

Vetspanel Survey 2016



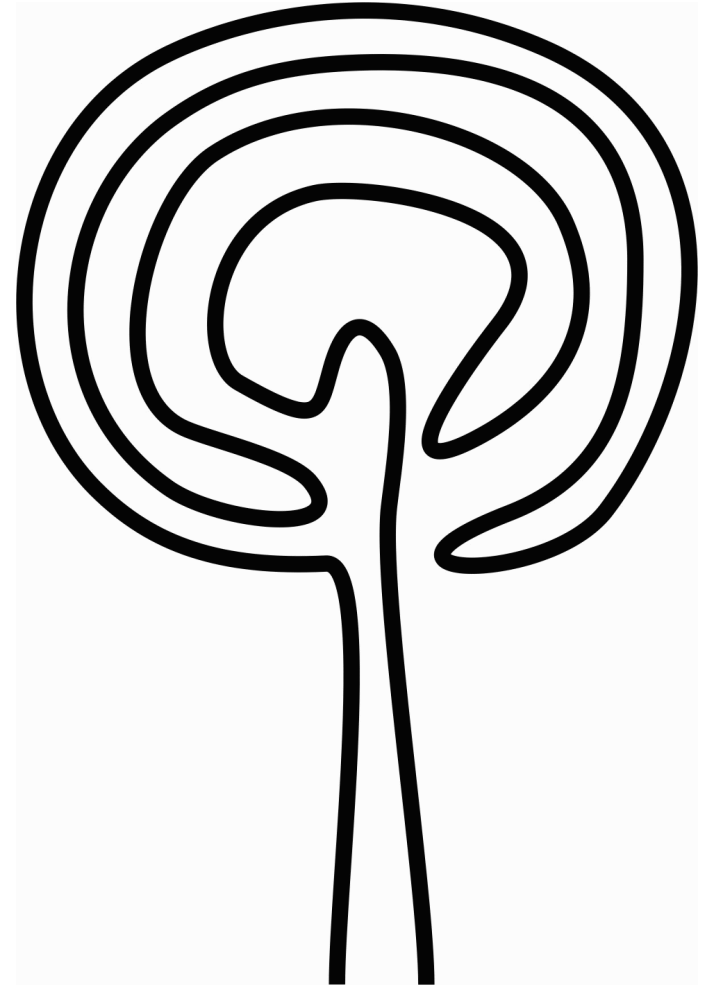
Report

June 2017

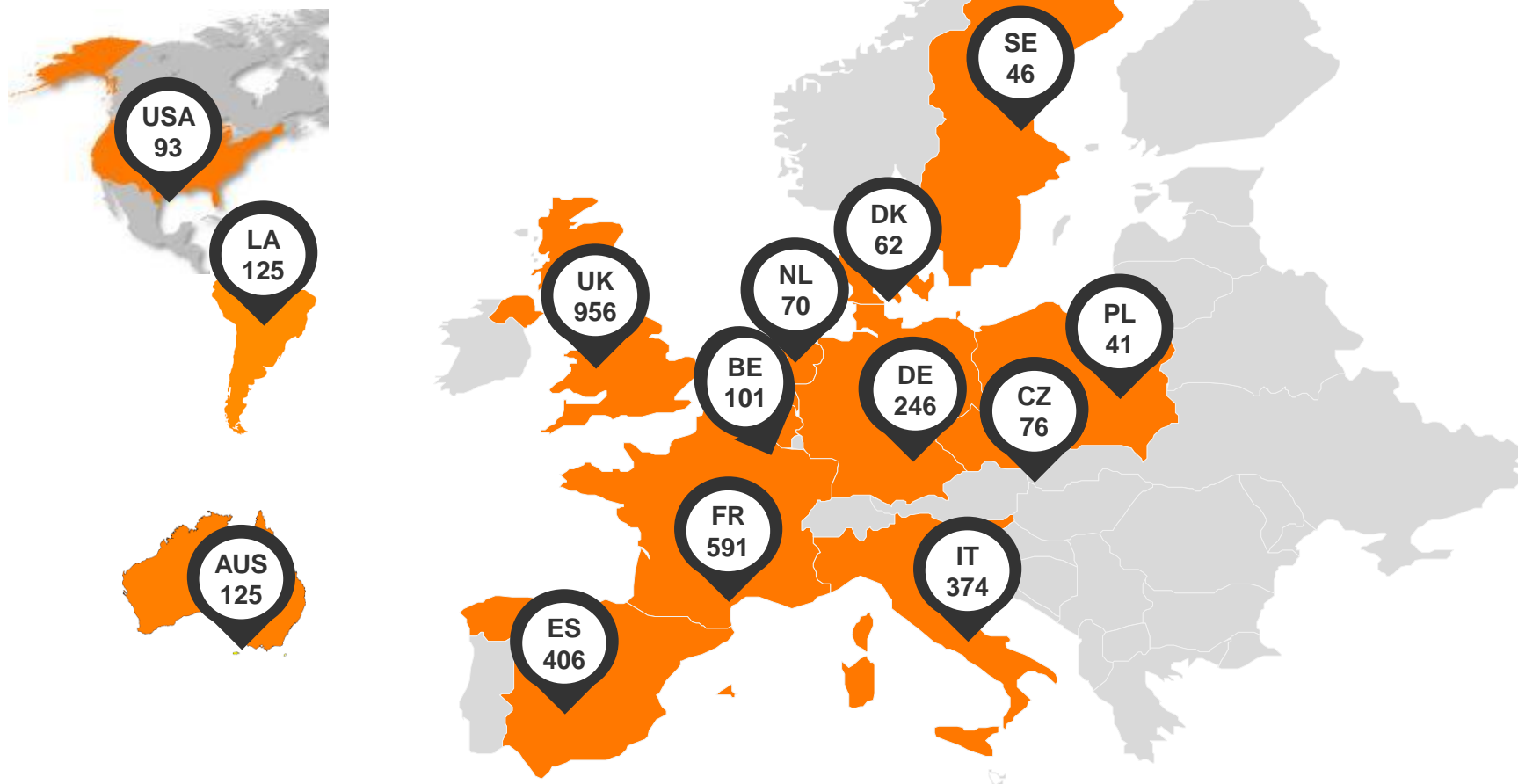


Methodology

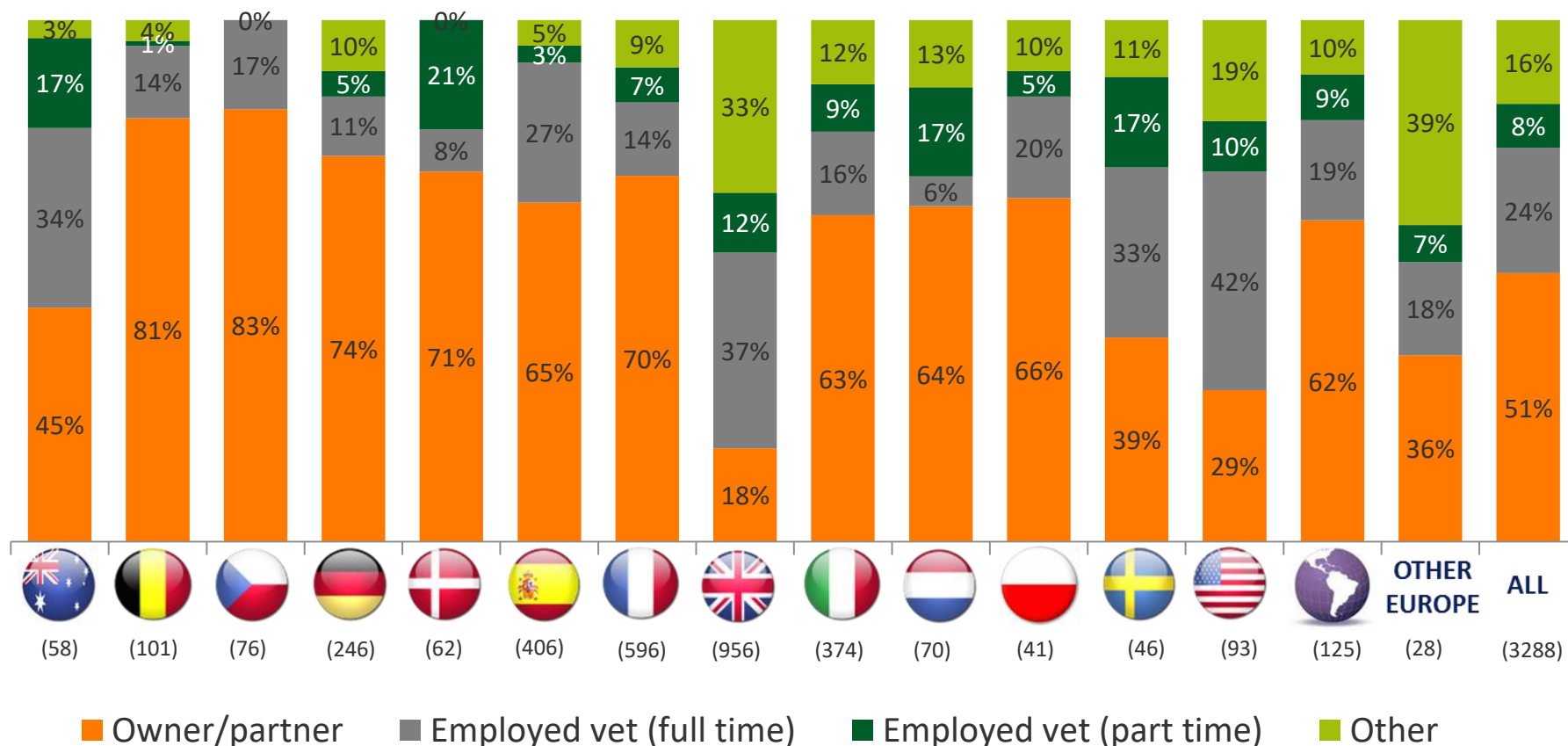
- Fieldwork: 14 March to 25 May 2017
- Online interviews
- 3,288 respondents
- Coverage: 11 European countries, Australia, USA and Latin America
- Respondent profile:
 - Practicing veterinarians
 - Clinic owners / partners or employed vets
 - Predominantly small animal vets
 - Members of Vetspanel
- Topic of the survey: All questions are related to the veterinary profession, some questions were suggested by vets.



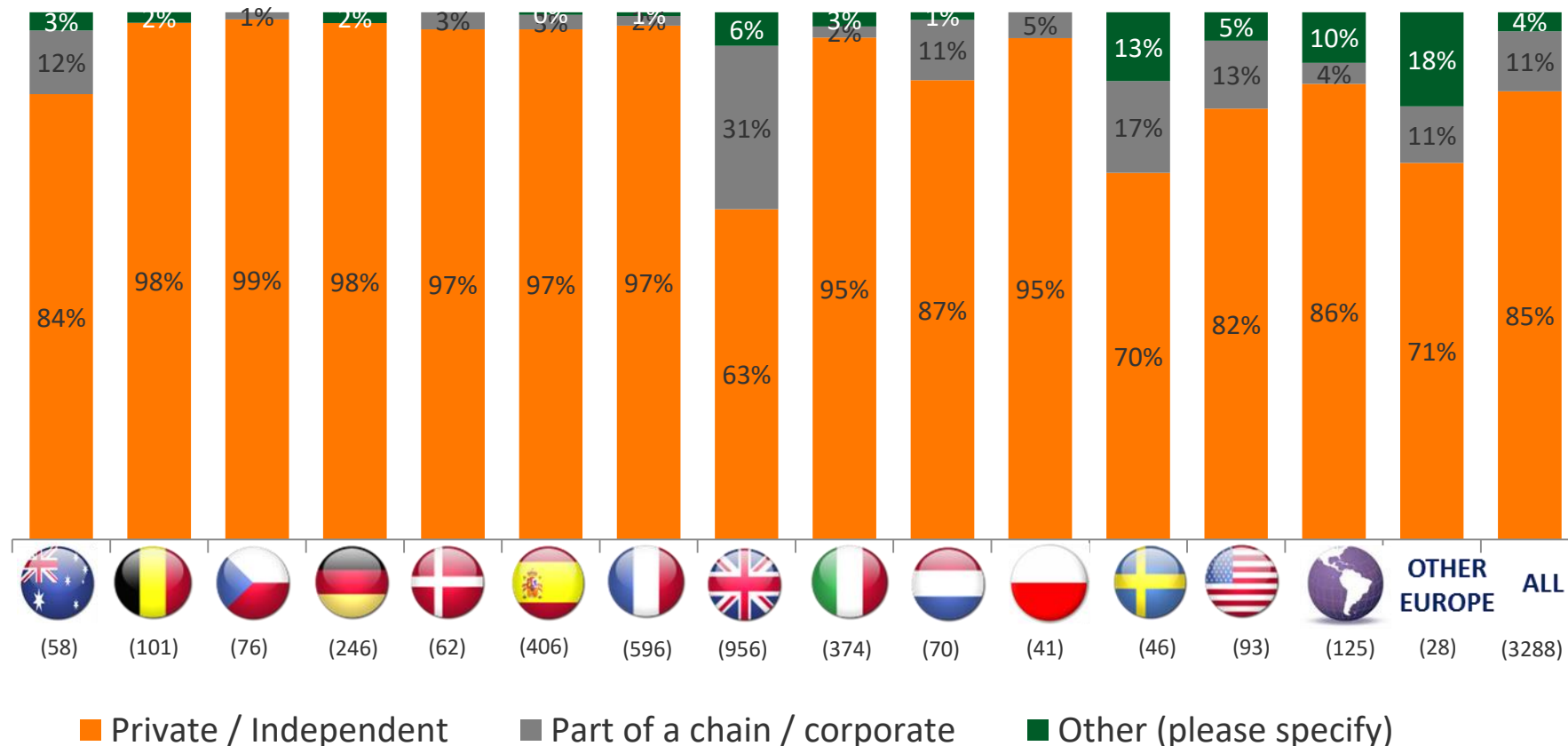
Number of interviews per country



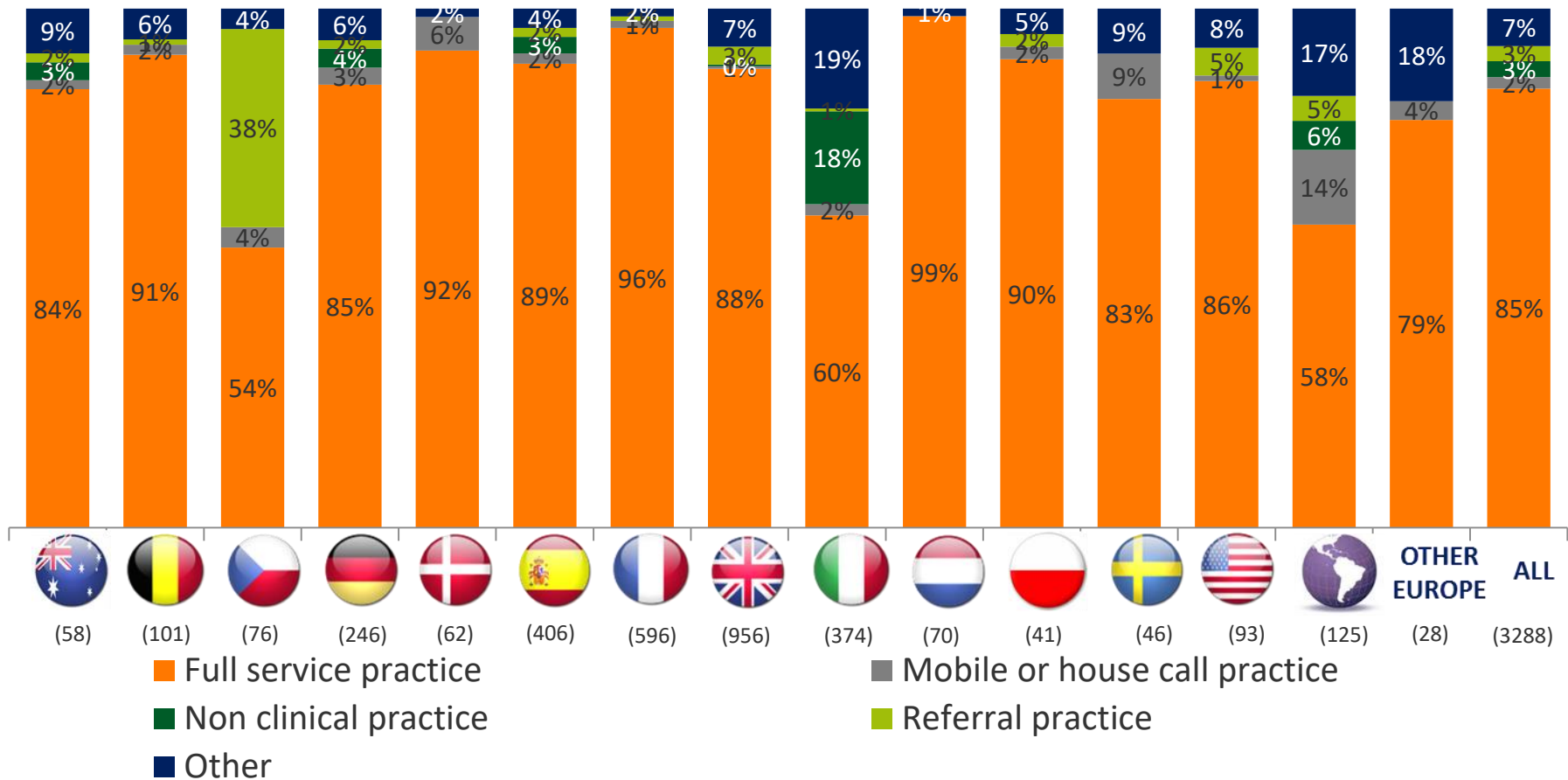
What is your position within the practice you work at?



Is your practice.....?

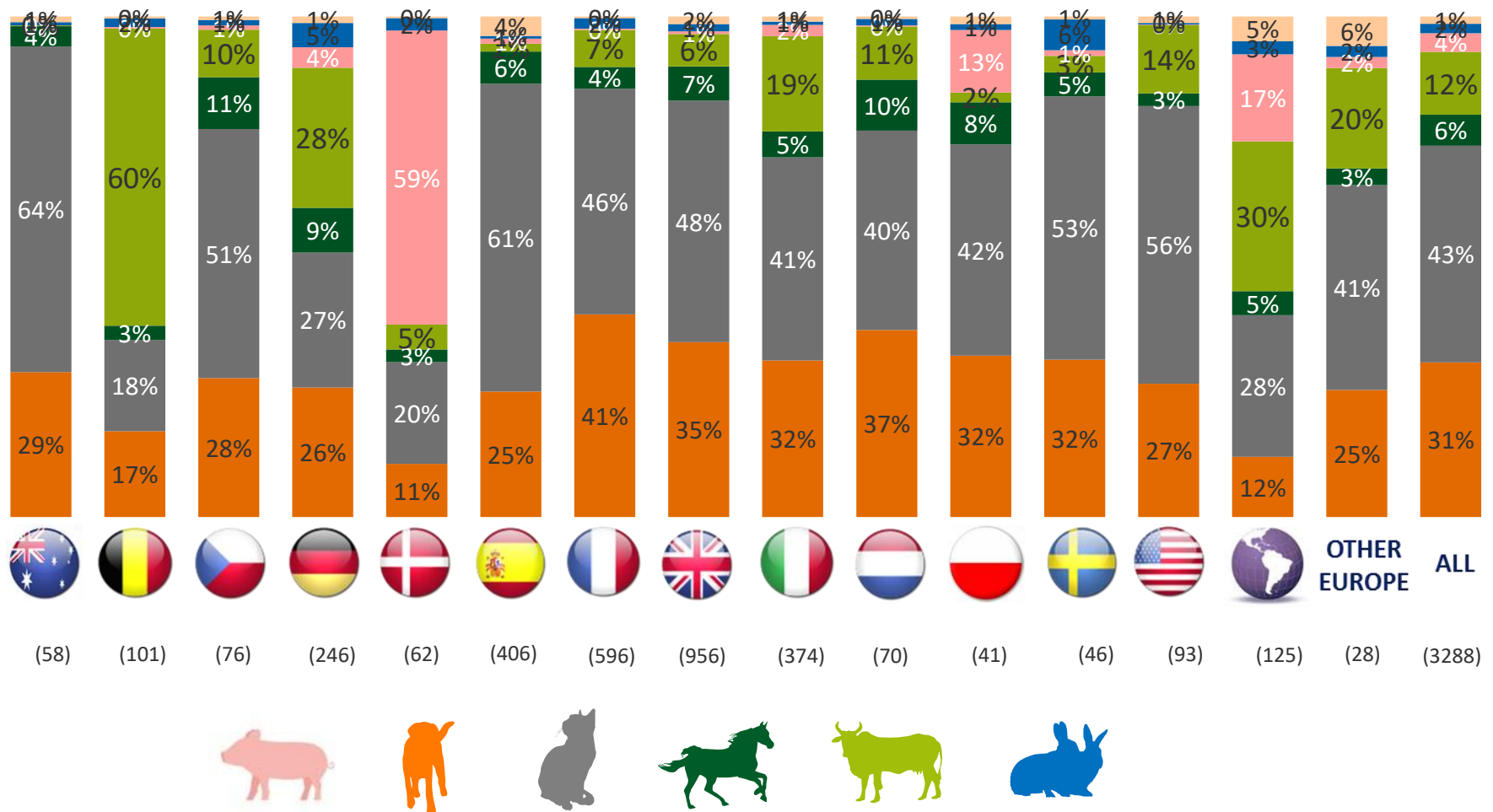


In what type of organisation do you work?

