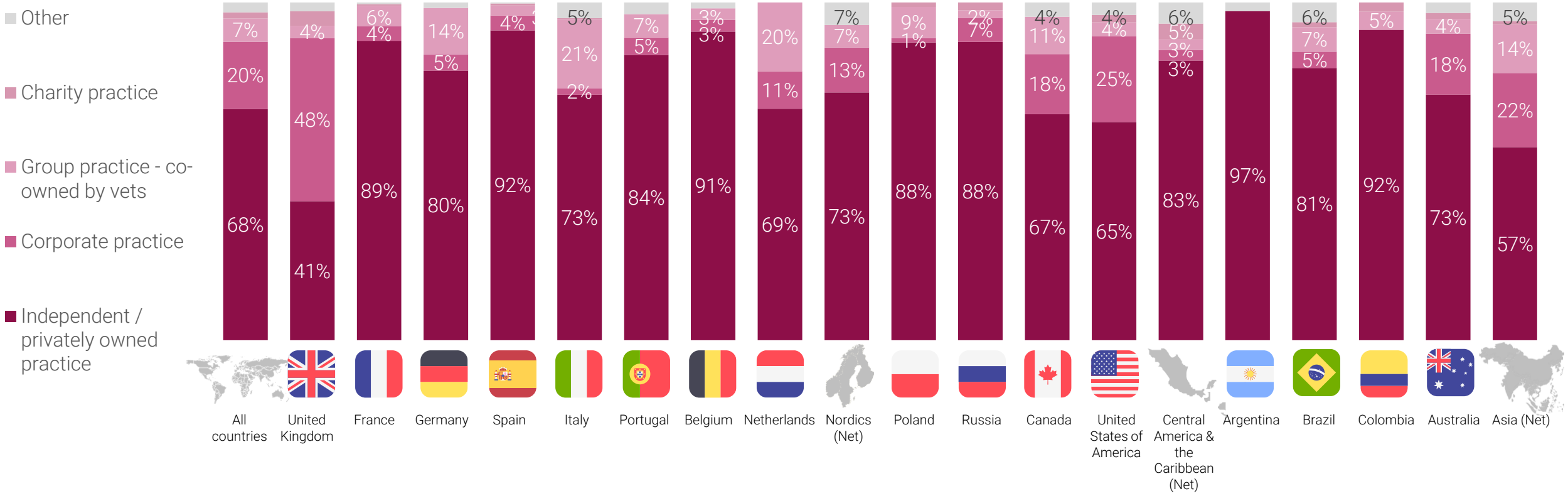
CHAPTER 04

PRACTICE PROFILES

Practice ownership by country

Overall, most veterinary professionals work in an independent/privately owned practice. And Argentina, Colombia and Spain have the highest proportions with more than 9 in 10 working in independent/privately owned practices. On the other hand, almost a half (48%) in the UK work in corporate practices.

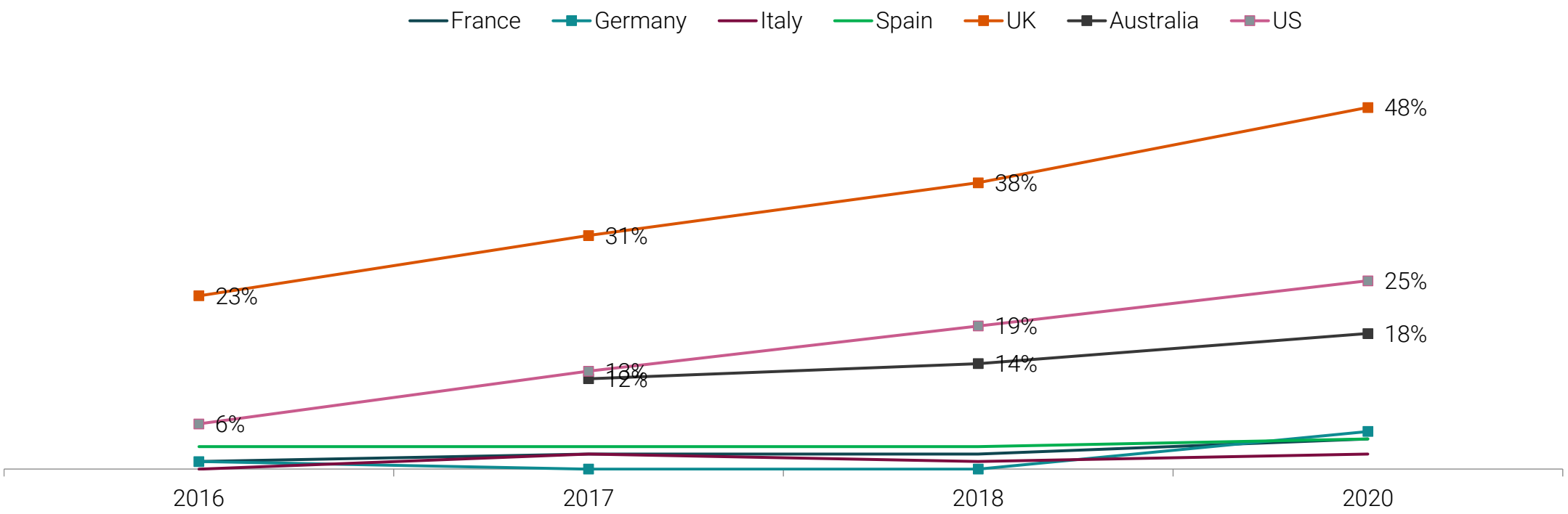
Practice ownership
By country & region



Which of the following best describes the ownership of your practice? United Kingdom (1072), France (398), Germany (249), Spain (342), Italy (326), Portugal (58), Belgium (58), Netherlands (54), Nordics (Net) (60), Poland (174), Russia (44), Canada (750), United States of America (631), Central America & the Caribbean (Net)(65), Argentina (316), Brazil(211), Colombia (36), Australia (244), Asia (Net) (91)

Corporatisation across time

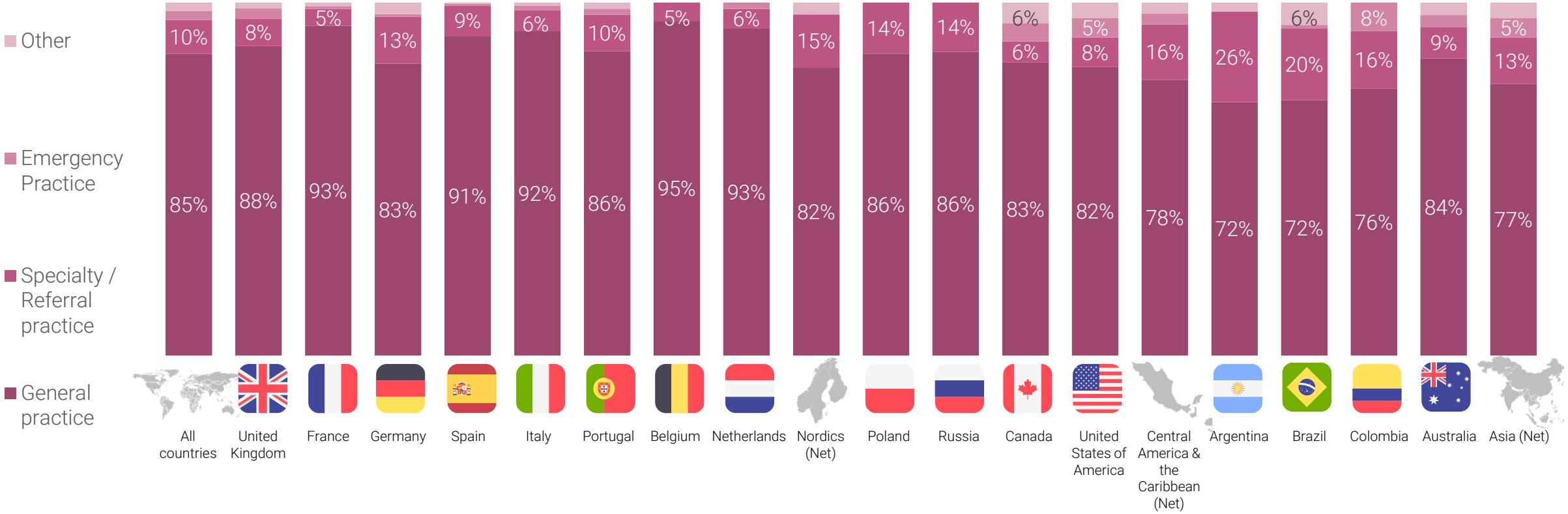
Corporatisation in English speaking markets continues to grow, with the UK still far out in front. There are some signs of increasing corporatisation in the EU4, though we are yet to see corporates take hold of any of these markets yet.



Type of practice by country

Overall, the majority of veterinary professionals participating the survey work in a general practice. More than a quarter (28%) work in speciality/referral, emergency, and other types of practices in Argentina and Brazil whereas all other countries have less than a quarter working in those type of practices.

Type of practice
By country & region

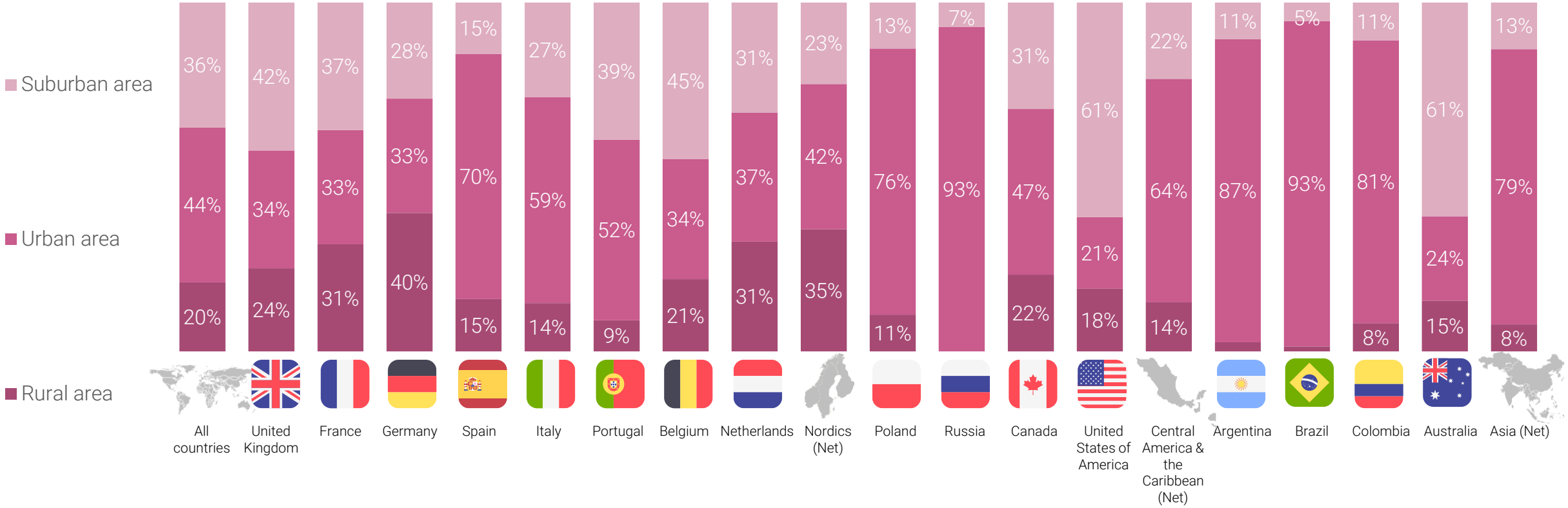


Which of the following best describes the type of practice you work in?
N.B. Only countries where n > 30 displayed

Practice location by country

In contrast to all other countries, more than a half of veterinary professionals in the US and Australia work in suburban areas. On the other hand, vast majority of professionals work in urban areas in Russia and Brazil, whereas around 1 in 3 work in rural areas in Germany, France and Netherlands.

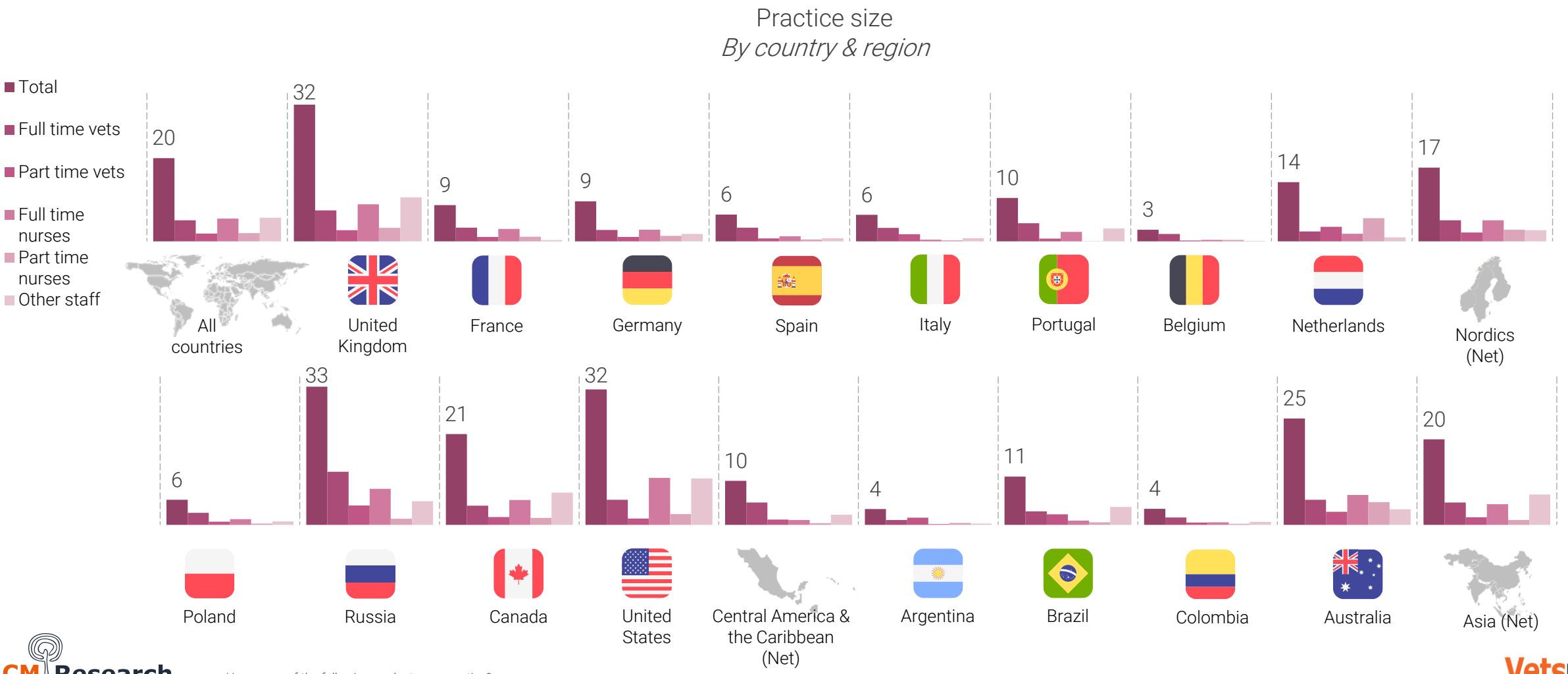
Practice location
By country & region



Which of the following best describes the area where your practice is located?
N.B. Only countries where n > 30 displayed

Size of practice by country

With the exception of Russia, English speaking markets have larger sized practices than most other countries. Colombia, Argentina and Belgium have the smallest sized practices.



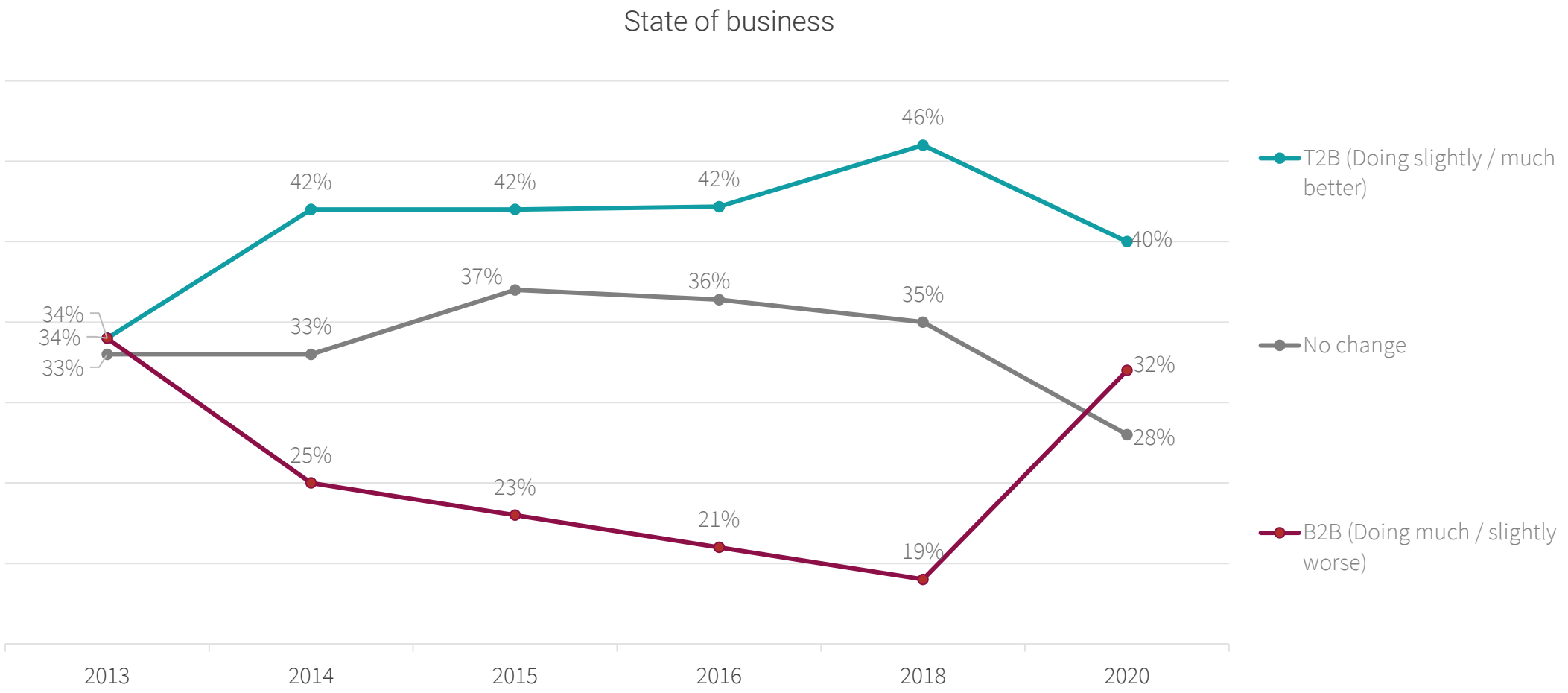
How many of the following work at your practice?
N.B. Only countries where n > 30 displayed

CHAPTER 05

STATE OF BUSINESS

State of business

The financial impact of the pandemic has been noticeable, with a sharp rise in clinics claiming to be doing slightly/much worse financially year-on-year.

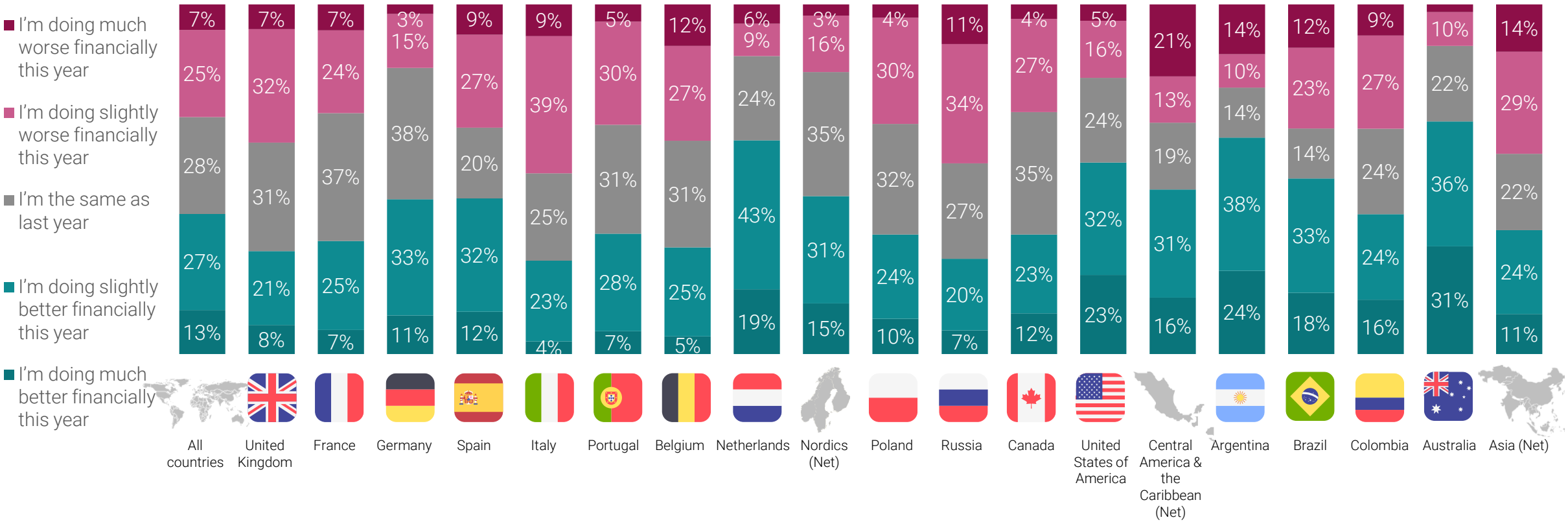


The current climate has affected different businesses in different ways. Compared to last year, would you say:
N.B. Only countries where n > 30 displayed

Current financial state by country

Clinics in Italy and Russia have been hit the hardest, while a majority of Argentinian, Australian and Dutch clinics in contrast report an increase in year-on-year revenue.

Current financial state
By country & region

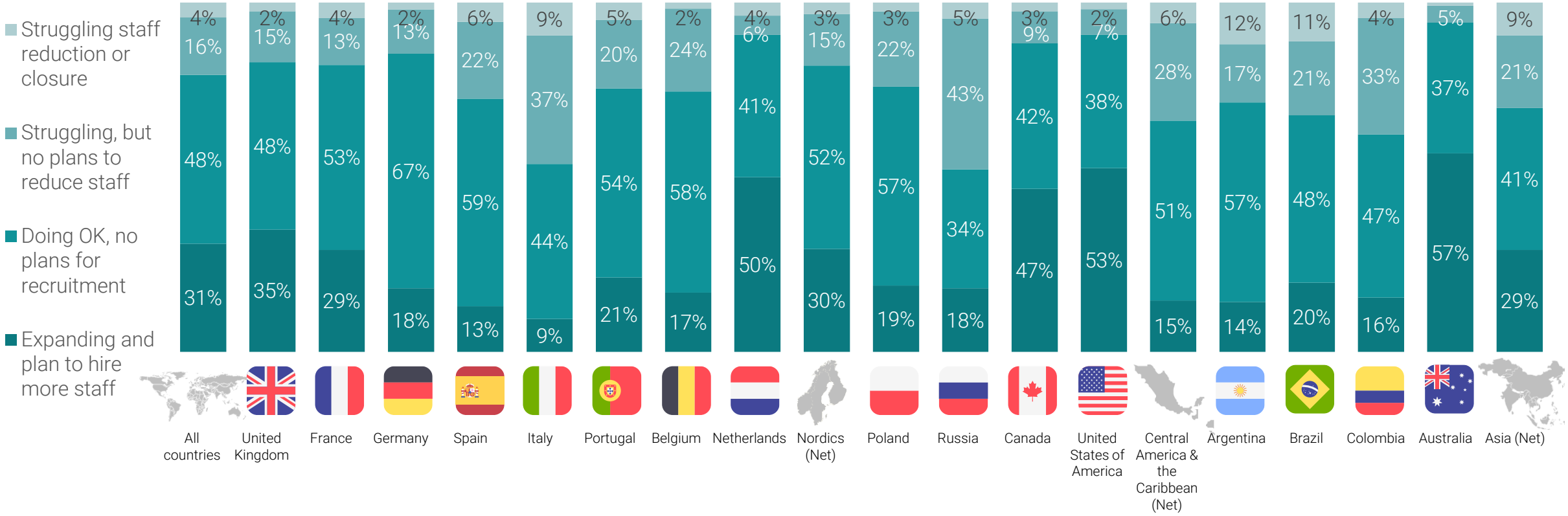


The current climate has affected different businesses in different ways. Compared to last year, would you say:
N.B. Only countries where n > 30 displayed

Staffing by country

Around half of clinics in the Netherlands, Canada, US and Australia are expanding and plan to hire more staff. The majority of countries are doing OK and have no plans to recruit more staff. Italy (37%) and Russia (43%) are the countries which report a struggle but no plans to reduce staff the most, while Argentina (12%) and Brazil (11%) are the countries which are struggling the most and face staff reduction or closure.

Staffing
By country & region

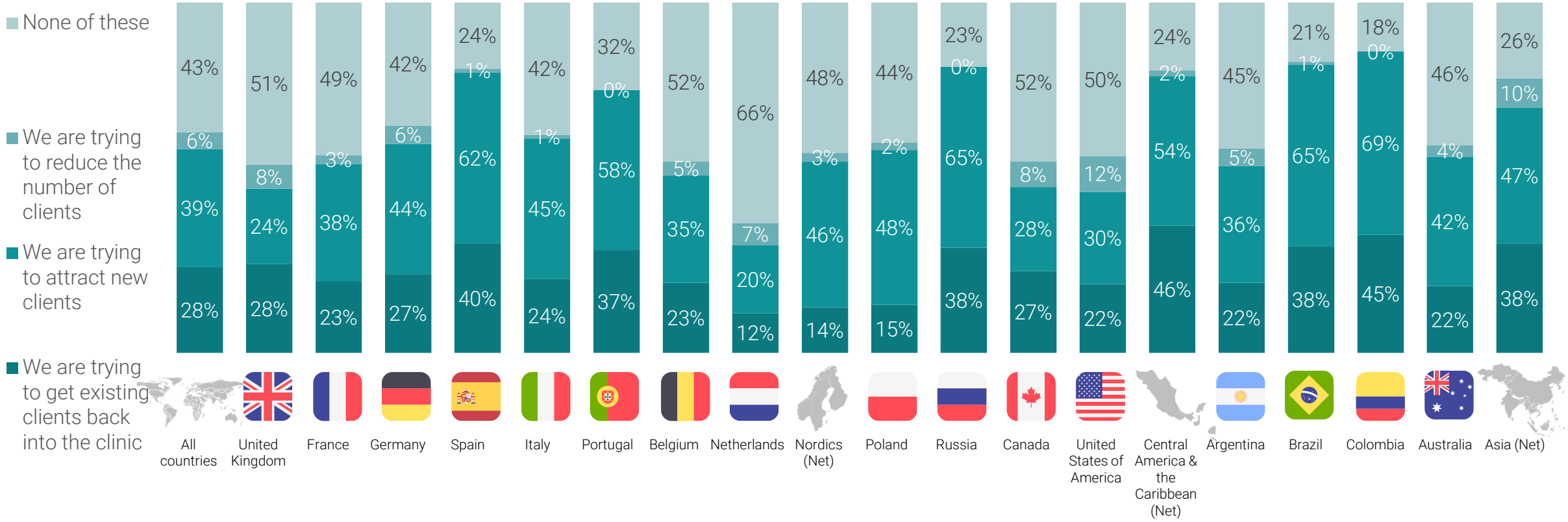


Where do you place your practice on the following scale?
N.B. Only countries where n > 30 displayed

Getting clients in the practice

Despite the reported increases in client number, the focus for most clinics is still on engaging existing clients and getting new ones – or taking no action with regard to either increasing or reducing client numbers.

Getting clients in the practice
By country & region



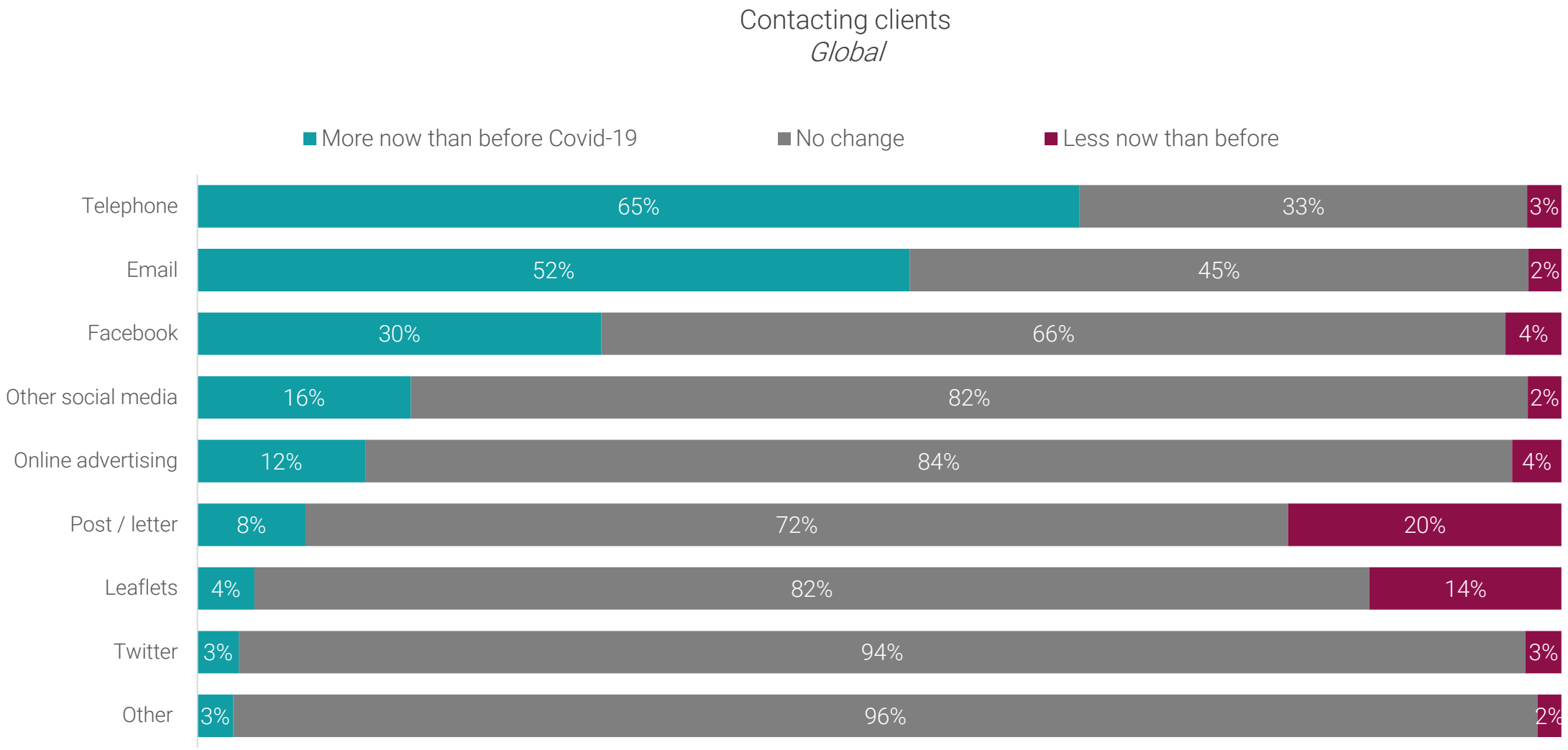
And which of the below statements apply to your clinic?
N.B. Only countries where n > 30 displayed

CHAPTER 06

COMMUNICATION & CE

Contacting clients

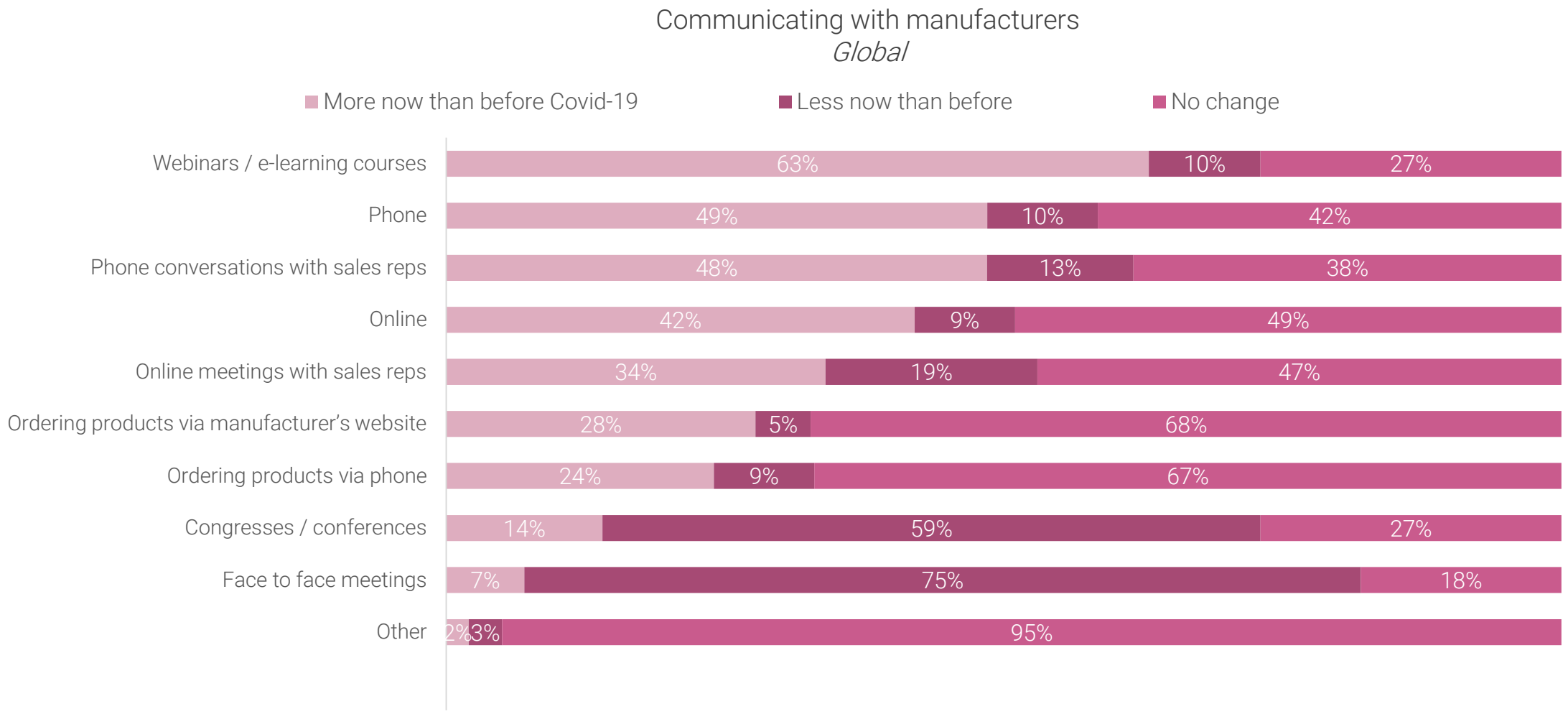
Clinics' contacting clients by telephone and email have increased, while social media and online advertising are showing no change.