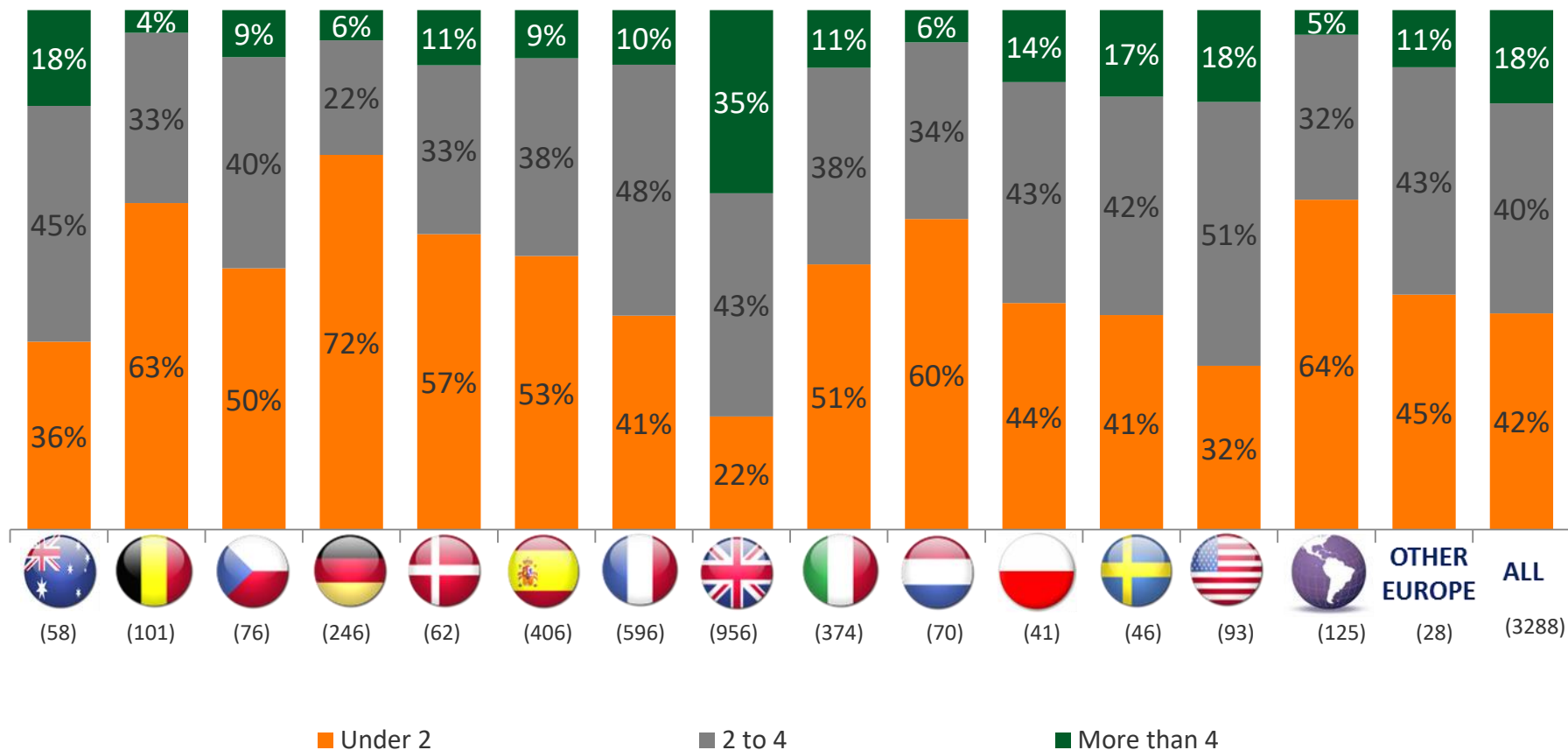


*Other includes Charity, emergency, teaching/research, military/ government

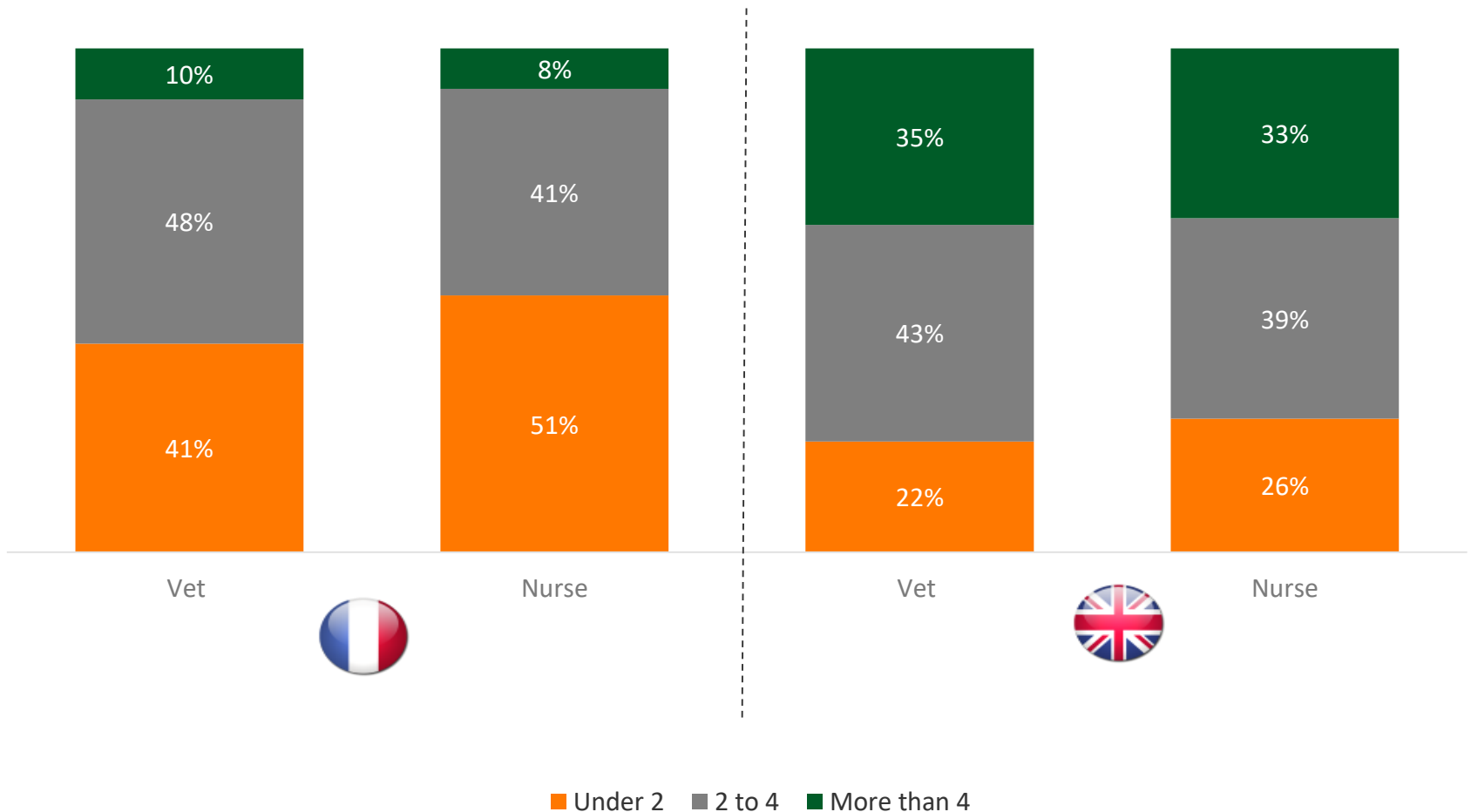
What percent of your time is spent treating the following?



How many veterinarians work at your practice?



How many veterinarians and nurses work at your practice?



Social Media

















How does your practice promote itself to potential clients?



	AUSTRALIA	BELGIUM	CZECH REPUBLIC	GERMANY	DENMARK	SPAIN	FRANCE	UNITED KINGDOM	ITALY	NETHERLANDS	POLAND	SWEDEN	UNITED STATES	OTHER EUROPE	ALL
By clients' word of mouth/referrals	90%	80%	82%	88%	92%	76%	77%	89%	79%	94%	54%	63%	90%	74%	82%
Social media (Facebook, Twitter, etc)	81%	53%	39%	33%	85%	69%	31%	83%	45%	80%	49%	80%	77%	60%	60%
Through our website	81%	49%	63%	72%	84%	51%	44%	74%	40%	77%	44%	74%	81%	25%	59%
Practice business cards/ calender	47%	44%	51%	73%	39%	47%	32%	29%	6%	29%	29%	22%	53%	31%	35%
Practice promotions (ie. Free weight check, etc)	36%	14%	11%	8%	39%	32%	17%	59%	9%	60%	24%	30%	28%	12%	32%
Emails to pet owners	50%	10%	9%	12%	19%	41%	11%	42%	11%	33%	2%	4%	47%	28%	27%
Advertisement in local business directory (like Yellow Pages)	47%	27%	26%	26%	26%	31%	21%	31%	18%	23%	10%	24%	33%	14%	26%
Take part in local events (dog shows, markets, etc)	38%	6%	17%	11%	35%	22%	7%	47%	11%	24%	20%	28%	34%	10%	24%
Supporting charities	33%	9%	18%	12%	27%	24%	4%	36%	5%	23%	12%	13%	35%	15%	20%
Posters in practice/in public places/ Car labels	10%	10%	13%	14%	19%	19%	7%	36%	5%	7%	15%	24%	8%	22%	19%
Google Adwords/ SEM/SEO	22%	13%	14%	10%	40%	21%	7%	14%	49%	19%	12%	26%	14%	11%	18%
Advertisement in local newspapers	12%	14%	9%	19%	32%	21%	2%	28%	7%	24%	7%	33%	14%	13%	17%
Hold lectures/ open house events/ client evenings in own practice	10%	8%	3%	22%	32%	9%	3%	29%	9%	29%	5%	33%	18%	6%	16%
Advertisement in online business directories	17%	10%	25%	9%	11%	25%	5%	19%	10%	0%	22%	9%	19%	10%	14%
Offering discounts/ being price competitive (e.g Groupon etc)	9%	1%	4%	1%	18%	7%	4%	20%	2%	17%	7%	17%	17%	9%	10%
Door to door flyers	7%	11%	4%	15%	2%	14%	1%	11%	2%	11%	10%	4%	4%	19%	8%
Radio/TV	7%	2%	4%	1%	10%	9%	1%	10%	1%	4%	2%	11%	10%	11%	6%
Other (specify)	7%	0%	3%	2%	2%	3%	1%	2%	2%	4%	5%	2%	1%	6%	2%
The practice does not do any promotional activity	2%	12%	3%	5%	2%	3%	16%	2%	7%	3%	20%	4%	2%	5%	6%

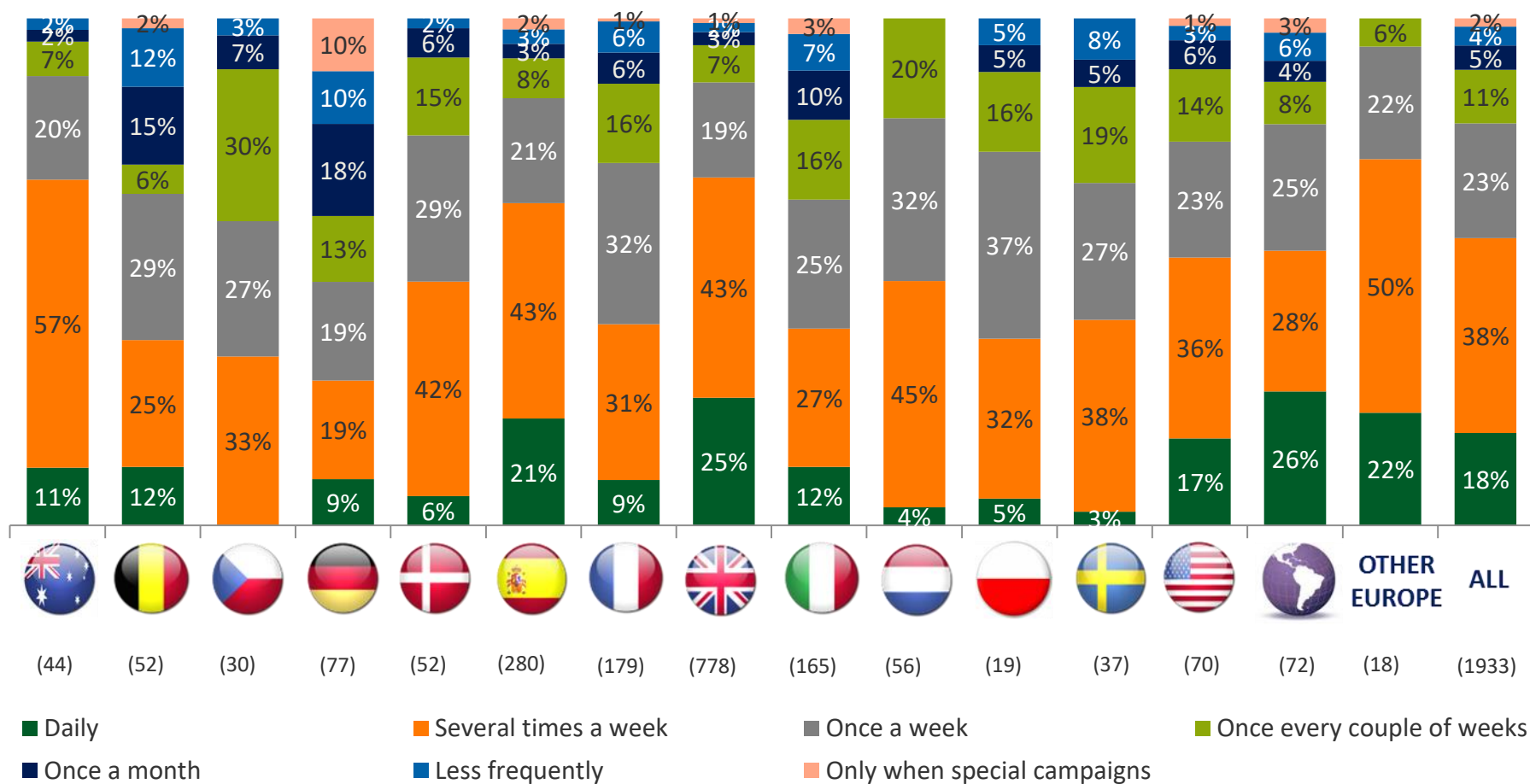
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Which social media platforms does your clinic/practice use to promote or advertise their services?

															OTHER EUROPE	ALL
My clinic does not use social media to advertise	14%	35%	38%	54%	13%	18%	56%	8%	35%	14%	37%	13%	9%	17%	25%	27%
Facebook	83%	55%	49%	36%	84%	78%	38%	89%	56%	84%	56%	85%	85%	75%	75%	67%
Google+	10%	9%	21%	15%	13%	23%	11%	12%	18%	7%	32%	7%	14%	15%	7%	14%
Twitter	3%	1%	1%	2%	0%	15%	1%	20%	3%	16%	5%	2%	9%	13%	11%	10%
Instagram	7%	1%	4%	1%	10%	13%	1%	7%	5%	6%	0%	17%	11%	26%	4%	7%
Own practice app	10%	9%	13%	2%	5%	3%	5%	5%	1%	7%	7%	2%	10%	2%	0%	4%
YouTube	7%	2%	4%	3%	5%	10%	1%	4%	3%	7%	7%	4%	3%	7%	7%	4%
Discussion boards on our website	3%	1%	3%	3%	11%	2%	1%	7%	2%	3%	0%	0%	4%	2%	11%	3%
LinkedIn	0%	4%	7%	2%	3%	5%	0%	2%	6%	10%	0%	2%	1%	10%	11%	3%
Blogger	2%	0%	0%	1%	0%	5%	0%	1%	0%	0%	0%	2%	0%	2%	0%	1%
Pinterest	0%	0%	0%	0%	0%	1%	0%	1%	0%	1%	0%	2%	3%	2%	0%	1%
Other (please specify)	0%	1%	4%	2%	0%	1%	1%	1%	2%	1%	0%	0%	0%	8%	0%	2%
Don't know	2%	1%	3%	2%	0%	0%	1%	2%	1%	1%	0%	0%	6%	2%	0%	2%
	(58)	(101)	(76)	(246)	(62)	(406)	(596)	(956)	(374)	(70)	(41)	(46)	(93)	(125)	(28)	(3288)

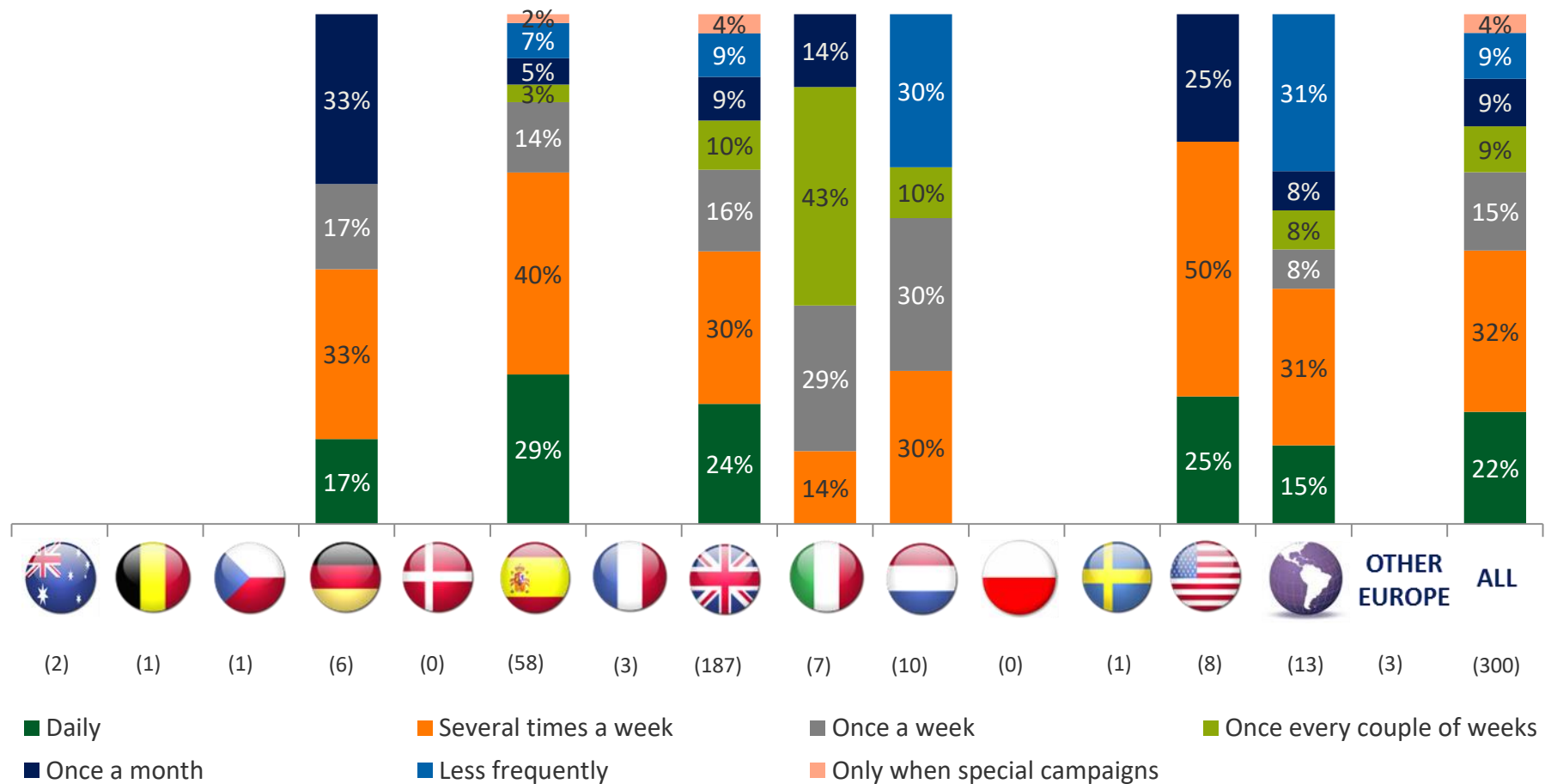
How often does your practice post something on social media?

Facebook



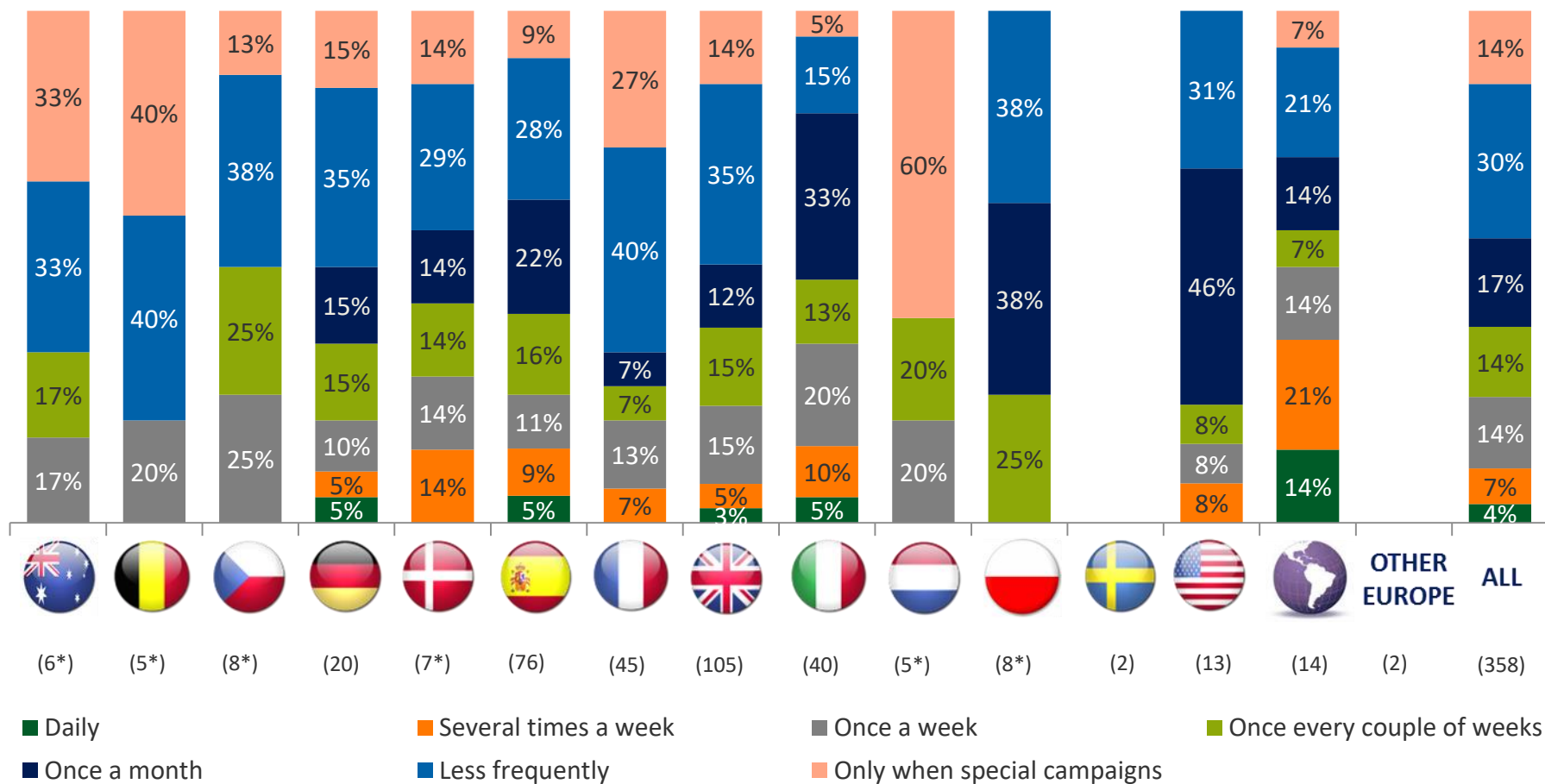
How often does your practice post something on social media?

Twitter



How often does your practice post something on social media?

Google+



We know it is difficult to determine what works best at attracting clients...
In your opinion, which marketing channels are the most effective at attracting new clients or bringing repeat business from current clients?