Thinking about the time before the Covid-19 outbreak, compared to now/today, how has your clinic's usage of each of these ways of contacting clients changed?

Communicating with manufacturers

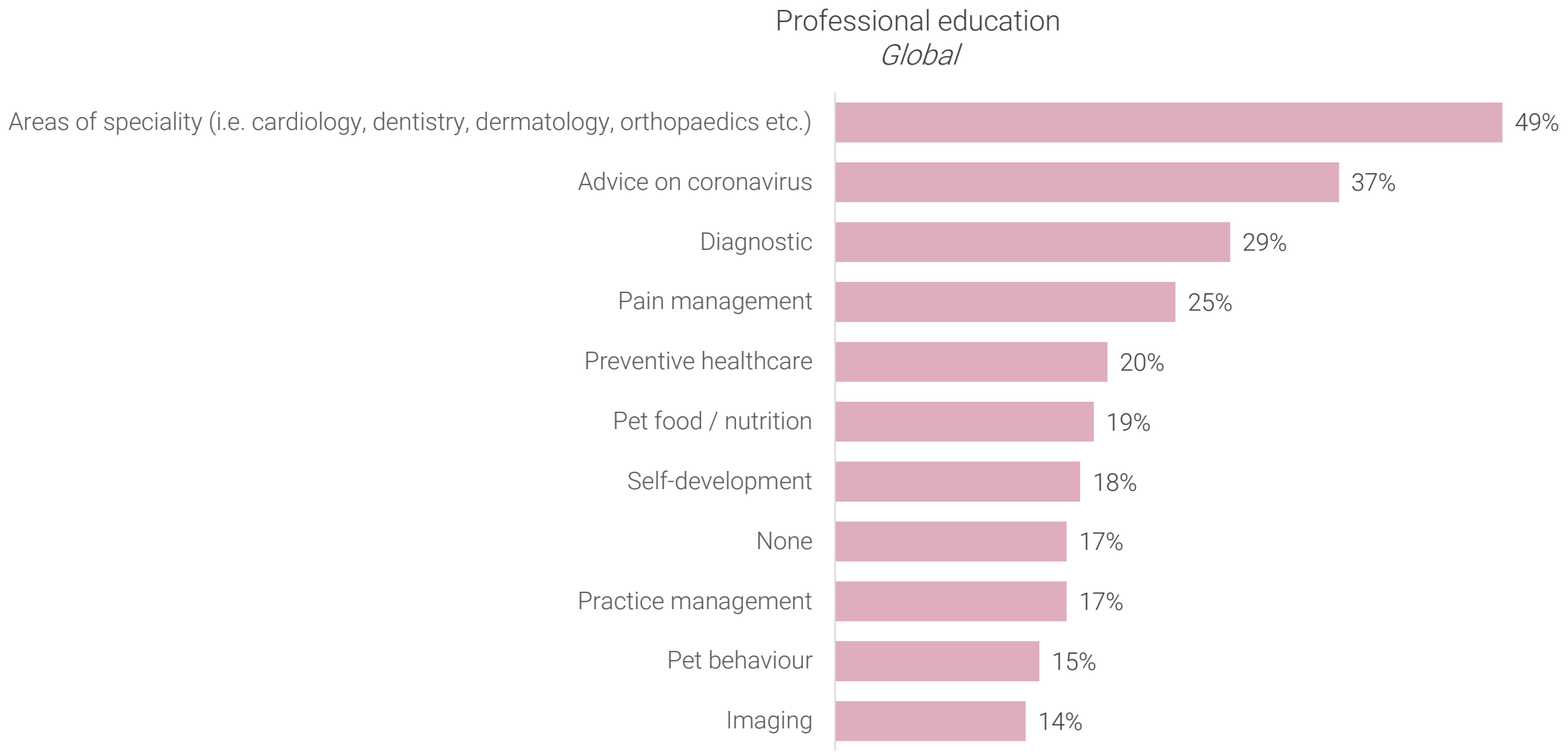
Communication with manufactures through webinars/e-learning courses and on the phone have increased, while ordering products via manufacturers' website or via the phone are showing no difference.



And how were you communicating with manufacturers before the Covid-19 outbreak compared to now?

Professional education

Half of vets have focused on receiving CPD on their areas of speciality, while 37% are following advice on Covid. CPD on pet behaviour and imaging featured at the bottom.

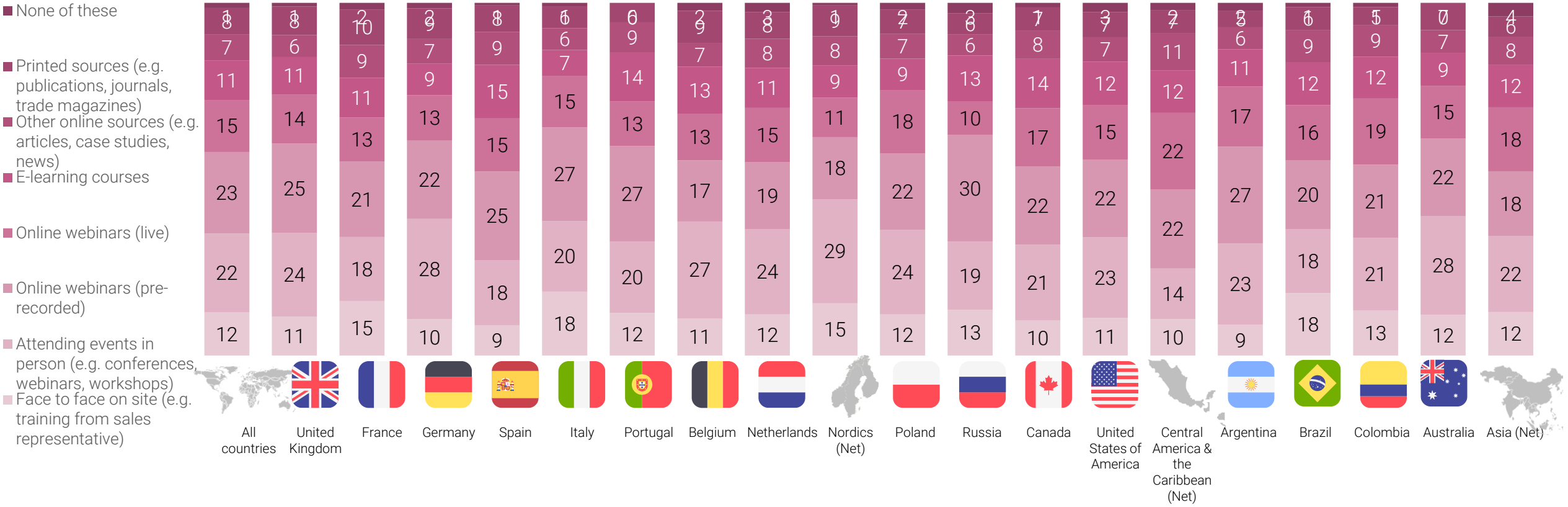


During the coronavirus outbreak, what continued professional education did you receive / attend?

Training sources

Training through pre-recorded webinars and attending events in person (e.g. conferences) were the main sources of CPD before the pandemic, a trend consistent across countries.

Training sources
By country & region



NQ15 Below is a list of potential sources you could find useful to access as part of ongoing training for your CPD. Please distribute 100 points across them to indicate how useful they are for you personally?

CHAPTER 07

CHALLENGES CURRENT & FUTURE

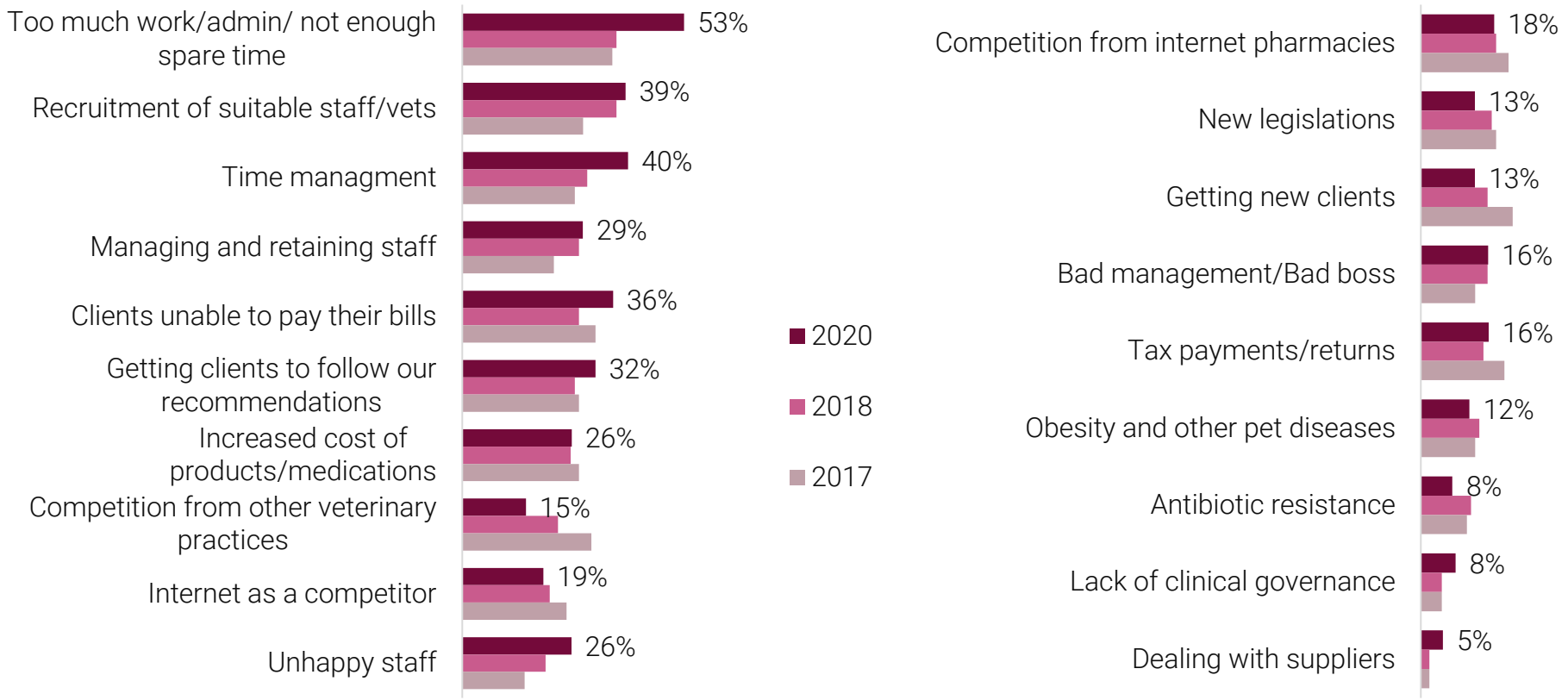
Biggest challenges globally

1. Too much work, not enough time — 66%
2. Client compliance & payment — 57%
3. Recruiting & managing staff — 49%
4. Competition — 36%
5. Costs & finances — 36%
6. Staff morale — 32%
7. Governance, policy & legislation — 20%
8. Clinical challenges — 17%

Biggest challenges over time

While competition has decreased since 2017, vet practices have seen an increase in work and issues with time management and recruitment of suitable staff/vets; those are the biggest challenges they face at the moment. This has led to an increase in unhappy staff.

Biggest challenges faced
Since 2017
All regions and countries

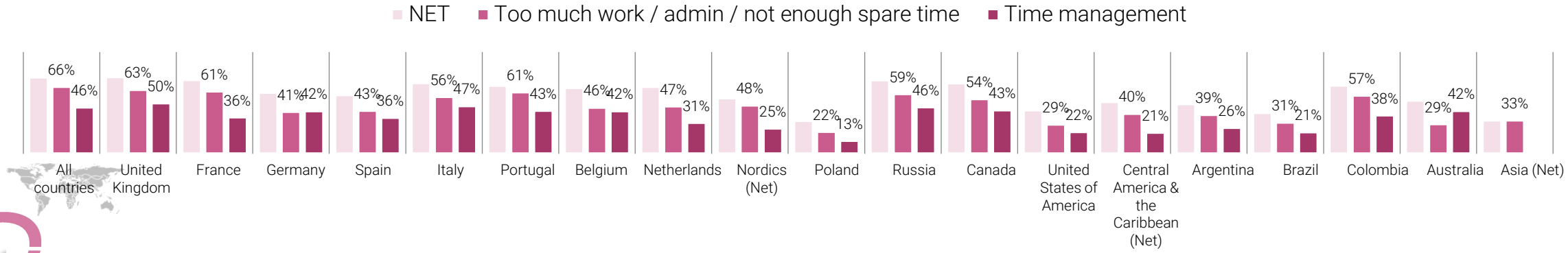


VS1. What would you say are the biggest challenges facing your vet practice at this moment? All answering (3779) United Kingdom (1023), France (311), Germany (161), Spain (256), Italy (242), Portugal (66), Belgium (61), Netherlands (57), Nordics (Net) (62), Poland (84), Russia (46), Canada (126), United States of America (447), Central America & the Caribbean (Net)(93), Argentina (43), Brazil(257), Colombia (42), Australia (129), Asia (Net) (99)

What would you say are the biggest challenges facing your vet practice at this moment?

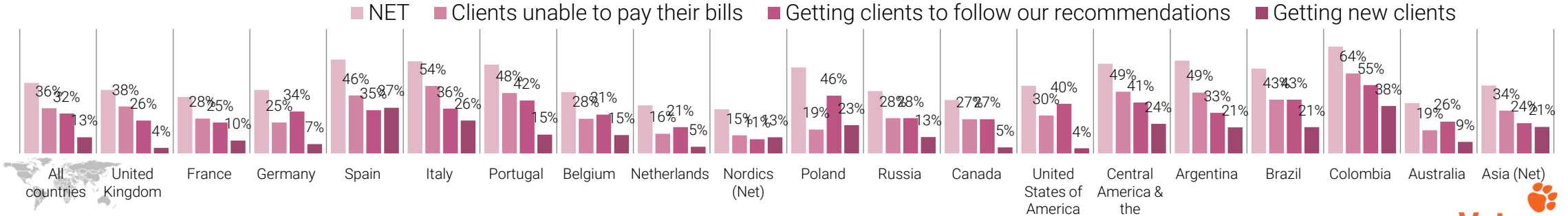
1 Too much work, not enough time (% agreeing)

In most countries, having too much work or admin and not enough spare time is one of the biggest challenges for veterinary professionals. Notable exceptions here are those in Poland, the US, Argentina & Brazil. This isn't necessarily because the volume of work is lower in these countries, but that there are sometimes cultural and social rewards for high work output. It is only in Australia where time management is a bigger challenge than too much work.



2 Client compliance and payment (% agreeing)

Spain, Italy, Central & South America have a higher level of client payment issues. Client compliance appears to be a particular issue for those in Portugal, Poland, the US, Brazil and Colombia. Client acquisition is a challenge for professionals in Spain, Colombia and Italy. In other parts of Europe, such as France, the Netherlands and Nordic countries, we see fewer challenges reported relating to clients



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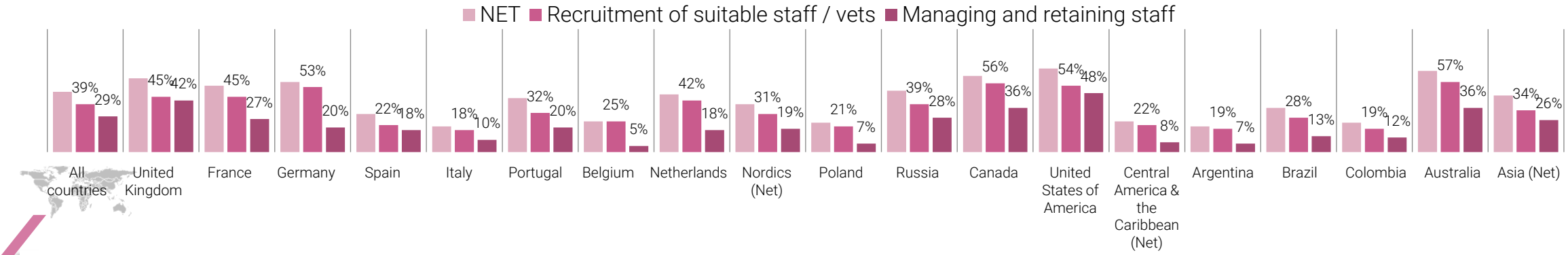
What would you say are the biggest challenges facing your vet practice at this moment?

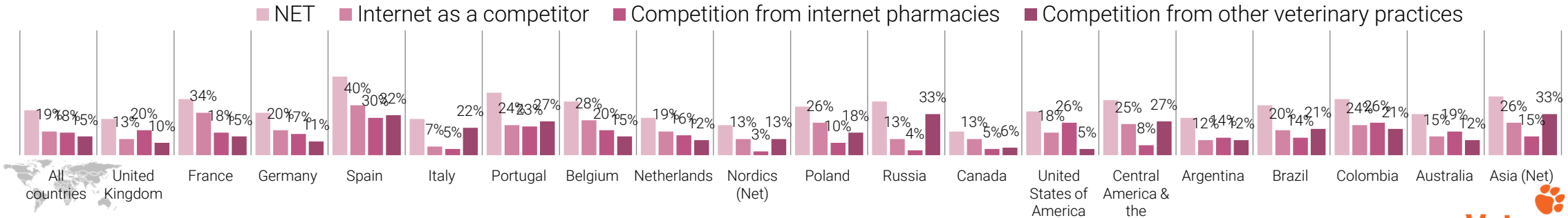
3 Recruiting & managing staff (% agreeing)

In the majority of countries recruitment is more of an issue than retention. However, in the United Kingdom and USA retention and recruitment are issues at a similar level. The countries with the biggest current recruitment challenges are Australia, Canada, USA & Germany. The countries which say they are not struggling with recruitment tend to be those which have been harder hit by the pandemic.



4 Competition (% agreeing)

There are a number of country and regional differences when it comes to competition. For example, in Spain it is the internet that is seen to pose the biggest challenge in terms of competition. However in in Asia and Russia it is other veterinary practices which are seen as (relative to other sources) the biggest competitive challenge. Practices in the US and the UK see competition from internet pharmacies as a bigger challenge than other veterinary practices.



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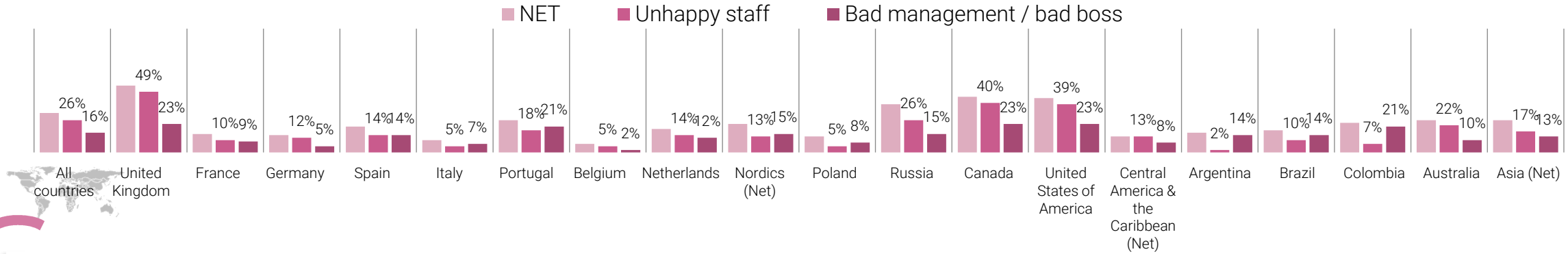
What would you say are the biggest challenges facing your vet practice at this moment?

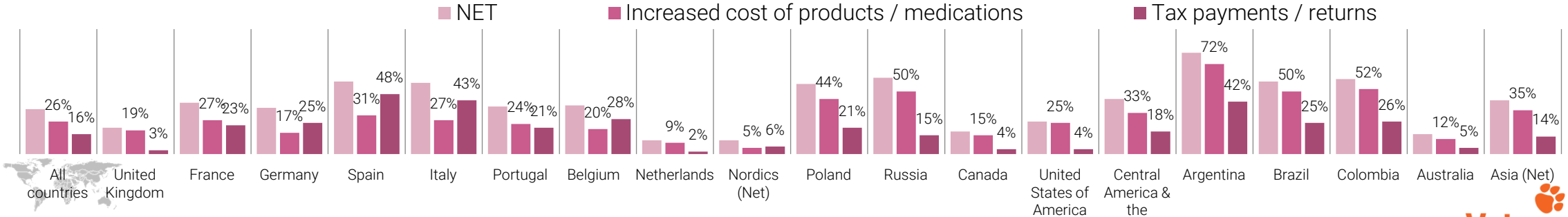
5 Staff Morale (% agreeing)

In the UK (49%), Canada (40%) and the US (39%), there are reports of a lot higher numbers of unhappy staff when compared to the average (17%). A little less than a quarter of UK, Portugal, Canada, US and Colombia clinics also report issues of bad management / bad boss, the highest numbers across countries/regions.



6 Costs & finances (% agreeing)

Argentina (72%) is performing the highest increases in cost of products / medications when compared to other countries/regions. Columbia (52%), Brazil (50%) and Russia (50%) follow, while the rest of the countries/regions report percentages of 44% and below. Regarding tax payments / returns, Spain (48%) is reporting the highest tax payments / returns, followed by Italy (43%) and Argentina (42%). The rest of the countries/regions report percentages of 28% and below.



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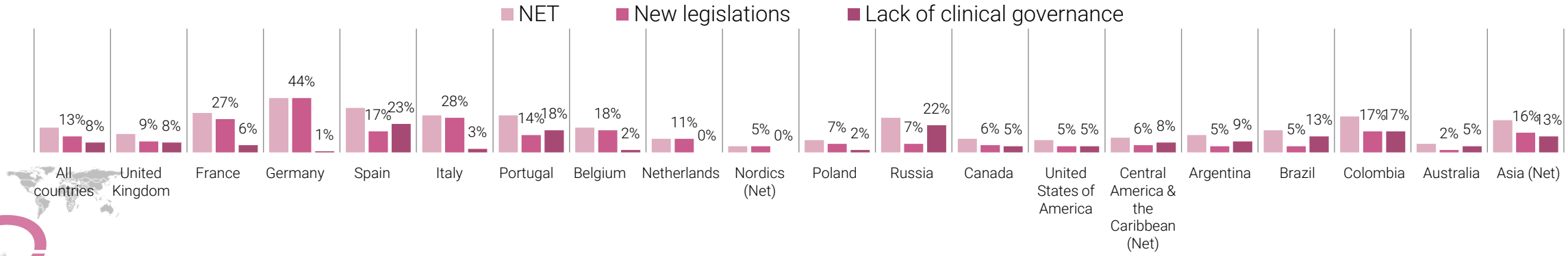
• What would you say are the biggest challenges facing your vet practice at this moment?

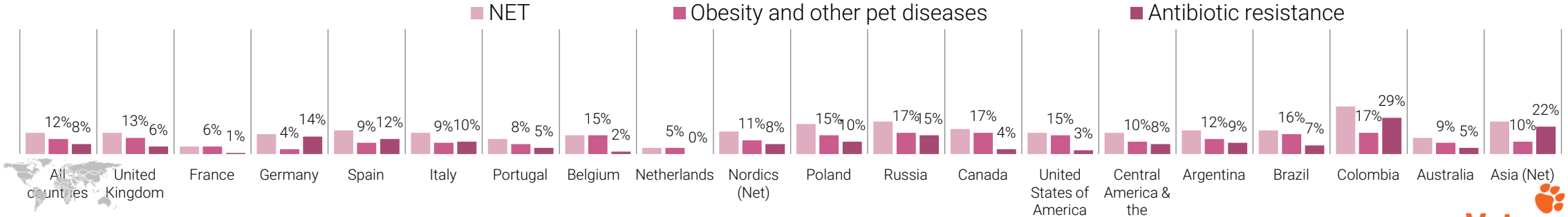
7 Legislation & clinical governance (% agreeing)

New legislations and lack of clinical governance do not seem to be a big challenge for most of the countries/regions. Germany is an exception where 44% of clinics report an increase in new legislations, while Italy (28%), France (27%) and Belgium (18%) follow. Lack of clinical governance performed the highest percentage in Spain in approximately a quarter of clinics, while Russia (22%) and Portugal (18%) followed.



8 Clinical challenges (% agreeing)

Obesity, other pet diseases and antibiotic resistance are not big challenges for most clinics across countries/regions. Russia (17%), Canada (17%), Colombia (17%) and Brazil (16%), are the countries which report obesity and other pet diseases as challenges the most. Regarding antibiotic resistance, Columbia (29%) is reporting the highest percentage by and large, followed by Asia (22%) and Russia (15%).



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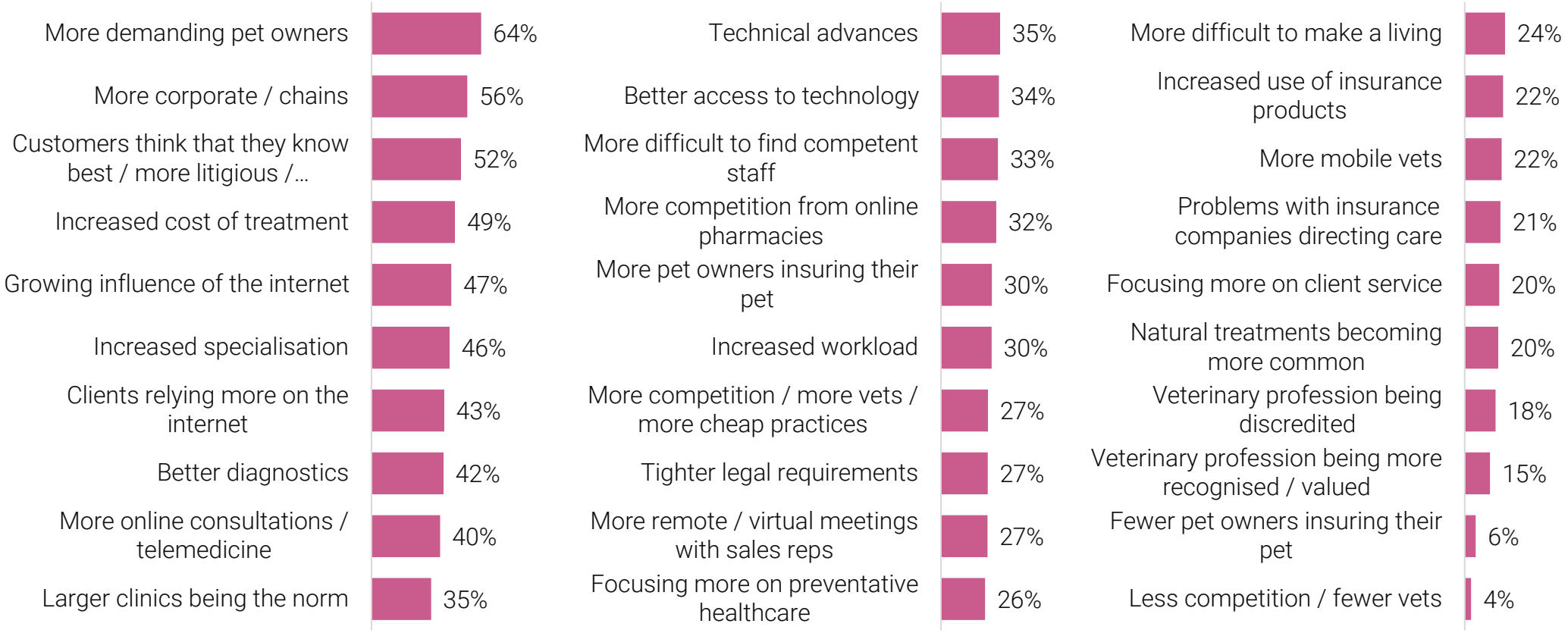
What changes do veterinary professionals expect?

Over half of vet practices are expecting more demanding pet owners and more corporate chains. Around half are also expecting an increase in the cost of treatment, influence of the internet and specialisation. They are however not expecting big changes in pet owners' insurance of pets, their recognition as professionals or in the use of natural treatments.