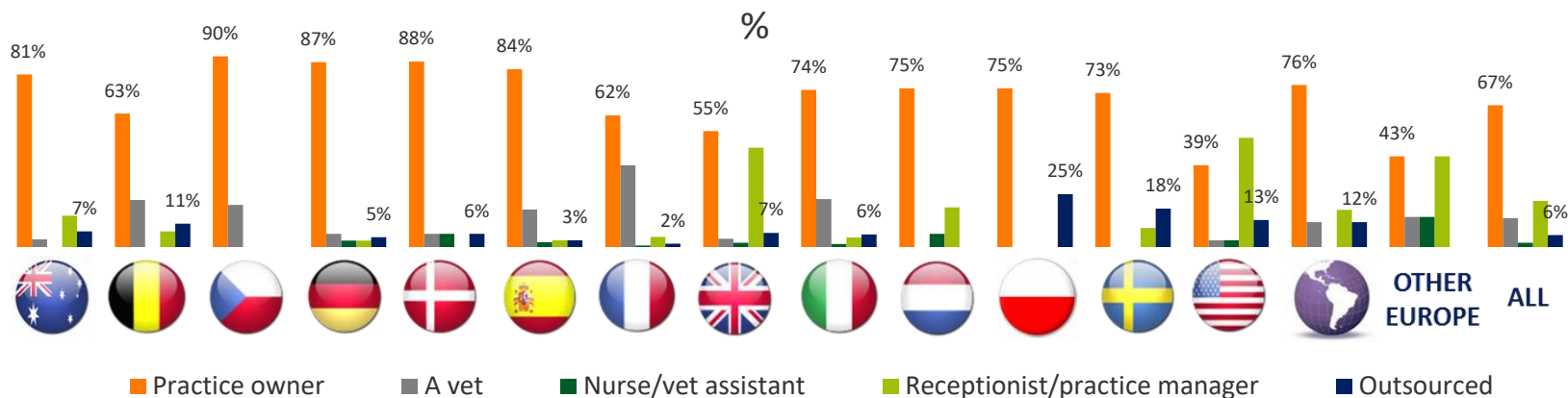


By clients word of mouth/referrals	2.1	1.5	2.6	2.1	2.1	2.6	1.9	2.4	3.2	1.5	4.1	3.0	1.8	3.2	3.0	2.4
Facebook	4.3	4.1	4.5	5.9	3.0	4.3	4.7	3.7	4.1	3.5	3.8	2.9	3.8	3.8	3.9	4.2
Through our website	4.5	4.4	4.5	3.7	5.1	7.1	3.9	4.9	4.8	4.5	3.9	4.1	4.6	7.8	3.6	4.9
Practice promotions (ie. Free weight check, etc)	7.1	7.1	6.8	7.4	6.6	5.8	5.5	5.4	7.1	5.3	5.0	7.9	6.7	6.4	5.1	6.1
Take part in local events (dog shows, markets, etc)	7.3	7.3	6.2	7.2	6.4	7.1	6.9	6.2	7.2	7.7	5.6	6.5	5.7	6.9	7.5	6.7
Advertisement in local newspapers	7.6	6.2	6.8	6.7	7.6	8.0	7.6	7.3	7.9	7.9	6.0	6.1	8.8	7.3	7.4	7.4
Advertisement in local business directory (like Yellow Pages)	6.9	6.4	7.3	7.3	9.7	8.9	5.6	8.4	7.7	10.1	6.0	8.2	8.2	9.0	8.2	7.7
Advertisement in online business directories	7.7	8.6	6.0	8.8	10.1	8.7	7.4	8.4	7.6	11.2	5.0	9.5	8.1	8.4	7.2	8.2
Google+	8.2	8.0	7.2	7.8	7.9	8.4	6.9	9.3	7.2	9.8	4.6	8.7	9.0	9.2	8.1	8.2
Door to door flyers	10.4	6.6	7.5	6.4	10.3	8.0	8.6	9.1	9.6	8.1	7.6	10.6	11.8	7.8	7.0	8.6
Discussion boards on our website	10.1	8.8	8.1	9.0	9.0	9.9	7.9	9.5	8.7	11.1	6.7	9.8	9.2	10.1	8.7	9.1
Twitter	11.8	9.6	9.7	10.3	10.5	9.5	9.2	9.7	9.3	10.3	7.8	11.6	10.2	9.0	8.0	9.6
Instagram	11.2	10.4	9.4	10.6	10.3	9.3	9.4	10.7	9.1	9.9	7.6	9.1	10.1	8.1	10.4	9.9
YouTube	11.1	10.0	9.7	10.0	10.4	9.6	9.3	11.1	9.2	10.5	7.3	11.2	11.1	9.3	9.6	10.1
Blogger	11.8	10.4	10.3	10.3	11.1	10.6	9.6	11.6	9.9	10.5	7.8	11.3	11.9	11.0	9.9	10.6
LinkedIn	12.1	10.0	10.5	10.4	11.5	11.5	9.8	11.7	9.4	11.6	8.7	13.0	11.9	10.0	10.9	10.8
Pinterest	13.3	11.0	10.1	10.6	11.8	11.9	10.1	11.9	10.5	13.0	8.3	13.0	12.2	11.4	10.0	11.2

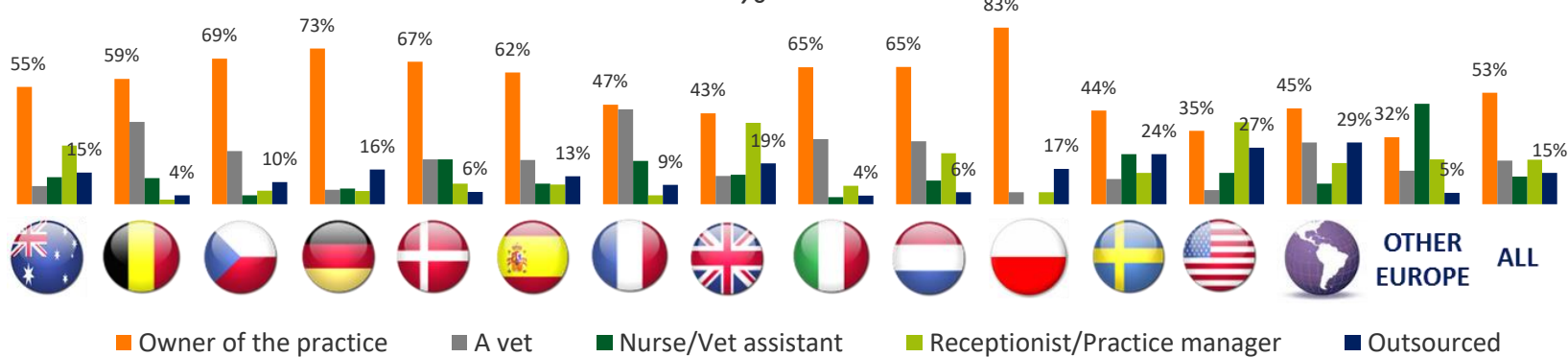
(58) (101) (76) (246) (62) (406) (596) (956) (374) (70) (41) (46) (93) (125) (28) (3288)

Who runs the marketing activities in your practice?

Advertisement in local business directory (like Yellow Pages)

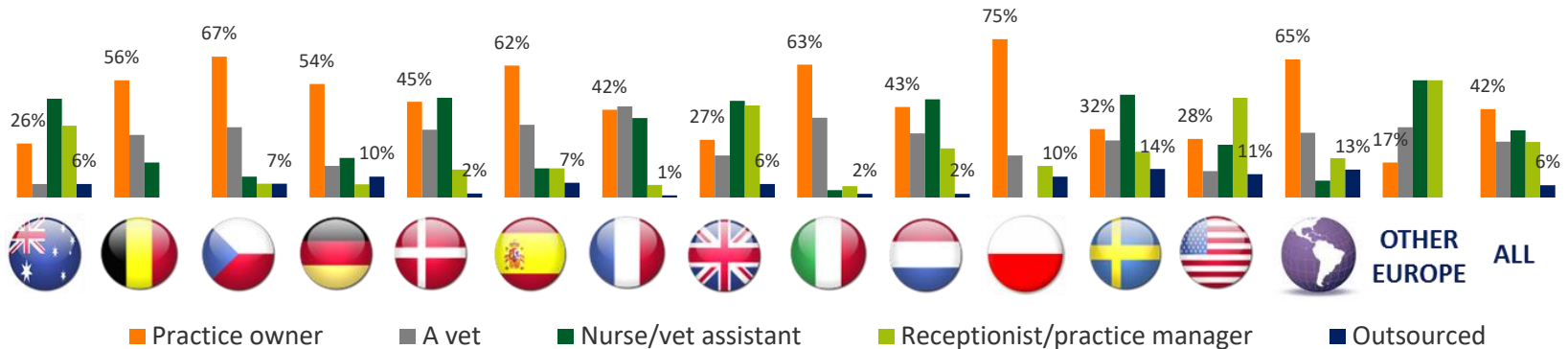


Website

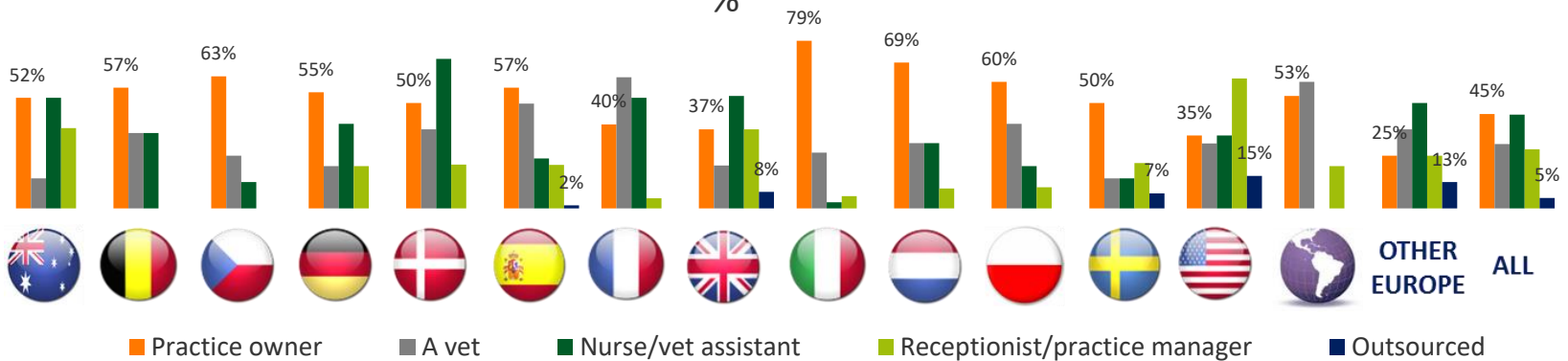


Who runs the marketing activities in your practice?

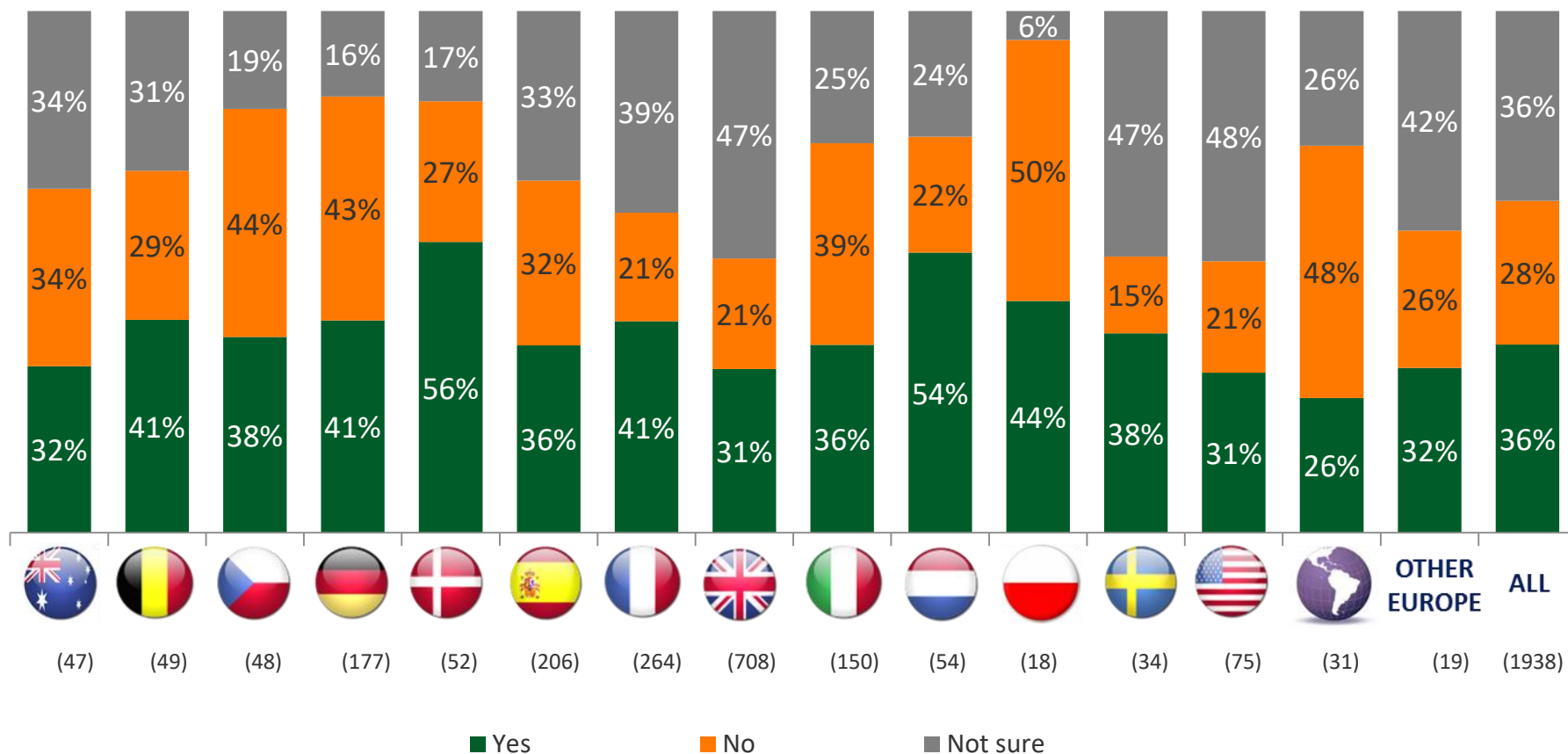
Facebook %



Practice promotions %



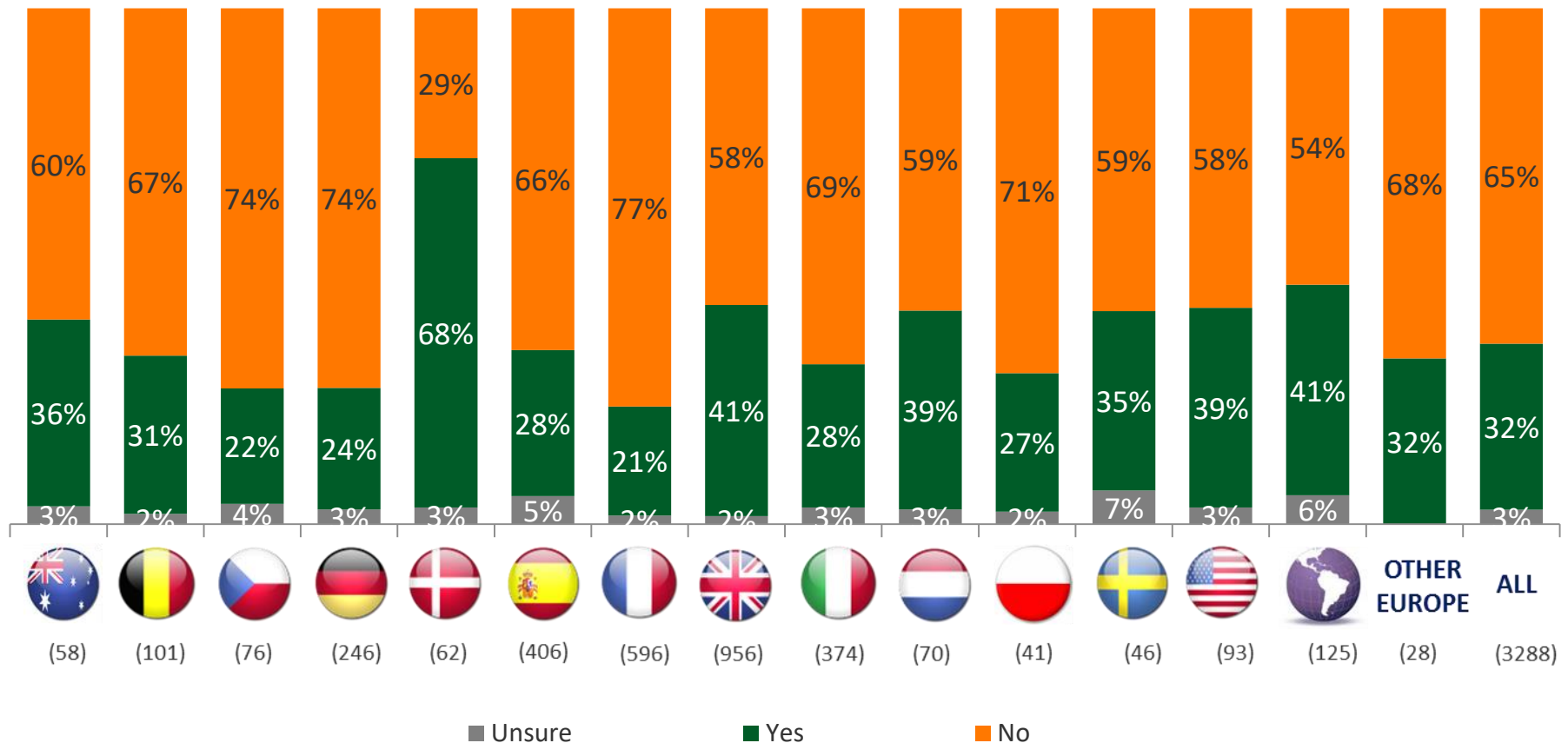
Does your clinic use search optimization engines / activities to ensure your website appears on top of online search lists?



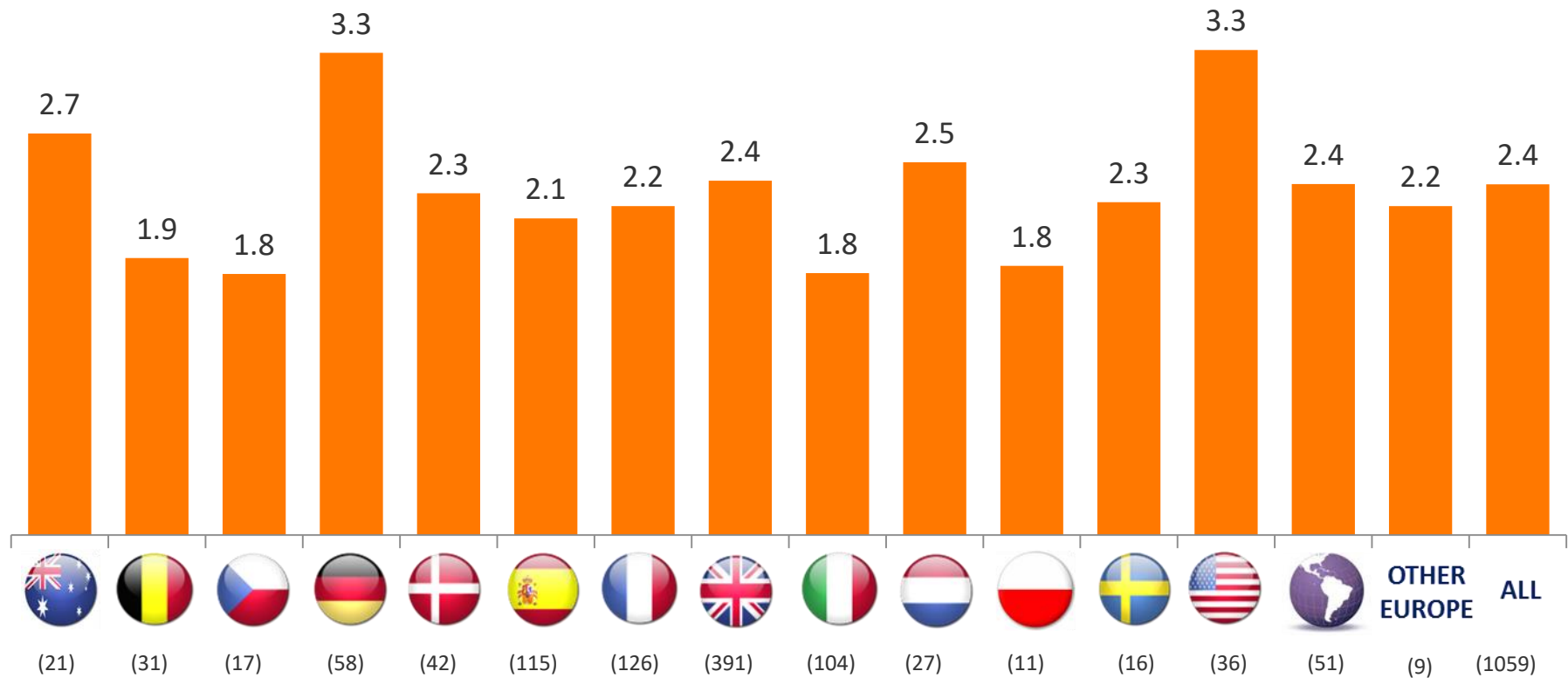
Apps



Do you use any veterinary applications for smartphone or tablet? For example, apps to calculate anaesthesia, chocolate toxicity, to look up the drug compendium, to liaise with drug manufacturers or suppliers, etc.



How many veterinary apps do you use?



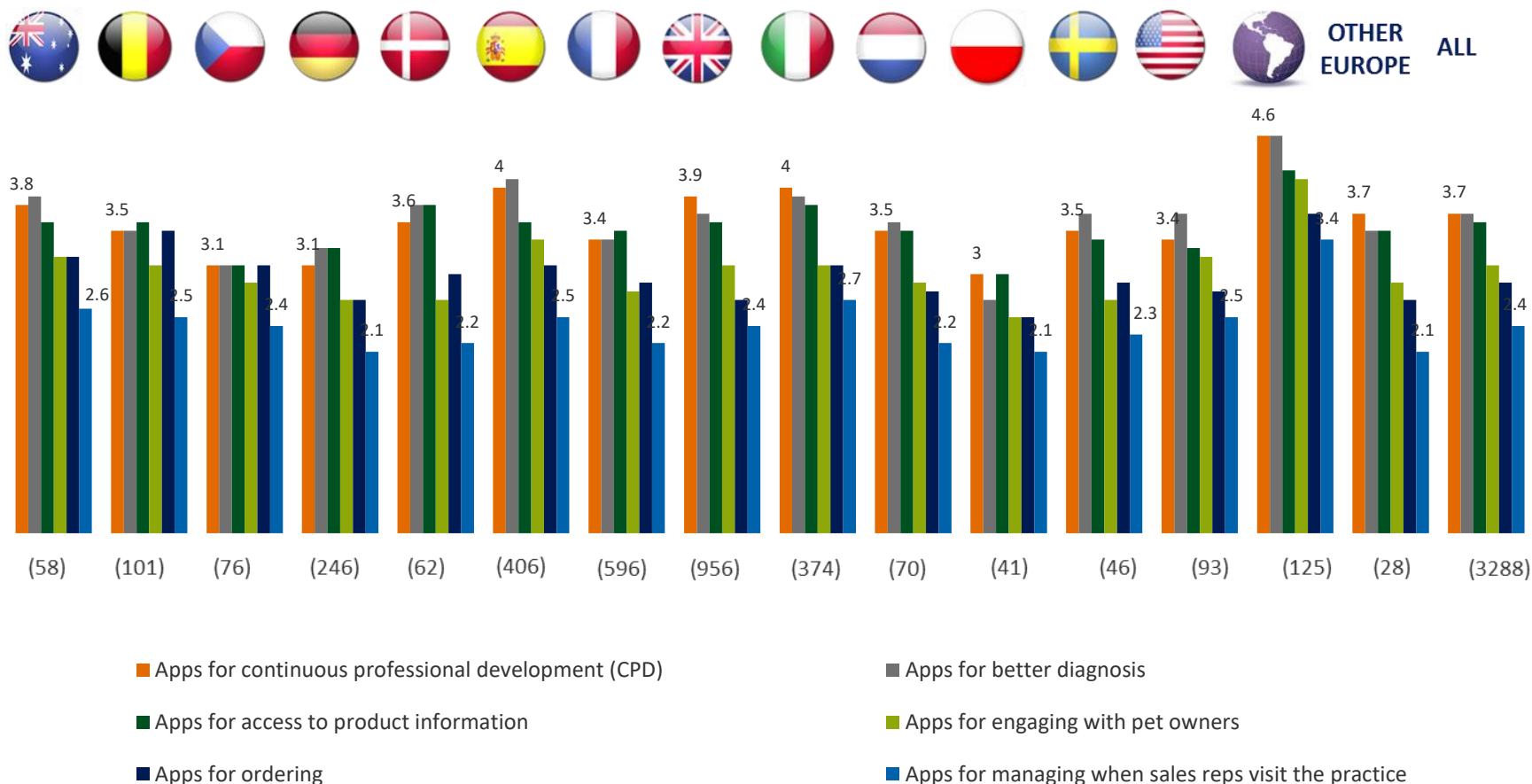
What, if anything, do you use your tablet or smartphone for at work?