Changes expected in next 10 years

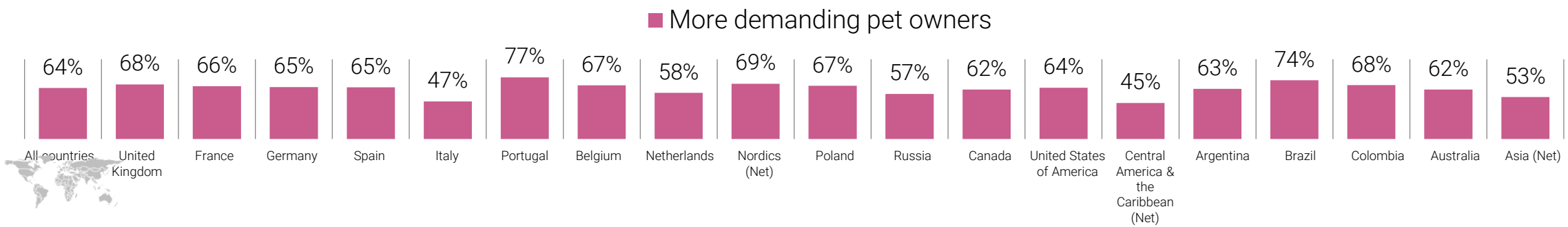
All regions and countries

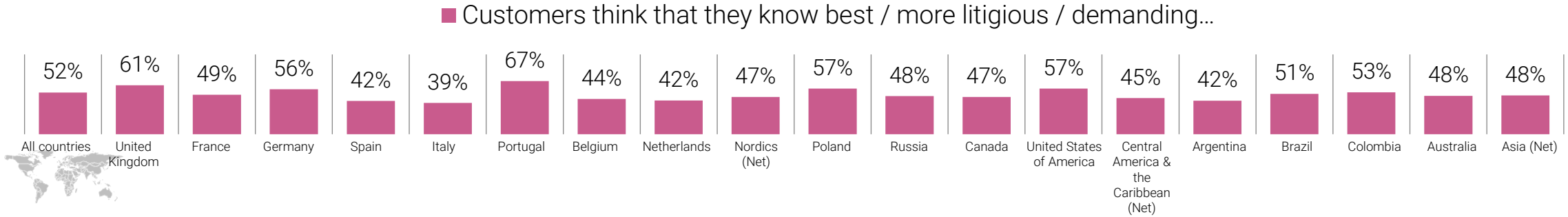


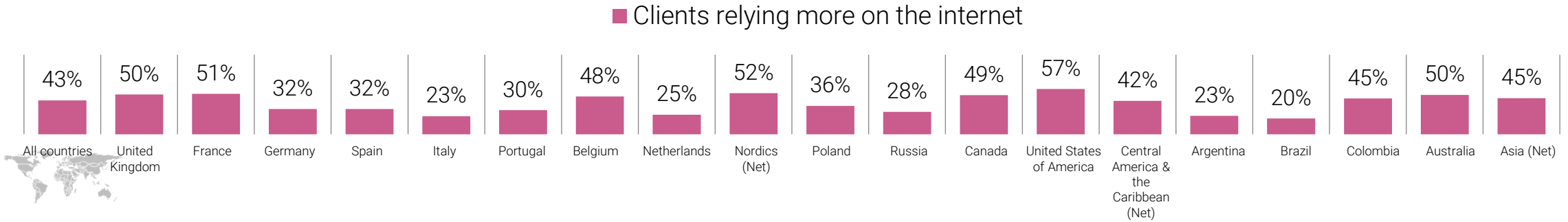
VS2 It is difficult to predict the future, but how do you see veterinary practices changing over the next 10 years? All answering (3779)

Future changes expected: clients

Clients are expected to get more demanding by nearly two thirds of veterinary professionals worldwide







CM Research

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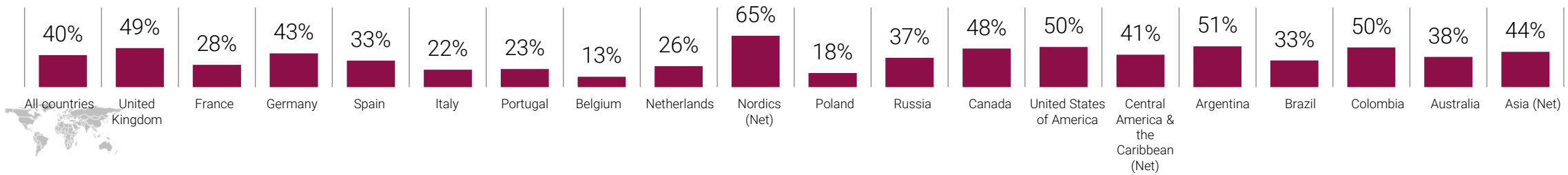
Vetspanel

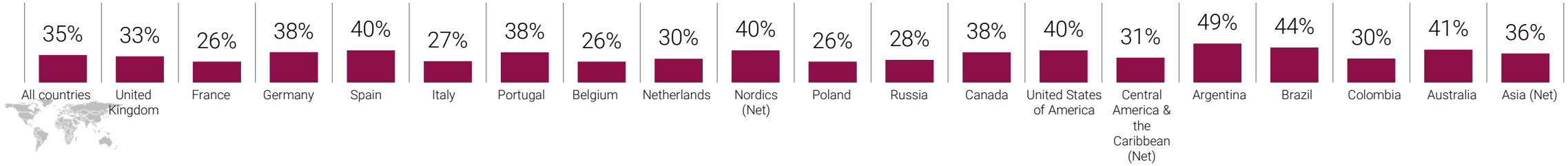
Future changes expected: technology

Around 4 in 10 veterinary professionals expect more online consultations & telemedicine in the future. The Nordic region expects more changes in the technology area than any other region or country.

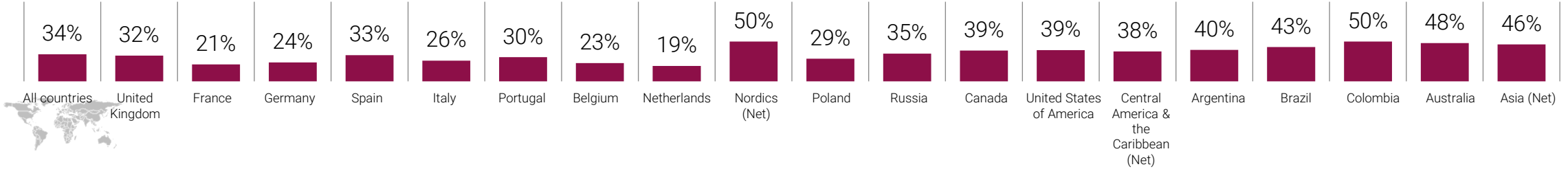
More online consultations / telemedicine



Technical advances



Better access to technology



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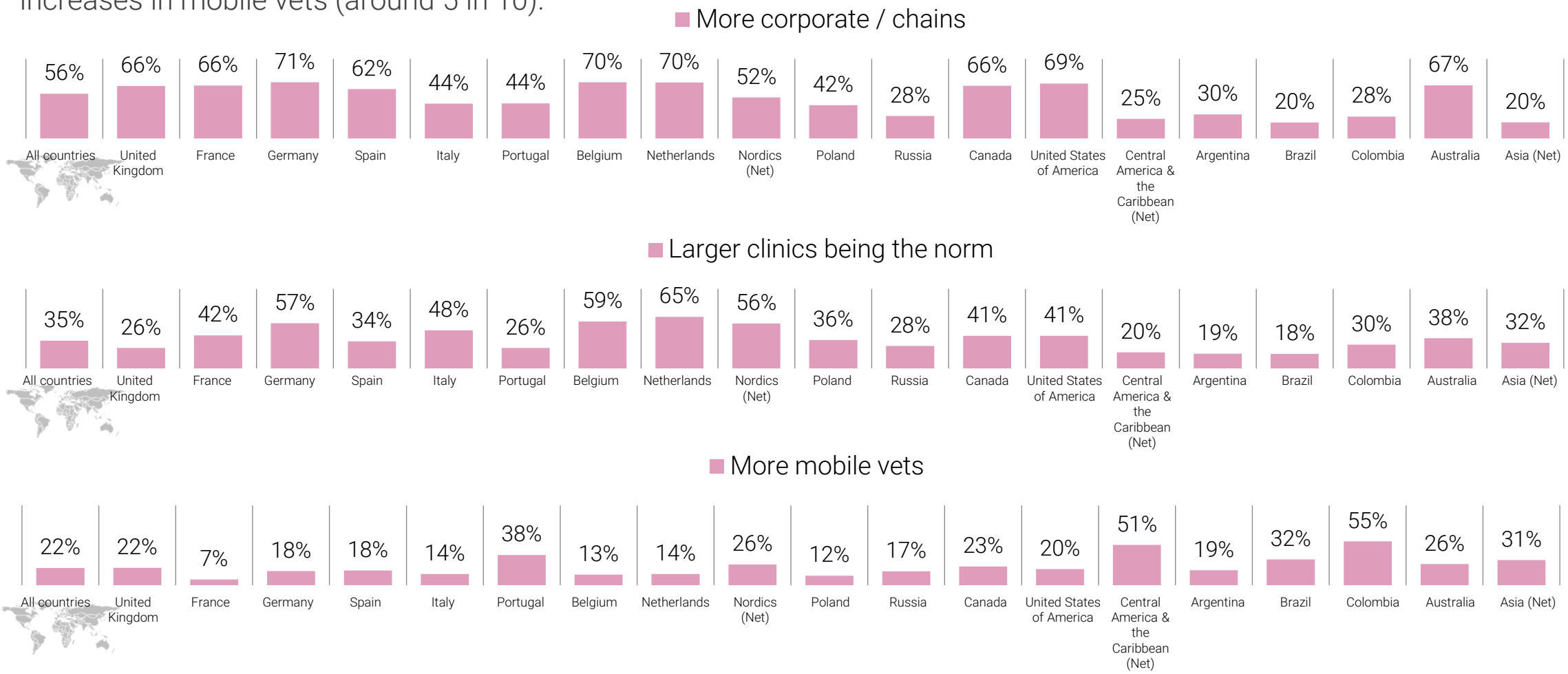
Future changes expected: clinic type

The strongest western economies expect more corporate clinics/chains in the future the most (around 7 in 10 clinics). The percentage drops to 20-28% in Russia, CA and the Caribbean, Brazil and Asia. CEU and NEU are expecting larger clinics being the norm the most (6 in 10 clinics), while Colombia and CA and the Caribbean, are expecting the biggest increases in mobile vets (around 5 in 10).



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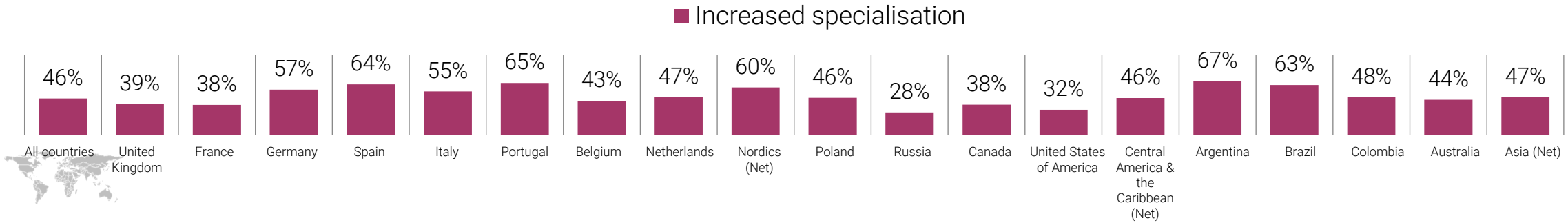
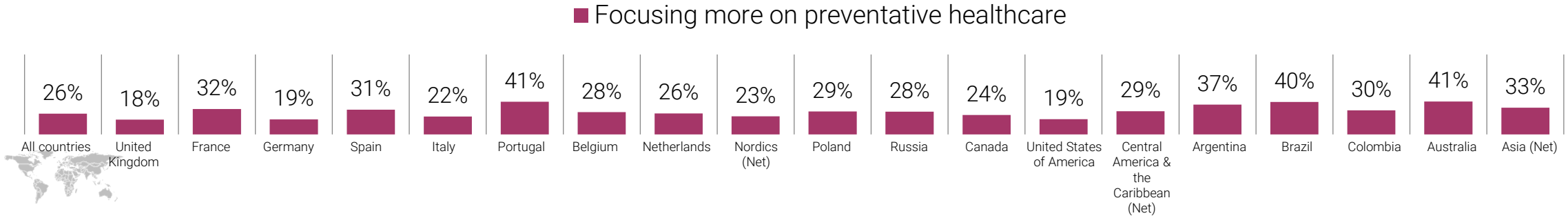
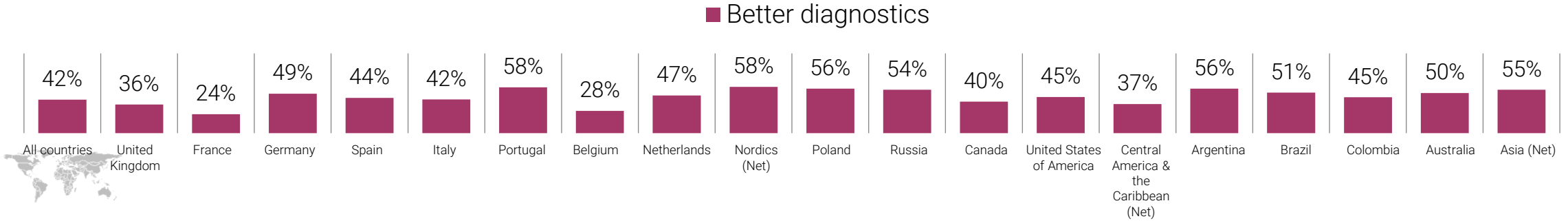
Future changes expected: clinical changes

SEU, the Nordics, Argentina and Brazil are expecting the biggest increases in specialisation (around 7 in 10 clinics). Portugal, Brazil and Australia are expecting to focus on preventative healthcare the most (4 in 10 clinics), and around 4 to 5 in 10 clinics expect better diagnostics across countries/regions.







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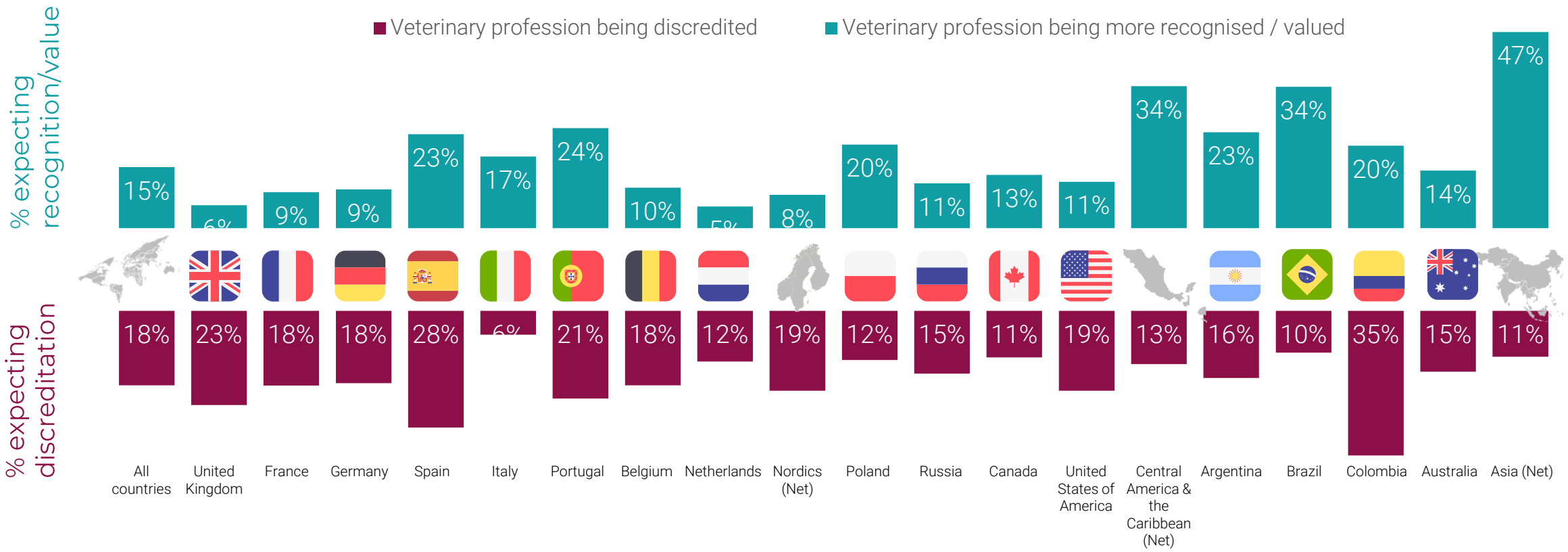
Do veterinarians expect the value of the veterinary industry to change

Expectations vary across countries; Asia, CA and the Caribbean, and Brazil are the most hopeful. Colombia, Spain and UK are the least hopeful.

Future changes expected

All regions and countries



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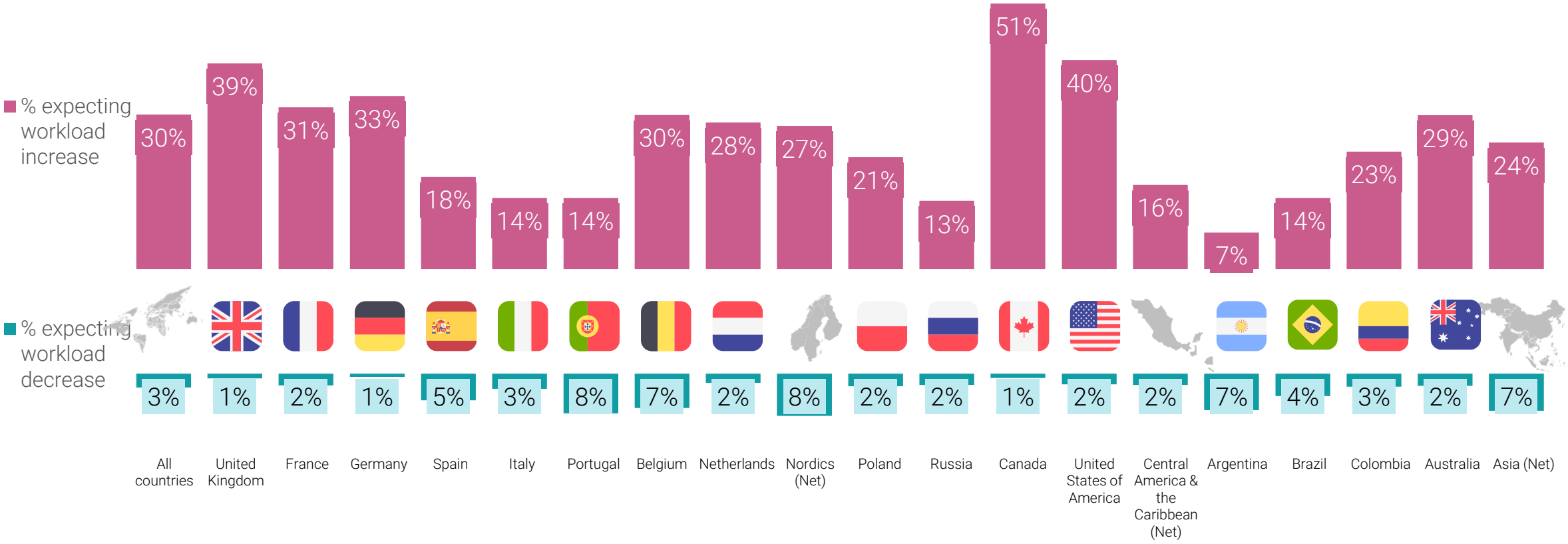
Increased vs. decreased workload

Workload is expected to increase in all countries/regions, particularly in Canada, the US and UK.

Future changes expected
All regions and countries



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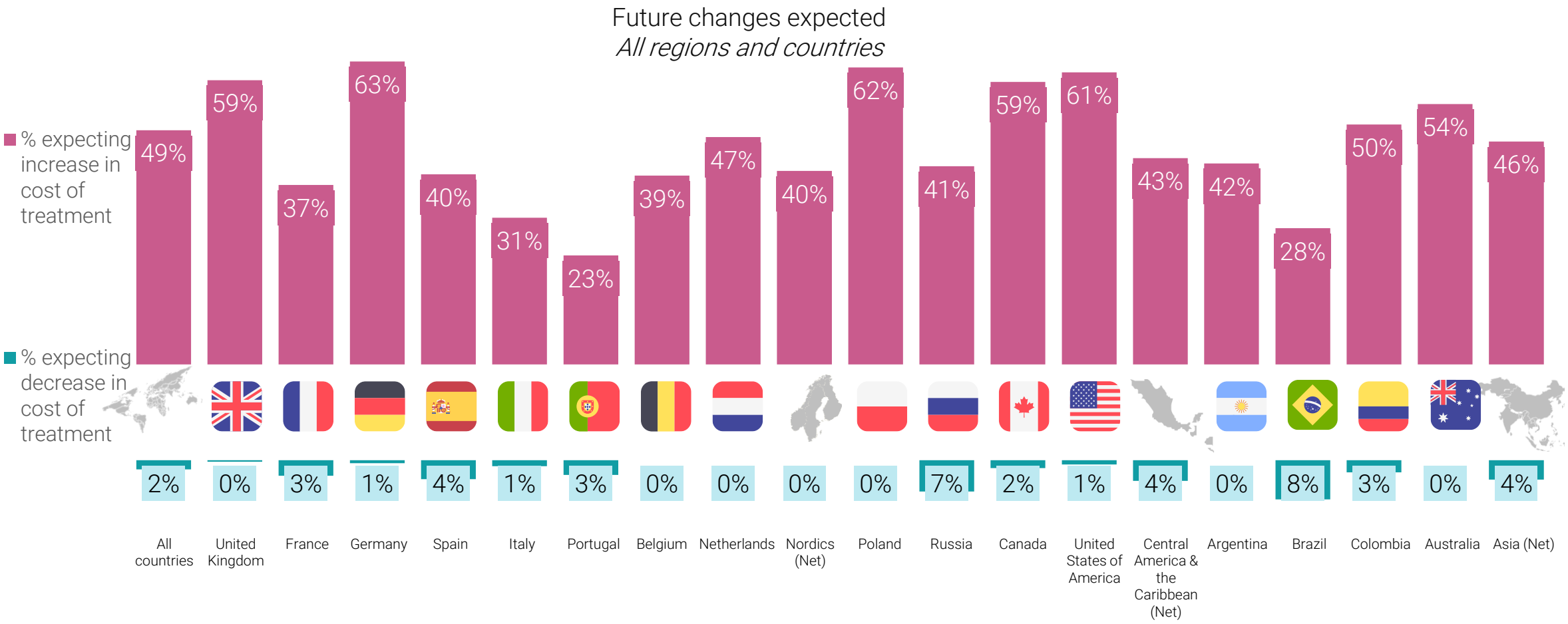
Increased vs. decreased cost of treatment

Cost of treatment is expected to increase in all countries/regions, particularly in Germany, Canada and the US.



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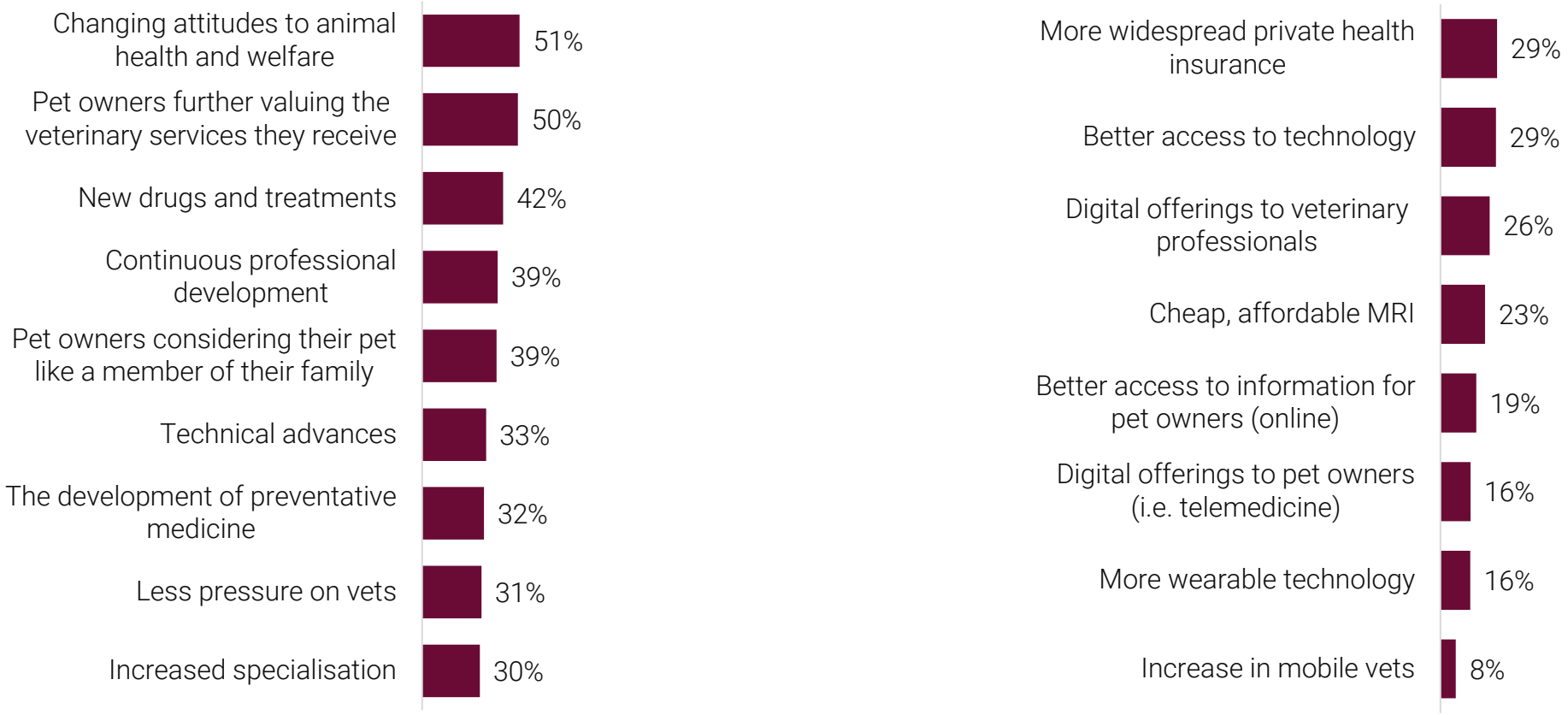
What would make the most positive difference to the future?

Changes in attitudes to animal health and welfare, and pet owners further valuing the veterinary services they receive, are the two things that would make the most positive difference to the future of veterinary medicine.

What would make the most positive difference to the future of veterinary medicine?
All regions and countries



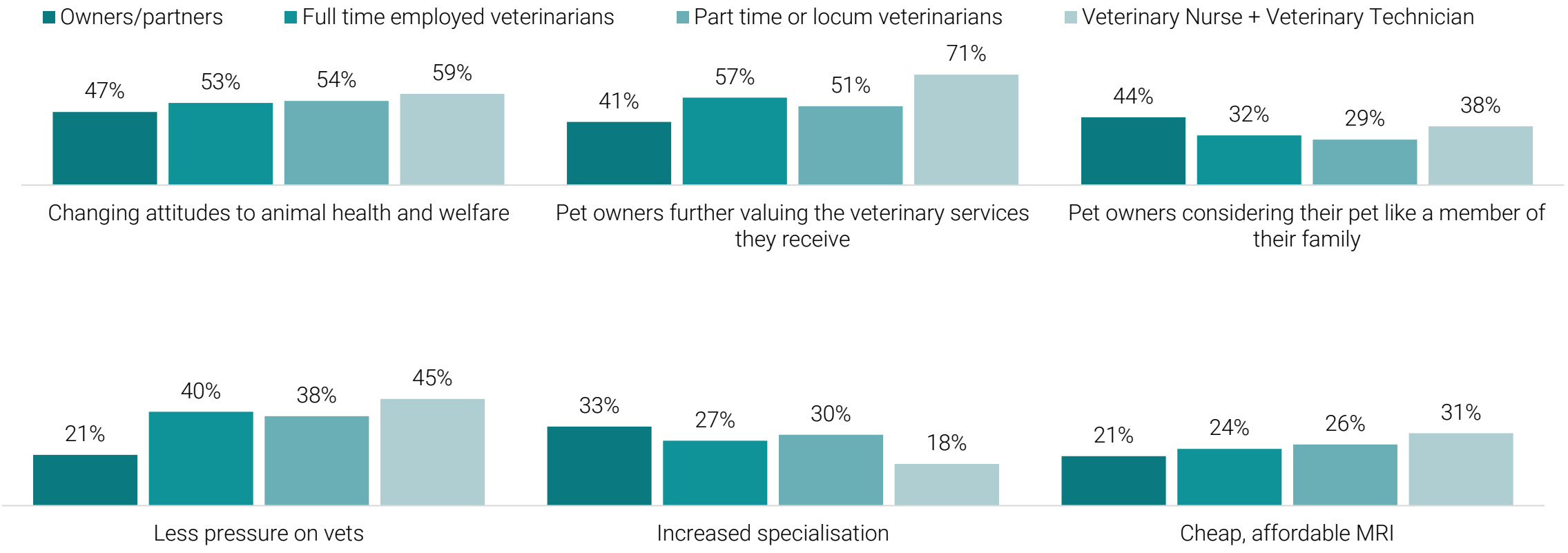
VS3 What do you think would make the most positive impact on veterinary medicine in the future? All answering (3779)

Positive impact on future: by role

Nurses and technicians feel the pressure the most and believe that what would make the most positive difference is pet owners further valuing the veterinary services they receive (71%). Owners/partners are more focused on values; they believe that what would make the most positive impact is changing attitudes to animal health and welfare (47%) and pet owners considering their pet like a family-member (44%).

What would make the most positive difference to the future of veterinary medicine?

All regions and countries

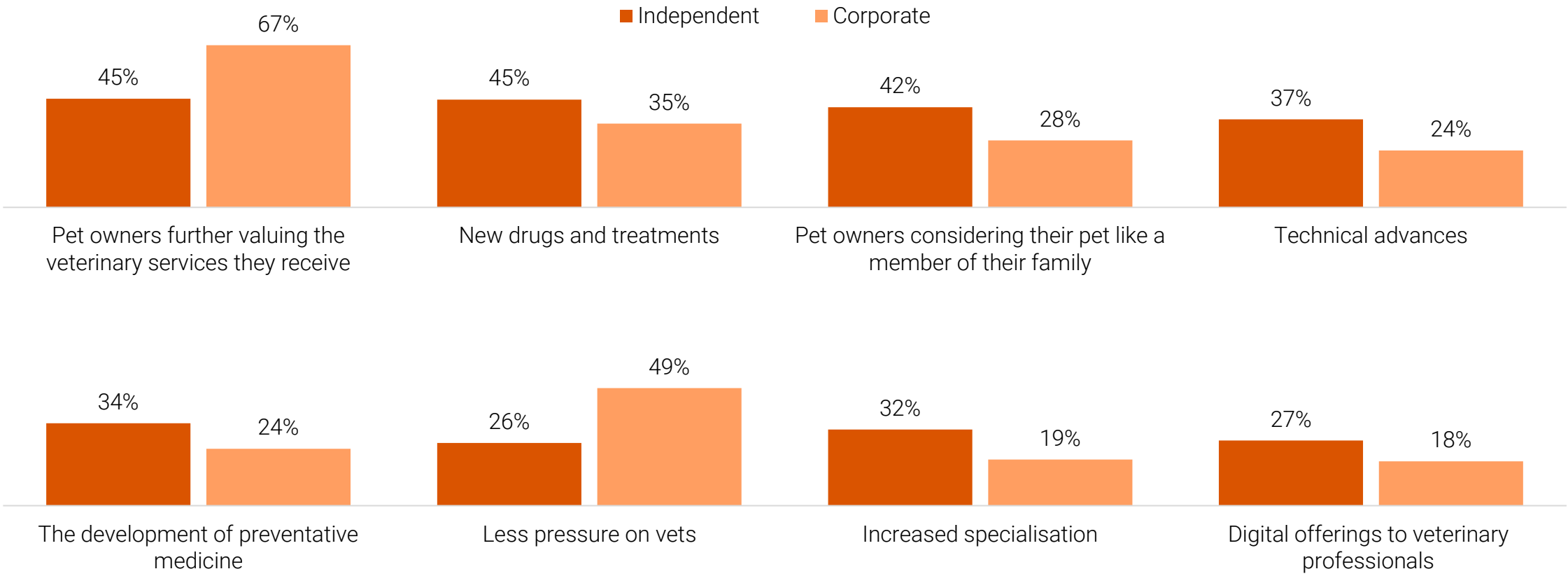


VS3 What do you think would make the most positive impact on veterinary medicine in the future? All answering (3779)

Positive impact on future: by ownership

Corporate vets believe that what would make the most positive difference in the future is pet owners further valuing the veterinary services they receive (45)%), and new drugs and treatments (45%). For corporate vets, the difference lies by far in pet owners further valuing the services (65%), while also 'less pressure on vets' (49%).

What would make the most positive difference to the future of veterinary medicine?
All regions and countries

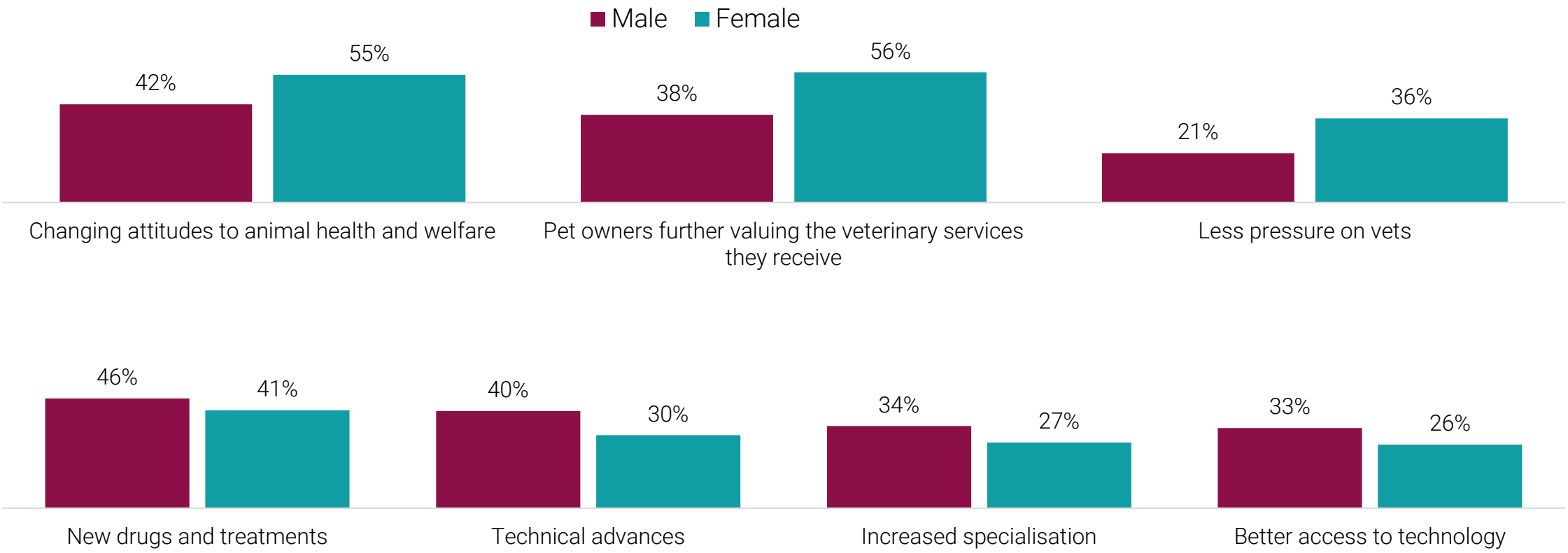


VS3 What do you think would make the most positive impact on veterinary medicine in the future? All answering (3779)

Positive impact on future: by gender

More male veterinary professionals believe in the impact of new drugs / treatments, increased specialisation and technology. More female veterinary professionals believe in the impact of changing attitudes to animal health and welfare, pet owners further valuing the veterinary services they receive and pressure on vets.

What would make the most positive difference to the future of veterinary medicine?
All regions and countries



VS3 What do you think would make the most positive impact on veterinary medicine in the future? All answering (3779)

CHAPTER 08

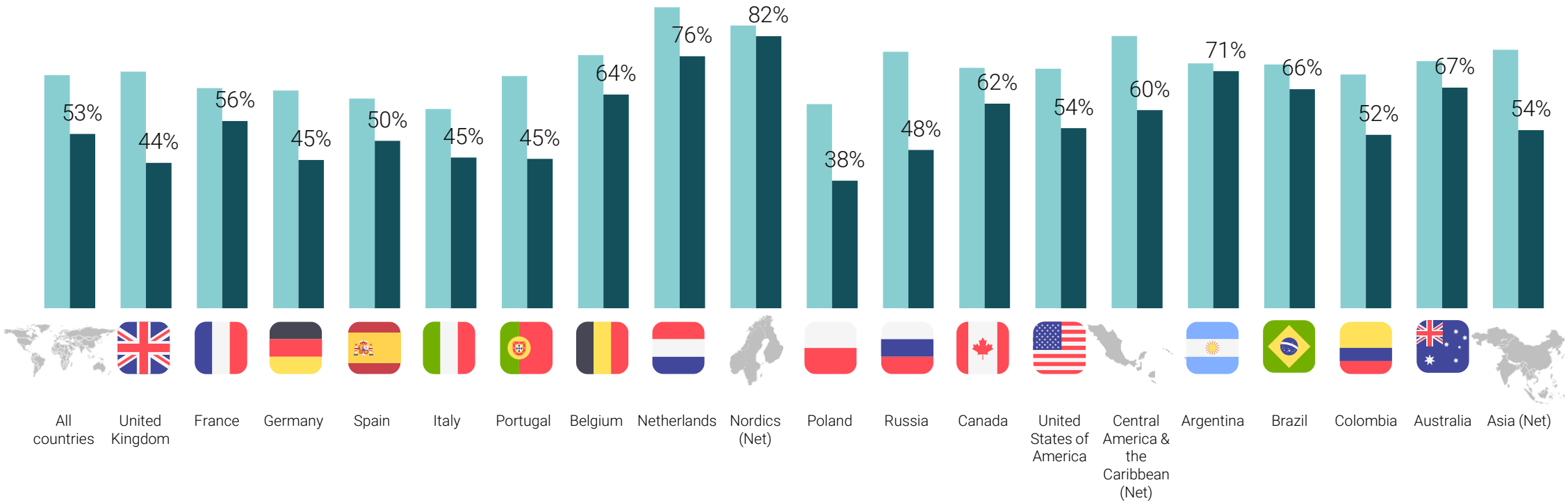
VETERINARY WELLBEING

Job Satisfaction levels

Job satisfaction levels were higher before the pandemic across all countries/regions. The UK and Russia are the countries with the highest decreases (-28% and -30%), while the Nordics, Argentina, Brazil and Australia are the countries/regions with the smallest decreases, ranging from -2% to -8%.

- % very or quite satisfied before Covid-19
- % very or quite satisfied today

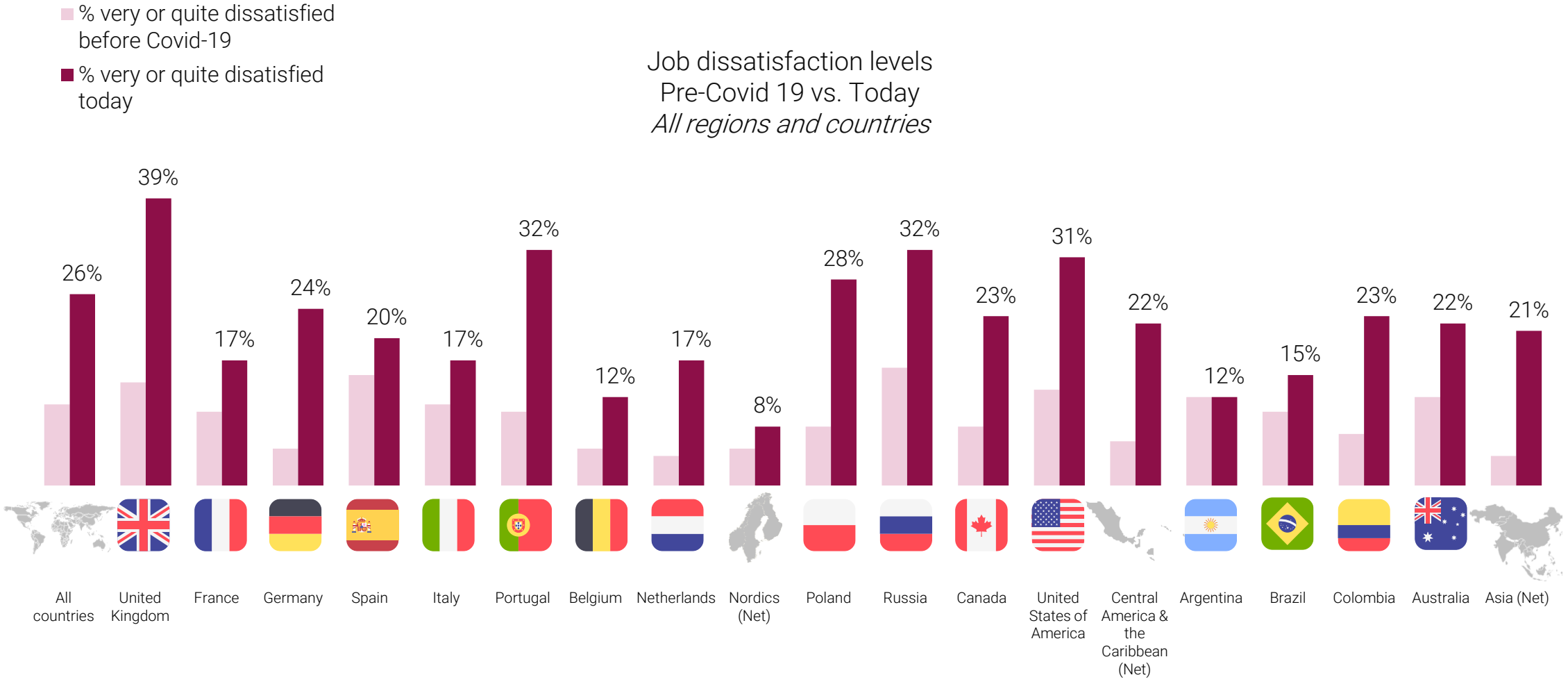
Job satisfaction levels
Pre-Covid 19 vs. Today
All regions and countries



How satisfied are you with your job now, vs. before Covid-19? (n=4995)
Country level sample sizes can be found in the appendix

Job dis-satisfaction levels

Equally, job dissatisfaction levels are much higher at the moment too; biggest increases are shown in the UK (+25%), Portugal (+22%) and Poland (+20%), with Spain (+5%), the Nordics (+3%) and Brazil (+5%) showing the smallest and Argentina showing no difference at all.



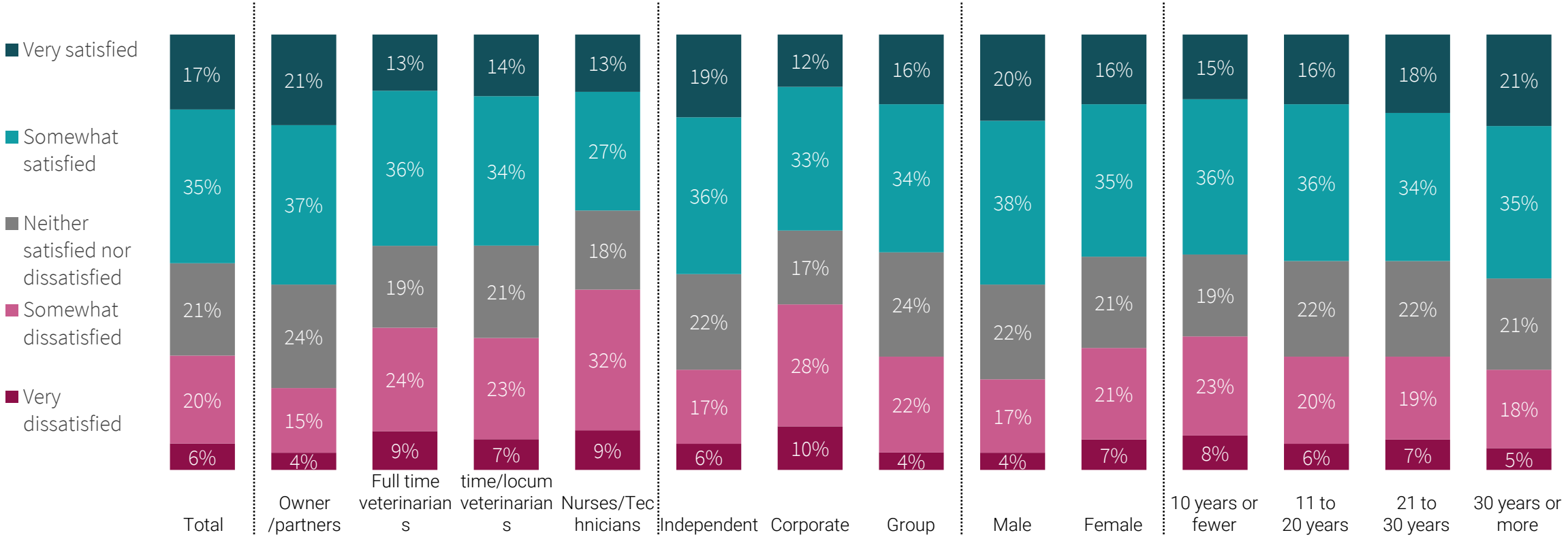
How satisfied are you with your job now, vs. before Covid-19? (n=4995)
Country level sample sizes can be found in the appendix

Job satisfaction by subgroup

Around half are somewhat satisfied or very satisfied, while around a third are somewhat dissatisfied or very dissatisfied. Males, owners and professionals with 30+ years of experience are the most satisfied groups overall, while nurses and technicians, and corporates are the least satisfied.

Job Satisfaction-Today

Differences by subgroup

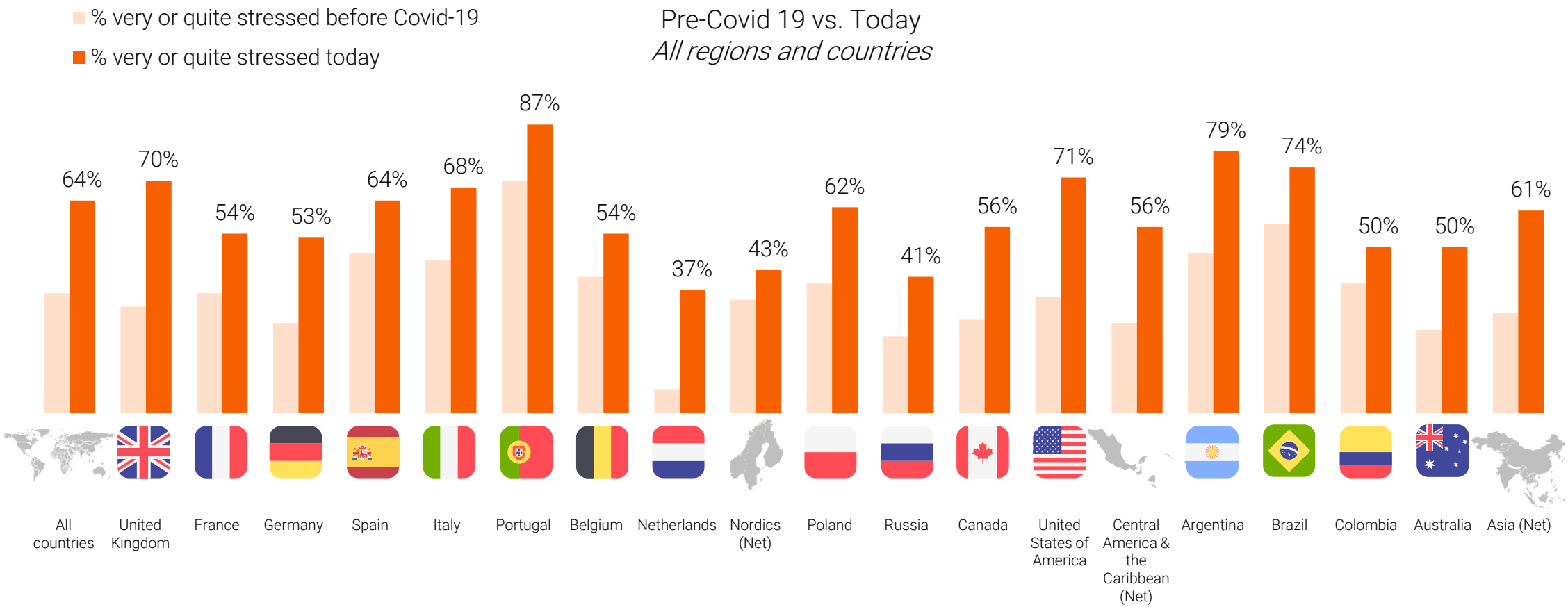


How satisfied are you with your job now? (n=4995)
Country level sample sizes can be found in the appendix

Job stress levels

The pandemic has increased the stress levels in all countries/regions. The countries reporting the highest levels of stress are Portugal, Argentina, Brazil, the US and the UK. The countries/regions with the biggest differences between Pre-Covid and today times are the UK, the US, Argentina and Asia.

Job dissatisfaction levels
Pre-Covid 19 vs. Today
All regions and countries



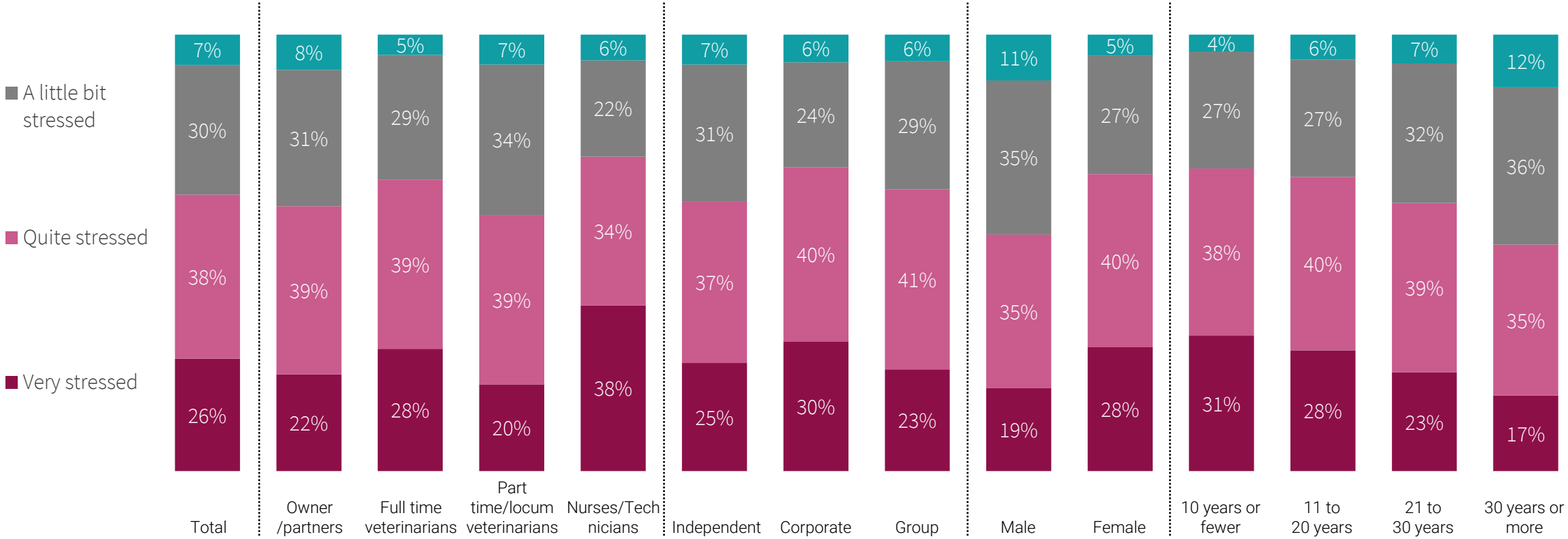
How satisfied are you with your job now, vs. before Covid-19? (n=4995)
Country level sample sizes can be found in the appendix

Stress levels by subgroup

All subgroups are reporting quite stressed the most, apart from males who 35% report quite and a little bit stressed, and experienced professionals who 35% report quite stressed and 36% a little bit. The most stressed groups are nurses and technicians (where most are very stressed) and corporates. The least stressed groups are PT, males and professionals with 30+ years of experience.

Stress levels-Today

Differences by subgroup

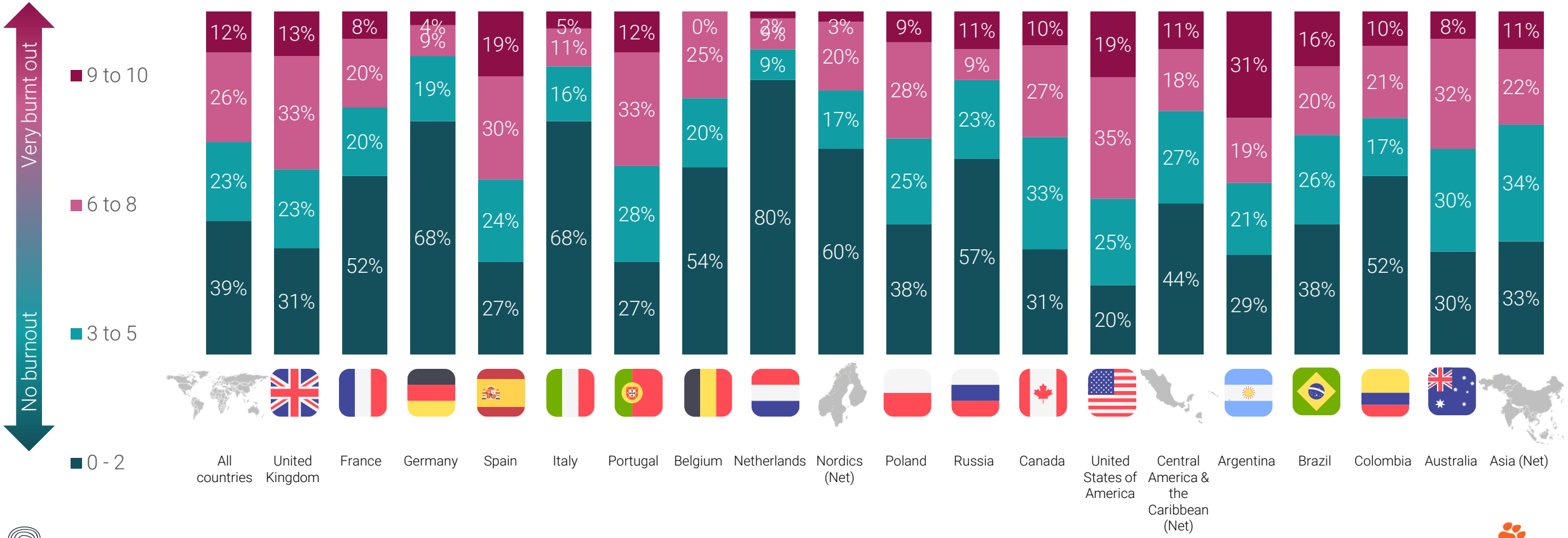


How stressed are you? (n=4995)
Country level sample sizes can be found in the appendix

Burnout levels by country

There are levels of burn out across countries. The US is reporting to be burnt out, followed by Argentina where the population is split 50/50. Aside from those two countries, Spain and the UK are showing the highest levels of burn out, while Germany, Italy and The Netherlands are showing the lowest.

Burnout levels
By country & region



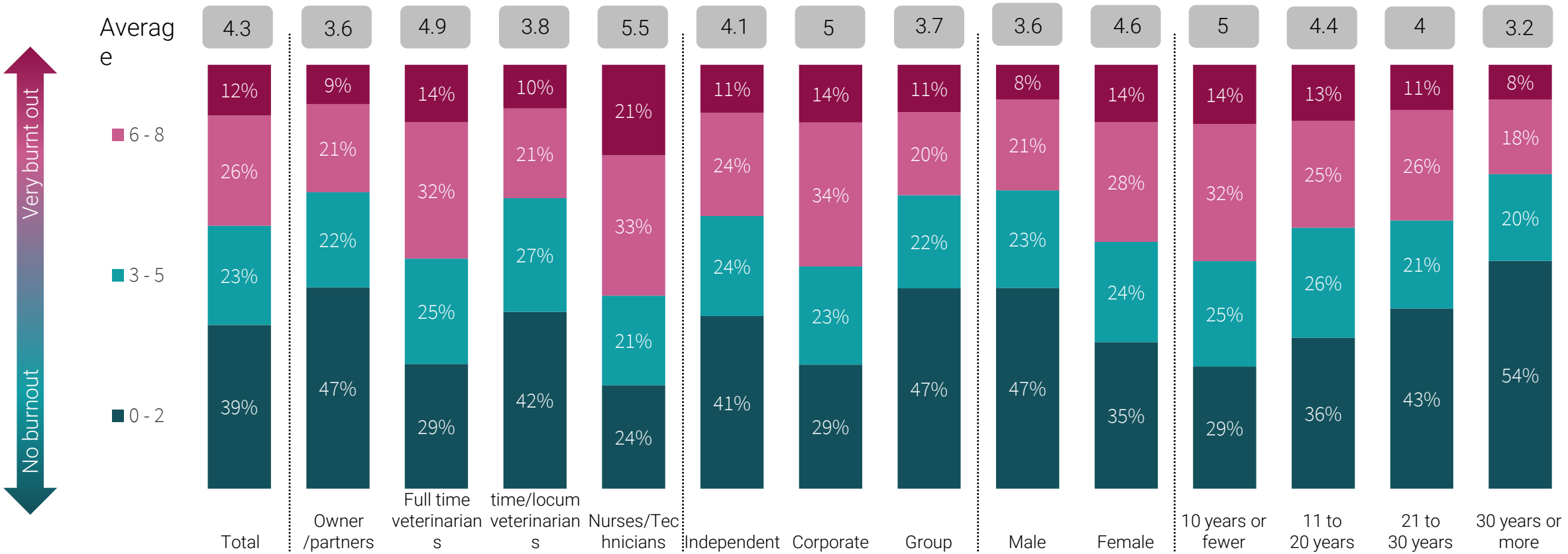
To what extent would you say you are currently experiencing
N.B. Only countries where n > 30 displayed

Burnout levels by subgroup

Nurses and technicians are the only group where its majority is burnt out. Aside from this subgroup, FT, corporates and professionals with 10years or fewer years of experience, are reporting the highest levels of burn out. Owners, males and professionals with 30+ years of experience are reporting the lowest levels of burn out

Burnout levels

Differences by subgroup

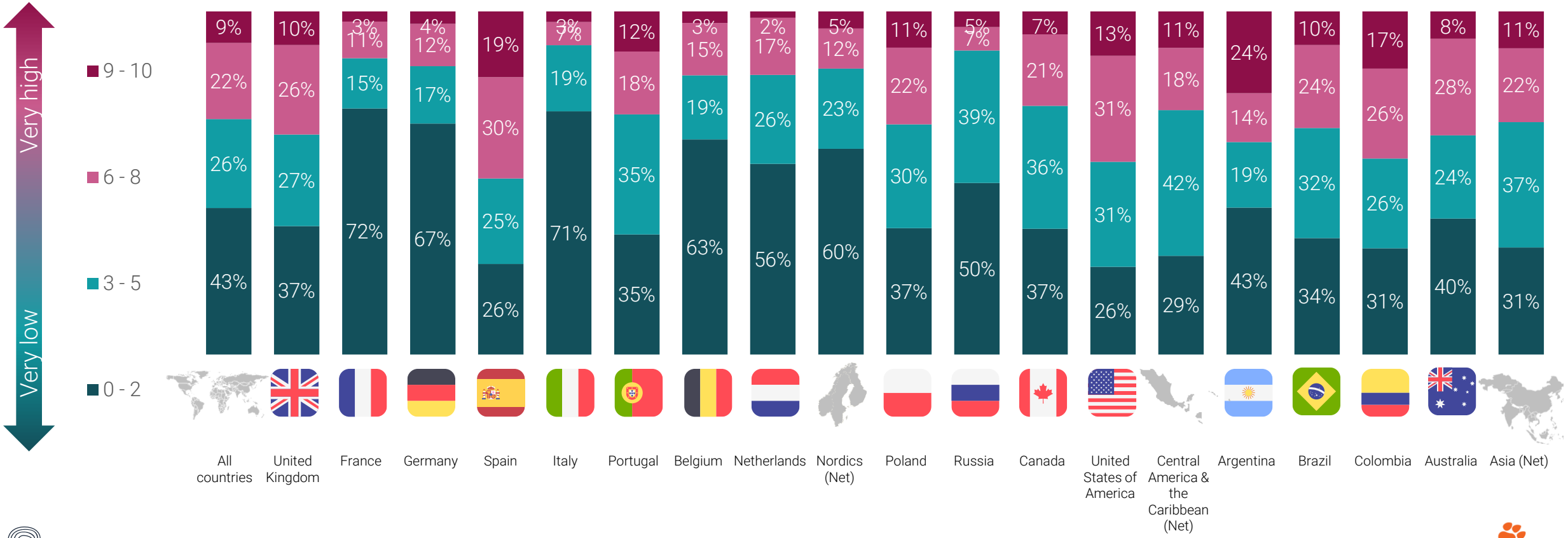


To what extent would you say you are currently experiencing
N.B. Only countries where n > 30 displayed

Compassion fatigue levels by country

There are levels of compassion fatigue, however, no country/region is reporting to be in its majority fatigued. Spain is the country which reports the highest levels of compassion fatigue, followed by the US and Colombia. Italy, Russia and France are reporting the lowest levels of compassion fatigue.

Compassion fatigue levels
By country & region

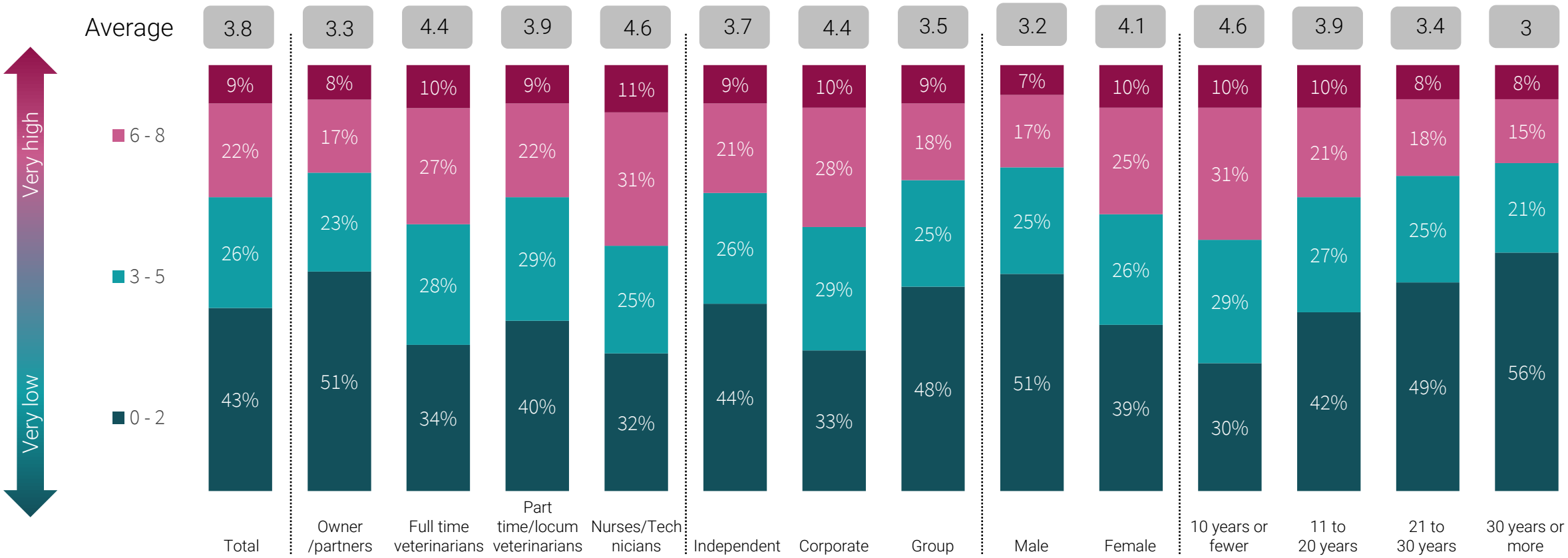


To what extent would you say you are currently experiencing
N.B. Only countries where n > 30 displayed

Compassion fatigue levels by subgroup

There are no subgroups whose majority is compassion fatigued. As with stress and burn out levels however, the groups showing the lowest levels of compassion fatigue are owners, males and experienced professionals (21+ years of experience). Equally, the groups showing the highest levels of compassion fatigue are nurses and technicians, professionals with 10 years or fewer of experience, and corporates.

Compassion fatigue levels
Differences by subgroup



To what extent would you say you are currently experiencing
N.B. Only countries where n > 30 displayed

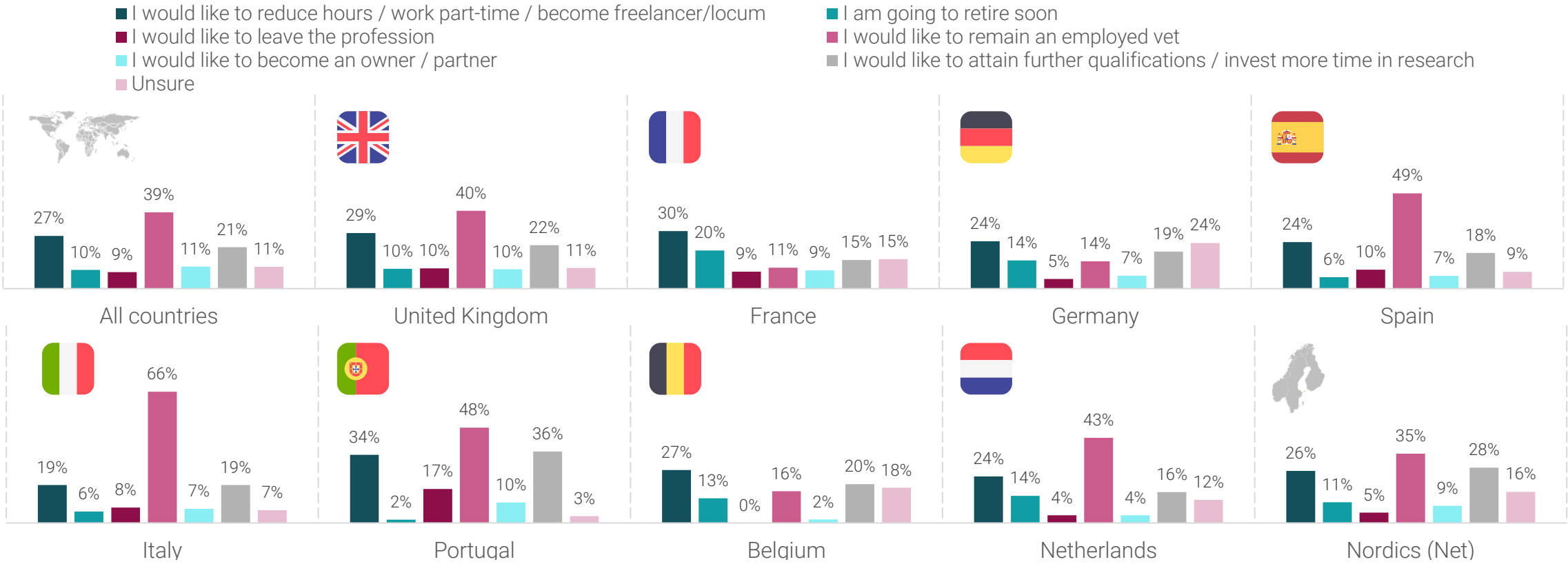
CHAPTER 09

FUTURE CAREER ASPIRATIONS

Future career aspirations by country

9% of veterinarians globally claim to want to leave the profession altogether. In Portugal, this number is well above the global average at a staggering 17%.