To take photos of the animals, to show progress, record cases, etc.	64%	51%	53%	54%	69%	58%	46%	62%	62%	61%	39%	61%	53%	67%	61%	57%
Emails	48%	54%	49%	52%	44%	44%	41%	49%	55%	33%	44%	48%	47%	78%	50%	48%
To use the calculator	47%	53%	42%	38%	35%	33%	32%	59%	45%	49%	39%	46%	55%	54%	54%	46%
To make/ receive calls	43%	62%	61%	57%	58%	42%	35%	31%	60%	49%	29%	43%	38%	62%	39%	43%
For social media (Facebook, Linked In, etc)	45%	41%	29%	28%	48%	39%	24%	38%	44%	39%	32%	46%	37%	59%	36%	36%
To go to vet specific websites	29%	38%	22%	30%	31%	34%	23%	31%	43%	20%	27%	39%	38%	57%	32%	32%
Stop watch	29%	31%	13%	23%	39%	21%	24%	34%	17%	16%	2%	33%	29%	30%	36%	26%
For continuous professional development (CPD), education, refresh my knowledge	24%	16%	12%	25%	11%	31%	12%	31%	32%	10%	24%	22%	20%	57%	32%	26%
To calculate anaesthesia, chocolate toxicity, to look up the drug compendium etc.	24%	23%	12%	19%	48%	20%	13%	33%	20%	33%	22%	22%	27%	38%	21%	24%
Drug formularies	17%	14%	0%	20%	26%	13%	5%	33%	47%	20%	37%	26%	25%	34%	32%	24%
To send text messages to pet owners	29%	38%	37%	33%	39%	30%	15%	11%	39%	13%	24%	28%	27%	49%	14%	24%
To schedule appointments, surgeries, etc.	19%	34%	36%	26%	16%	20%	10%	15%	33%	11%	27%	15%	18%	38%	21%	20%
To have easy access to information during consults	16%	28%	22%	16%	21%	20%	11%	14%	30%	10%	20%	22%	14%	48%	21%	18%
To listen to music	16%	13%	16%	13%	11%	10%	7%	8%	11%	7%	10%	7%	23%	26%	11%	10%
For better diagnosis	5%	7%	4%	7%	10%	8%	5%	8%	8%	10%	17%	9%	6%	23%	14%	8%
To access and add to client records	3%	15%	13%	9%	6%	6%	3%	3%	9%	13%	12%	11%	3%	20%	0%	7%
To invoice/make payments	3%	14%	7%	10%	8%	6%	2%	3%	11%	3%	12%	9%	4%	20%	4%	6%
Other	3%	0%	0%	2%	0%	2%	2%	1%	1%	1%	0%	2%	6%	1%	7%	2%
I don't have a smartphone or a tablet	0%	2%	8%	7%	3%	2%	5%	3%	2%	4%	10%	0%	1%	3%	4%	4%
I do not use a smartphone or a tablet at work	17%	14%	22%	17%	13%	23%	28%	17%	10%	19%	22%	24%	22%	4%	25%	19%
	(58)	(101)	(76)	(246)	(62)	(406)	(596)	(956)	(374)	(70)	(41)	(46)	(93)	(125)	(28)	(3288)

How interested are you in using apps provided by pharmaceutical, nutritional or animal health equipment manufacturers?

1 "Not at all interested", 5 "Very interested"



Why don't you currently use veterinary apps?

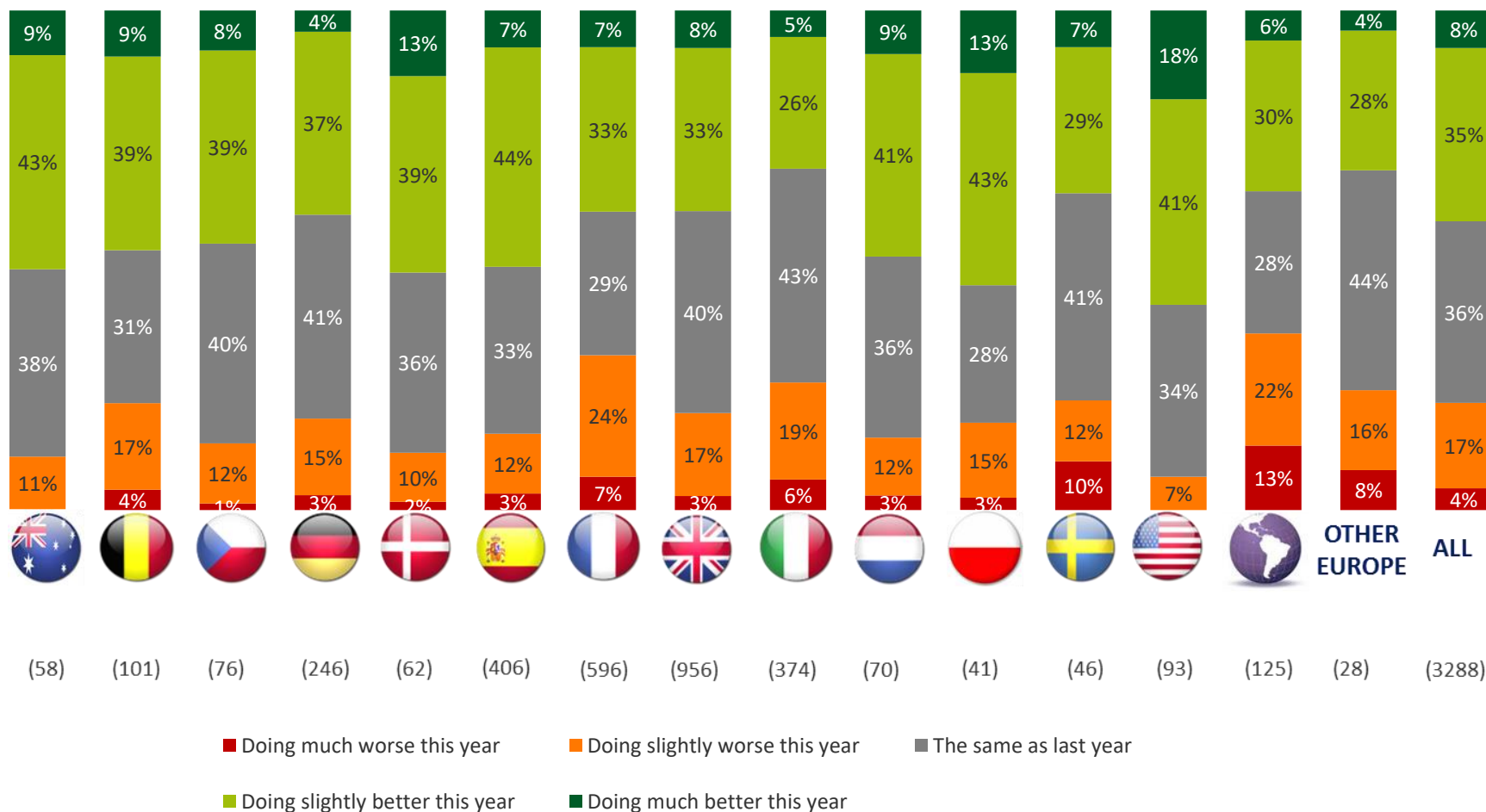


	Australia	Belgium	Czech Republic	Germany	Denmark	Spain	France	United Kingdom	Italy	Netherlands	Poland	Sweden	United States	OTHER EUROPE	ALL
Unaware of good apps / vet apps	48%	28%	36%	37%	8%	43%	34%	31%	33%	23%	22%	35%	31%	30%	33%
Time consuming to research what apps are useful	29%	28%	21%	33%	13%	26%	28%	17%	15%	26%	27%	26%	24%	13%	22%
Time consuming another gadget to get out during a short client consult	24%	25%	14%	26%	19%	23%	28%	20%	17%	16%	24%	20%	25%	9%	21%
Difficult to find the right app	29%	18%	18%	17%	8%	31%	20%	15%	33%	16%	22%	24%	15%	29%	21%
Can put clients off, impression that you don't pay attention to clients	10%	15%	18%	31%	19%	21%	22%	17%	14%	23%	20%	11%	15%	18%	19%
Don't use apps in general	12%	16%	20%	12%	11%	19%	17%	15%	14%	4%	12%	9%	11%	5%	15%
Another thing to get familiar with	24%	24%	18%	29%	18%	14%	14%	11%	9%	10%	12%	26%	18%	3%	14%
Unnecessary / not relevant	10%	10%	13%	17%	8%	7%	8%	10%	5%	11%	10%	2%	8%	1%	9%
Cost	3%	12%	3%	6%	2%	8%	9%	9%	9%	4%	7%	7%	11%	14%	8%
Apps slow phone down / use up memory	7%	2%	7%	9%	3%	7%	6%	9%	8%	3%	2%	11%	11%	8%	7%
Not allowed to use phone or tablets at work	3%	0%	0%	3%	0%	4%	2%	11%	1%	9%	0%	9%	8%	2%	5%
Don't have a smart / compatible phone	3%	4%	8%	6%	5%	1%	7%	5%	3%	4%	15%	0%	4%	6%	5%
Not compatible with my phone / tablet	2%	6%	8%	2%	2%	1%	4%	6%	2%	3%	7%	2%	0%	3%	4%
Not interested in technology	3%	7%	4%	7%	3%	2%	4%	3%	2%	1%	5%	11%	1%	0%	3%
Too old to learn	3%	1%	7%	3%	3%	1%	2%	1%	2%	1%	2%	4%	0%	1%	2%
Other	0%	0%	3%	5%	0%	2%	4%	2%	2%	6%	5%	7%	8%	0%	3%
	(21)	(31)	(17)	(58)	(42)	(115)	(126)	(391)	(104)	(27)	(11)	(16)	(36)	(51)	(1059)

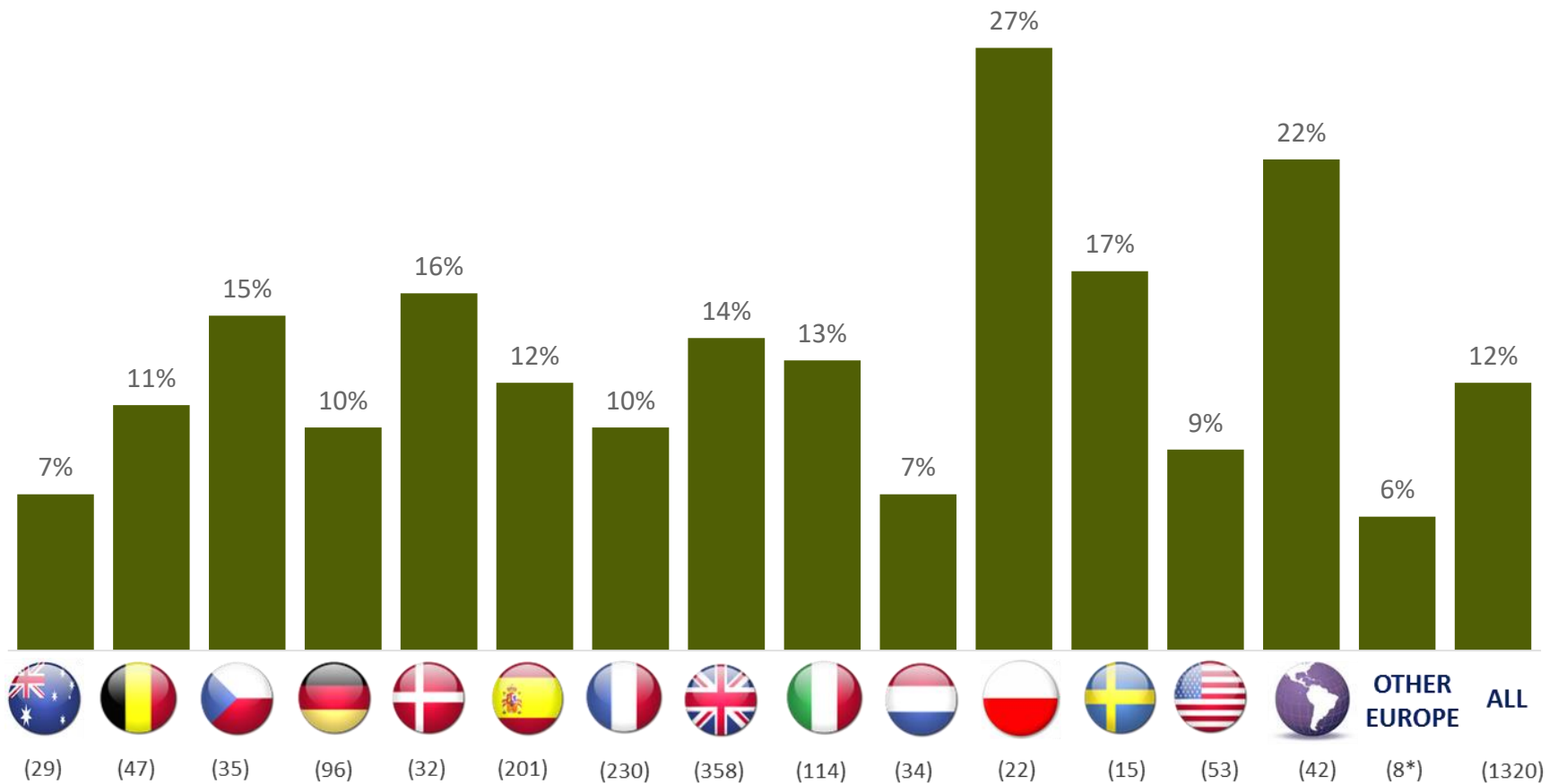
Finances 1



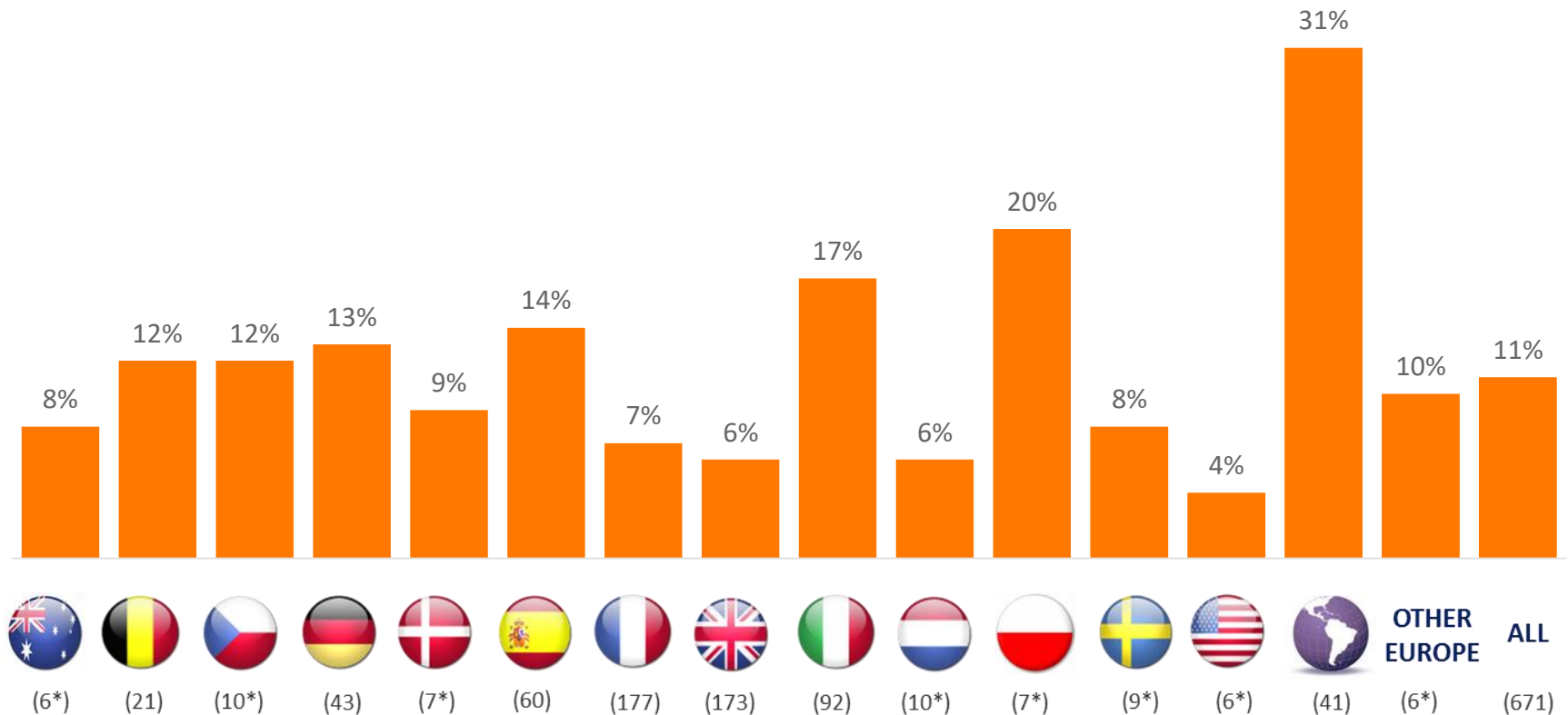
The current economic climate has affected different businesses in different ways. Compared to last year would you say:



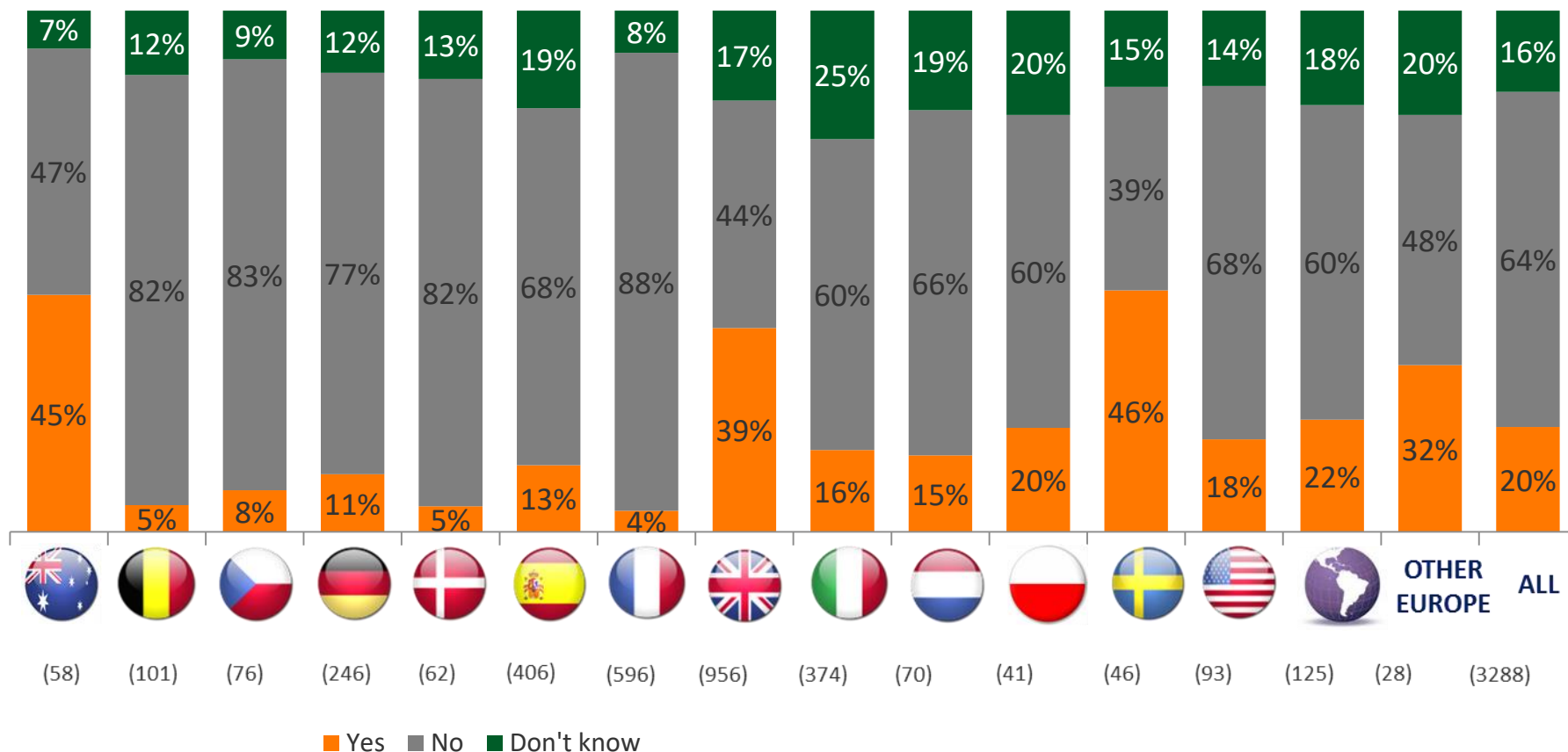
By how much has the number of clients increased?



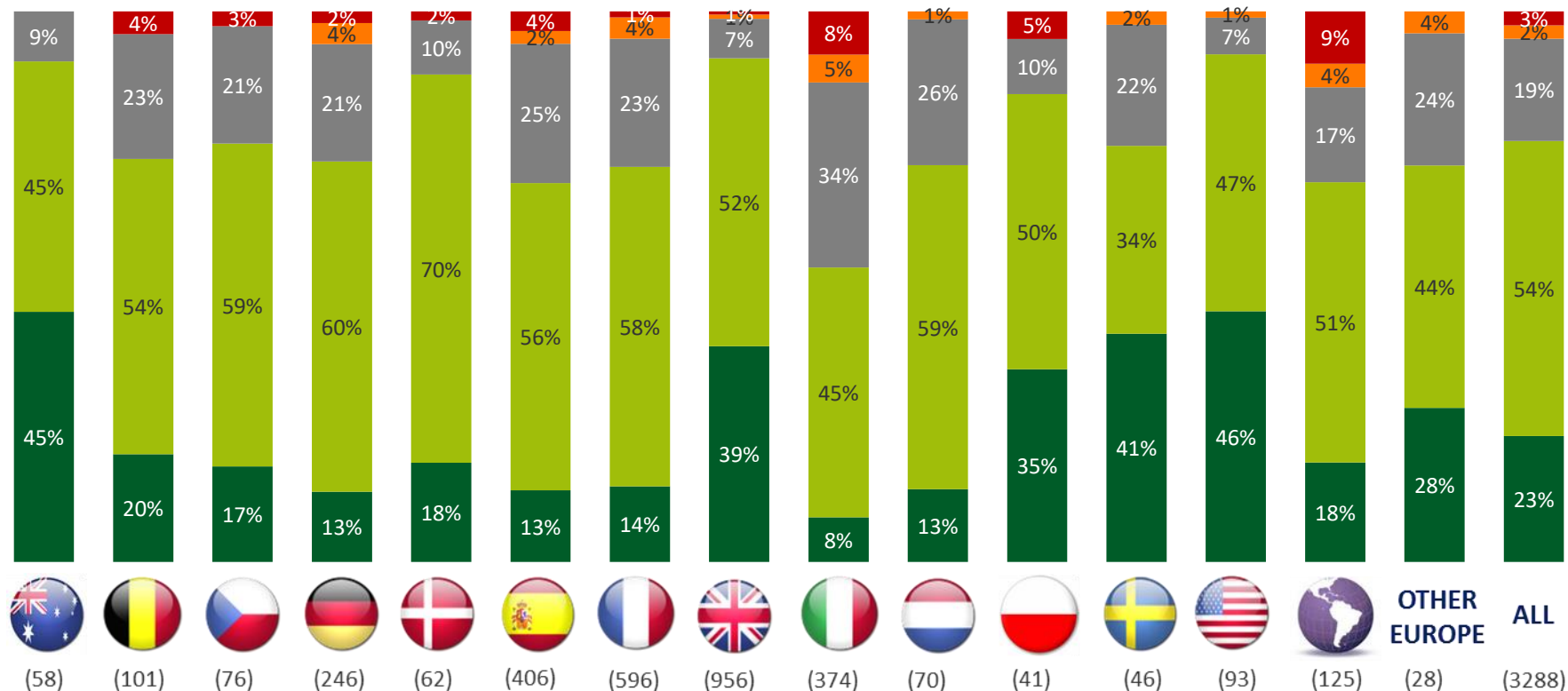
By how much has the number of clients decreased?



Is your practice planning to add a veterinary surgeon in the next year?