Future career aspirations
By country & region

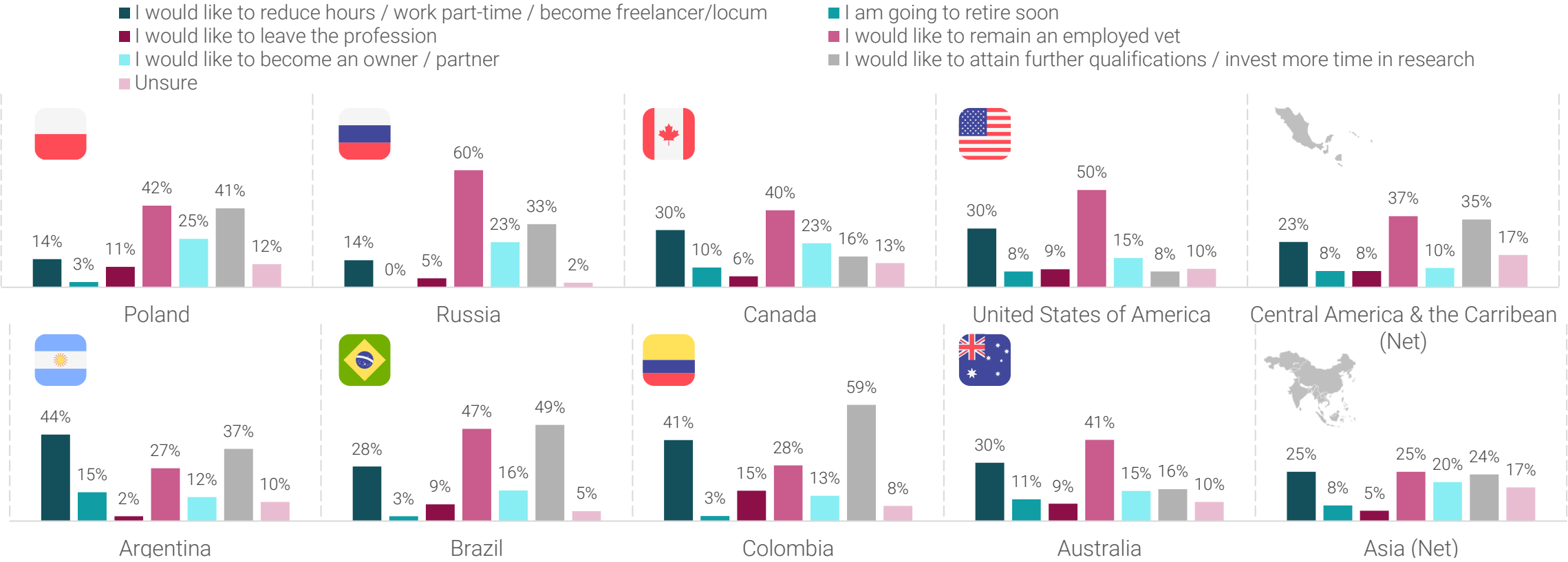


Considering the pandemic and its effect, what are your long-term career aspirations?
N.B. Only countries where n > 30 displayed

Future career aspirations by country

An interest in attaining further qualifications or investing more time in research was particularly high in South American countries like Colombia, Brazil and Argentina.

Future career aspirations
By country & region

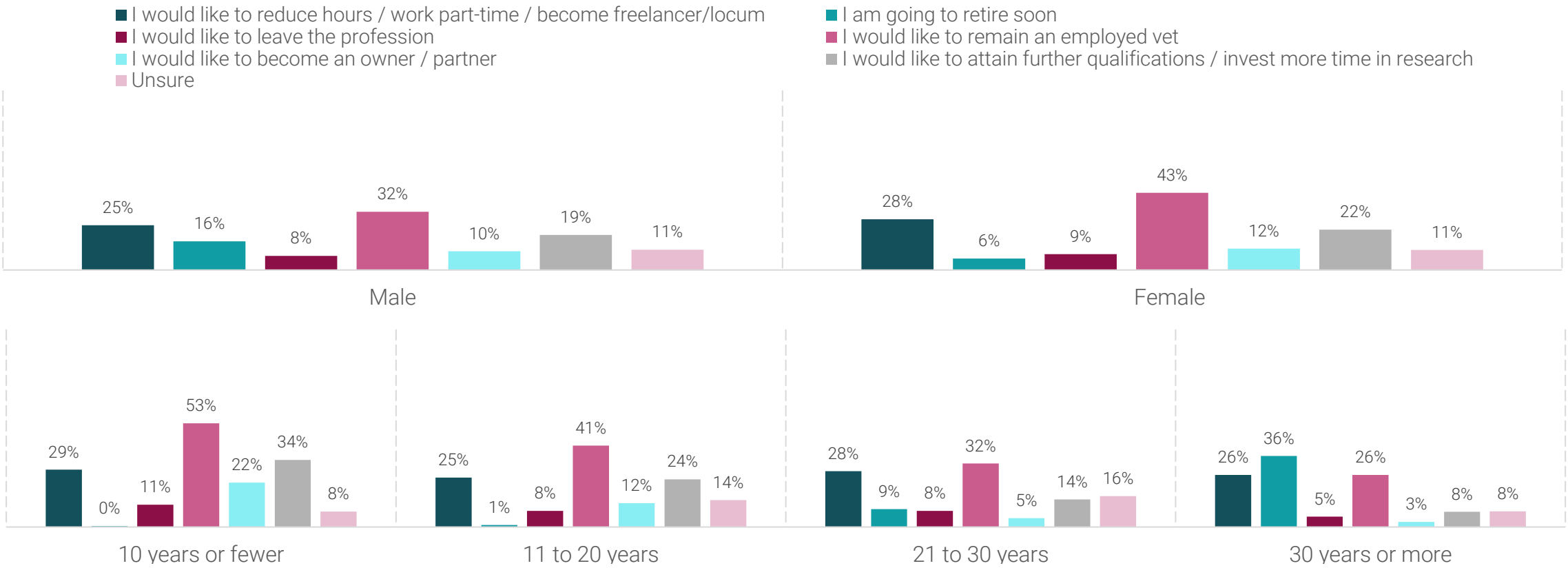


Considering the pandemic and its effect, what are your long-term career aspirations?
N.B. Only countries where n > 30 displayed

Future career aspirations by gender & tenure

Despite reporting higher stress levels, females are more likely than men to want to remain employed vets. Overall, however, roughly 1 in 4 regardless of gender reported a desire to reduce their hours through e.g. part time or locum work

Future career aspirations
By Gender and Tenure



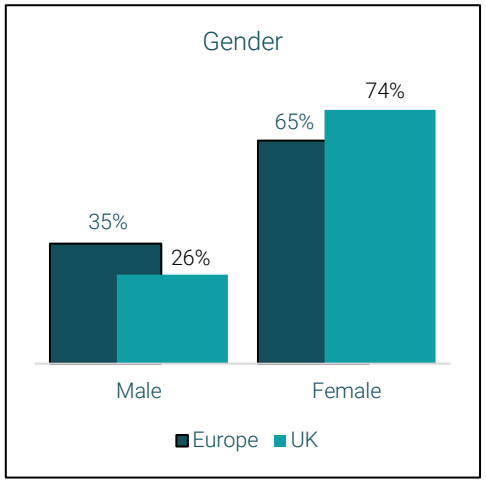
Considering the pandemic and its effect, what are your long-term career aspirations?
N.B. Only countries where n > 30 displayed

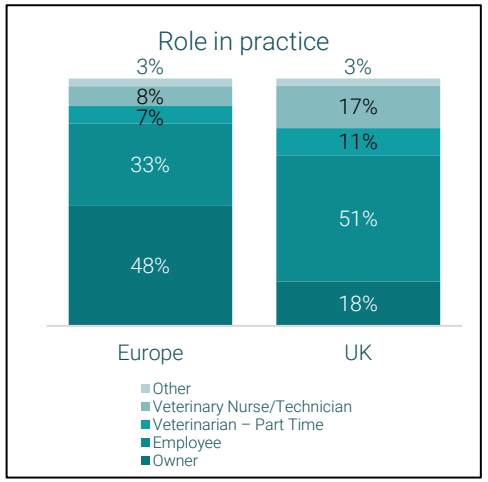
CHAPTER 10

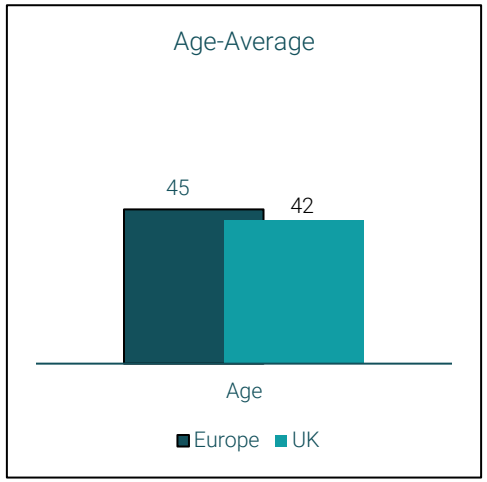
COUNTRY PROFILES

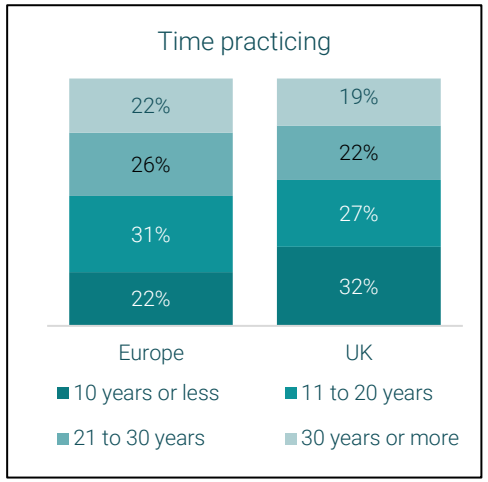
CM Research

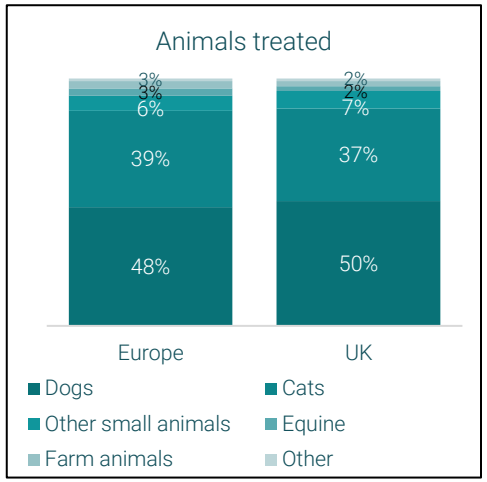
DEMOGRAPHICS: UNITED KINGDOM

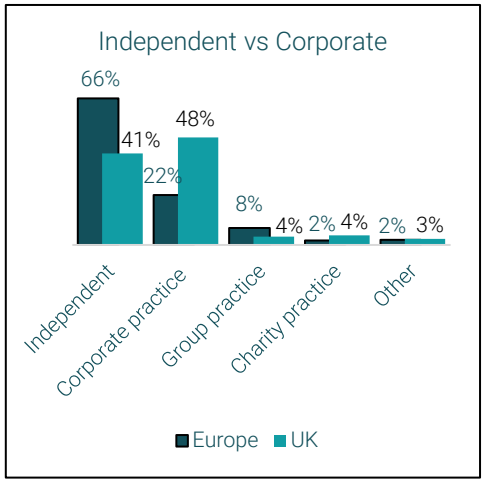


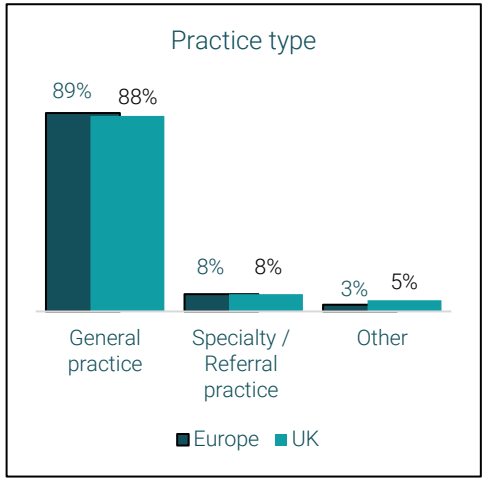


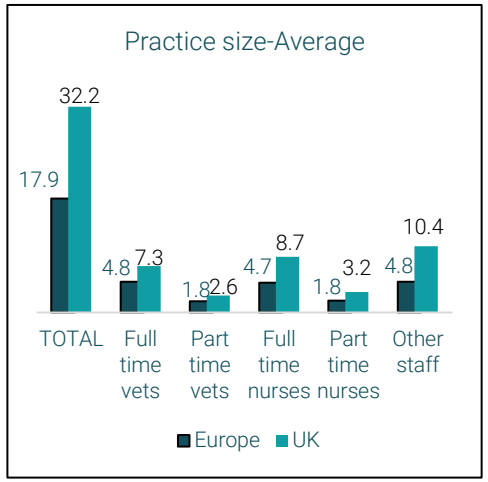


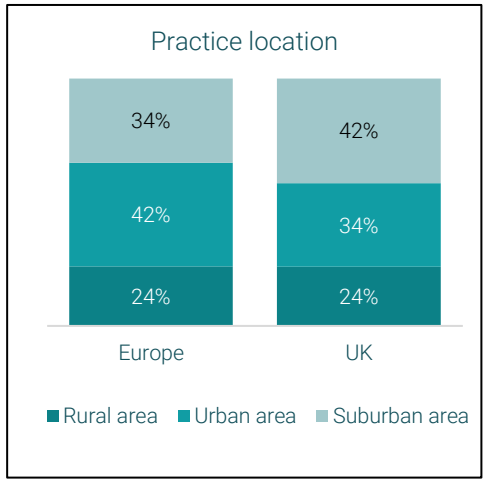






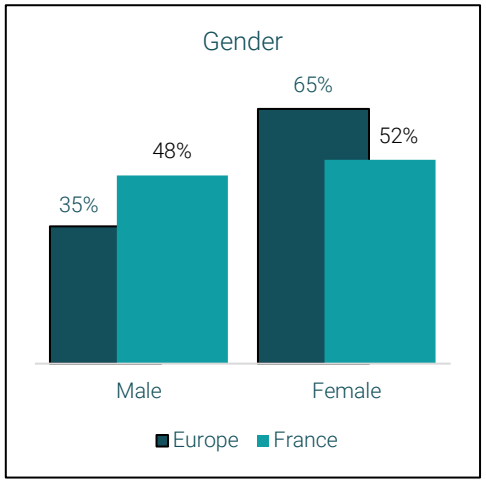


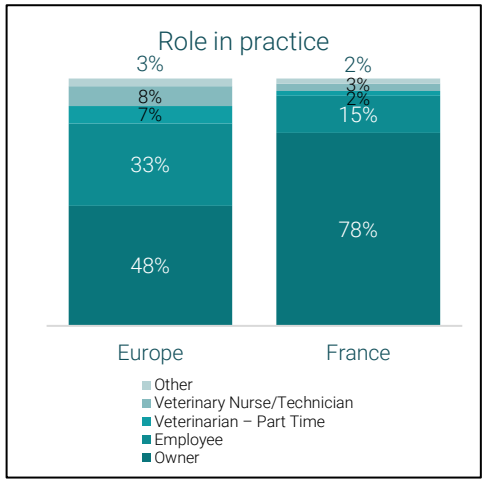


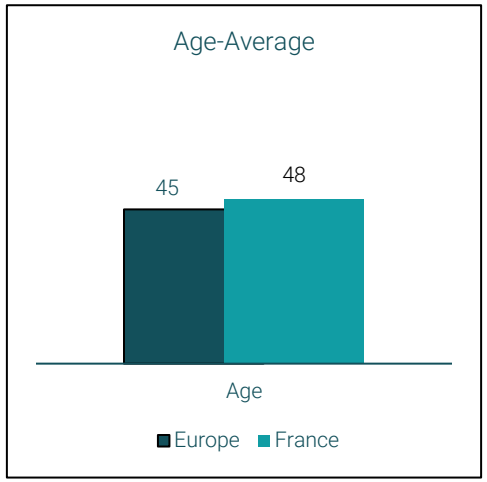


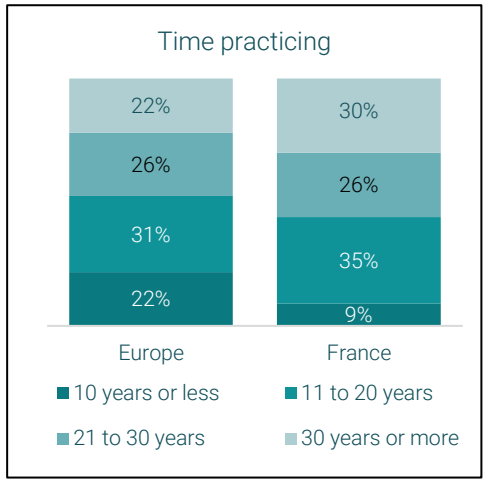
Base: Europe (2965) , UK (1285)

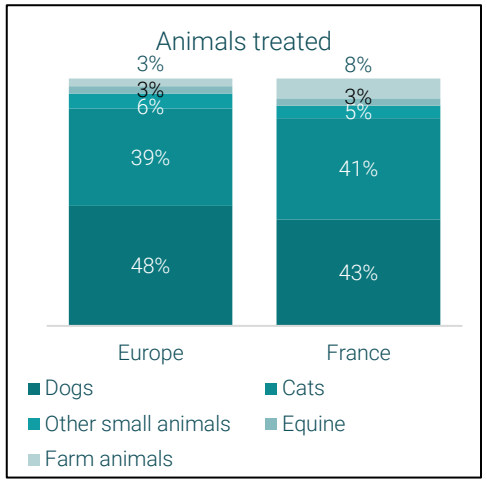
DEMOGRAPHICS: FRANCE

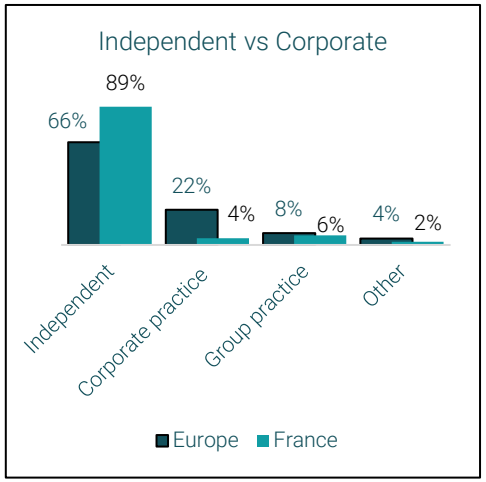


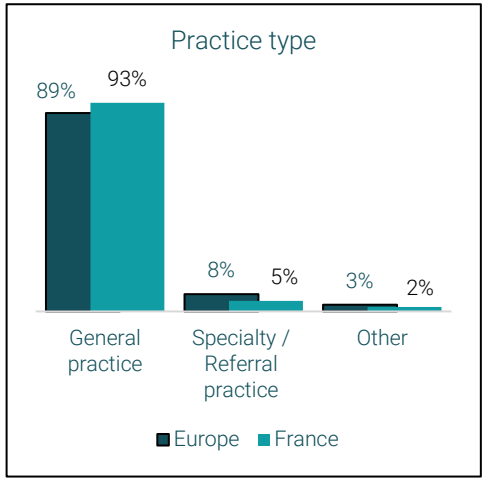


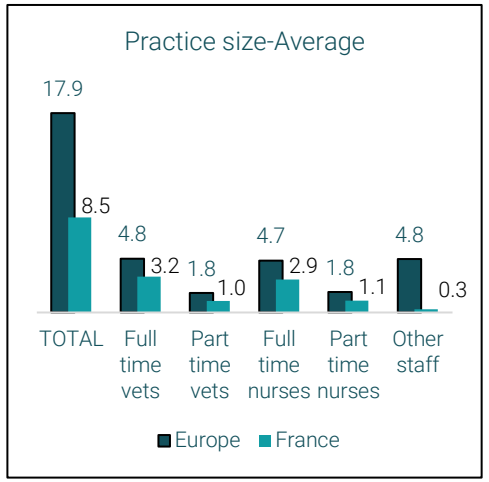


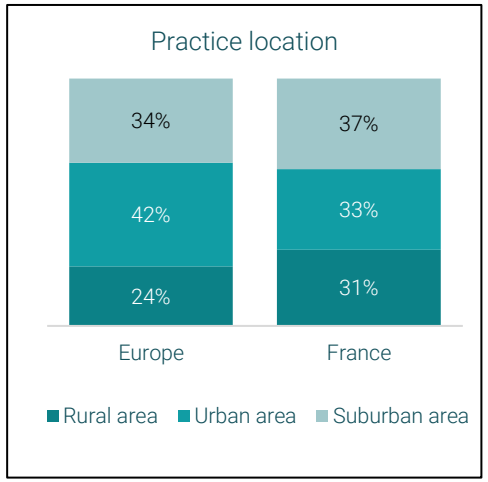










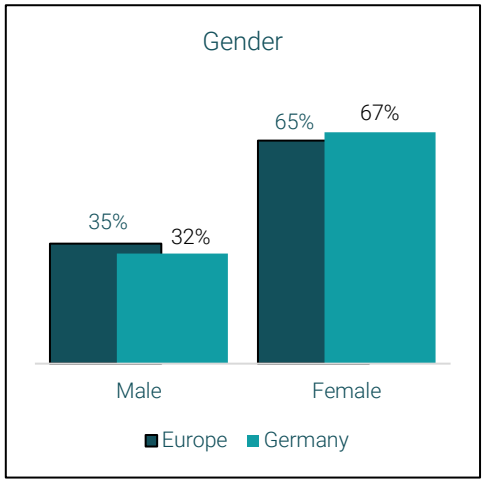


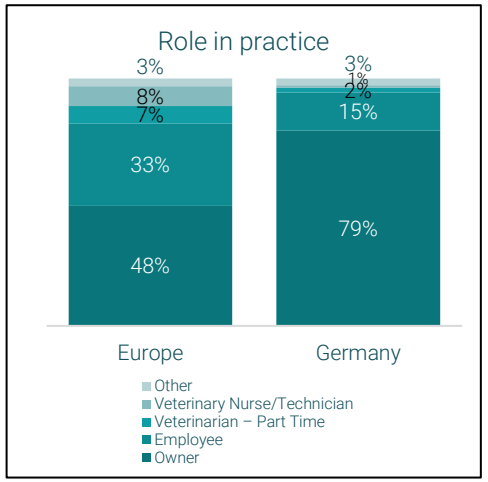
CM Research

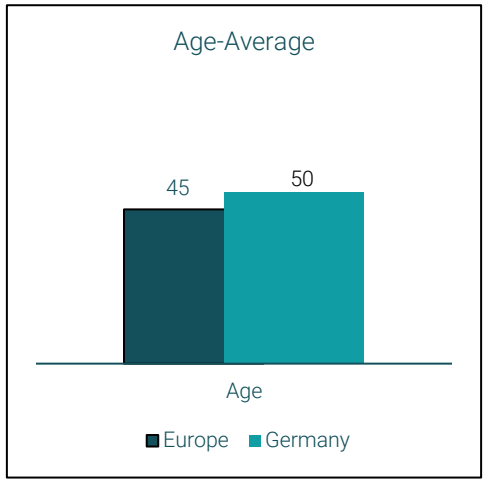
Base: Europe (2965) , FR (430)

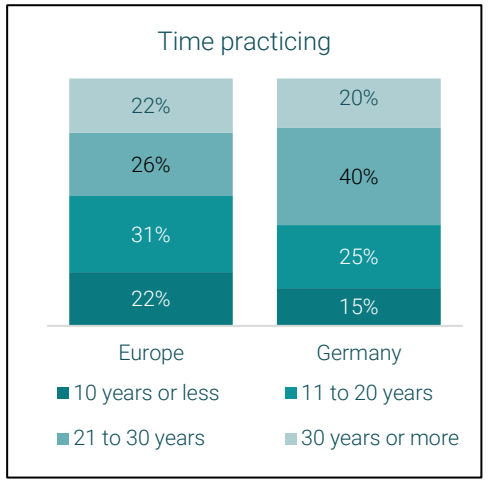
Vetspanel

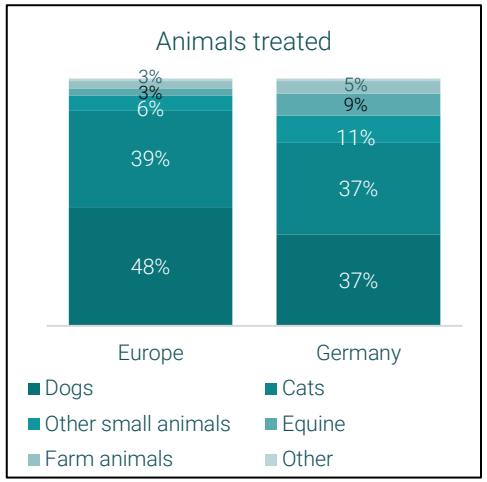
DEMOGRAPHICS: GERMANY

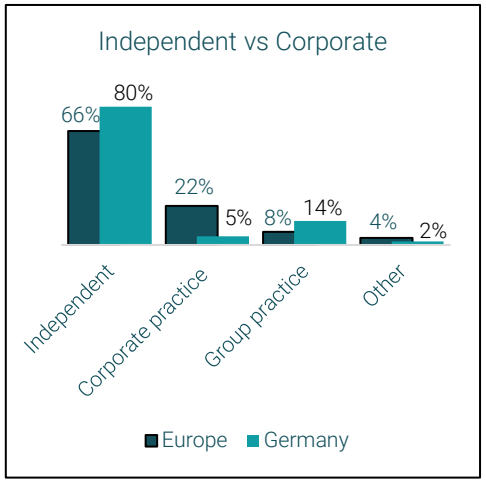


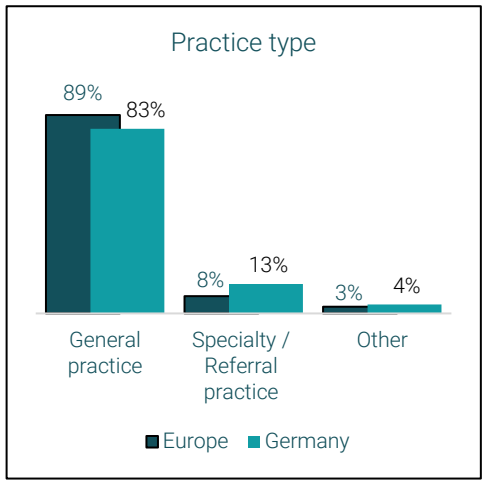


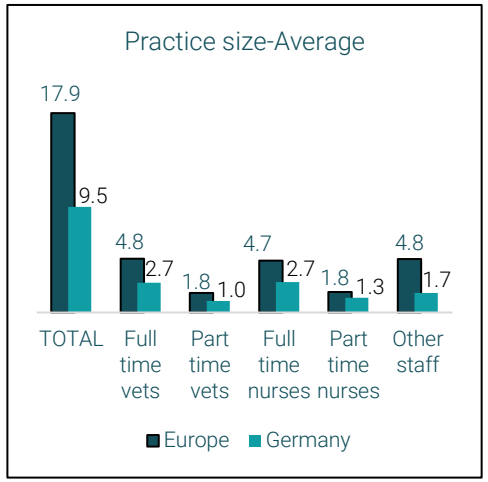


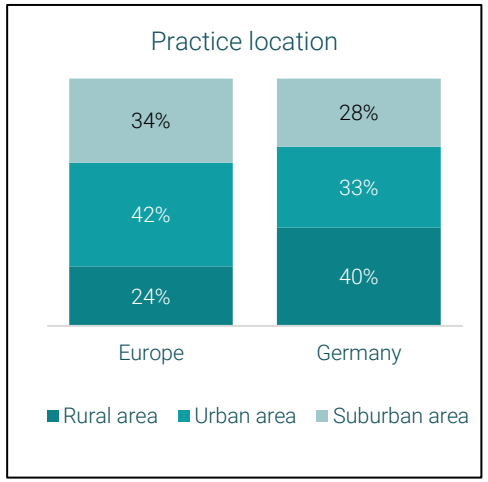










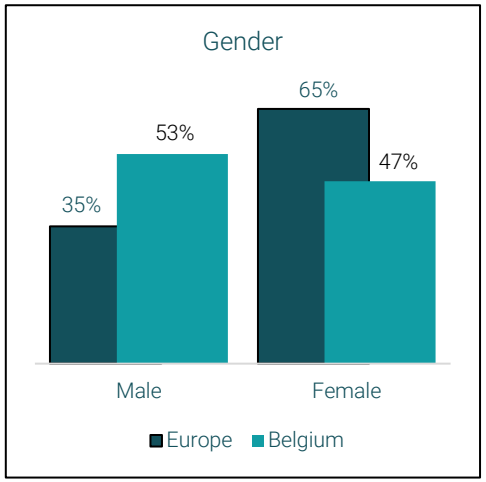


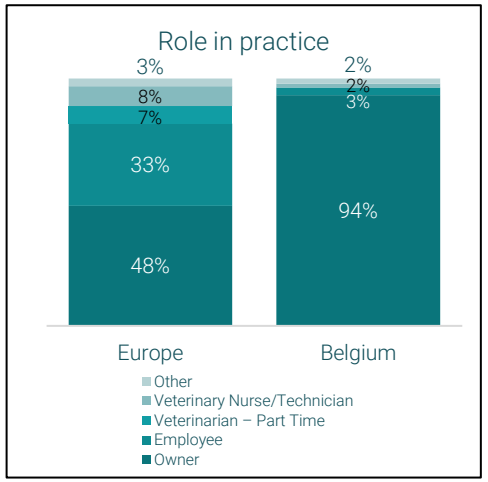
CM Research

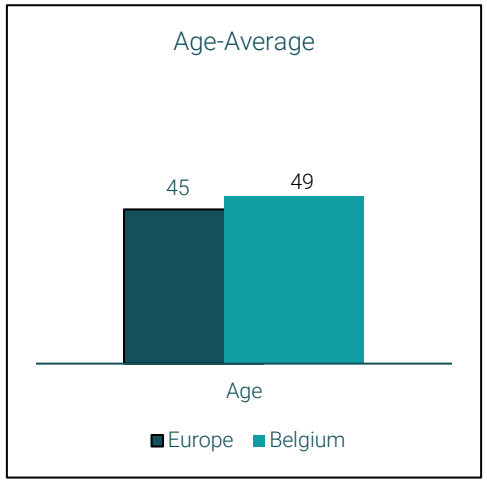
Base: Europe (2965) , DE (277)