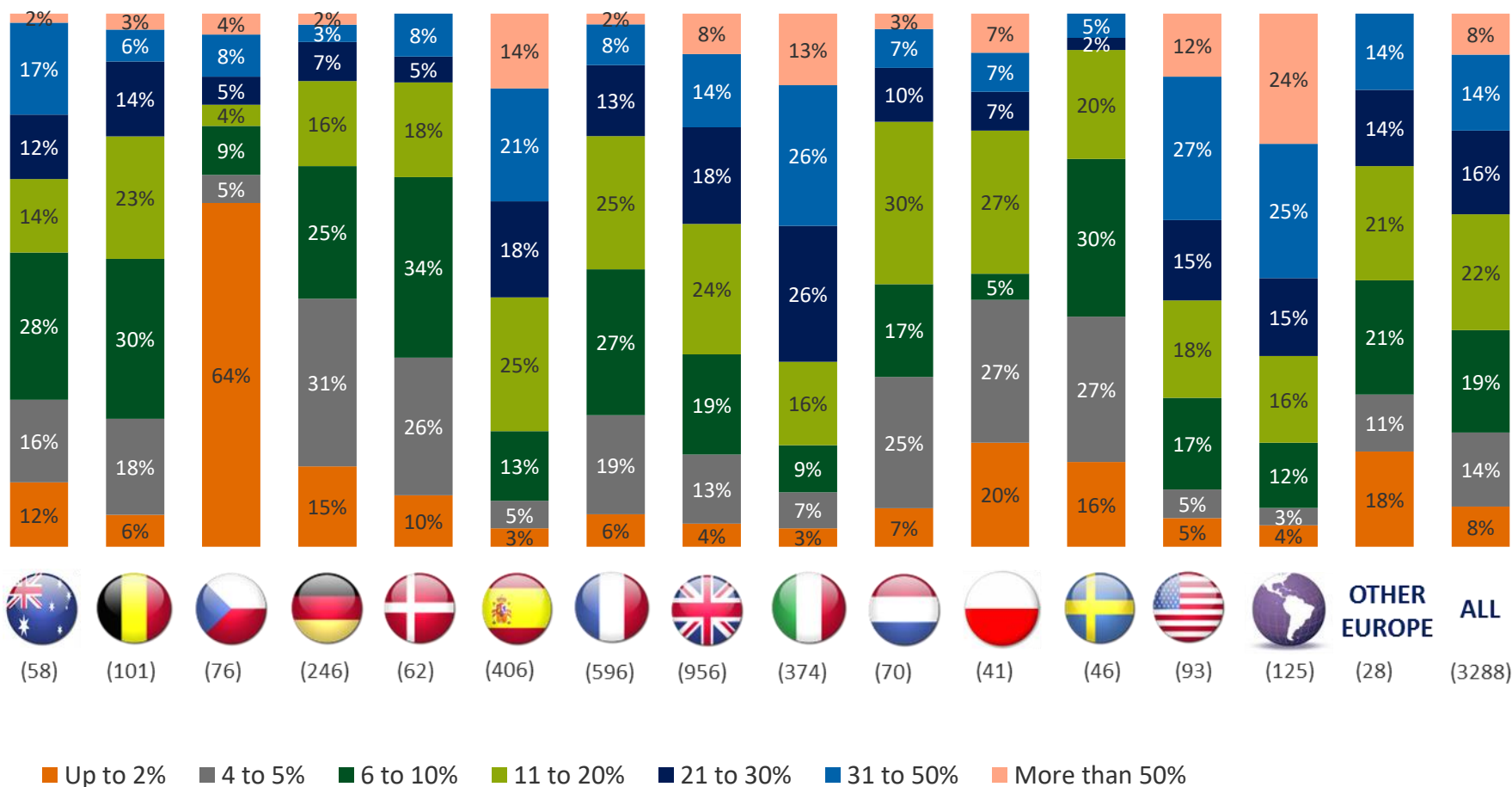


Where do you place your practice on the following scale?



- We are really struggling and may close the practice soon unless things pick up
- We are struggling, and we plan to reduce staff
- We are struggling somewhat, but not plans yet to reduce staff
- We are doing OK, no plans for recruitment
- We are expanding and plan to hire more staff

What percentage of your clients would you say struggle to pay their veterinary bills?



Attitudes and Feelings



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



	AUSTRALIA	BELGIUM	CZECH REPUBLIC	GERMANY	DENMARK	SPAIN	FRANCE	UNITED KINGDOM	ITALY	NETHERLANDS	POLAND	SWEDEN	UNITED STATES	SOUTH AMERICA	OTHER EUROPE	ALL
Too much work/admin/ not enough spare time	39%	48%	39%	36%	40%	30%	42%	39%	17%	21%	54%	39%	28%	21%	35%	35%
Clients unable to pay their bills	23%	41%	23%	25%	19%	33%	39%	28%	20%	21%	8%	7%	33%	41%	41%	30%
Competition from other veterinary practices	18%	36%	18%	30%	40%	52%	17%	26%	23%	46%	38%	34%	17%	34%	41%	29%
Recruitment of suitable staff/vets	38%	8%	38%	27%	13%	14%	26%	45%	12%	10%	22%	44%	33%	18%	29%	26%
Increased cost of products/medications	18%	30%	18%	17%	10%	31%	32%	23%	19%	23%	32%	10%	51%	42%	24%	26%
Getting clients to follow our recommendations	21%	32%	21%	15%	15%	32%	22%	26%	30%	15%	32%	22%	33%	35%	29%	26%
Time management	45%	33%	45%	25%	26%	25%	28%	28%	17%	20%	24%	5%	35%	14%	29%	26%
Internet as a competitor	14%	32%	14%	21%	15%	29%	35%	18%	12%	44%	16%	22%	29%	18%	12%	24%
Getting new clients	11%	31%	11%	21%	19%	37%	22%	15%	18%	23%	24%	12%	20%	34%	12%	22%
Tax payments/returns	4%	31%	4%	34%	3%	25%	37%	3%	22%	8%	8%	0%	5%	26%	18%	21%
Managing and retaining staff	29%	7%	29%	18%	5%	16%	13%	35%	9%	15%	3%	29%	44%	12%	35%	19%
Competition from internet pharmacies	25%	29%	25%	18%	0%	23%	22%	25%	3%	34%	19%	2%	27%	5%	12%	19%
New legislations	5%	14%	5%	33%	8%	16%	43%	9%	10%	7%	14%	7%	7%	12%	12%	19%
What would Obesity and other pet diseases	11%	8%	11%	7%	6%	9%	7%	20%	12%	7%	14%	7%	23%	12%	18%	12%
Unhappy staff	11%	2%	11%	7%	5%	11%	3%	28%	4%	5%	3%	12%	21%	12%	18%	12%
Bad management/Bad boss	11%	3%	11%	5%	10%	12%	6%	20%	4%	7%	5%	12%	20%	6%	6%	10%
Antibiotic resistance	5%	10%	5%	9%	11%	12%	4%	12%	12%	16%	16%	29%	13%	13%	12%	10%
Lack of clinical governance	4%	2%	4%	4%	3%	7%	5%	4%	3%	3%	5%	10%	3%	6%	0%	4%
Dealing with suppliers	2%	1%	2%	1%	0%	1%	1%	1%	0%	0%	0%	2%	4%	6%	6%	1%
Other	5%	2%	5%	3%	6%	2%	3%	3%	2%	3%	0%	2%	4%	1%	0%	3%
Don't know	0%	1%	0%	1%	2%	1%	1%	1%	14%	2%	3%	0%	0%	0%	6%	2%

(58) (101) (76) (246) (62) (406) (596) (956) (374) (70) (41) (46) (93) (125) (28) (3288)

What do you think will make the biggest positive impact to veterinary medicine in the future?



	Australia	Belgium	Czech Republic	Germany	Denmark	Spain	France	United Kingdom	Italy	Netherlands	Poland	Sweden	United States	Other Europe	ALL
Changing attitudes to animal health and welfare, making people want to do more for the animals in their care.	43%	19%	43%	36%	35%	40%	18%	45%	41%	57%	32%	24%	48%	46%	36%
Pet owners further valuing the veterinary services they receive	52%	20%	52%	35%	13%	15%	25%	52%	9%	16%	30%	24%	49%	25%	29%
New drugs and treatments	25%	37%	25%	18%	23%	32%	27%	26%	26%	34%	43%	29%	37%	30%	28%
Increased specialization	4%	30%	4%	68%	26%	56%	16%	9%	23%	21%	24%	24%	8%	36%	27%
More widespread private health insurance	46%	36%	46%	9%	58%	21%	36%	24%	37%	11%	30%	2%	20%	9%	26%
Technical advances	20%	23%	20%	36%	18%	30%	29%	14%	23%	31%	19%	29%	24%	26%	25%
The development of preventative medicine	21%	27%	21%	17%	13%	24%	38%	15%	30%	11%	3%	27%	13%	18%	24%
Continuous professional development	29%	27%	29%	23%	58%	22%	19%	15%	32%	44%	30%	32%	17%	27%	23%
Better access to technology	11%	21%	11%	17%	8%	25%	15%	9%	15%	10%	16%	15%	16%	36%	16%
Cheap, affordable MRI	2%	5%	2%	4%	2%	6%	6%	11%	11%	8%	16%	5%	7%	10%	8%
Other	7%	0%	7%	4%	11%	2%	2%	5%	2%	0%	3%	0%	5%	2%	3%
	(58)	(101)	(76)	(246)	(62)	(406)	(596)	(956)	(374)	(70)	(41)	(46)	(93)	(125)	(3288)

It's difficult to predict the future, but how do you see veterinary practices changing over the next few years?



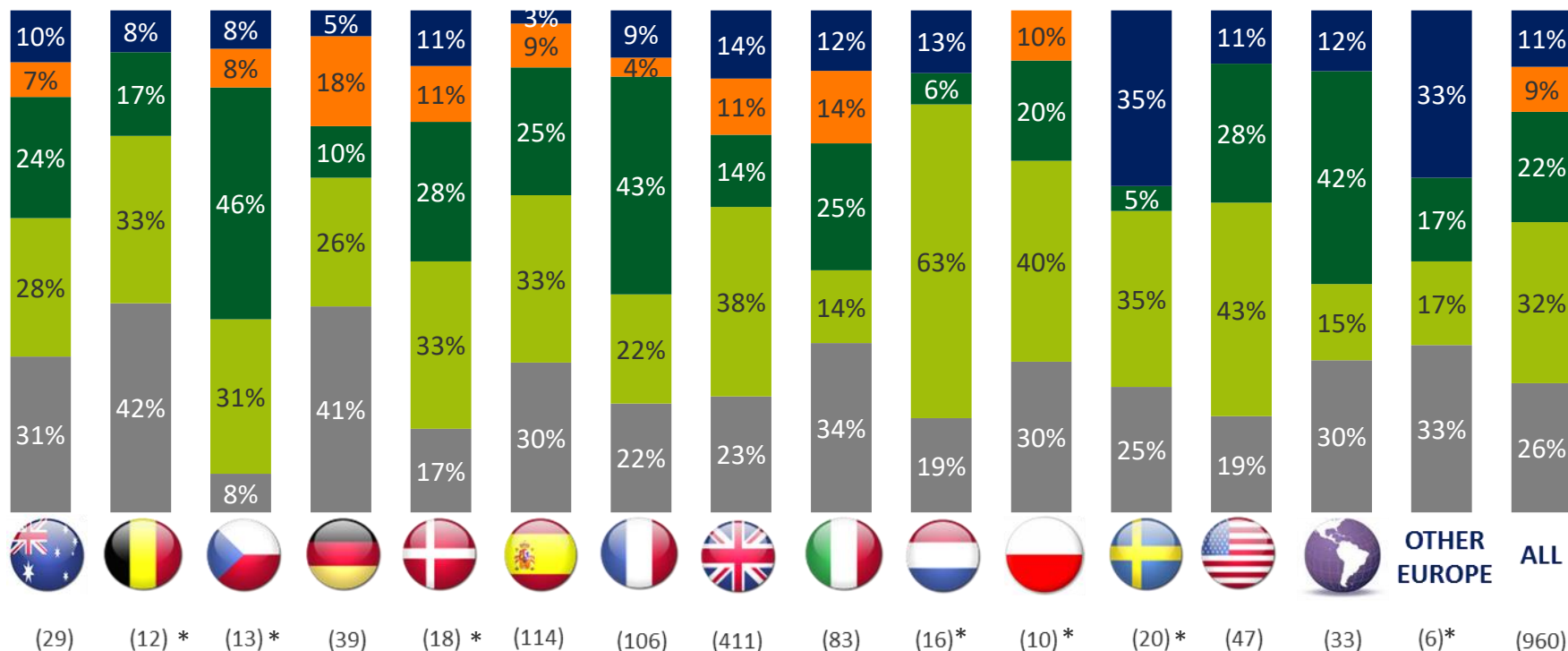
	AU	BE	CZ	DE	DK	ES	FR	GB	IT	NL	PL	SE	US	SA	OTHER EUROPE	ALL
More demanding pet owners	55%	72%	61%	71%	65%	52%	67%	66%	62%	67%	57%	78%	56%	61%	59%	64%
Growing influence of the Internet	59%	54%	82%	73%	66%	53%	64%	60%	54%	66%	51%	63%	68%	52%	65%	61%
Increased specialization	45%	46%	63%	70%	63%	62%	37%	55%	62%	48%	49%	54%	45%	55%	71%	54%
More corporate/chains	79%	31%	49%	65%	56%	52%	32%	82%	32%	69%	30%	46%	72%	27%	41%	53%
The increased cost of treatment	52%	51%	49%	53%	15%	28%	36%	67%	36%	61%	57%	61%	61%	35%	47%	46%
Better diagnostics	48%	41%	63%	41%	63%	50%	29%	47%	43%	46%	57%	49%	55%	54%	53%	44%
Customers that think they know best, more litigious/demanding customers	39%	32%	54%	58%	32%	39%	17%	56%	57%	39%	49%	59%	57%	46%	47%	44%
More competition from online pharmacies	63%	45%	50%	48%	5%	49%	42%	61%	10%	51%	19%	7%	68%	25%	47%	43%
Tighter legal requirements	36%	32%	42%	70%	18%	39%	59%	38%	24%	25%	27%	22%	43%	37%	41%	42%
Patients relying more on the internet	46%	34%	66%	46%	31%	30%	26%	51%	35%	36%	51%	49%	63%	38%	59%	39%
More difficult to make a living	21%	56%	47%	28%	21%	36%	48%	37%	45%	26%	35%	12%	36%	29%	47%	39%
Larger clinics being the norm	41%	40%	36%	52%	40%	37%	31%	35%	44%	46%	27%	22%	39%	34%	41%	38%
More competition/more vets/ more cheap practices in Eastern Europe	2%	40%	36%	43%	21%	69%	28%	19%	19%	23%	41%	27%	9%	58%	29%	33%
Focusing more on preventative health care	36%	23%	24%	31%	32%	45%	27%	31%	31%	39%	11%	22%	28%	40%	47%	32%
Focusing more on client service	45%	27%	24%	33%	53%	37%	23%	36%	21%	49%	30%	32%	24%	33%	53%	31%
Increased use of insurance products	55%	29%	30%	18%	48%	48%	24%	26%	34%	13%	19%	12%	48%	38%	18%	31%
More difficult to find competent staff	20%	13%	39%	42%	2%	14%	32%	42%	9%	16%	32%	27%	43%	25%	35%	28%
Veterinary profession being discredited	16%	24%	22%	23%	18%	22%	27%	24%	15%	30%	38%	20%	17%	10%	24%	22%
Natural treatments becoming more common	23%	22%	20%	25%	11%	20%	29%	11%	23%	15%	11%	7%	37%	35%	29%	21%
Problems with insurance companies directing care	23%	5%	7%	7%	11%	10%	7%	55%	9%	28%	8%	24%	25%	9%	41%	21%
Other	2%	2%	1%	3%	3%	2%	2%	3%	1%	5%	5%	2%	5%	0%	6%	2%
	(58)	(101)	(76)	(246)	(62)	(406)	(596)	(956)	(374)	(70)	(41)	(46)	(93)	(125)	(28)	(3288)

Future Plans



What are your long-term career aspirations?

Employed vets



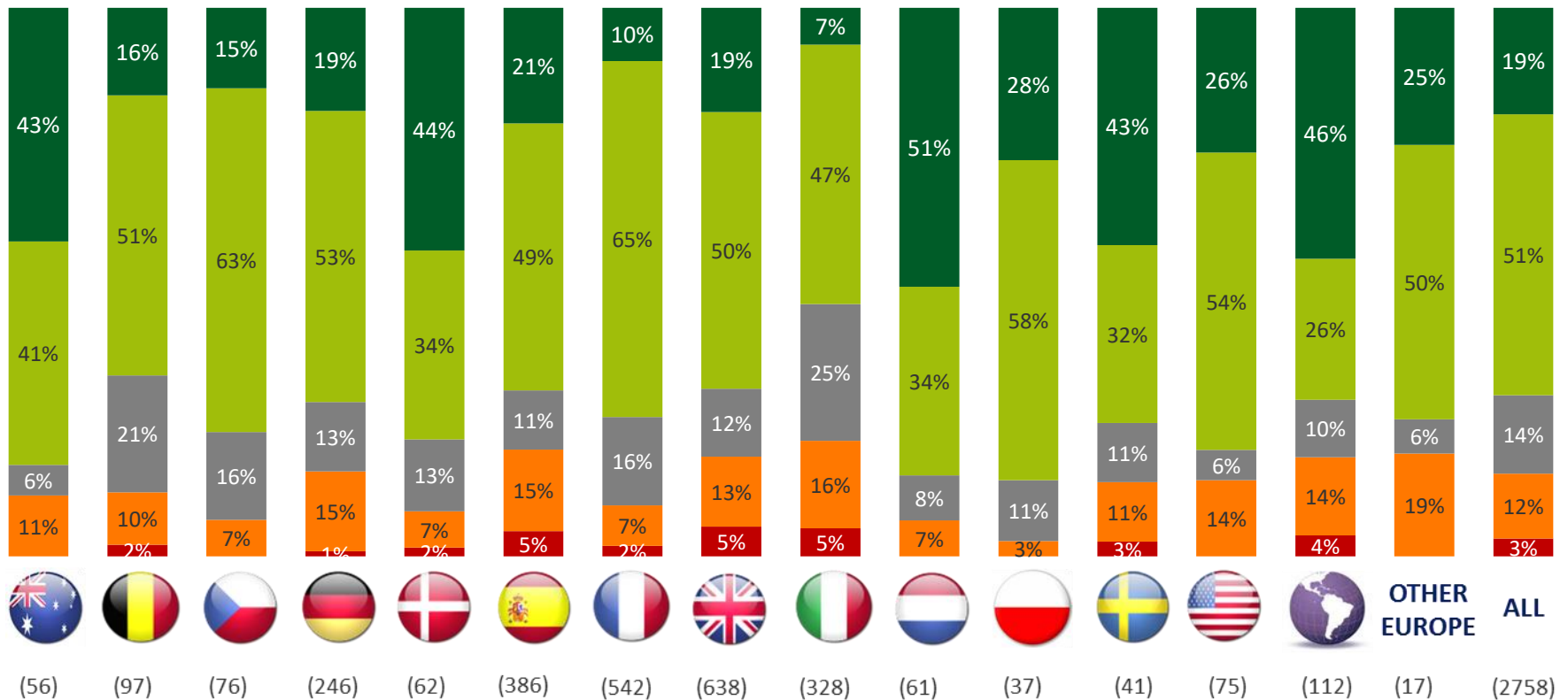
■ I would like to reduce hours/work part-time/ become freelancer
■ I would like to become an owner / partner
■ Other

■ I would like to leave the profession
■ I would like to remain an employed vet

Work – Life Balance

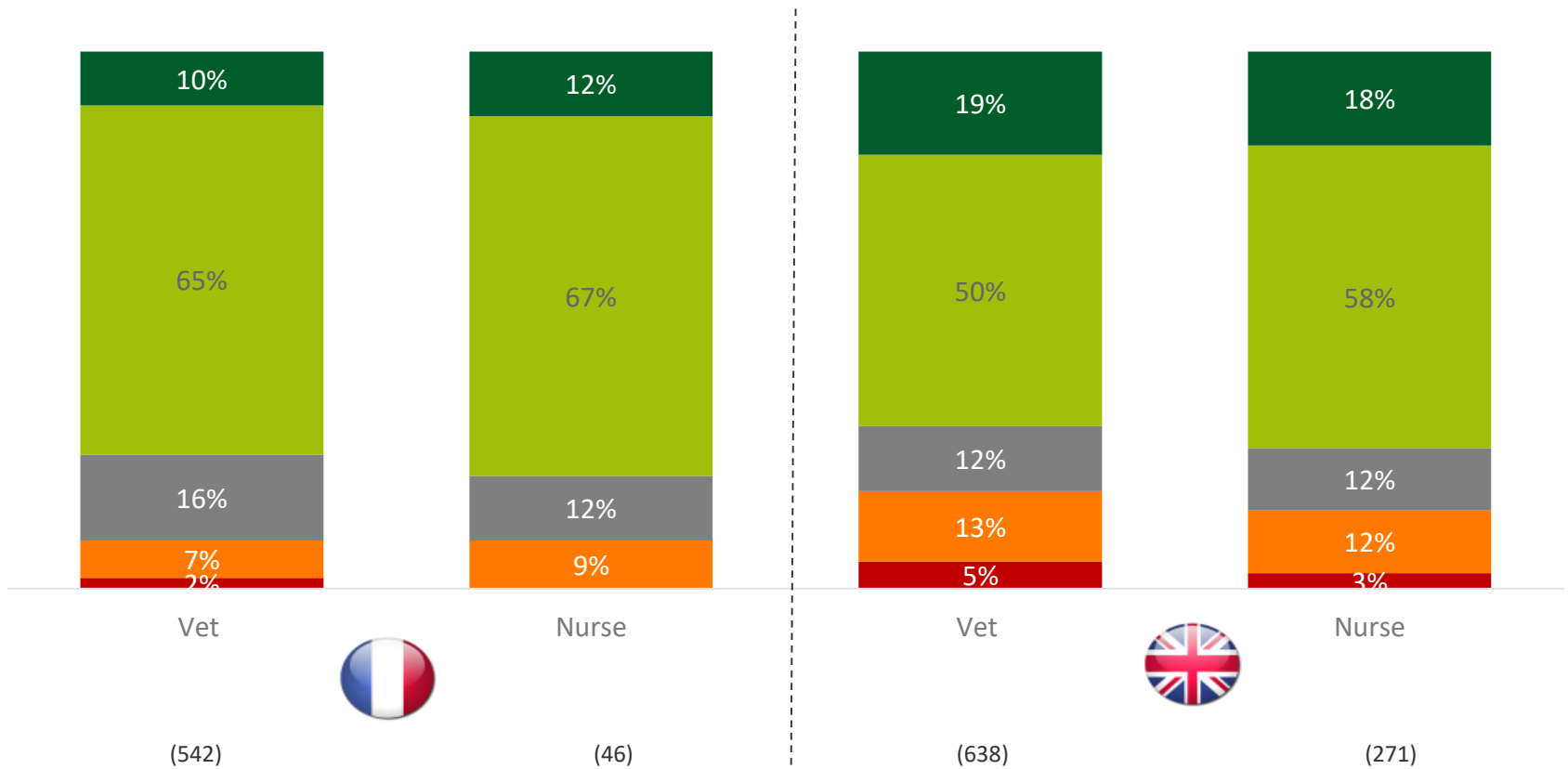


Currently, how satisfied are you with your job?