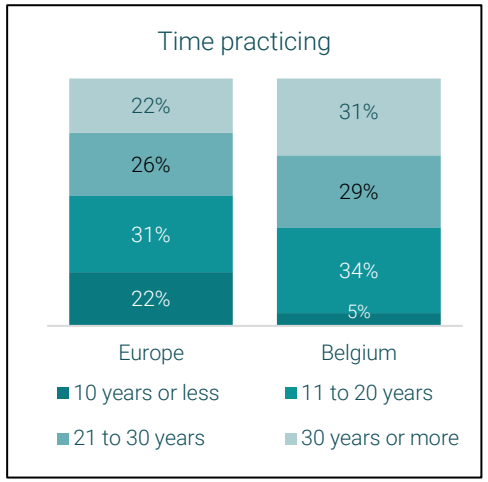
Vetspanel

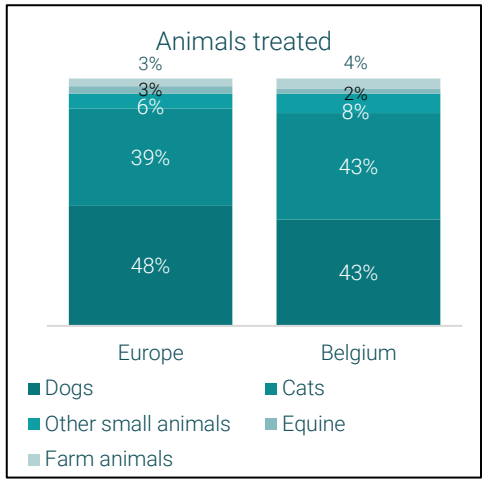
DEMOGRAPHICS: BELGIUM

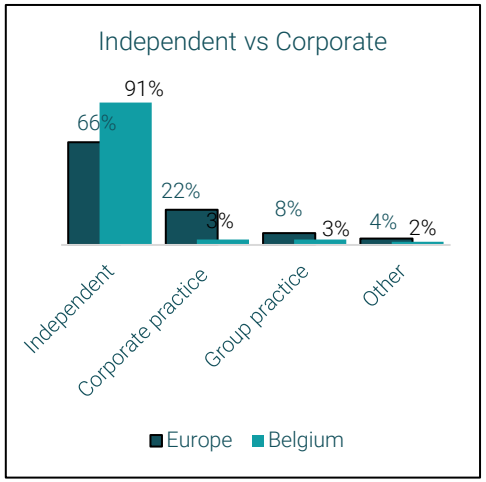


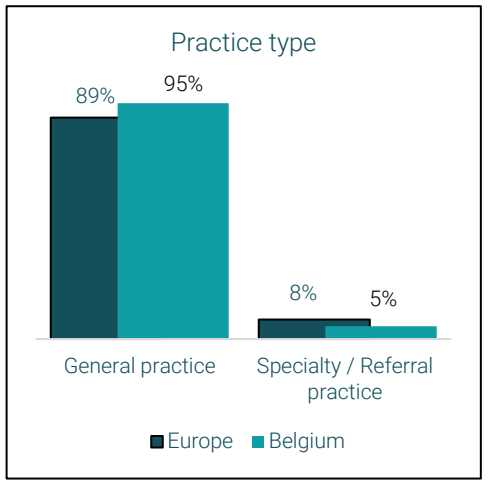


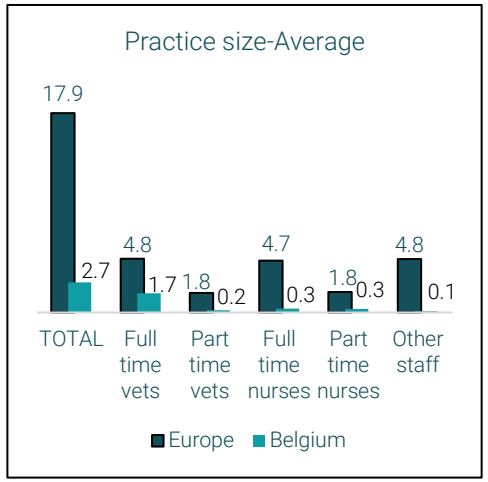


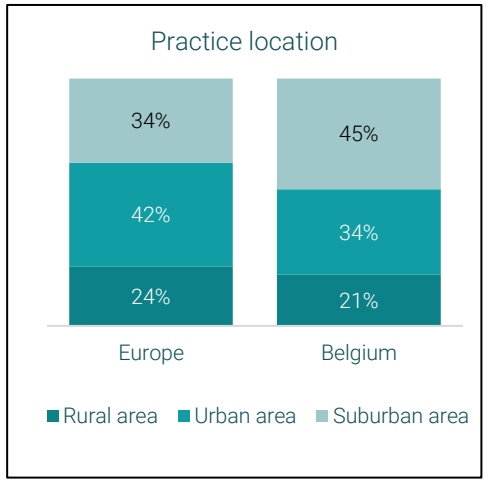








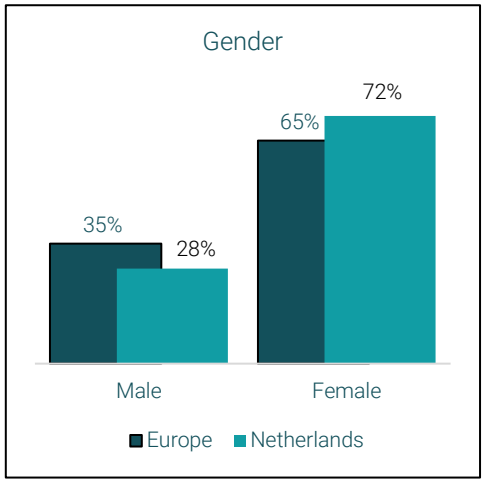


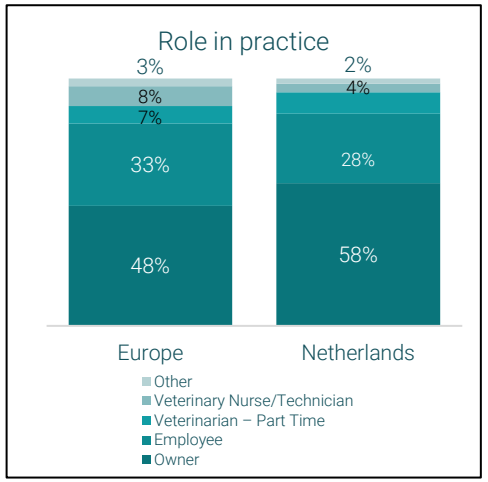


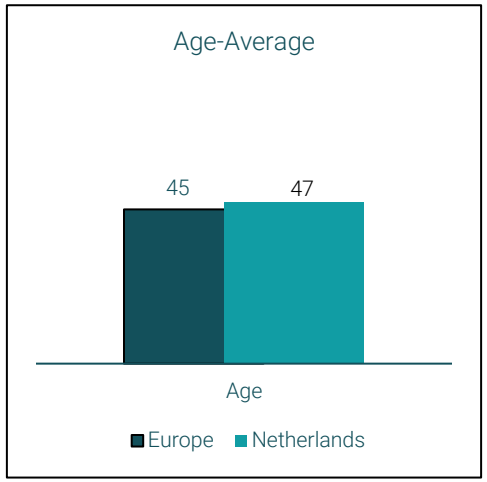
CM Research

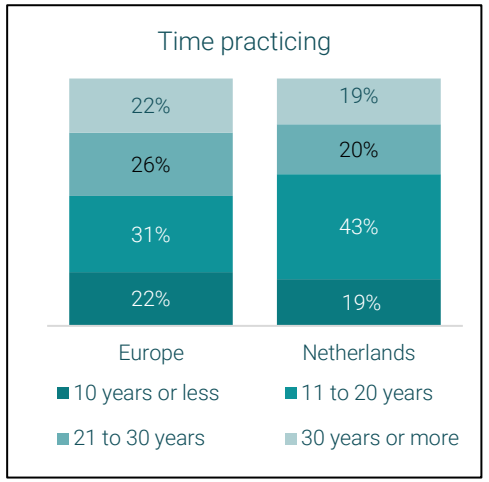
Base: Europe (2965) , BE (66)

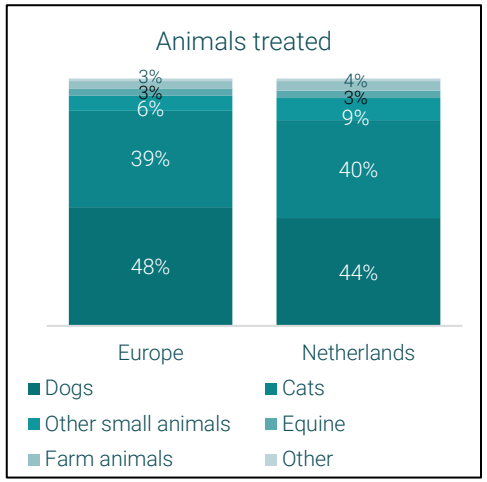
DEMOGRAPHICS: NETHERLANDS

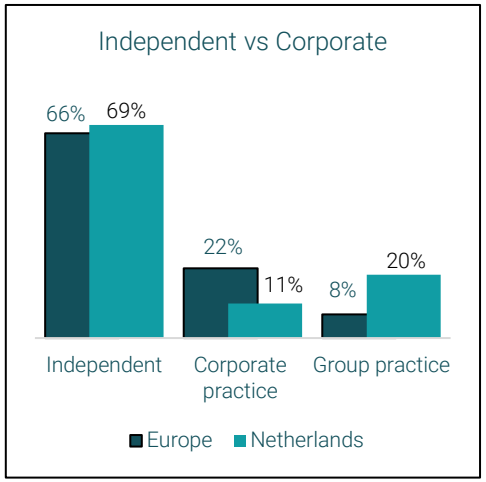


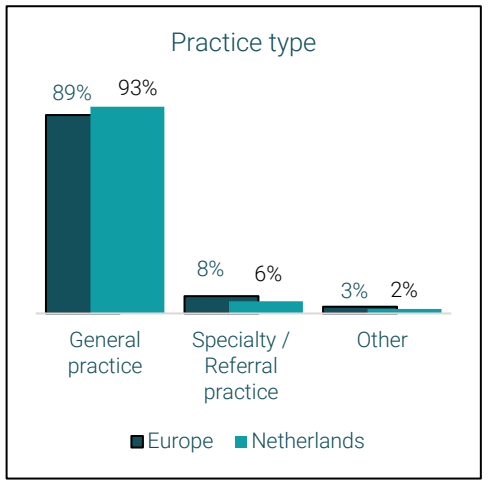


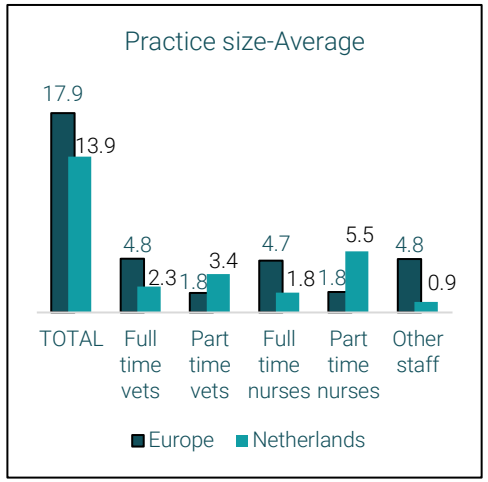


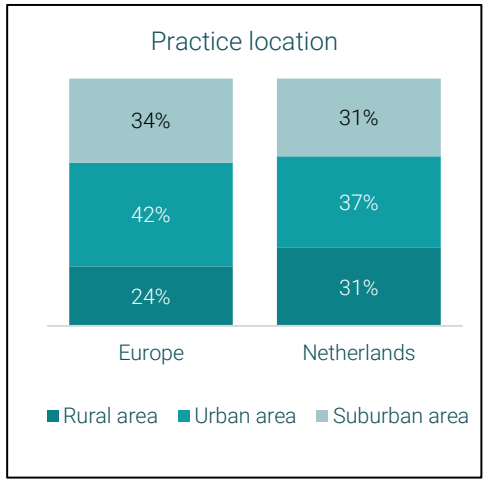










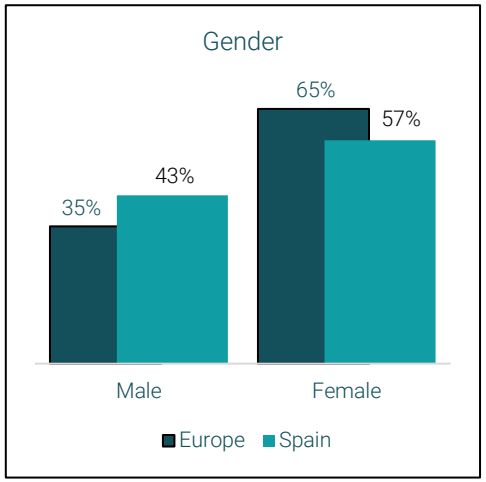


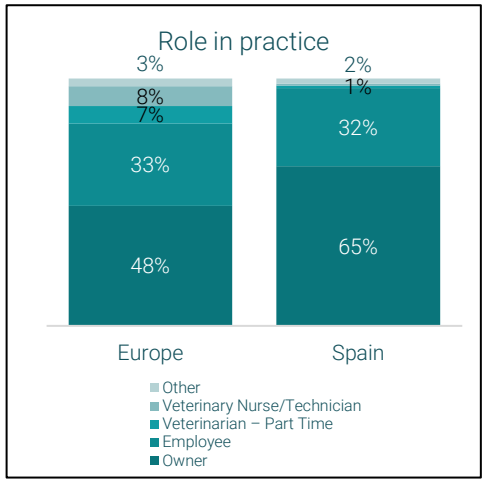
CM Research

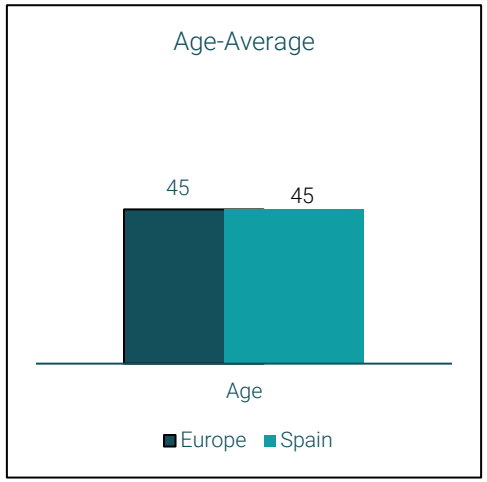
Base: Europe (2965) , NE (60)

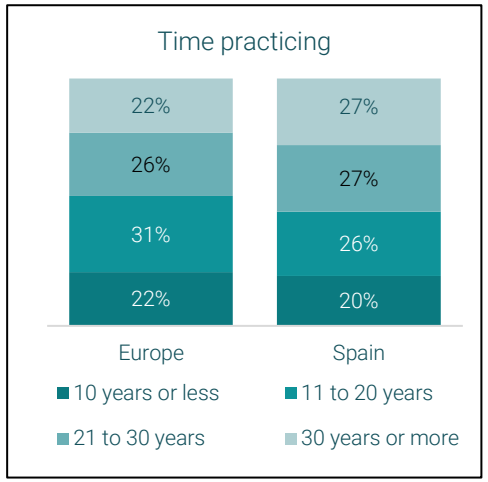
Vetspanel

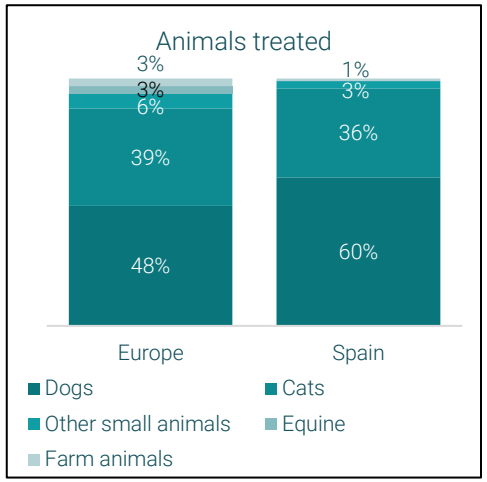
DEMOGRAPHICS: SPAIN

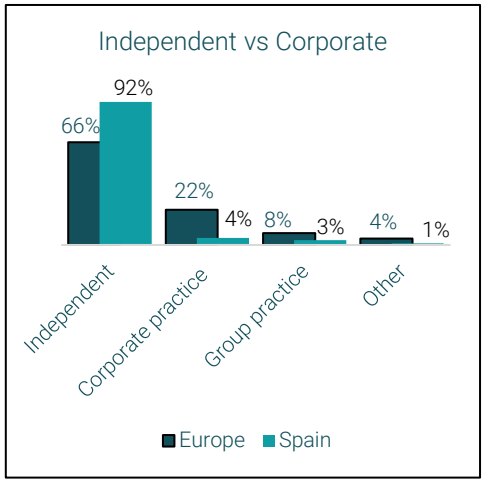


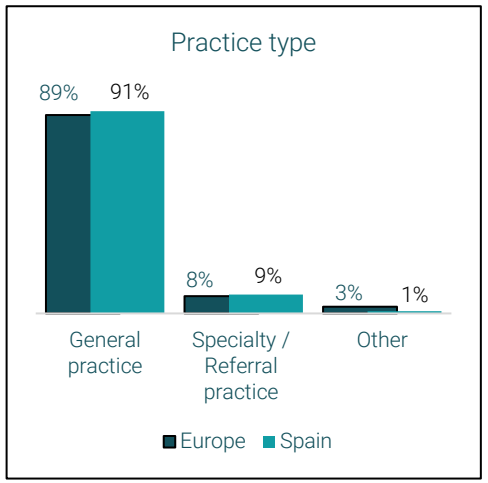


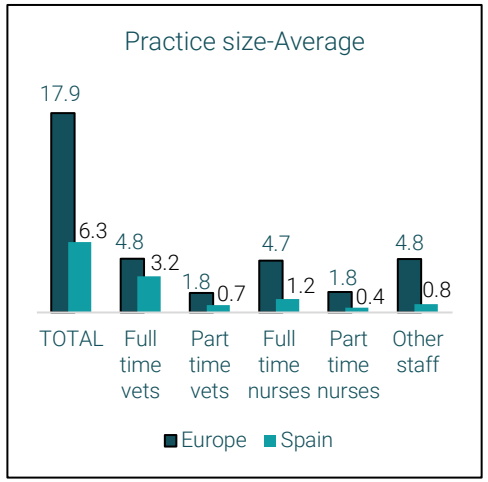


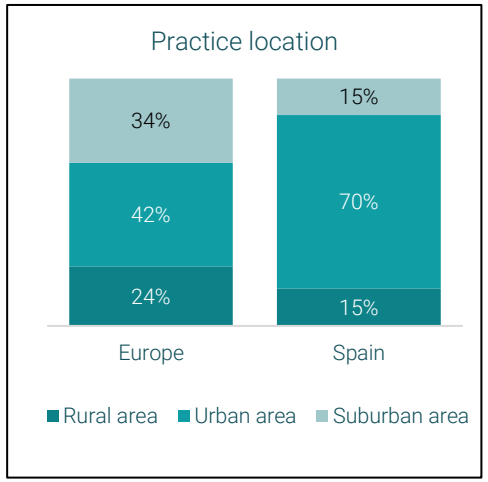










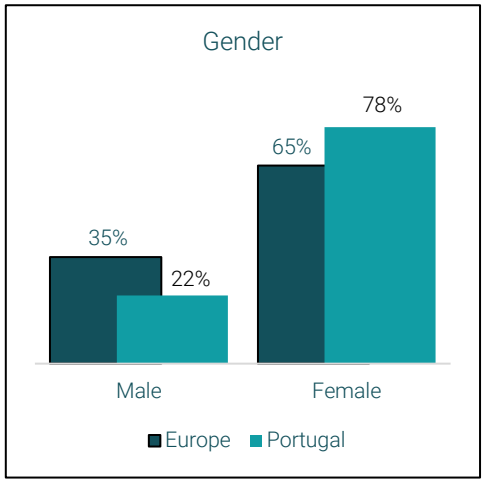


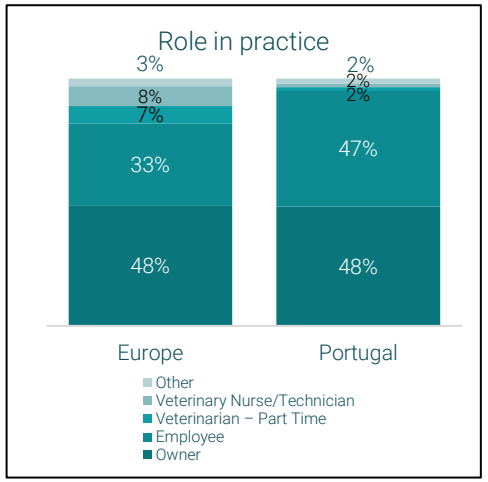
CM Research

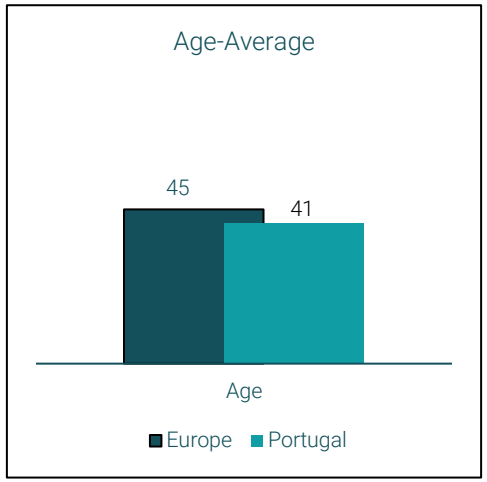
Base: Europe (2965) , SP (380)

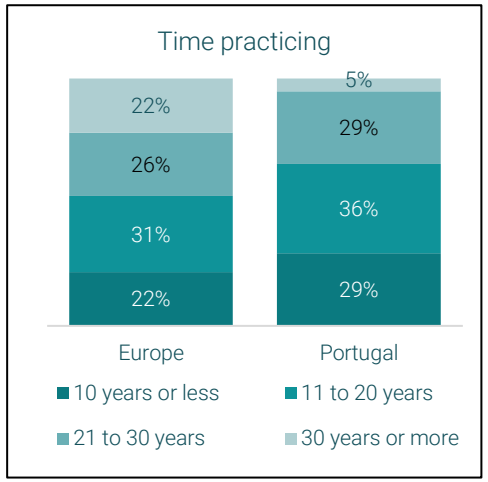
Vetspanel

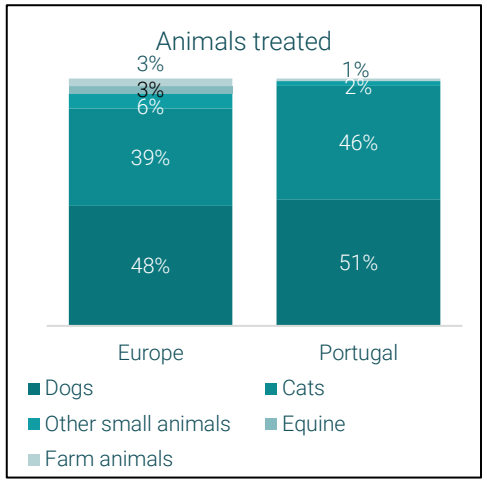
DEMOGRAPHICS: PORTUGAL

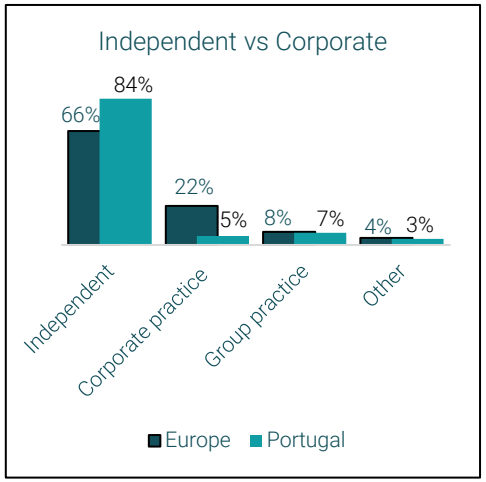


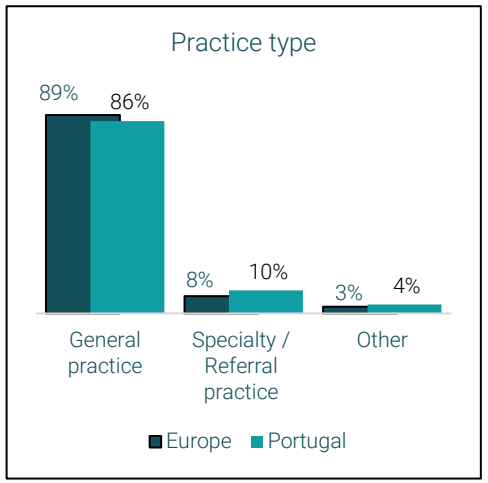


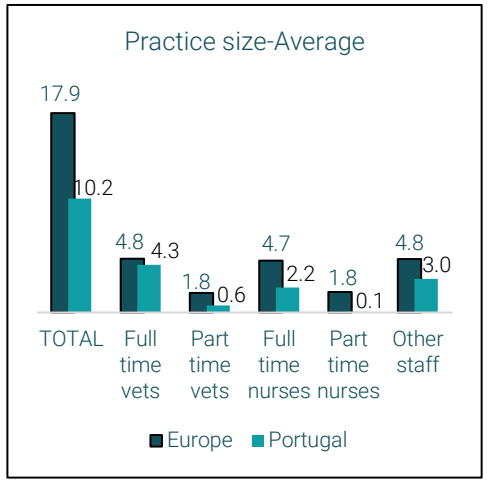


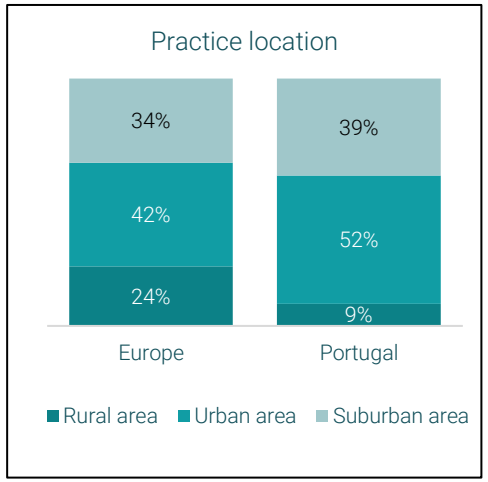










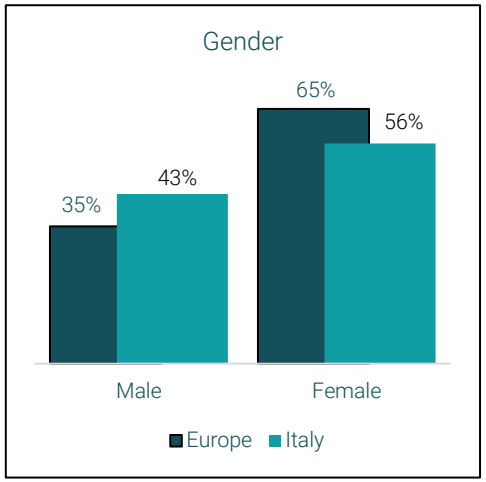


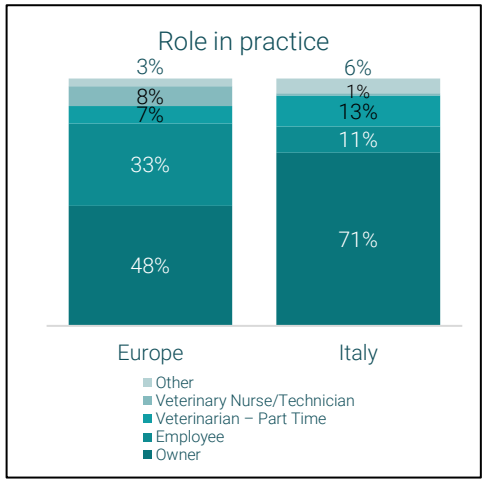
CM Research

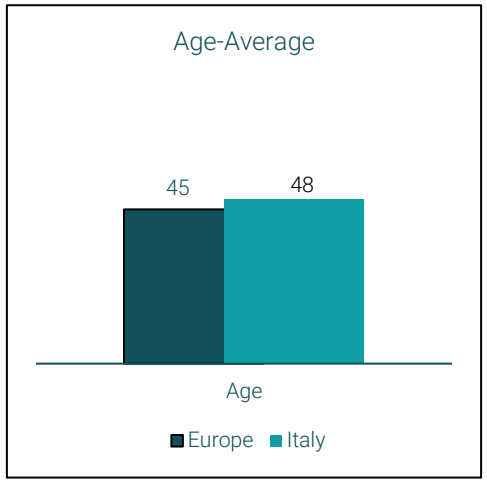
Base: Europe (2965) , PT (74)

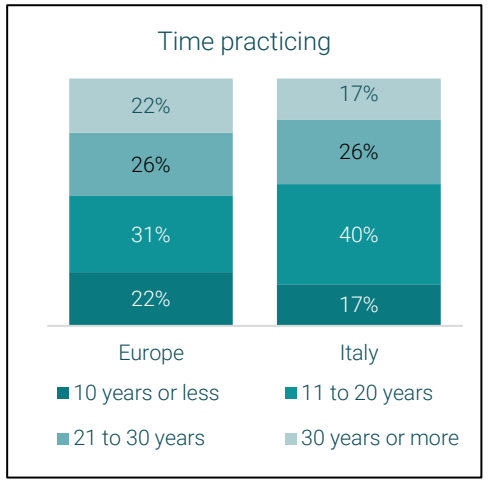
Vetspanel

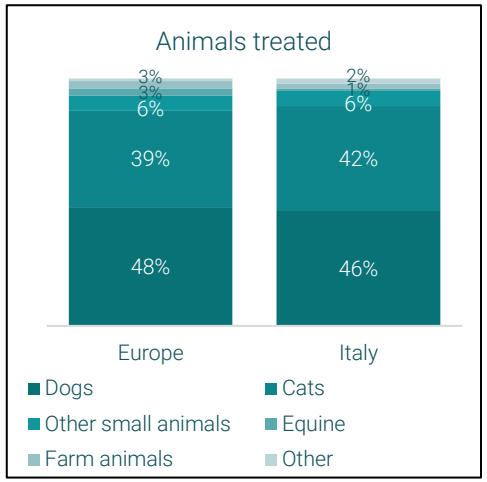
DEMOGRAPHICS: ITALY

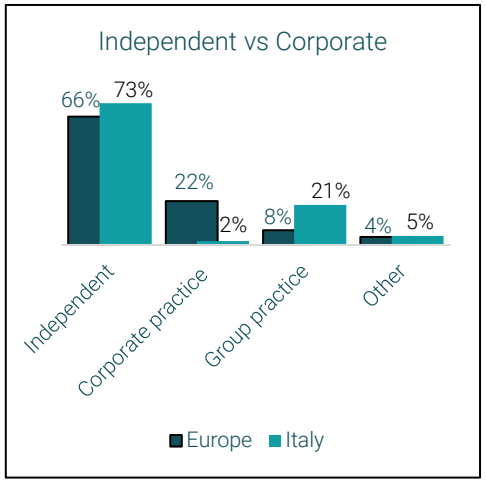


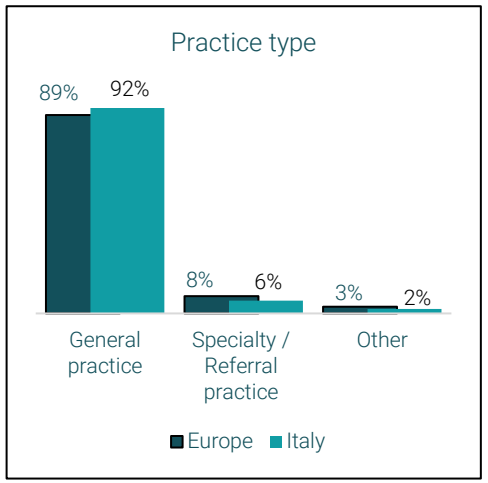


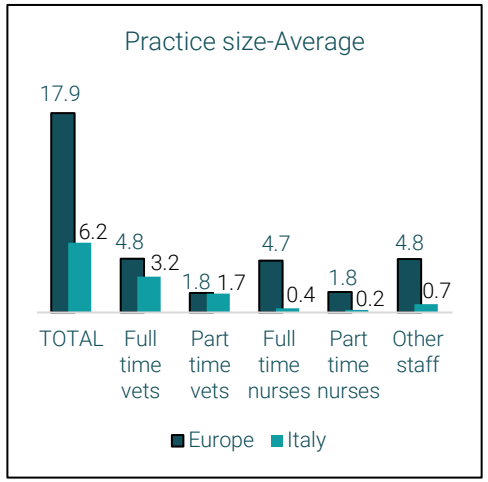


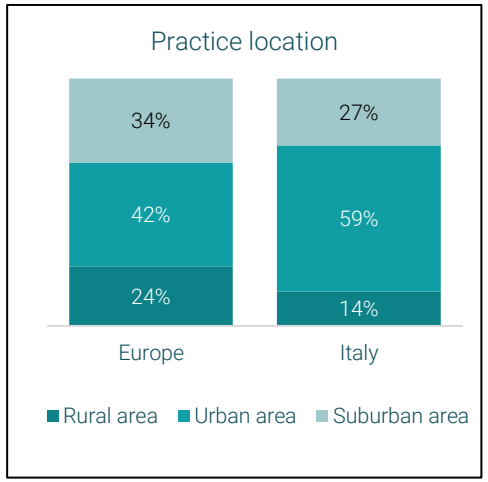










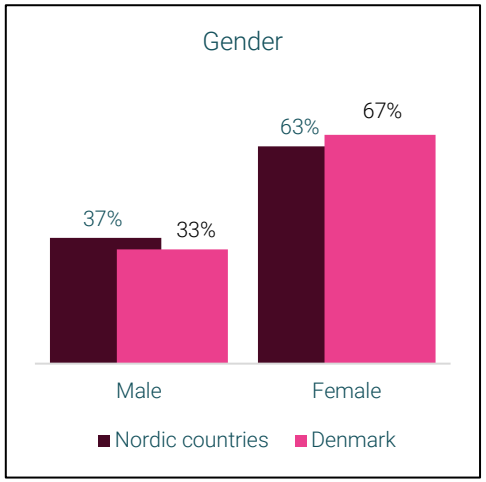


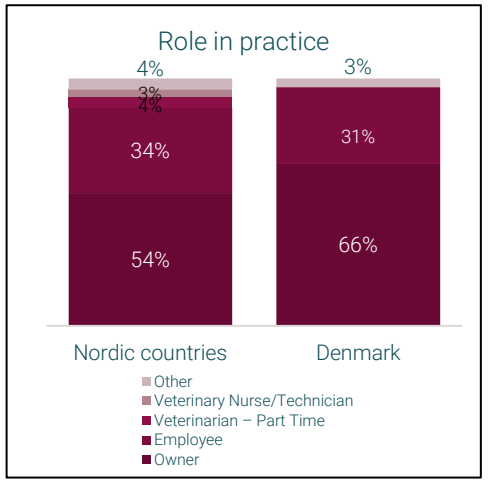
CM Research

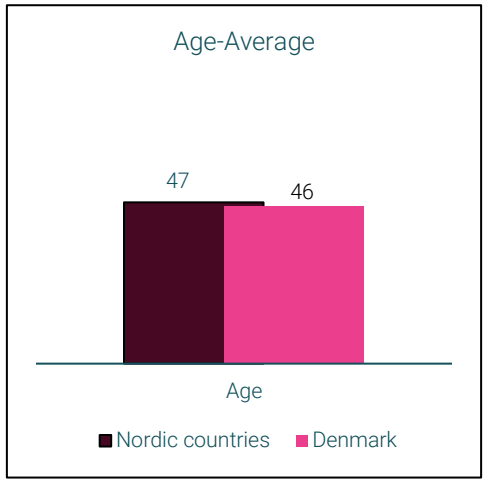
Base: Europe (2965) , IT (355)