■ Very Dissatisfied
 ■ Somewhat Dissatisfied
 ■ Neither Satisfied Nor Dissatisfied
 ■ Somewhat Satisfied
 ■ Very Satisfied

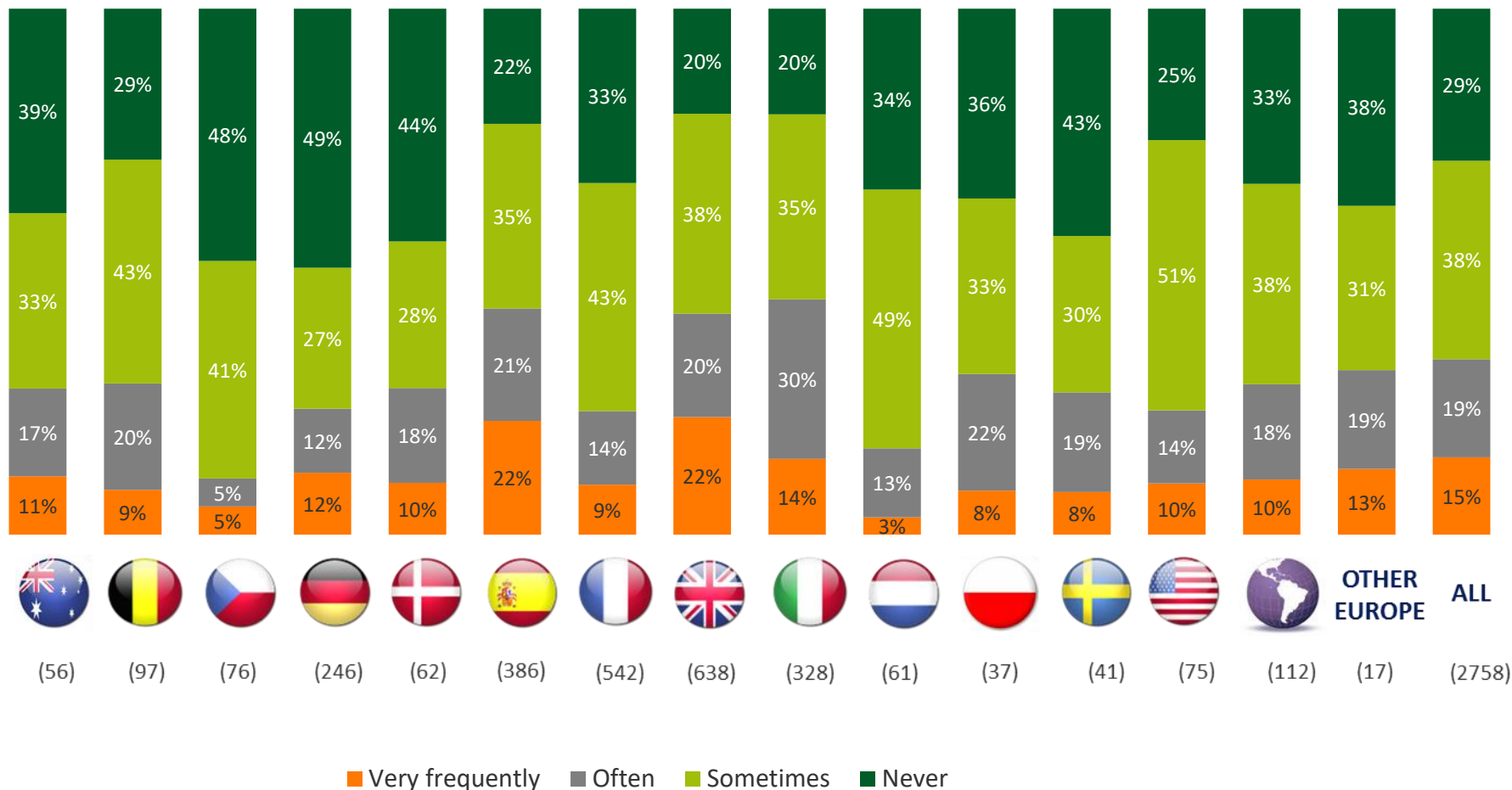
Currently, how satisfied are you with your job?



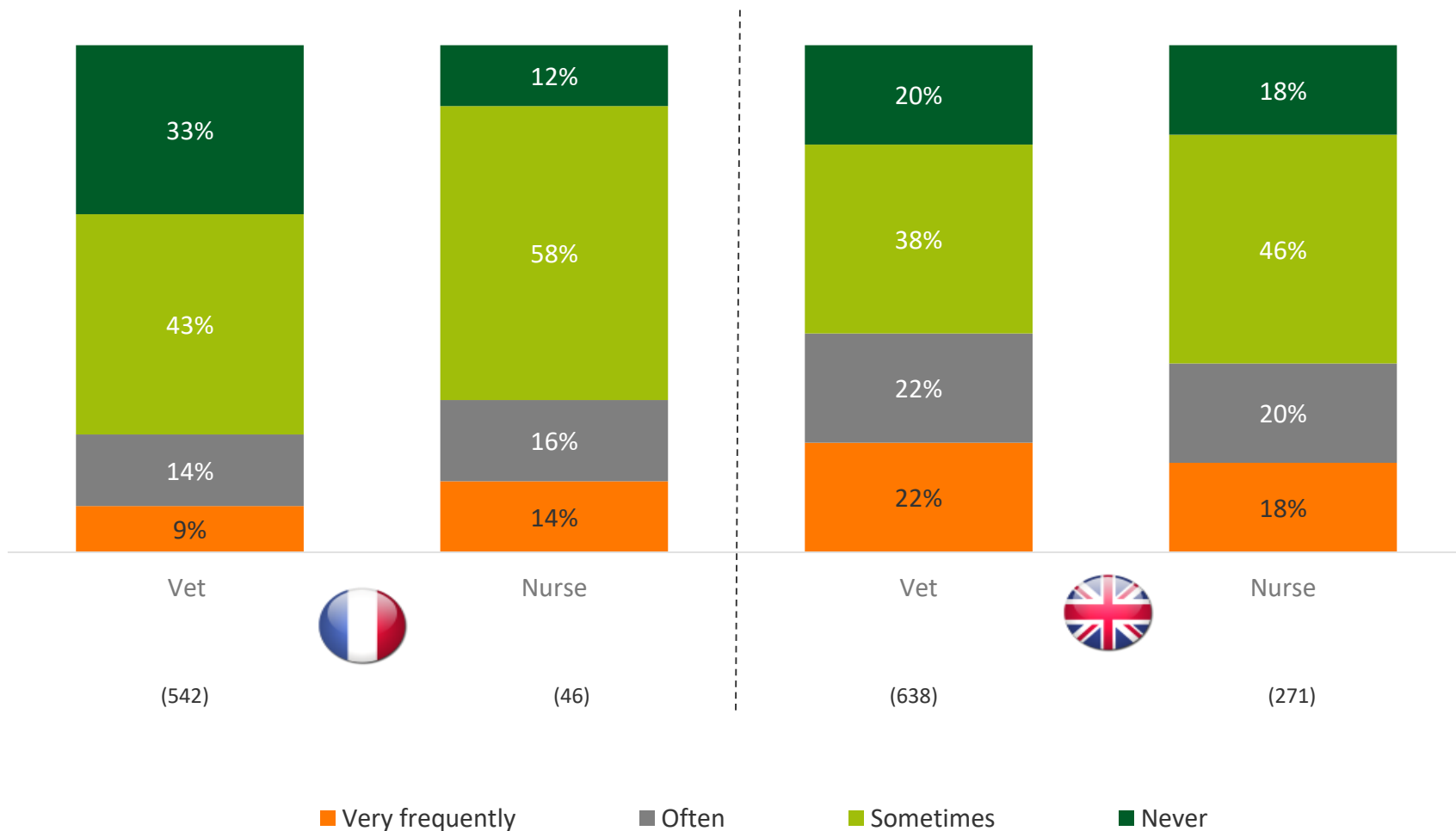
■ Very dissatisfied ■ Somewhat dissatisfied ■ Neither satisfied nor dissatisfied ■ Somewhat satisfied ■ Very satisfied

How often do you think about leaving the profession to get a better work/life balance?

Vets

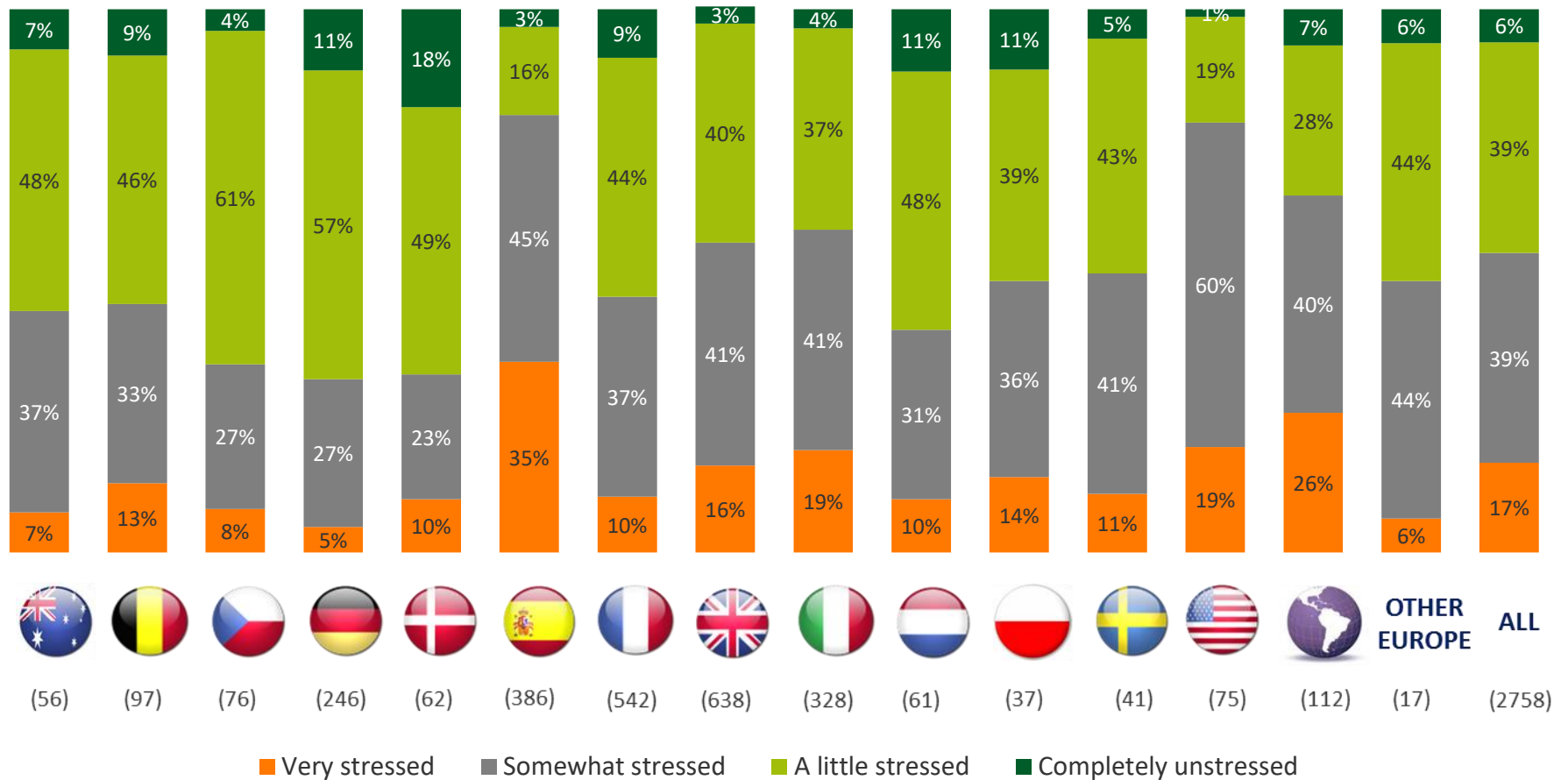


How often do you think about leaving the profession to get a better work/life balance?

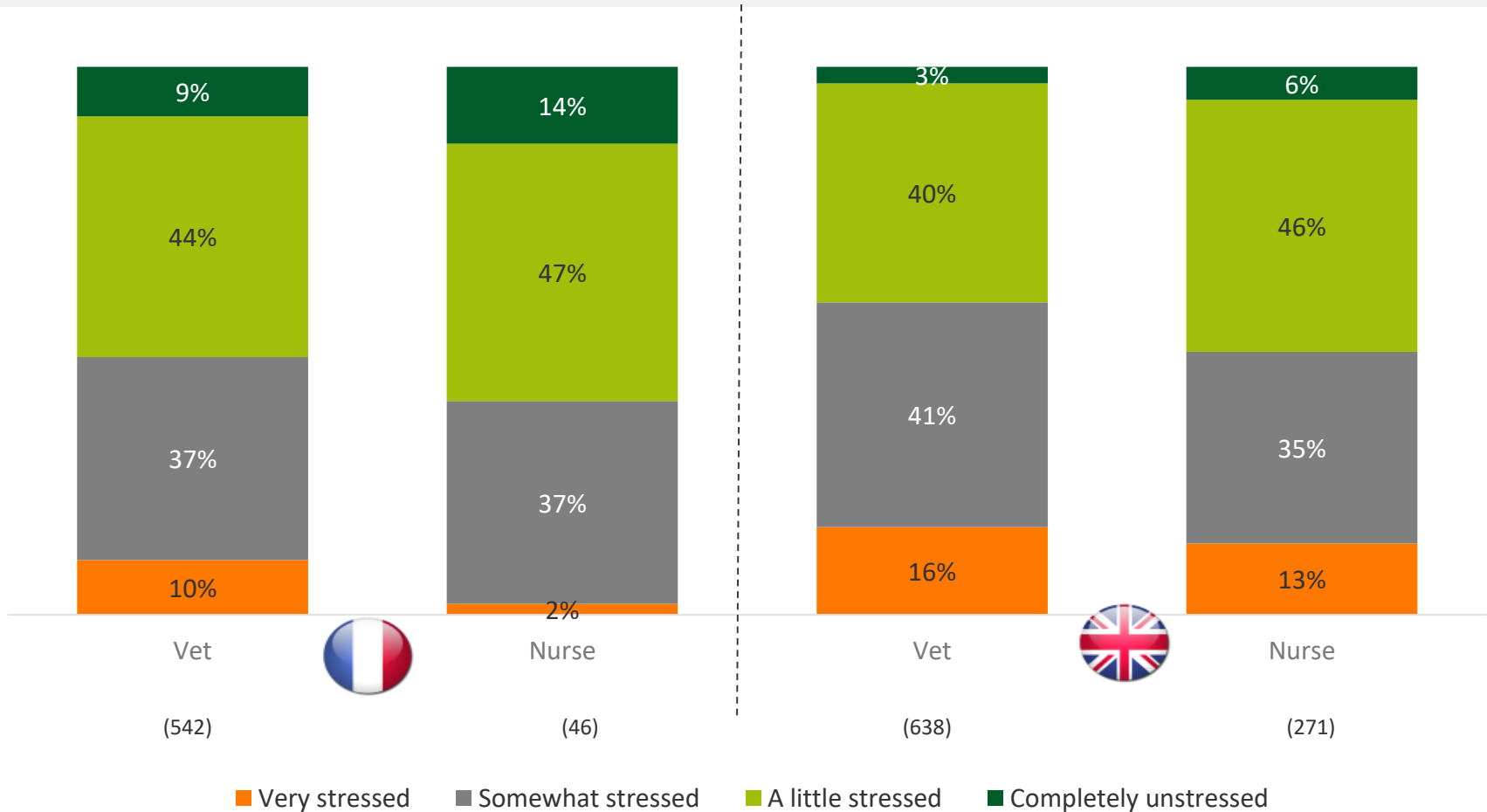


How stressed are you on a daily basis?

Vets



How stressed are you on a daily basis?



Working Life



How many hours a week, on average, do you spend on each of the following activities?

Vets



	Australia	Belgium	Czech Republic	Germany	Denmark	Spain	France	United Kingdom	Italy	Netherlands	Poland	Sweden	United States	South America	OTHER EUROPE	ALL
Consultation	37%	21%	10%	14%	7%	44%	28%	34%	16%	4%	11%	7%	35%	32%	17%	28%
Surgery	18%	13%	10%	10%	13%	16%	10%	14%	12%	11%	16%	14%	13%	12%	12%	13%
On call duties	5%	11%	13%	13%	12%	2%	12%	10%	29%	10%	8%	9%	4%	4%	17%	11%
Admin	14%	8%	6%	8%	10%	9%	26%	10%	5%	7%	5%	14%	12%	9%	6%	13%
Emergency cover (nights / weekends)	7%	13%	14%	11%	8%	3%	11%	12%	6%	24%	3%	8%	4%	3%	23%	9%
Teaching/ supporting and training junior vets	2%	2%	1%	1%	2%	1%	0%	3%	1%	2%	1%	3%	2%	3%	1%	1%
Nursing duties	1%	1%	4%	1%	1%	2%	1%	0%	1%	1%	0%	2%	1%	2%	1%	1%
Diagnostic	4%	4%	10%	8%	11%	8%	2%	3%	6%	7%	3%	11%	7%	11%	4%	6%
Looking after in-patients	3%	3%	3%	2%	2%	3%	2%	3%	4%	2%	1%	2%	5%	6%	1%	3%
Cleaning	1%	4%	3%	2%	2%	3%	1%	1%	4%	1%	1%	2%	1%	3%	1%	2%
Home visits	1%	8%	4%	6%	3%	3%	4%	2%	6%	4%	7%	7%	1%	5%	1%	4%
Treatment	7%	11%	22%	24%	27%	6%	2%	5%	8%	26%	43%	21%	12%	11%	6%	9%
Other (Please specify)	2%	0%	0%	1%	2%	0%	0%	1%	1%	1%	0%	1%	3%	1%	9%	1%















(58) (101) (76) (246) (62) (406) (596) (956) (374) (70) (41) (46) (93) (125) (28) (3288)

How many hours a week, on average, do you spend on each of the following activities?



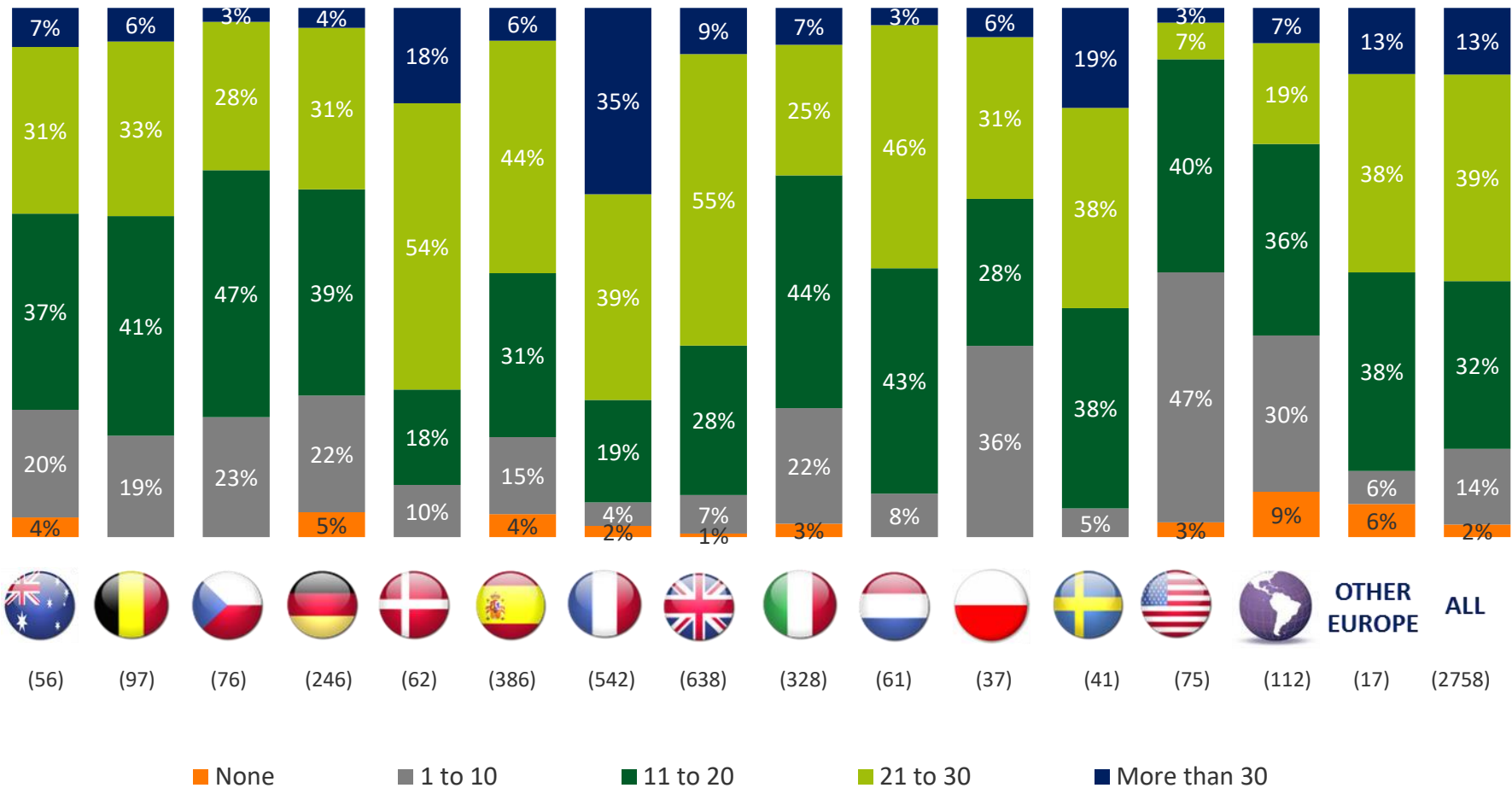
	Vets	Nurses	Vets	Nurses
Consultation	28%	31%	34%	9%
Surgery	10%	14%	14%	10%
On call duties	12%	4%	10%	5%
Admin	26%	10%	10%	10%
Emergency cover (nights / weekends)	11%	4%	12%	7%
Teaching/ supporting and training junior vets	0%	0%	3%	3%
Nursing duties	1%	11%	0%	26%
Diagnostic	2%	3%	3%	3%
Looking after in-patients	2%	8%	3%	11%
Cleaning	1%	10%	1%	12%
Home visits	4%	2%	2%	0%
Treatment	2%	2%	5%	4%
Other (Please specify)	0%	1%	1%	1%
	(542)	(46)	(638)	(271)

Approximately how many hours do you work in an average week?

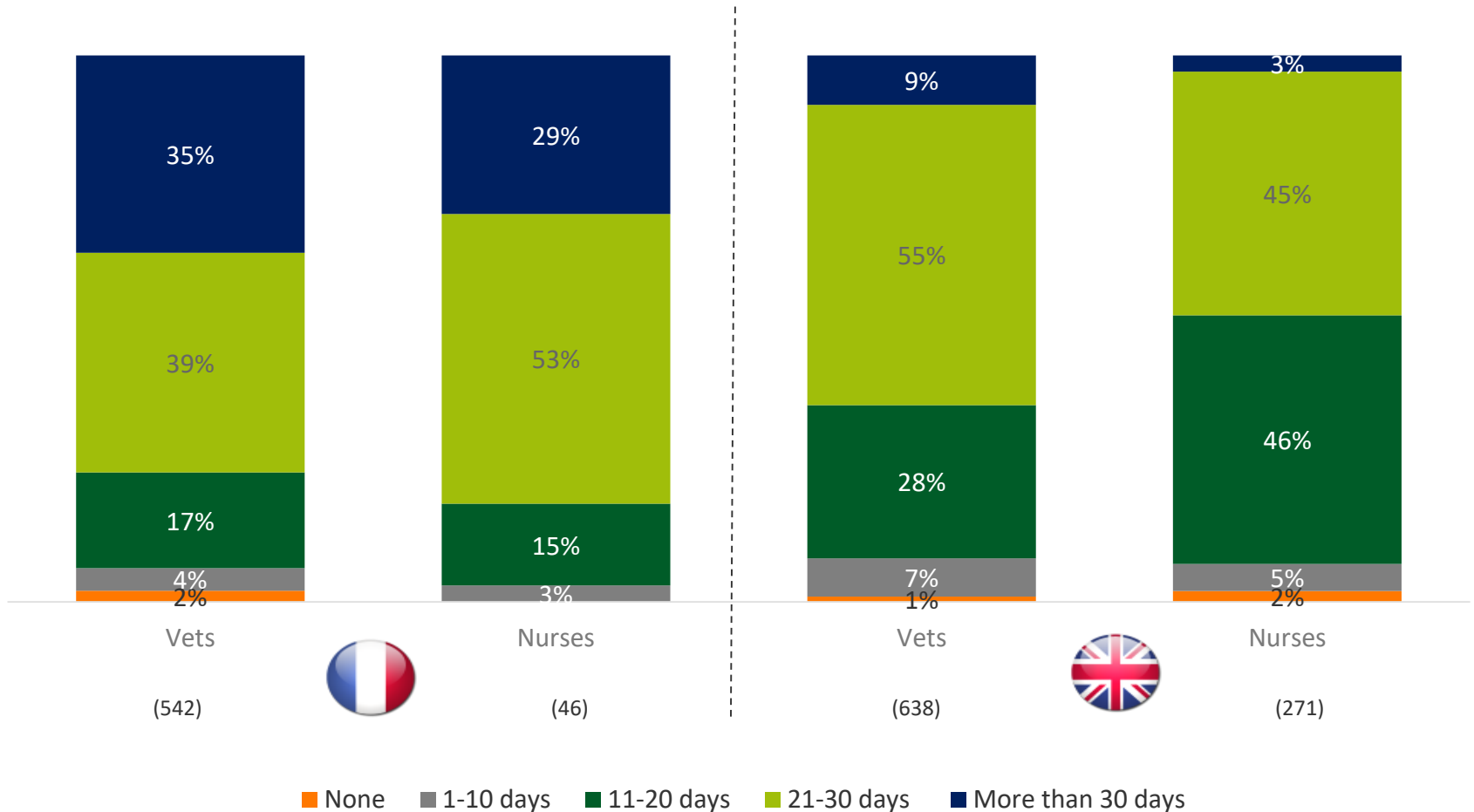
															OTHER EUROPE	ALL
Up to 20 hours	7%	4%	3%	5%	3%	0%	2%	5%	6%	6%	8%	3%	6%	3%	12%	4%
21 to 30 hours	9%	5%	4%	6%	8%	0%	4%	10%	9%	10%	5%	0%	5%	5%	4%	6%
31 to 40 hours	30%	10%	11%	12%	10%	2%	18%	20%	25%	16%	13%	44%	18%	4%	31%	16%
41 to 50 hours	23%	12%	18%	18%	25%	1%	21%	18%	23%	10%	28%	23%	33%	6%	19%	17%
51 to 60 hours	14%	14%	16%	15%	22%	1%	10%	12%	16%	16%	15%	10%	11%	2%	8%	11%
More than 60 hours	16%	55%	49%	43%	31%	96%	44%	35%	22%	41%	31%	21%	27%	79%	27%	45%
	(58)	(101)	(76)	(246)	(62)	(406)	(596)	(956)	(374)	(70)	(41)	(46)	(93)	(125)	(28)	(3288)

How many days of holiday do you take on average per year?