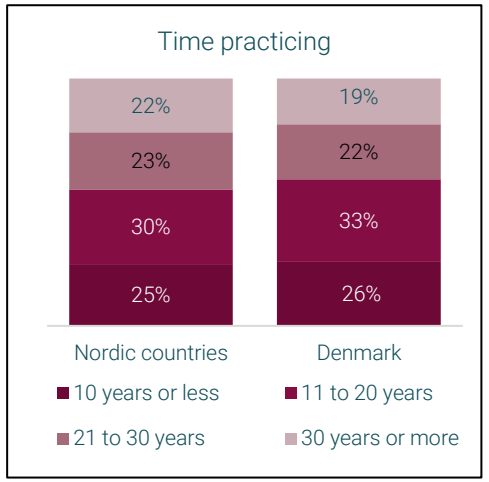
Vetspanel

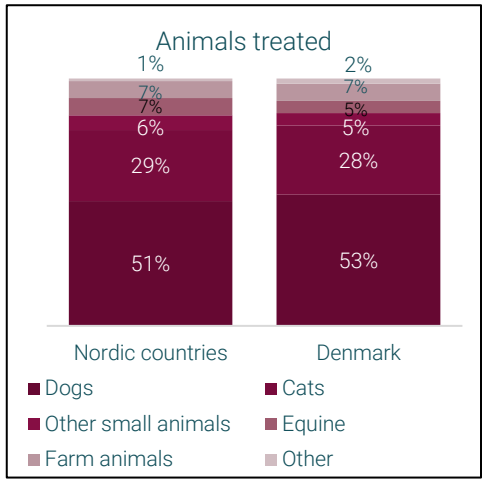
DEMOGRAPHICS: DENMARK

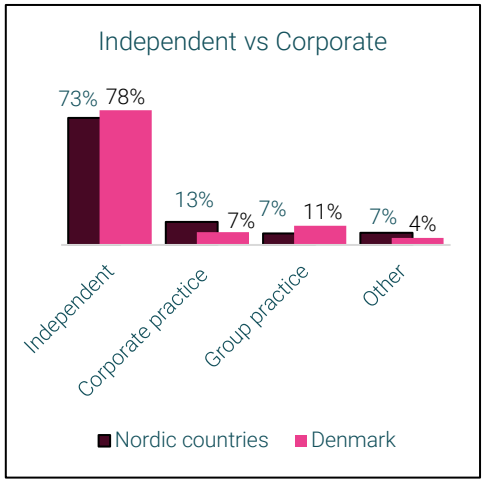


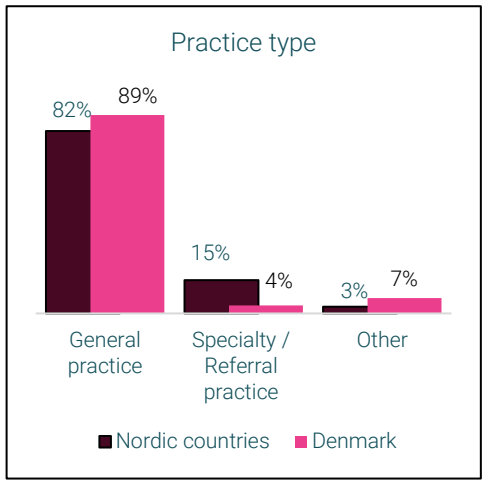


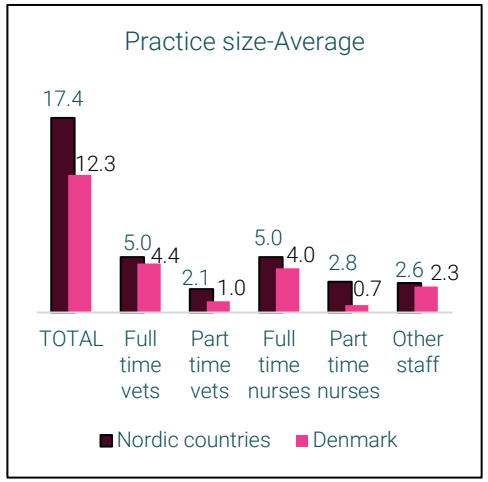


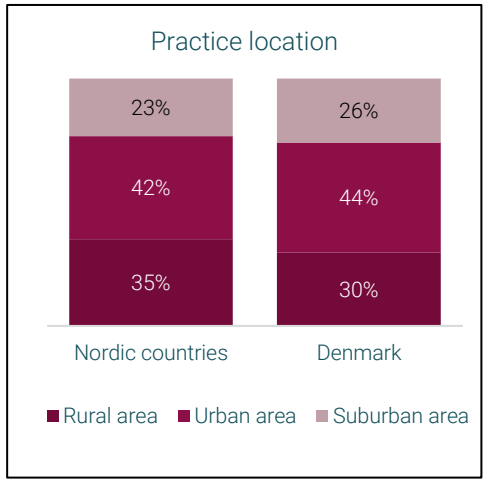










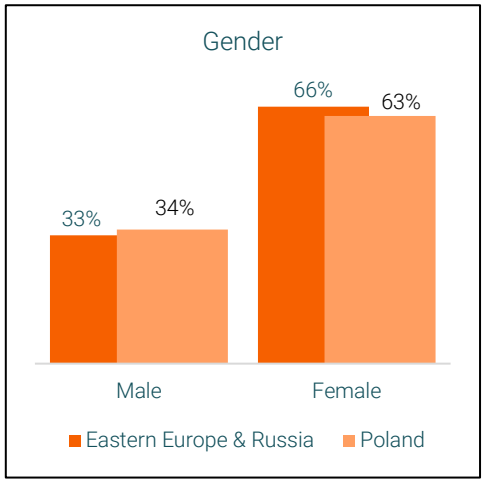


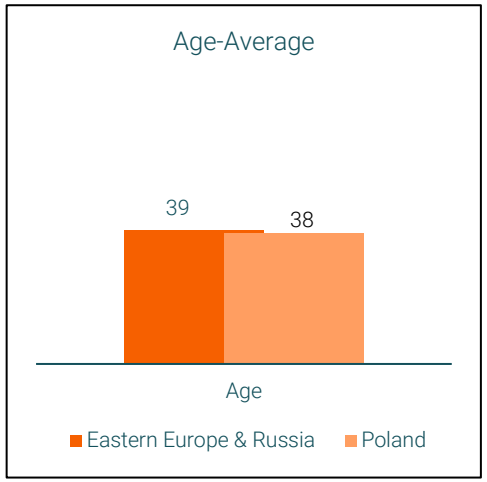
CM Research

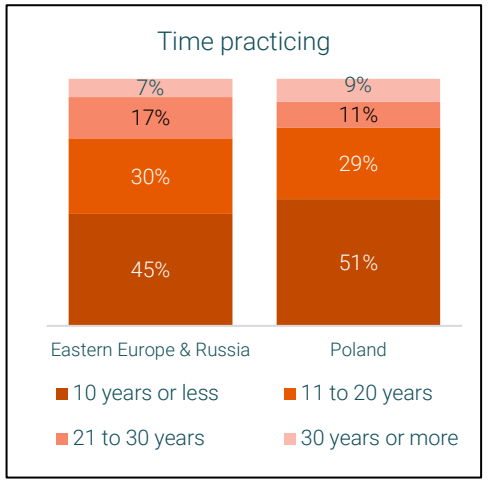
Base: Nordic countries (69) , DE (29)

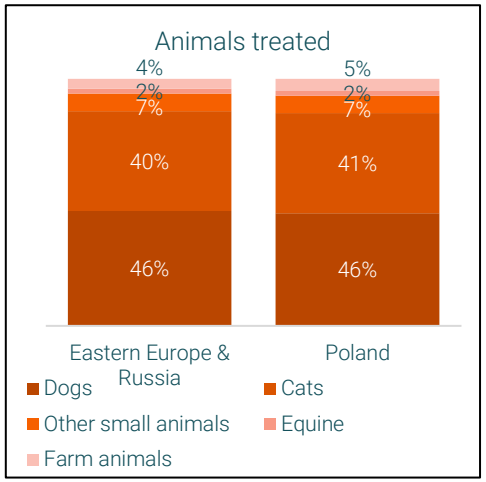
Vetspanel

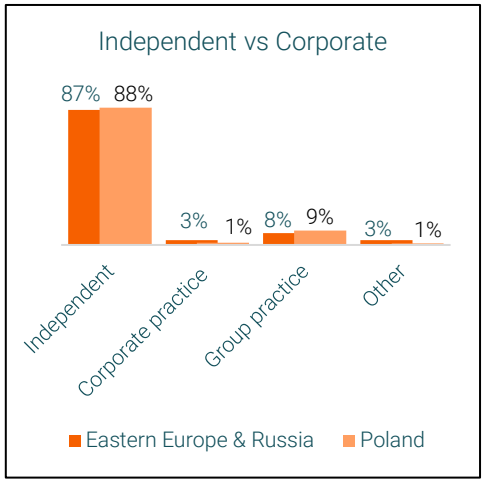
DEMOGRAPHICS: POLAND

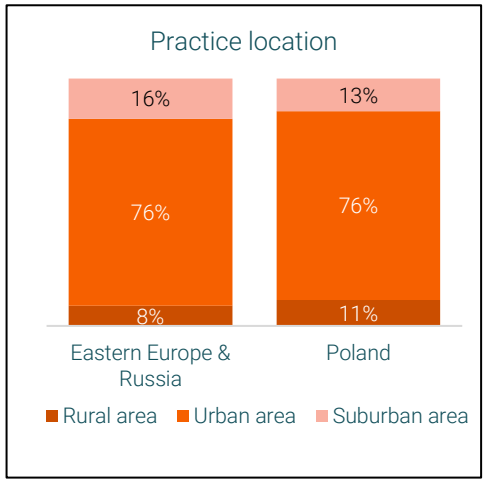










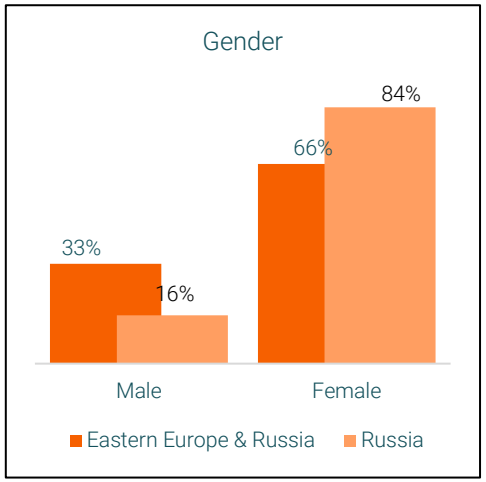


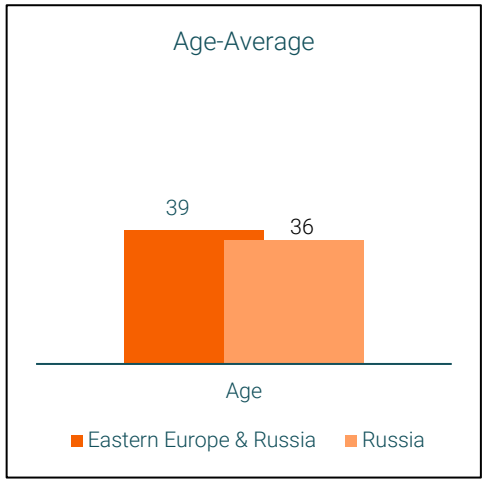
CM Research

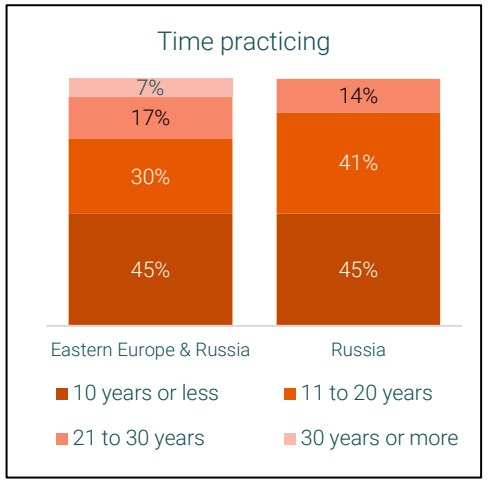
Base: Eastern Europe & Russia (200) , PL (90)

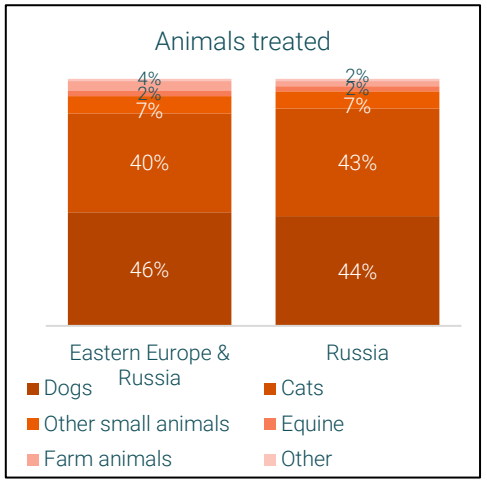
Vetspanel

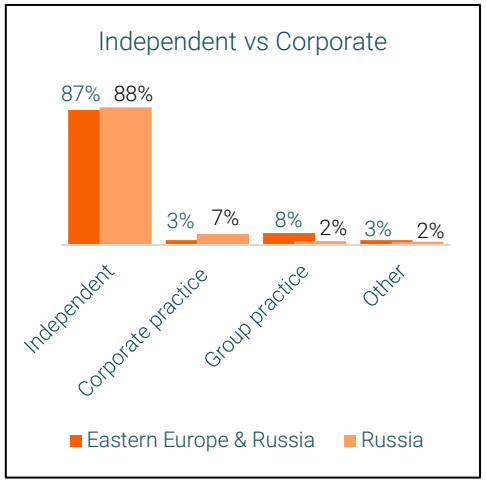
DEMOGRAPHICS:RUSSIA

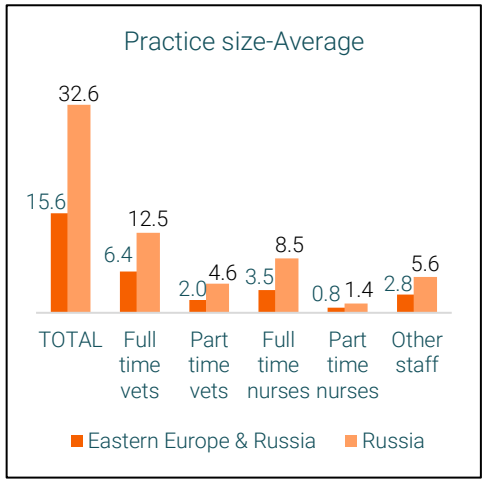


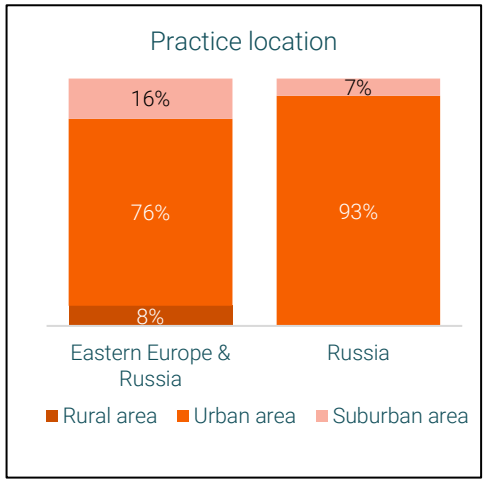










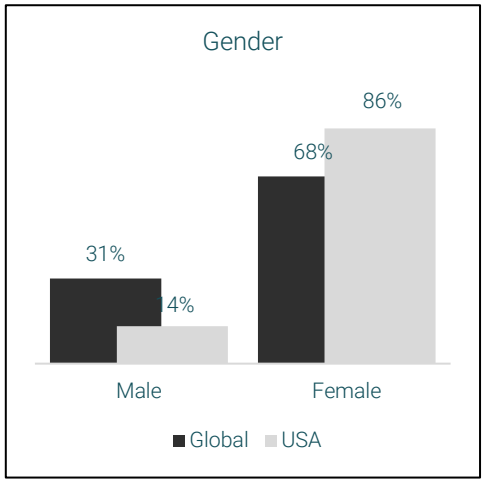


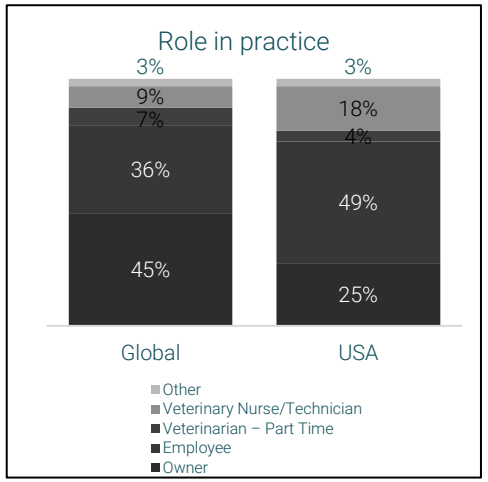
CM Research

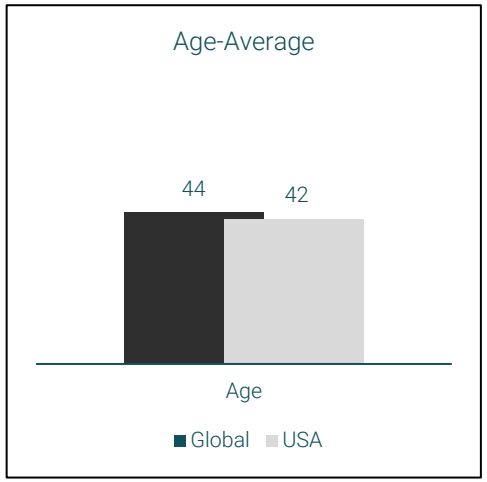
Base: Eastern Europe & Russia (200) , RU (48)

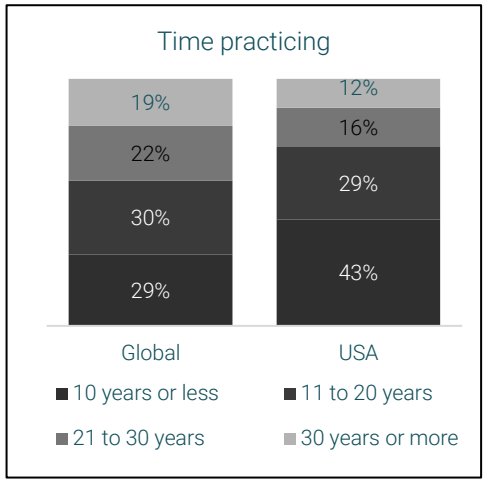
Vetspanel

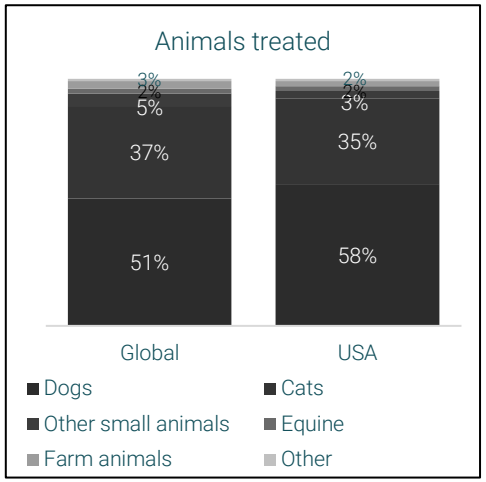
DEMOGRAPHICS: UNITED STATES OF AMERICA

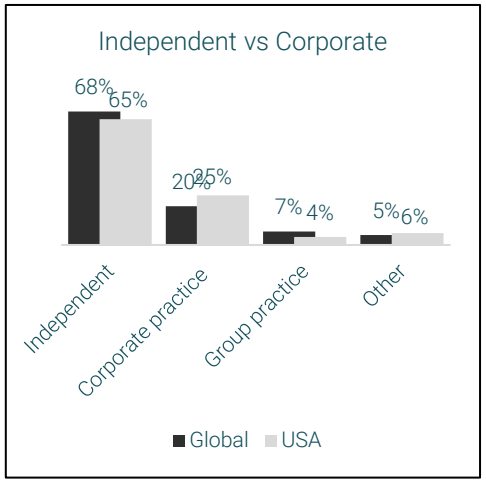


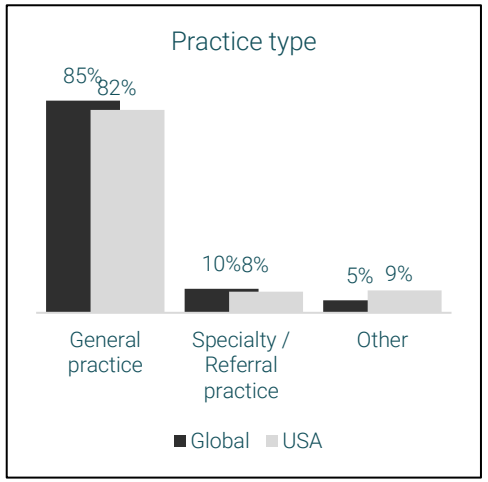


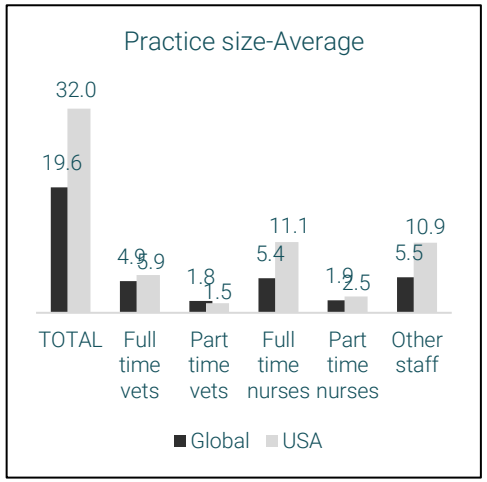


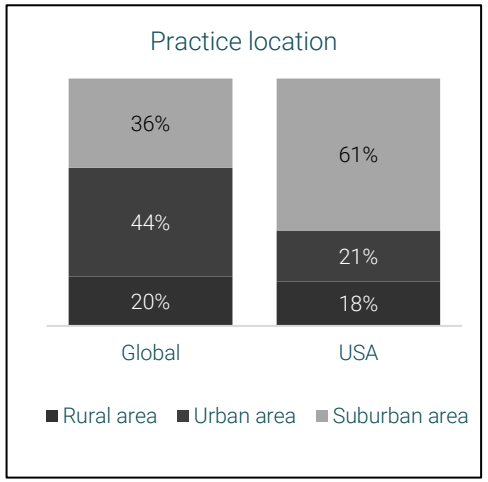










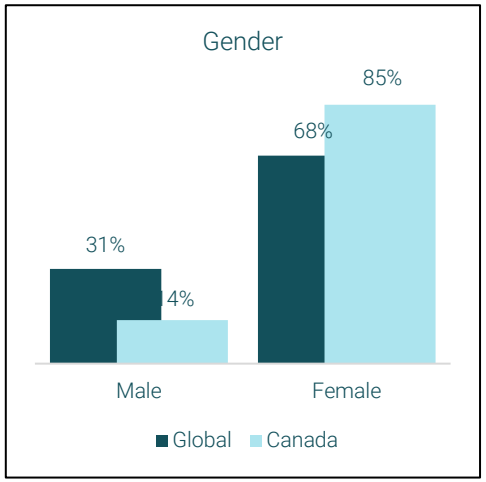


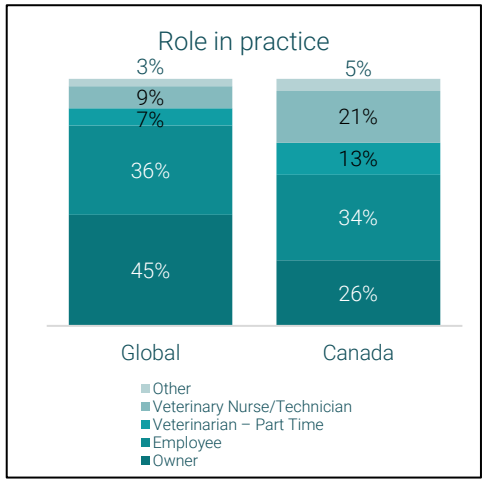
CM Research

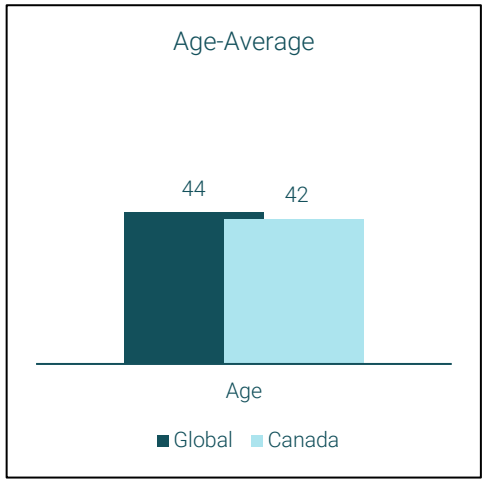
Base: Global (4995), USA (685)

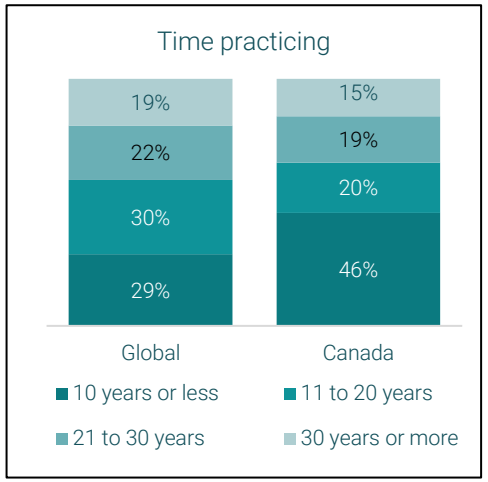
Vetspanel

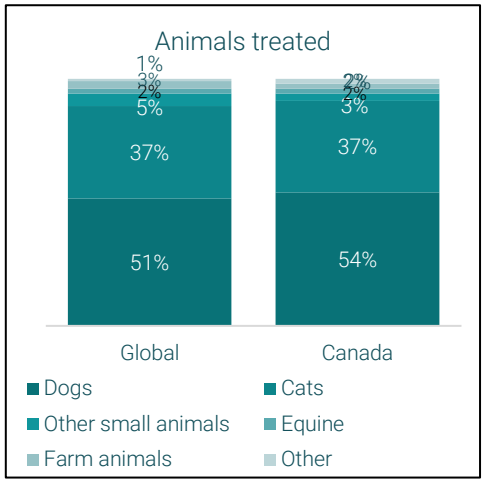
DEMOGRAPHICS: CANADA

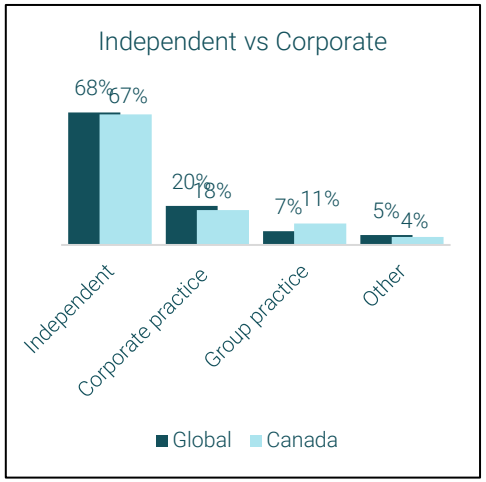


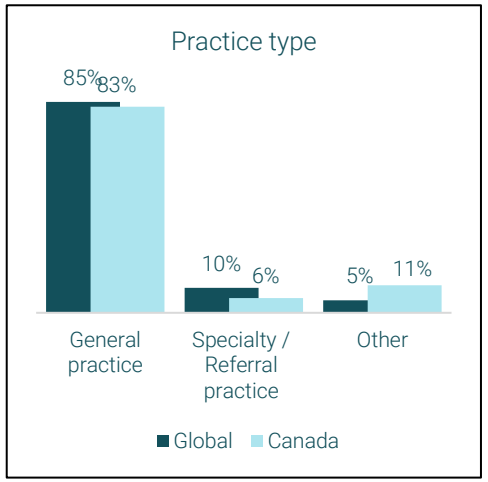


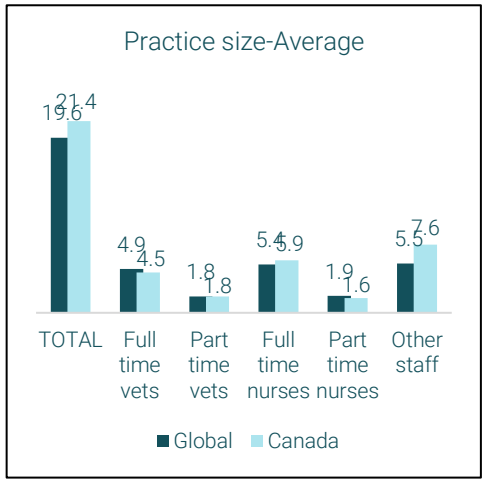


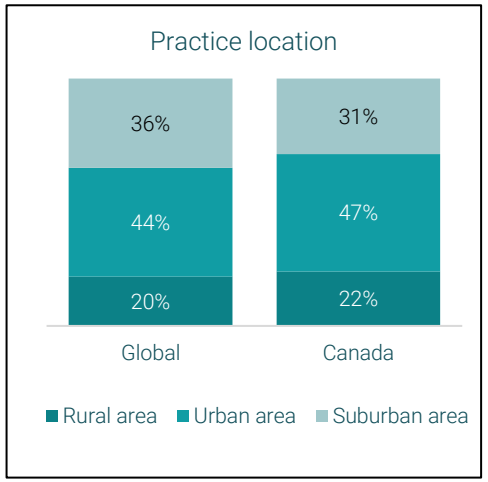










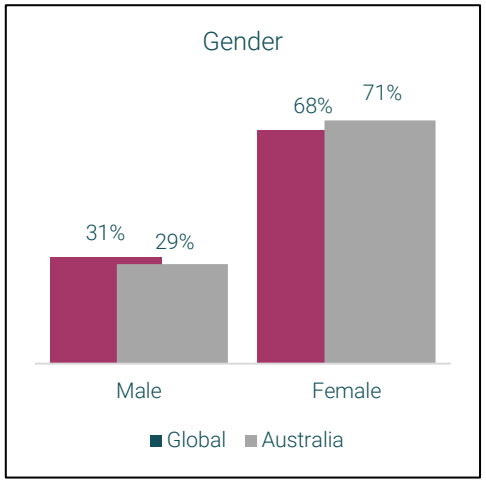


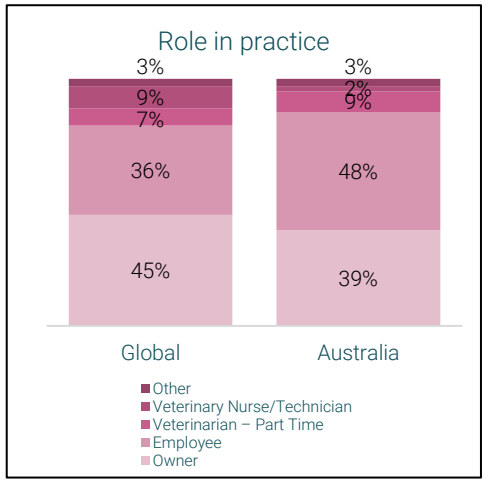
CM Research

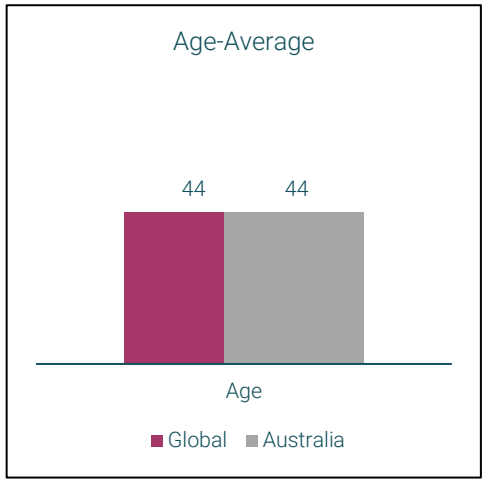
Base: Global (4995), CA (130)