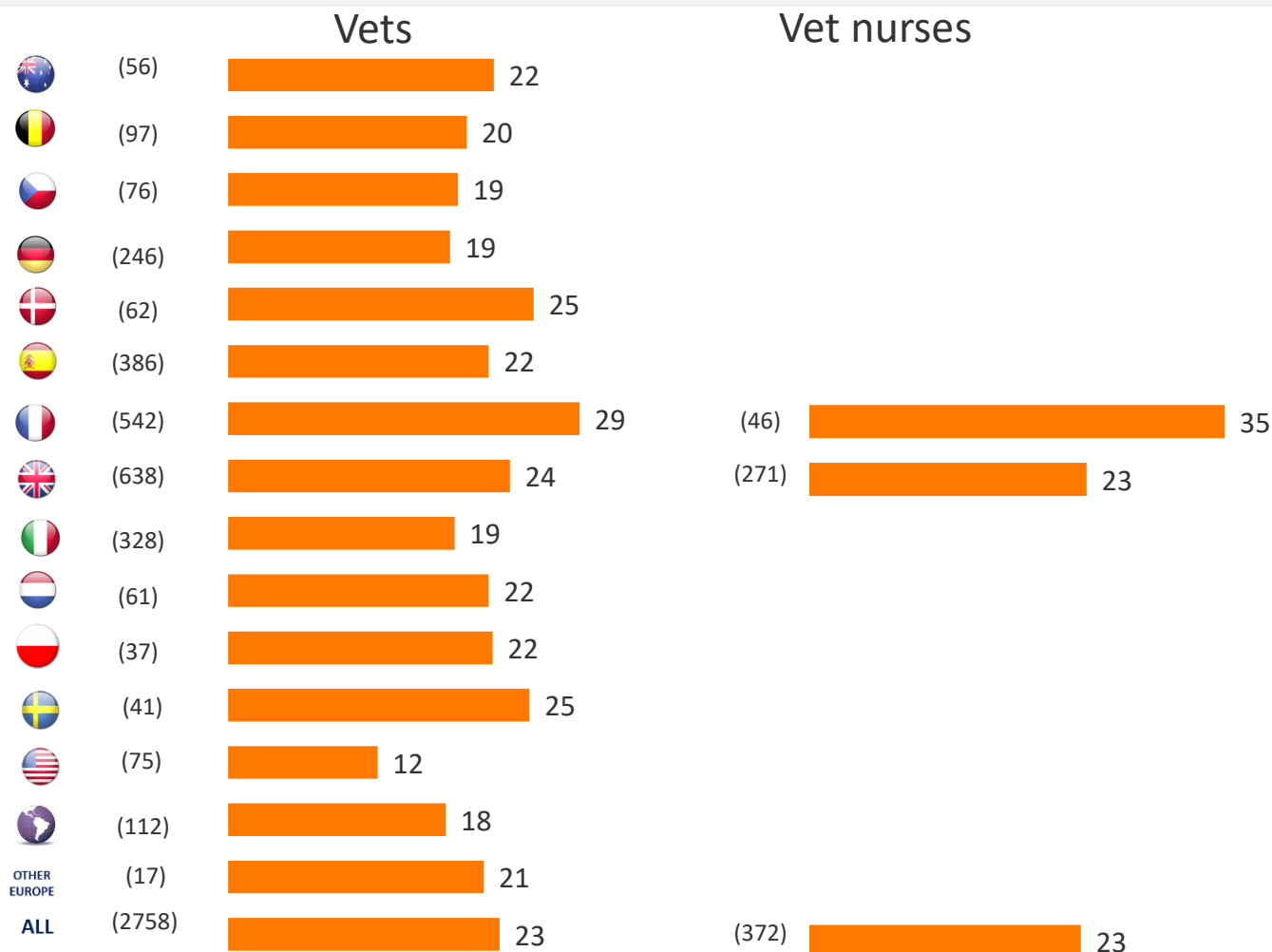
Vets



How many days of holiday do you take on average per year?



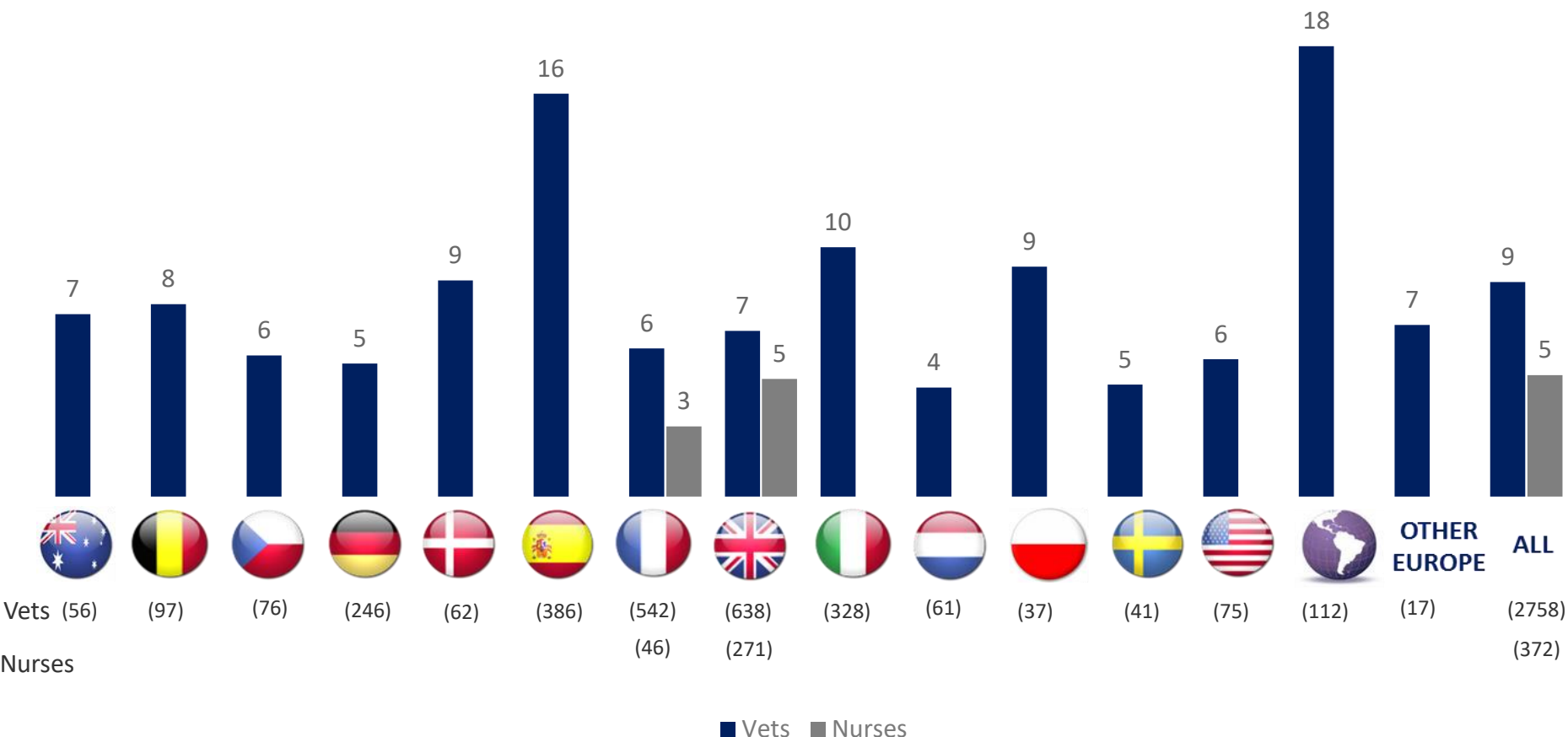
How many days of holiday do you take on average per year?



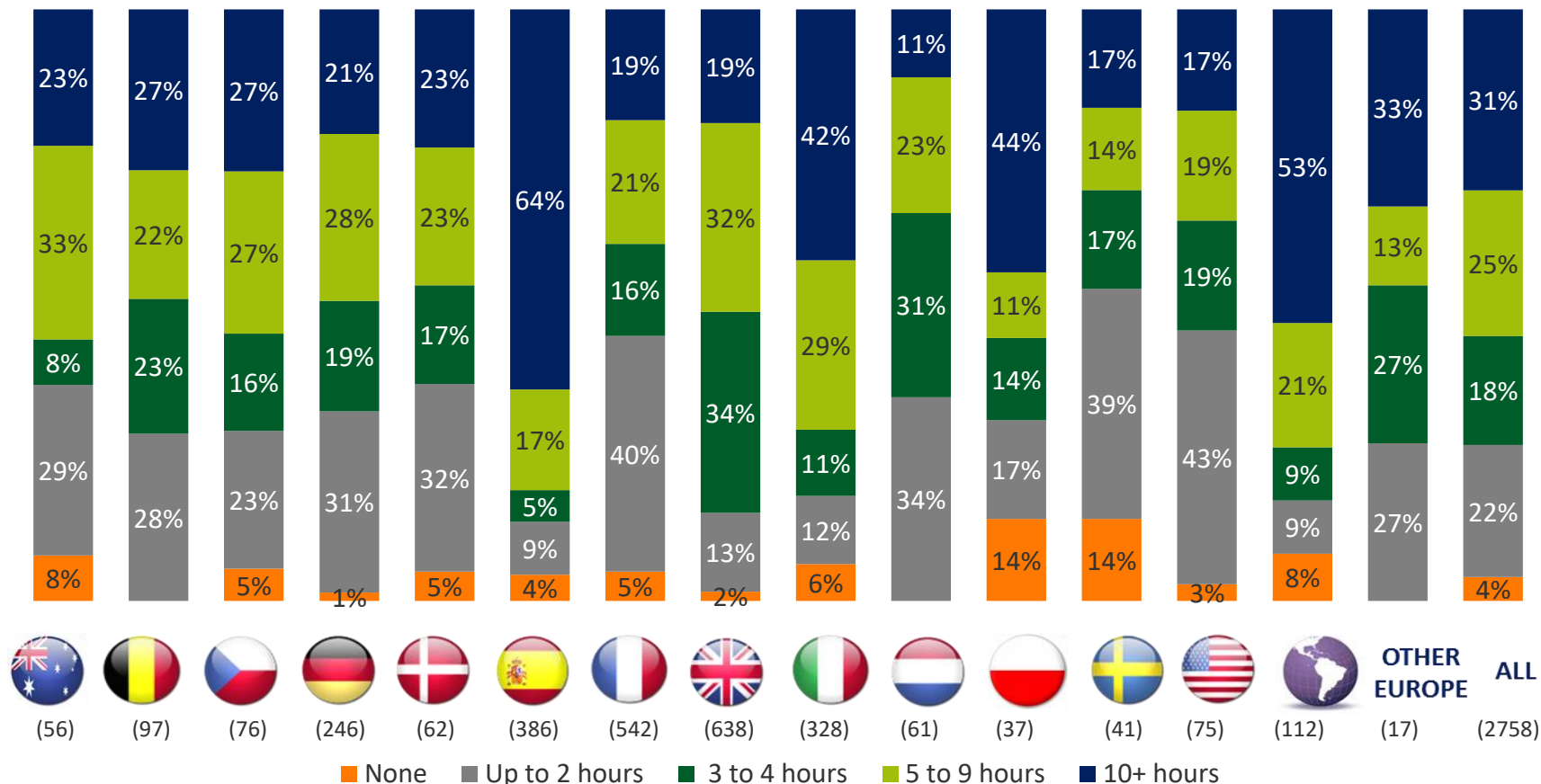
Continuous Professional Education



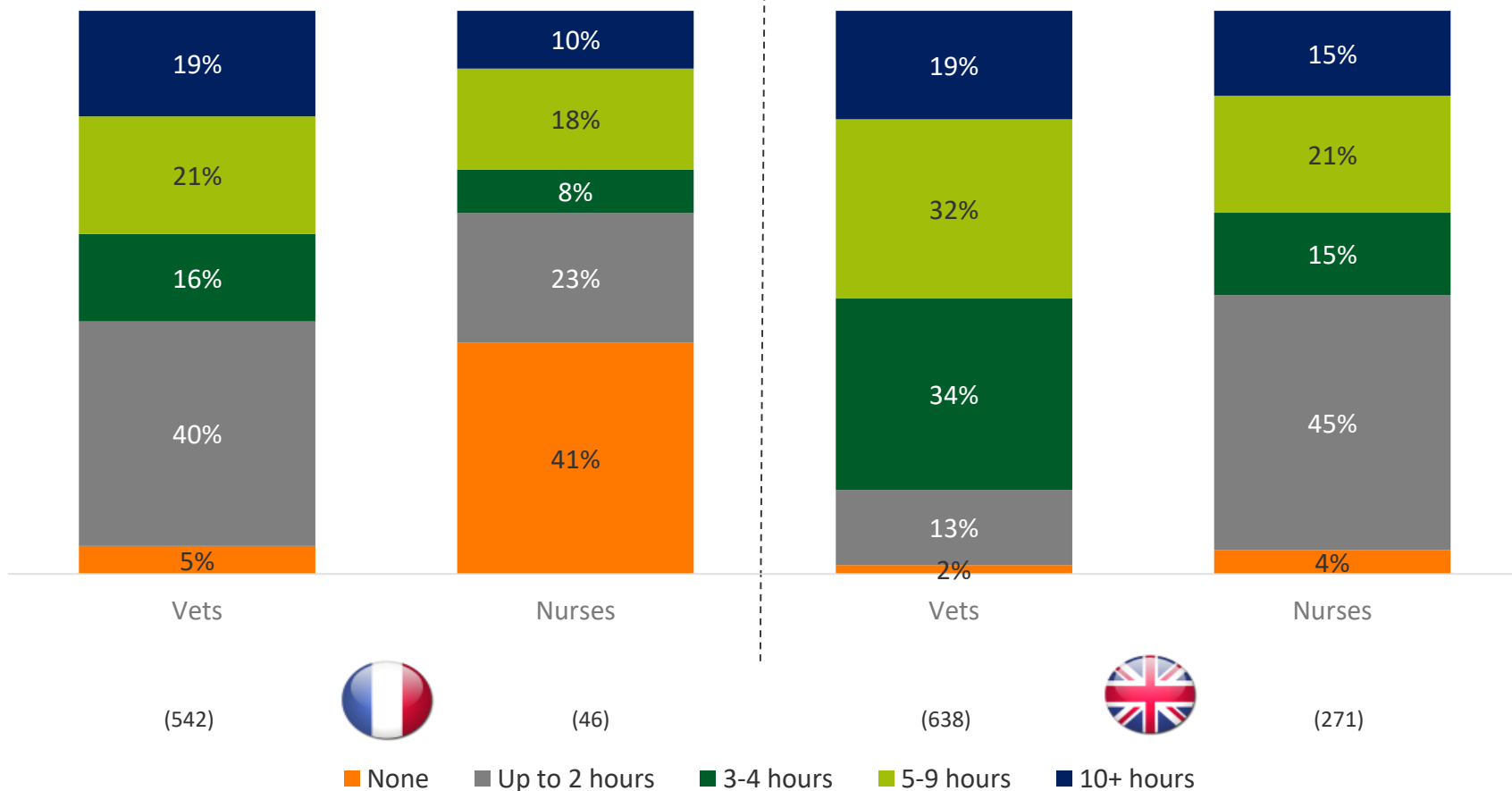
On average, how many hours a month do you dedicate to professional development (CPD, specialisation courses, lectures, webinars etc.)?



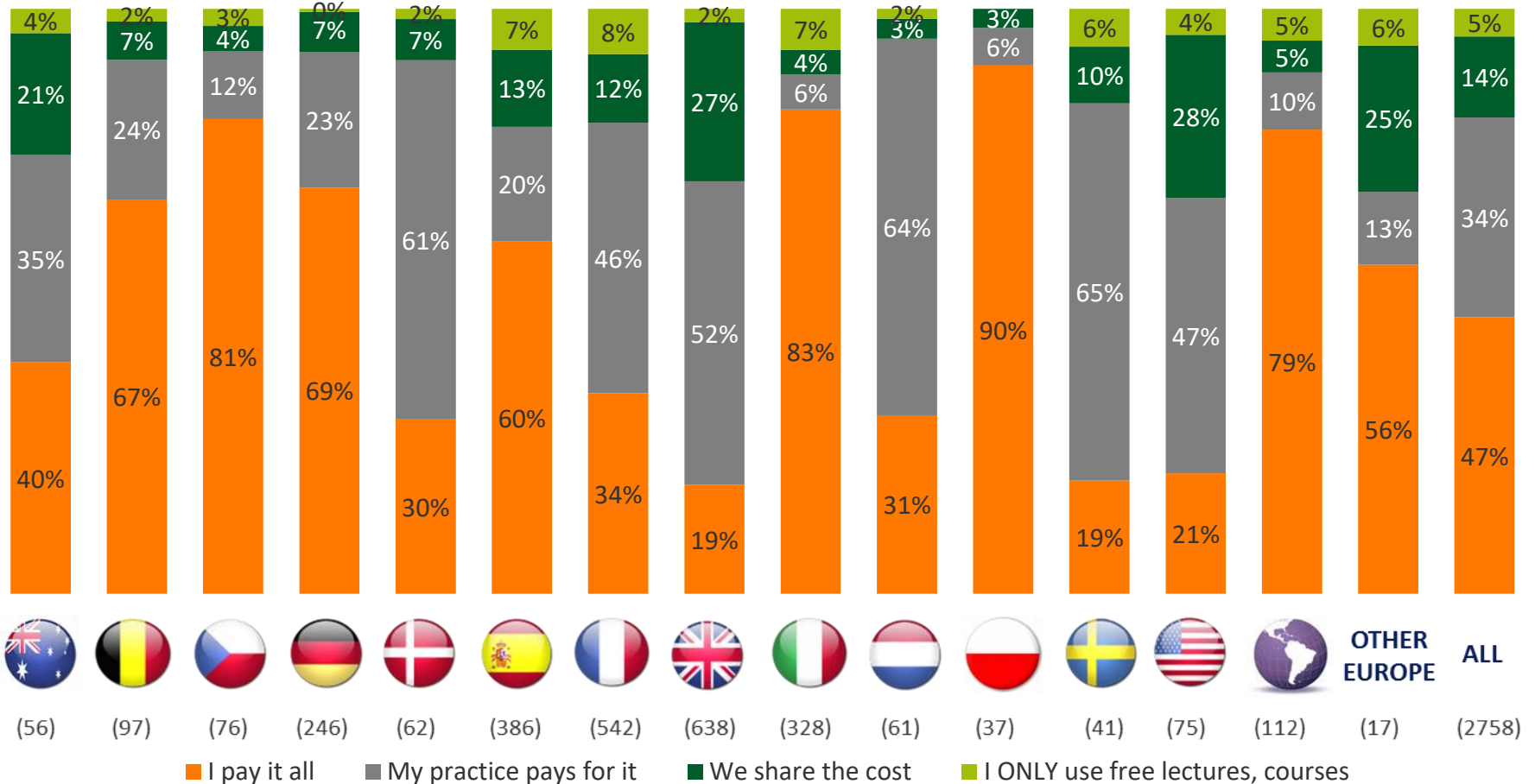
On average, how many hours a month do you dedicate to professional development (CPD, specialisation courses, lectures, webinars etc.)?



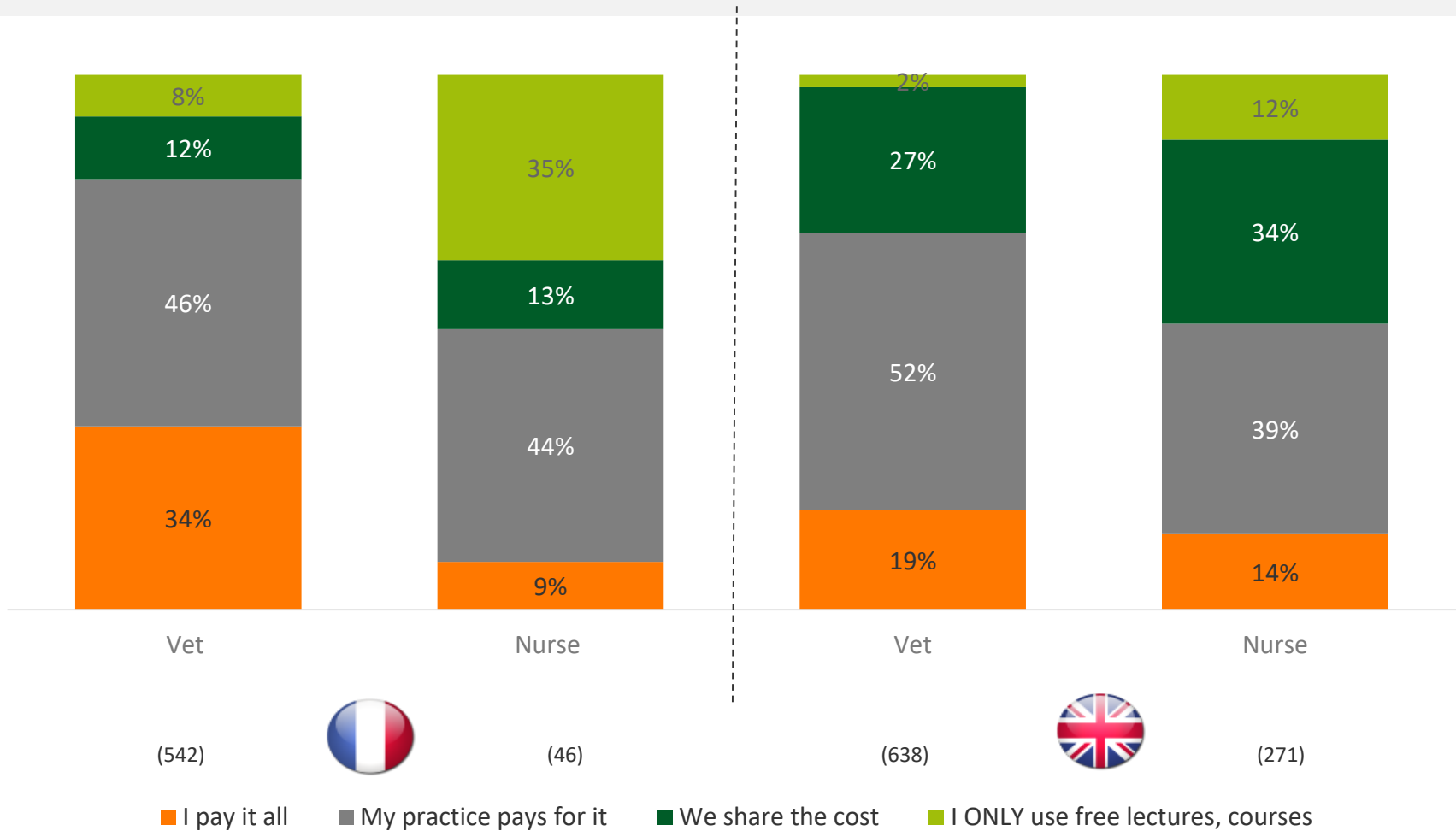
On average, how many hours a month do you dedicate to professional development (CPD, specialisation courses, lectures, webinars etc.)?