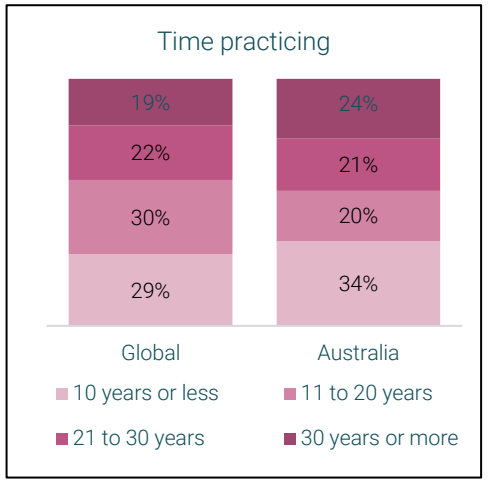
Vetspanel

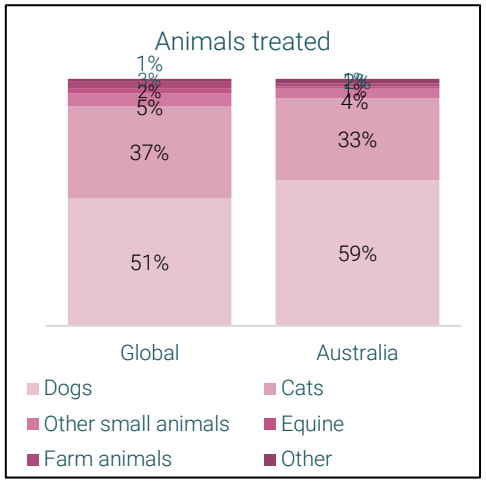
DEMOGRAPHICS:AUSTRALIA

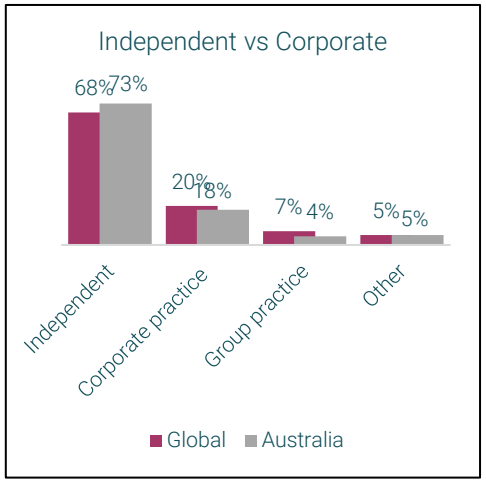


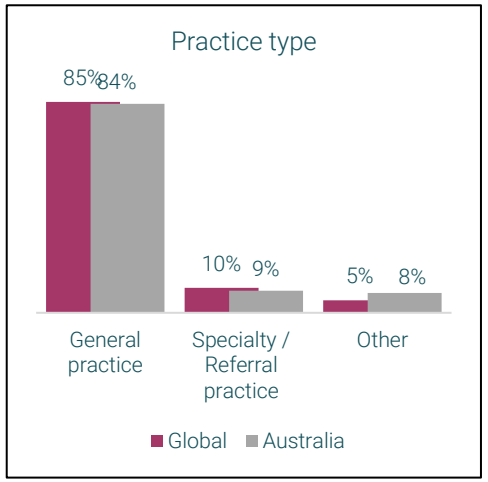


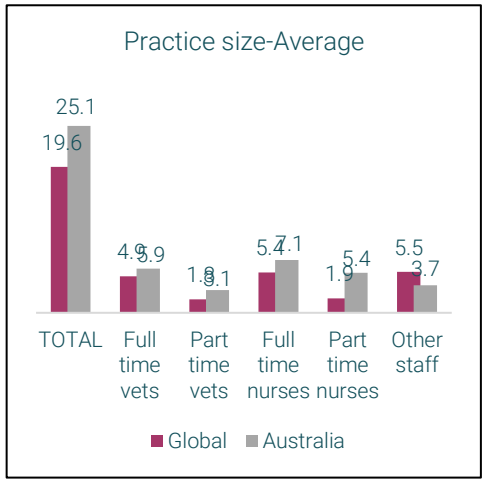


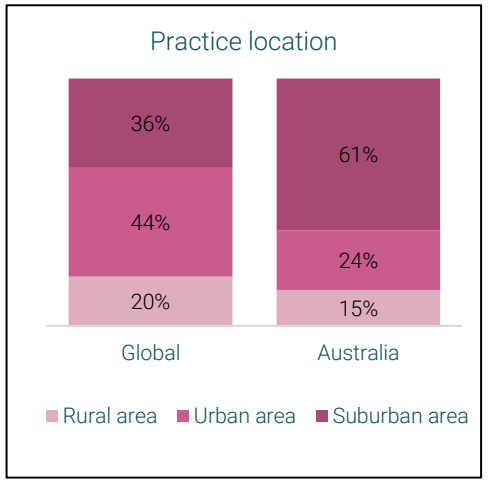










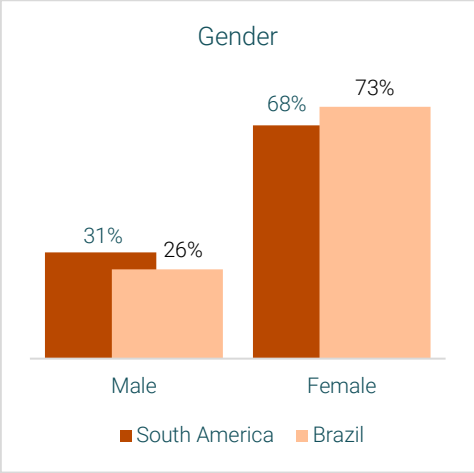


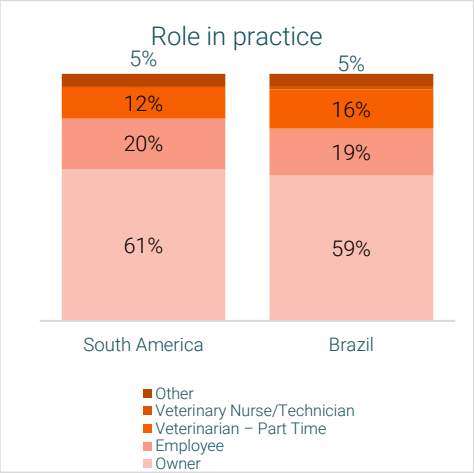
CM Research

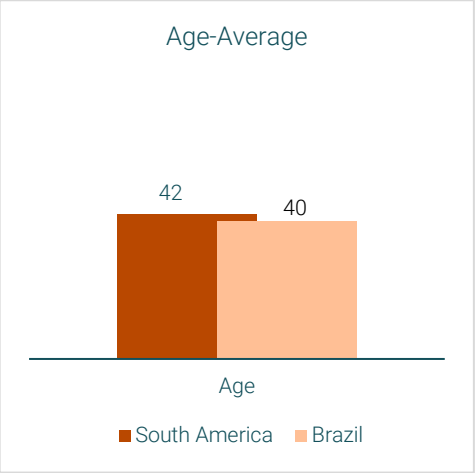
Base: Global (4995), AUS (236)

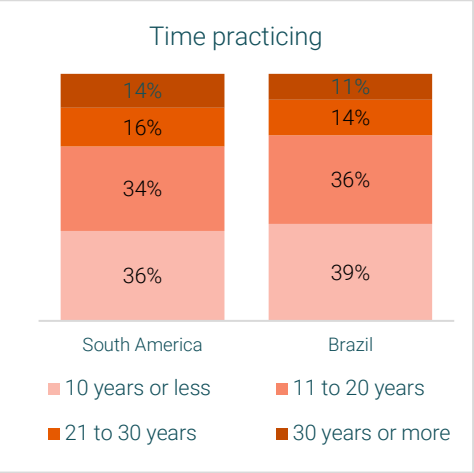
Vetspanel

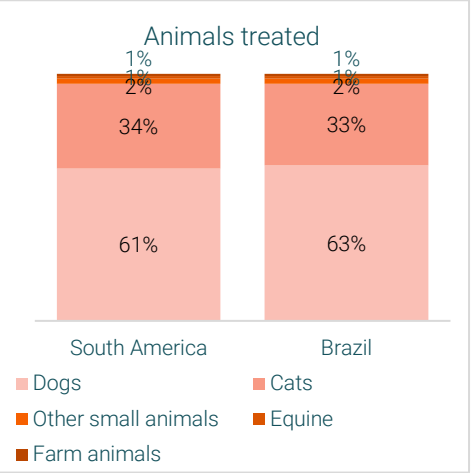
DEMOGRAPHICS: BRAZIL

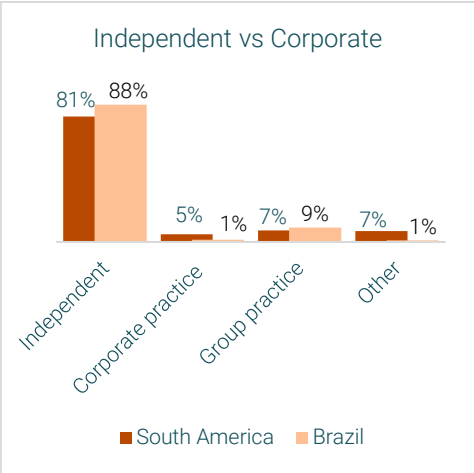


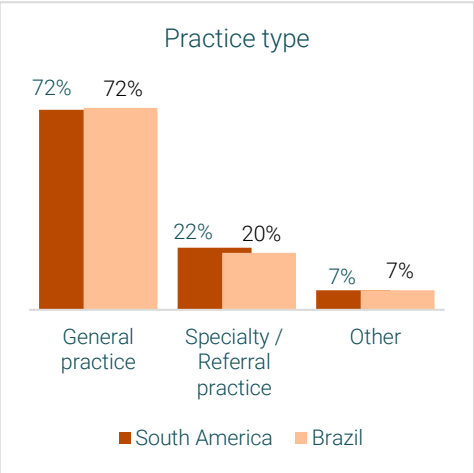










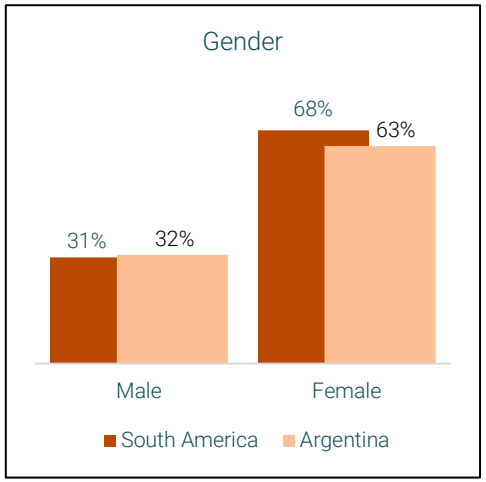


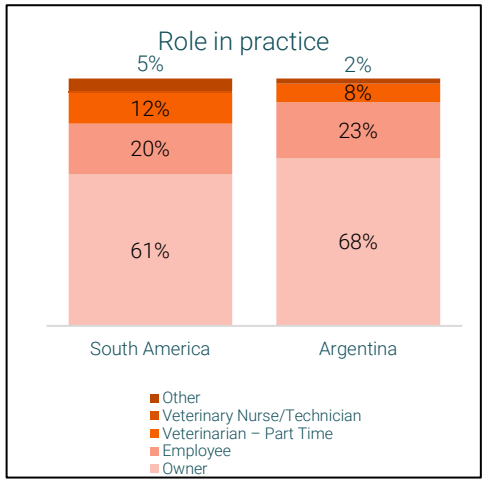
CM Research

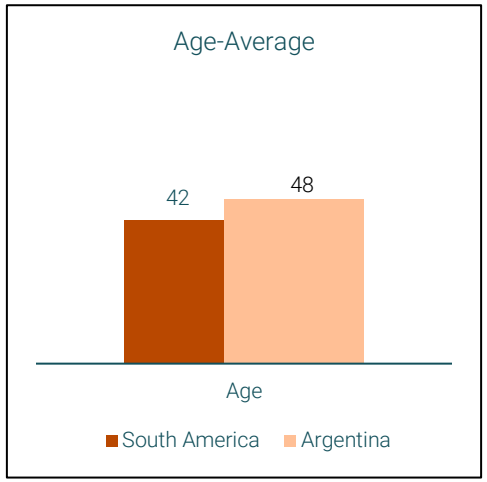
Base: South America (420) , BR (267)

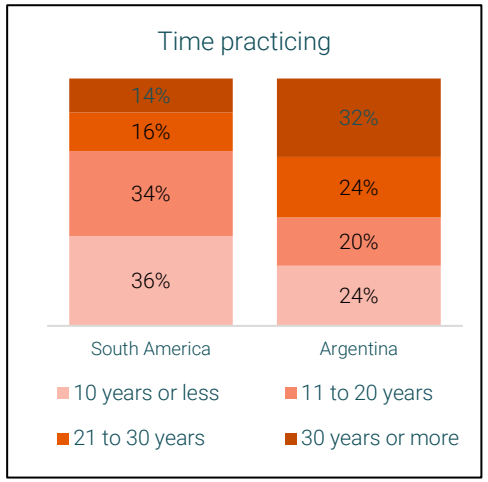
Vetspanel

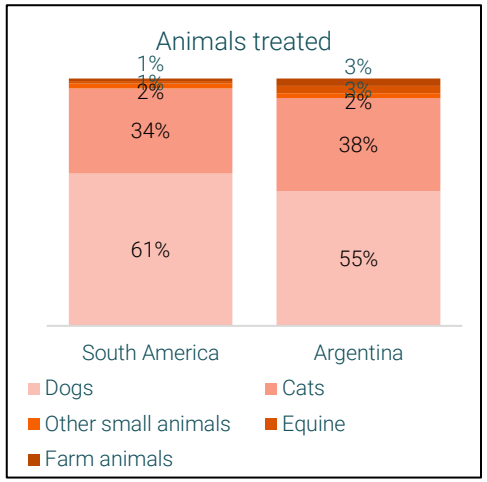
DEMOGRAPHICS: ARGENTINA

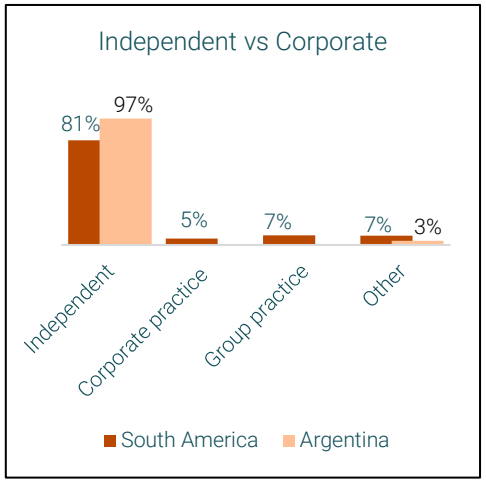


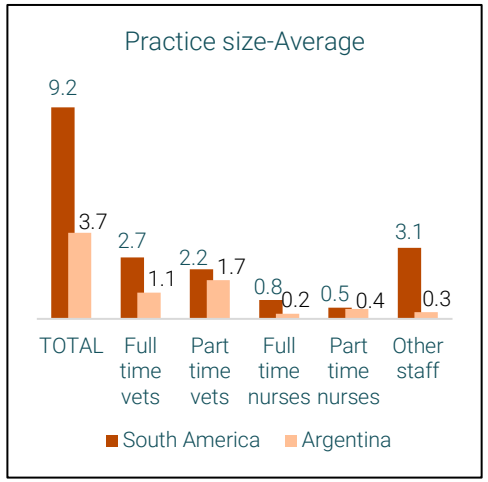


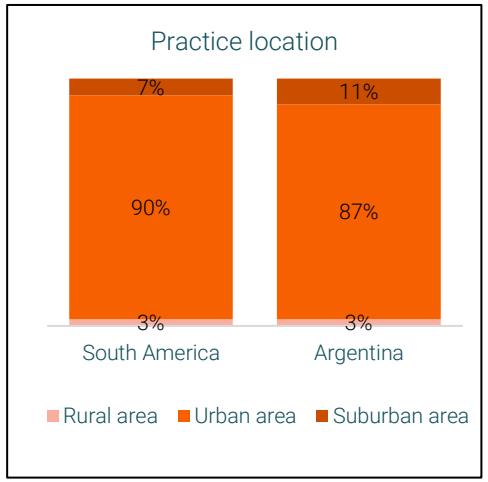






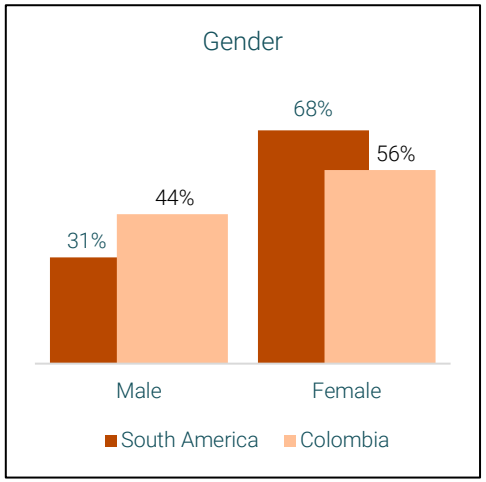


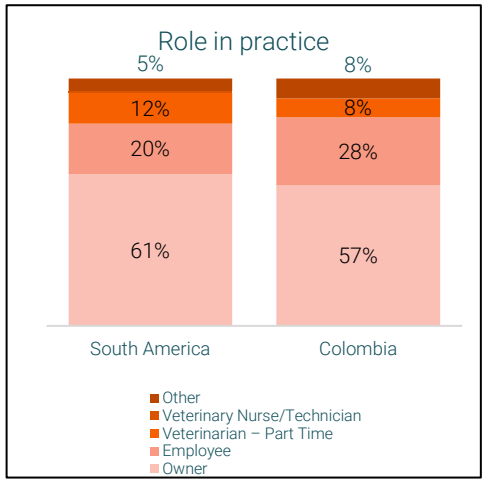


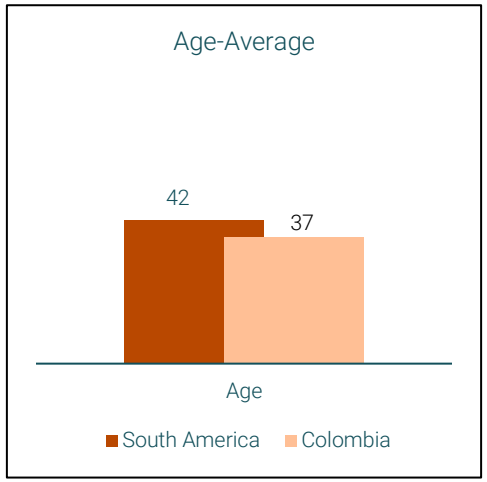


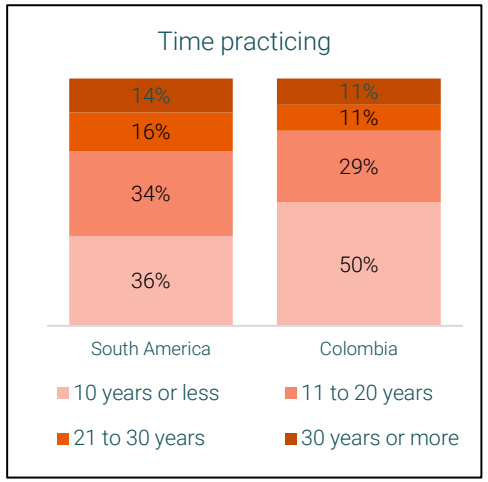
Base: South America (420) , AR (55)

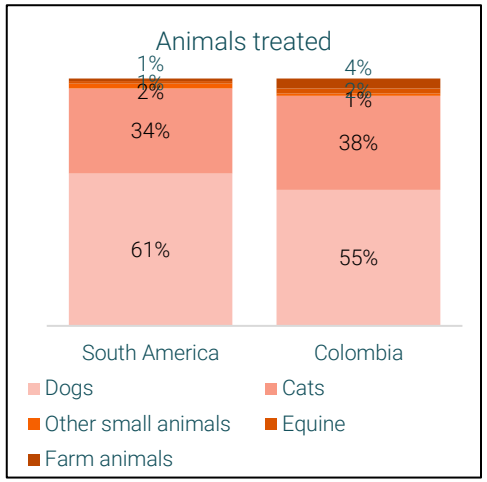
DEMOGRAPHICS: COLOMBIA

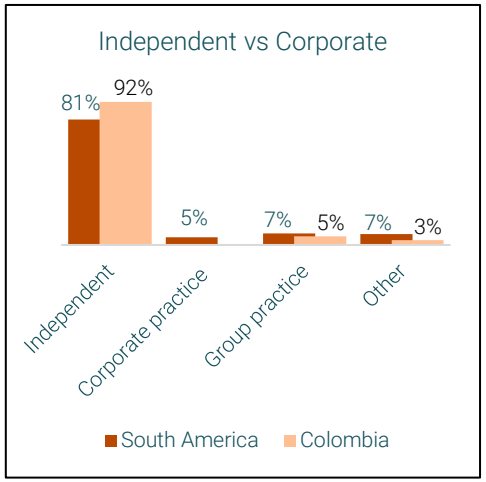


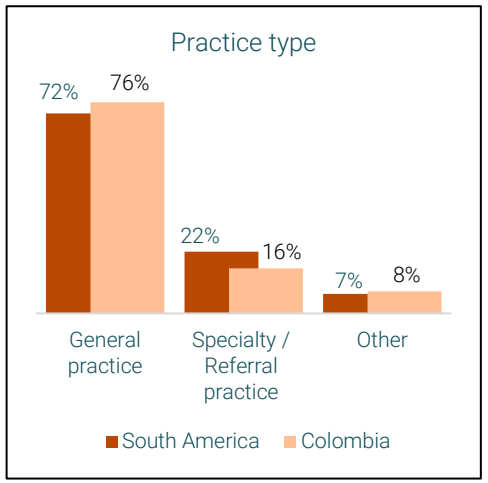


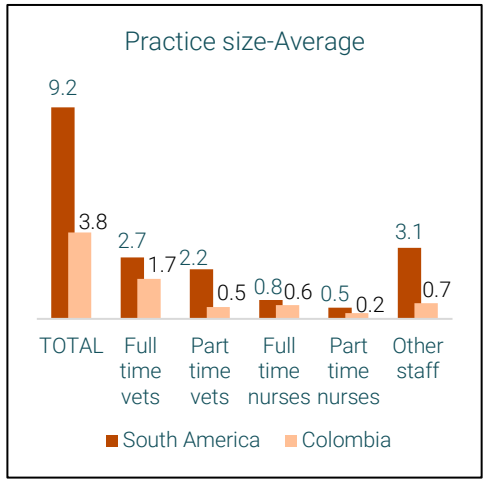


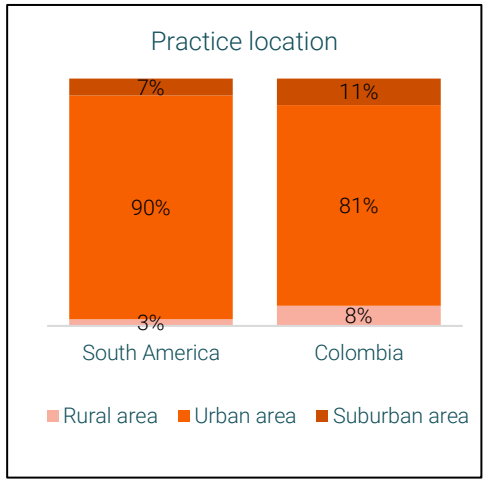












CM Research

Base: South America (420) , CO (65)

Vetspanel

WHO IS CM RESEARCH?

CM Research is a market research agency specialized in the veterinary and pet owner sector.

We run quantitative & qualitative, syndicated & ad-hoc, global & local projects for the world's largest animal health & pet care brands.

We own the largest independent veterinary panel, Vetspanel, with over 28,000 veterinary professionals across the world.

Our team brings together some of the market research industry's top research professionals and animal health & veterinary marketing experts.

No one knows veterinarians better than we do.

Established in 2010, a decade of getting to know veterinarians

Panel of over 28,000 in 17 countries and growing!

Small animal, equine and other large animal professionals

125 ...years of combined research experience

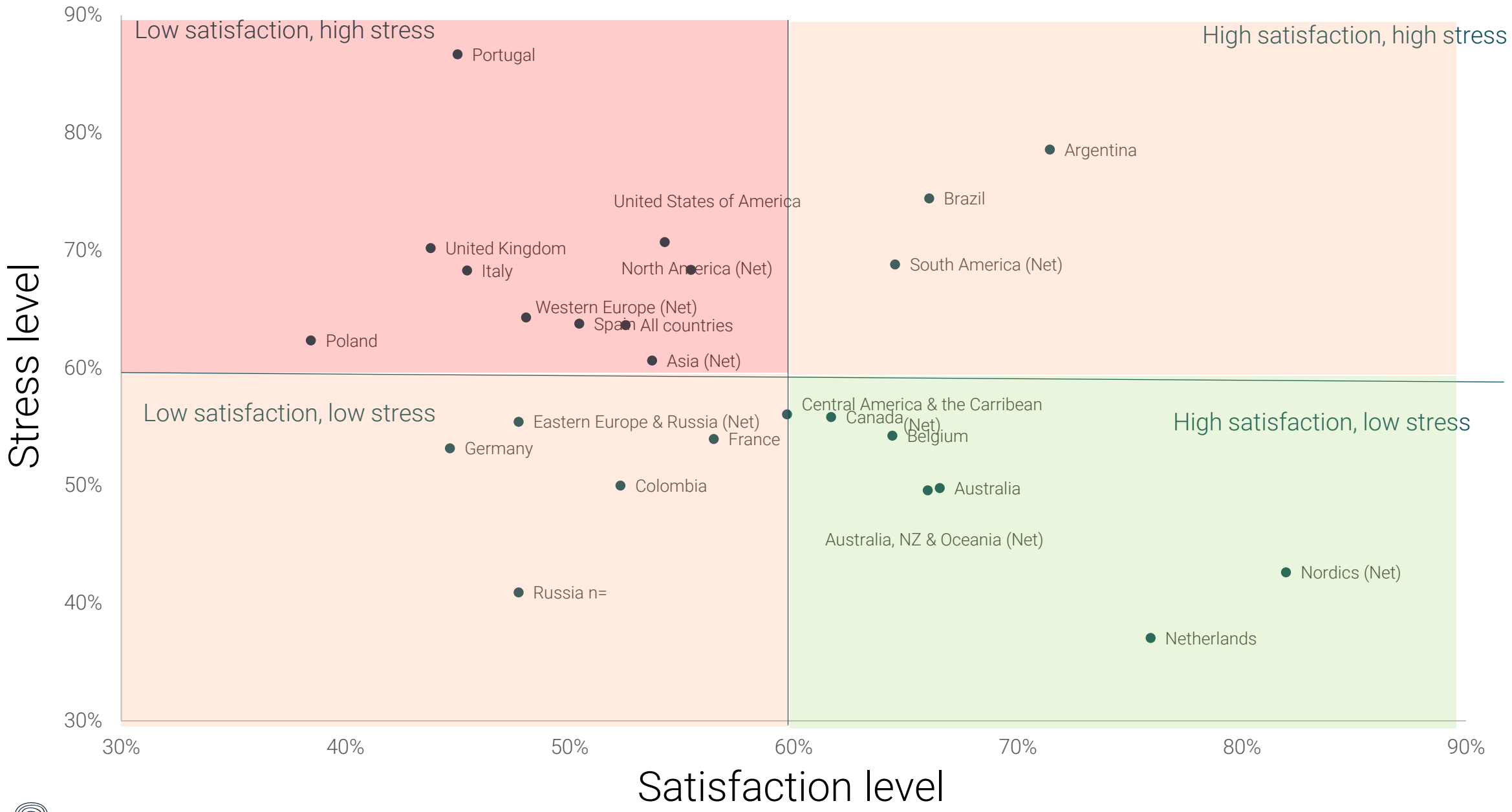
Concept database of over 350 new veterinary concepts

Meet us at industry conferences worldwide

Six office dogs, many home cats, some chickens

SAMPLE BREAKDOWN (% OF RESPONDENTS)	TOTAL COUNTRIES	South America	Australia, New Zealand & Oceania	Western Europe	Nordics	Central America, Mexico & the Caribbean	Asia	Eastern Europe & Russia	North America	Africa
SPECIES FOCUS										
Small animals (80% or more of time spent treating)	87%	94%	92%	86%	73%	73%	80%	84%	91%	63%
Equine (50% or more of time spent treating)	1%	0%	0%	2%	5%	0%	0%	1%	1%	0%
Farm animals (30% or more of time spent treating)	3%	1%	1%	4%	8%	5%	7%	5%	2%	19%
ROLE										
Veterinarian - Practice owner or partner	45%	61%	38%	48%	54%	61%	56%	43%	26%	57%
Veterinarian - Employee	36%	20%	48%	33%	34%	23%	27%	48%	47%	27%
Veterinarian – Part Time/ Locum/ Work for more than one practice	7%	12%	10%	7%	4%	7%	1%	7%	6%	10%
Veterinary Nurse	6%	1%	2%	8%	3%	0%	0%	1%	3%	0%
Veterinary Technician	3%	0%	0%	0%	0%	0%	8%	0%	16%	0%
Practice Manager (not a practising vet)	1%	0%	1%	0%	0%	3%	0%	1%	2%	0%
Office Manager (not a practising vet)	0%	1%	0%	0%	0%	0%	2%	1%	0%	0%
Other	2%	4%	2%	2%	4%	7%	5%	0%	2%	7%

SAMPLE BREAKDOWN (% OF RESPONDENTS)	TOTAL COUNTRIES	South America	Australia, New Zealand & Oceania	Western Europe	Nordics	Central America, Mexico & the Caribbean	Asia	Eastern Europe & Russia	North America	Africa
PRACTICE TYPE										
General practice	85%	72%	85%	89%	82%	78%	77%	84%	82%	74%
Specialty / Referral practice	10%	22%	9%	8%	15%	16%	13%	15%	8%	26%
Emergency Practice	3%	2%	3%	2%	0%	3%	5%	1%	5%	0%
Other	2%	5%	3%	1%	3%	3%	4%	0%	5%	0%
PRACTICE OWNERSHIP										
Independent / privately owned practice	68%	85%	72%	66%	73%	83%	57%	87%	65%	67%
Corporate practice	20%	4%	19%	22%	13%	3%	22%	3%	24%	11%
Group practice - co-owned by vets	7%	6%	5%	8%	7%	3%	14%	8%	5%	7%
Charity practice	2%	1%	2%	2%	0%	5%	1%	1%	2%	4%
Other	3%	4%	3%	2%	7%	6%	5%	2%	4%	11%
PRACTICE LOCATION										
Rural area	20%	3%	15%	24%	35%	14%	8%	8%	19%	4%
Urban area	44%	90%	27%	42%	42%	64%	79%	76%	25%	70%
Suburban area	36%	7%	58%	34%	23%	22%	13%	16%	57%	26%


Low satisfaction, high stress
High satisfaction, high stress
Low satisfaction, low stress
High satisfaction, low stress
Portugal
Argentina
Brazil
United States of America
United Kingdom
Italy
North America (Net)
South America (Net)
Western Europe (Net)
Spain
All countries
Poland
Asia (Net)
Central America & the Carribean
Canada (Net)
Eastern Europe & Russia (Net)
France
Belgium
Germany
Colombia
Australia
Australia, NZ & Oceania (Net)
Nordics (Net)
Russia n=
Netherlands
90%
80%
70%
60%
50%
40%
30%
30%
40%
50%
60%
70%
80%
90%
Stress level
Satisfaction level