Who pays for your professional development?



Who pays for your professional development?



What type of learning have you ever undertaken towards professional development?



	AU	BE	CZ	DE	DK	ES	FR	UK	IT	NL	PL	SE	US	SA	OTHER EUROPE	ALL
Seminar/workshop - external	70%	48%	78%	68%	61%	54%	40%	63%	49%	66%	54%	51%	68%	53%	41%	55%
Distance learning - webinars	66%	52%	43%	50%	34%	62%	41%	74%	34%	74%	32%	41%	65%	27%	65%	53%
Reading - planned and documented private study/reading	59%	46%	3%	45%	32%	47%	47%	72%	40%	49%	68%	44%	61%	41%	47%	51%
Lecture by external provider	50%	48%	41%	50%	65%	67%	33%	77%	9%	56%	54%	49%	68%	40%	65%	51%
Distance learning - on-line/informal (not assessed)	50%	27%	9%	4%	16%	45%	27%	58%	28%	38%	16%	17%	43%	24%	35%	35%
Training - in house	57%	12%	21%	12%	34%	46%	14%	65%	12%	56%	22%	37%	53%	28%	47%	35%
Distance learning - on-line/ formal (assessed and/or moderated by a third party)	50%	22%	5%	6%	11%	46%	13%	48%	24%	34%	5%	12%	43%	38%	35%	30%
Practical training - clinical skills lab	38%	23%	17%	11%	27%	31%	10%	42%	22%	46%	43%	17%	49%	23%	24%	26%
Practical training - wet lab	36%	22%	20%	8%	18%	30%	6%	46%	7%	48%	38%	24%	57%	19%	18%	24%
Seeing practice - work-based observation	39%	9%	29%	27%	32%	25%	7%	29%	38%	16%	51%	29%	25%	14%	41%	24%
Discussion group - informal learning set	34%	20%	12%	5%	40%	12%	8%	38%	20%	44%	22%	39%	31%	15%	18%	21%
Mentoring or being mentored	45%	8%	36%	5%	8%	7%	2%	36%	8%	33%	41%	29%	44%	12%	12%	17%
Studying for an external qualification	34%	12%	16%	8%	18%	13%	5%	34%	6%	15%	41%	12%	17%	14%	24%	17%
Preparing a new lecture/presentation	27%	12%	13%	21%	21%	13%	3%	32%	7%	23%	14%	27%	24%	10%	41%	16%
Clinical audit activity	7%	1%	3%	5%	8%	3%	2%	28%	11%	8%	8%	2%	1%	2%	6%	10%
Research - scientific	14%	10%	4%	10%	6%	6%	7%	9%	9%	10%	24%	10%	11%	13%	12%	9%
Research - clinical	7%	6%	13%	8%	6%	7%	4%	8%	7%	15%	14%	17%	11%	17%	12%	8%
Secondment to another work place	13%	2%	4%	8%	6%	5%	1%	11%	12%	7%	16%	29%	3%	3%	12%	7%
Training as examiner/assessor	7%	8%	5%	3%	2%	4%	2%	15%	5%	7%	14%	7%	4%	3%	12%	7%
Project - working on a new project/in a new area of work	5%	2%		2%	10%	3%	2%	13%	4%	5%	3%	5%	12%	8%	12%	6%
Research - veterinary business	7%	5%	3%	4%	2%	5%	3%	7%	5%	8%	5%	7%	5%	15%	6%	6%
Other	2%	3%	0%	2%	8%	0%	3%	2%	2%	0%	0%	5%	0%	2%	6%	2%
Not undertaken any learning towards professional development	0%	5%	0%	4%	5%	0%	4%	0%	1%	0%	0%	2%	0%	0%	0%	2%
	(56)	(97)	(76)	(246)	(62)	(386)	(542)	(638)	(328)	(61)	(37)	(41)	(75)	(112)	(17)	(2758)

With regards to your professional development, what type of education do you find the most useful?



	Australia	Belgium	Czech Republic	Germany	Denmark	Spain	France	United Kingdom	Italy	Netherlands	Poland	Sweden	United States	Other Europe	ALL
External seminars/lectures/workshops/courses	59%	72%	67%	74%	65%	65%	64%	60%	69%	64%	57%	56%	65%	57%	64%
Webinars	66%	44%	53%	56%	37%	56%	41%	60%	40%	56%	27%	29%	37%	23%	49%
Clinical cases or case studies	31%	44%	57%	46%	52%	63%	42%	23%	49%	31%	61%	28%	34%	48%	40%
Distance learning - on-line/ formal (assessed and/or moderated by a third party)	39%	21%	7%	6%	5%	52%	20%	28%	26%	11%	5%	12%	25%	43%	26%
Short videos (5-10 min)	21%	24%	36%	18%	37%	31%	35%	18%	23%	26%	38%	12%	21%	27%	26%
Distance learning - webinars	30%	15%	7%	9%	5%	29%	23%	28%	20%	25%	3%	7%	15%	18%	22%
Ebooks/online journals	14%	13%	17%	12%	18%	25%	14%	11%	27%	10%	24%	12%	19%	24%	17%
Distance learning - on-line/informal (not assessed)	18%	12%	4%	3%	2%	15%	19%	22%	19%	13%	14%	15%	12%	11%	16%
Research - clinical	16%	7%	8%	11%	19%	15%	6%	8%	10%	7%	24%	12%	13%	29%	11%
Research - scientific	9%	8%	3%	5%	13%	6%	5%	3%	8%	13%	11%	7%	9%	24%	7%
Secondment to another work place	2%	1%	1%	7%	3%	8%	1%	4%	9%	2%	11%	22%	1%	1%	5%
Research - veterinary business	5%	1%	3%	3%	8%	7%	1%	3%	2%	8%	11%	5%	5%	11%	4%
Other	4%	2%	3%	2%	5%	2%	4%	4%	2%	8%	3%	7%	9%	4%	3%
	(56)	(97)	(76)	(246)	(62)	(386)	(542)	(638)	(328)	(61)	(37)	(41)	(75)	(112)	(2758)

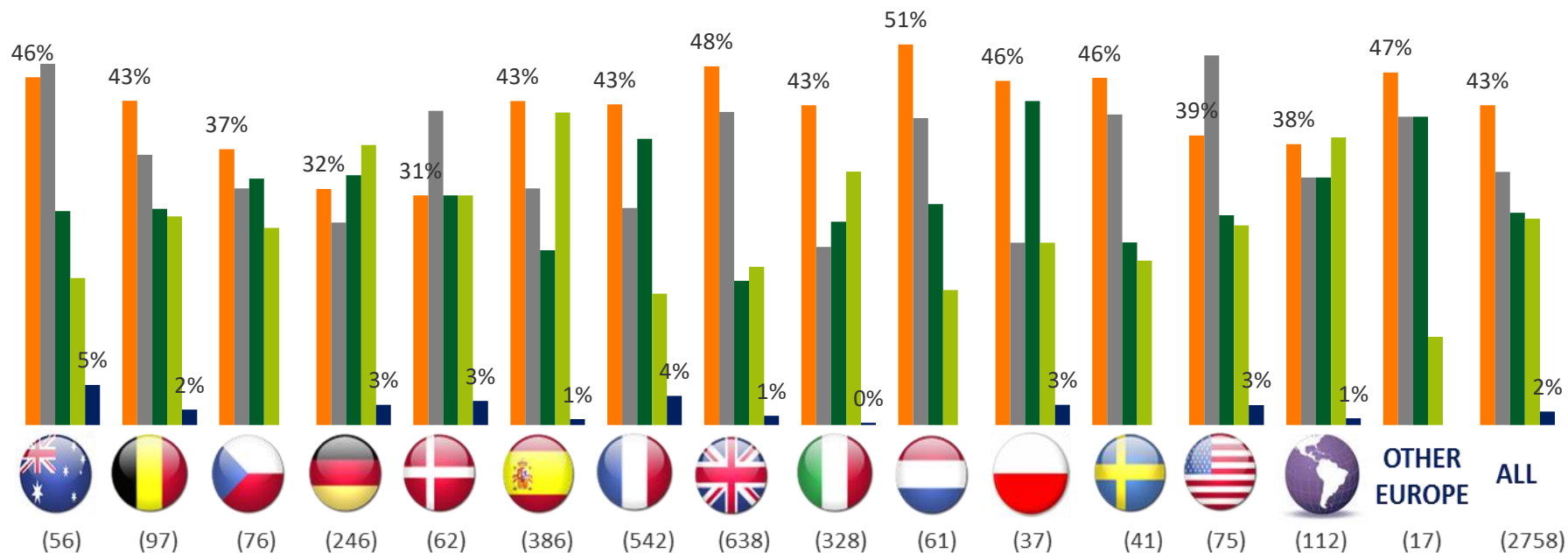
With regards to your profession, what do you do when you have a veterinary technical question (e.g. about treatment, medication, vaccines etc.)? What sources of information do you use to look for a solution?



	Australia	Belgium	Czech Republic	Germany	Denmark	Spain	France	United Kingdom	Italy	Netherlands	Poland	Sweden	United States	OTHER EUROPE	ALL
Veterinary specialist textbooks/drug handbooks	57%	62%	54%	74%	61%	74%	61%	53%	63%	66%	73%	63%	53%	67%	61%
Colleagues	48%	56%	62%	63%	66%	61%	46%	56%	54%	66%	71%	72%	60%	55%	56%
Vet Journal/books	33%	57%	64%	43%	58%	74%	57%	36%	56%	39%	73%	63%	44%	55%	51%
Contact technical support of drug company/manufacturer	50%	36%	24%	44%	71%	47%	49%	59%	26%	44%	27%	39%	43%	24%	46%
Referral specialist/clinician	40%	34%	14%	22%	53%	37%	39%	44%	34%	34%	24%	59%	53%	39%	38%
Data sheet compendium	22%	19%	18%	12%	5%	3%	25%	67%	13%	6%	27%	9%	9%	18%	30%
Vet association manual (e.g. BSAVA Manuals etc.)	38%	16%	20%	5%	52%	30%	1%	51%	37%	30%	17%	54%	9%	16%	29%
Journal articles	28%	39%	47%	16%	31%	14%	41%	26%	36%	44%	59%	37%	29%	8%	29%
Google	40%	32%	47%	37%	29%	27%	25%	27%	22%	34%	24%	11%	11%	34%	27%
Veterinary Online Forums	19%	26%	25%	24%	39%	19%	25%	14%	22%	19%	29%	52%	24%	21%	21%
Referral centres	33%	6%	1%	27%	6%	13%	12%	30%	12%	6%	12%	17%	16%	10%	18%
University clinic	9%	26%	9%	26%	16%	6%	3%	8%	10%	66%	5%	20%	9%	6%	10%
VIN (Veterinary Information Network)	52%	6%	3%	16%	2%	4%	1%	8%	4%	6%	2%	7%	63%	6%	8%
Publishers' vet forums	0%	0%	0%	6%	8%	26%	2%	2%	7%	4%	7%	7%	8%	18%	7%
American Vet Schools	0%	14%	5%	0%	3%	4%	14%	1%	3%	3%		4%	6%	4%	5%
Vetidata	0%	0%	0%	59%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	4%
Wikivet	5%	1%	1%	4%	0%	2%	1%	4%	5%	0%	2%	0%	0%	3%	3%
Other	9%	5%	4%	6%	6%	2%	2%	4%	3%	7%	0%	0%	1%	6%	4%

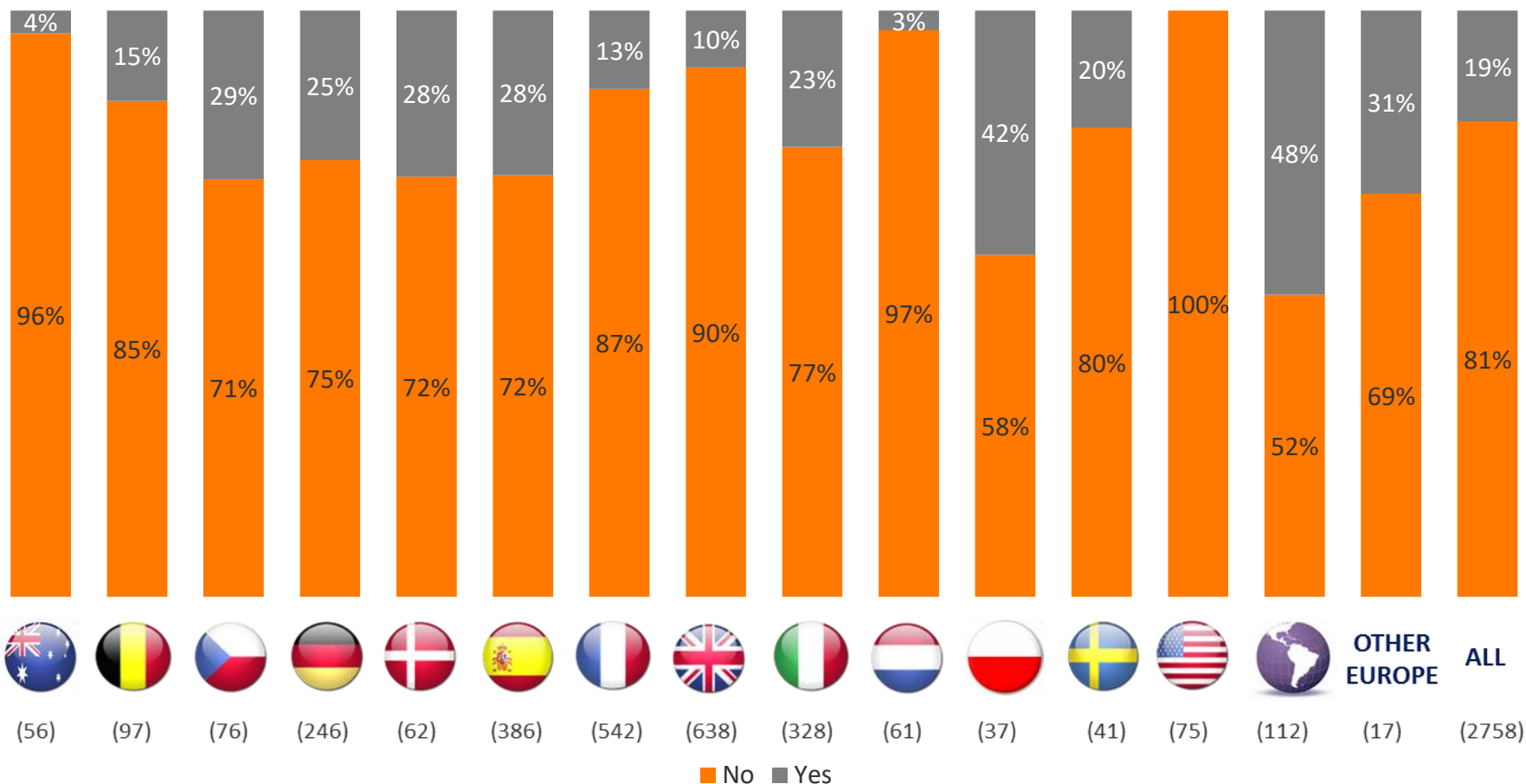
(56) (97) (76) (246) (62) (386) (542) (638) (328) (61) (37) (41) (75) (112) (17) (2758)

If you were to use distance learning when completing your CPD, for example on Canine Dermatology, what combination(s) of learning materials would you prefer to receive the most?



- Video recording of lecture + photos of cases + practical videos
- PowerPoint slides with audio + photos of cases + practical videos
- Printable scientific paper on the topic + photos of cases + practical videos
- Printable scientific paper on the topic + scientific paper audio recording + photos of cases + practical videos
- Other (please specify)

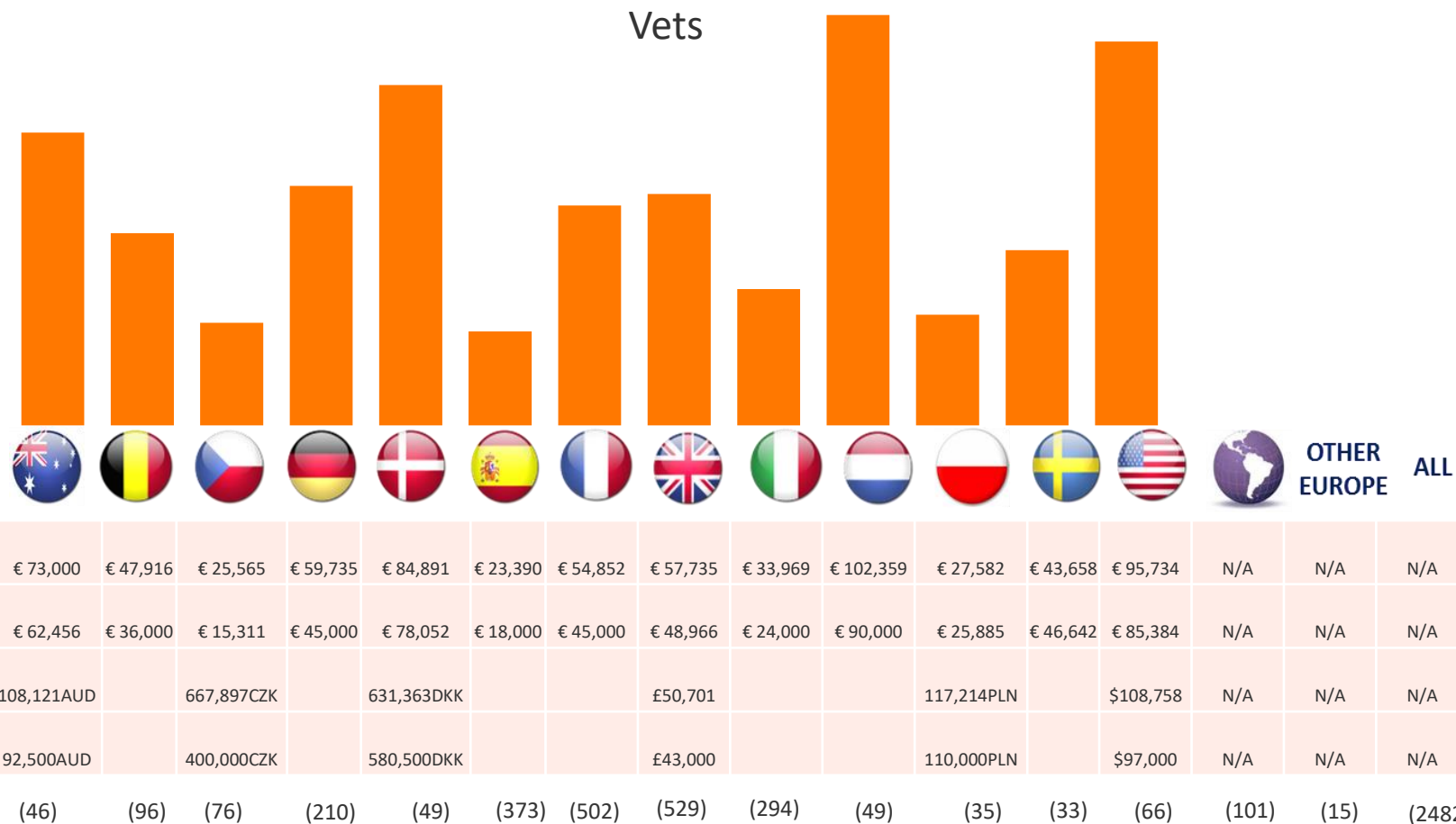
Have you attained a Certificate in Advanced Veterinary Practice (CertAVP)?



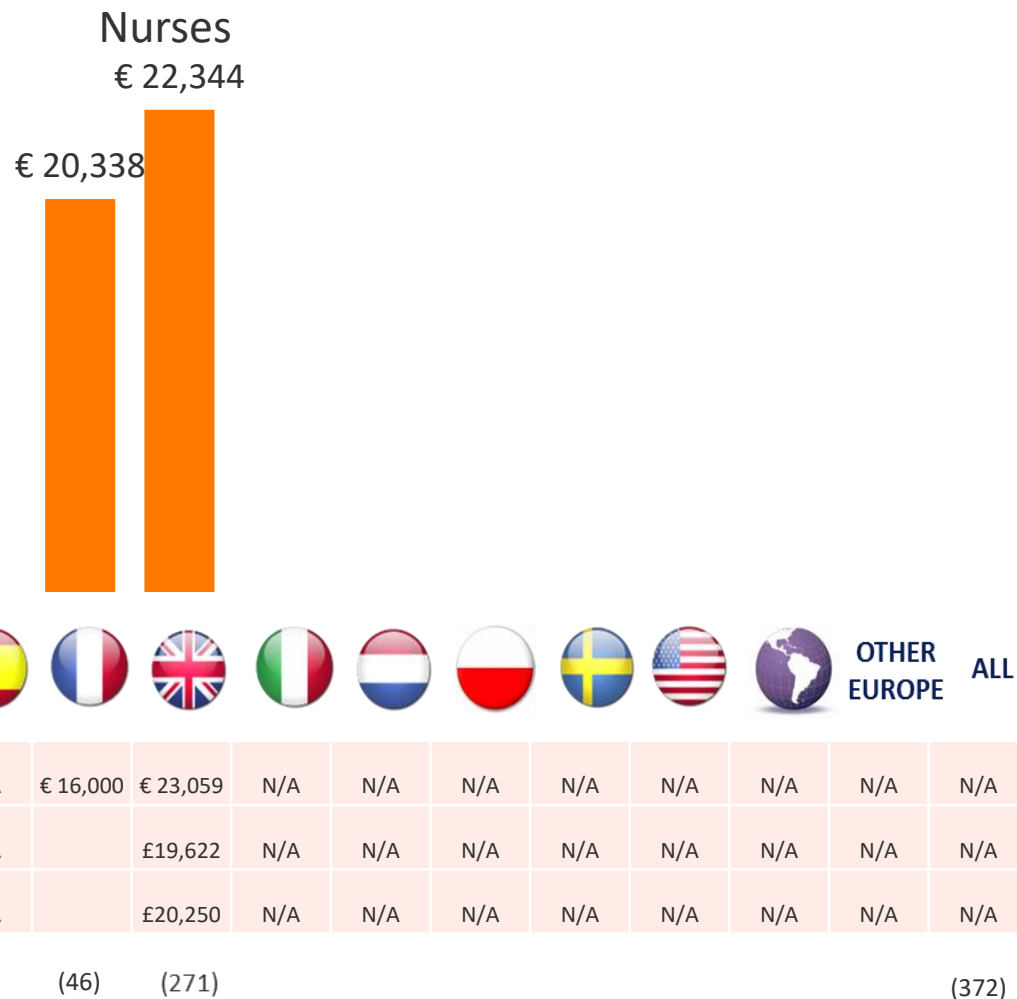
Finances 2



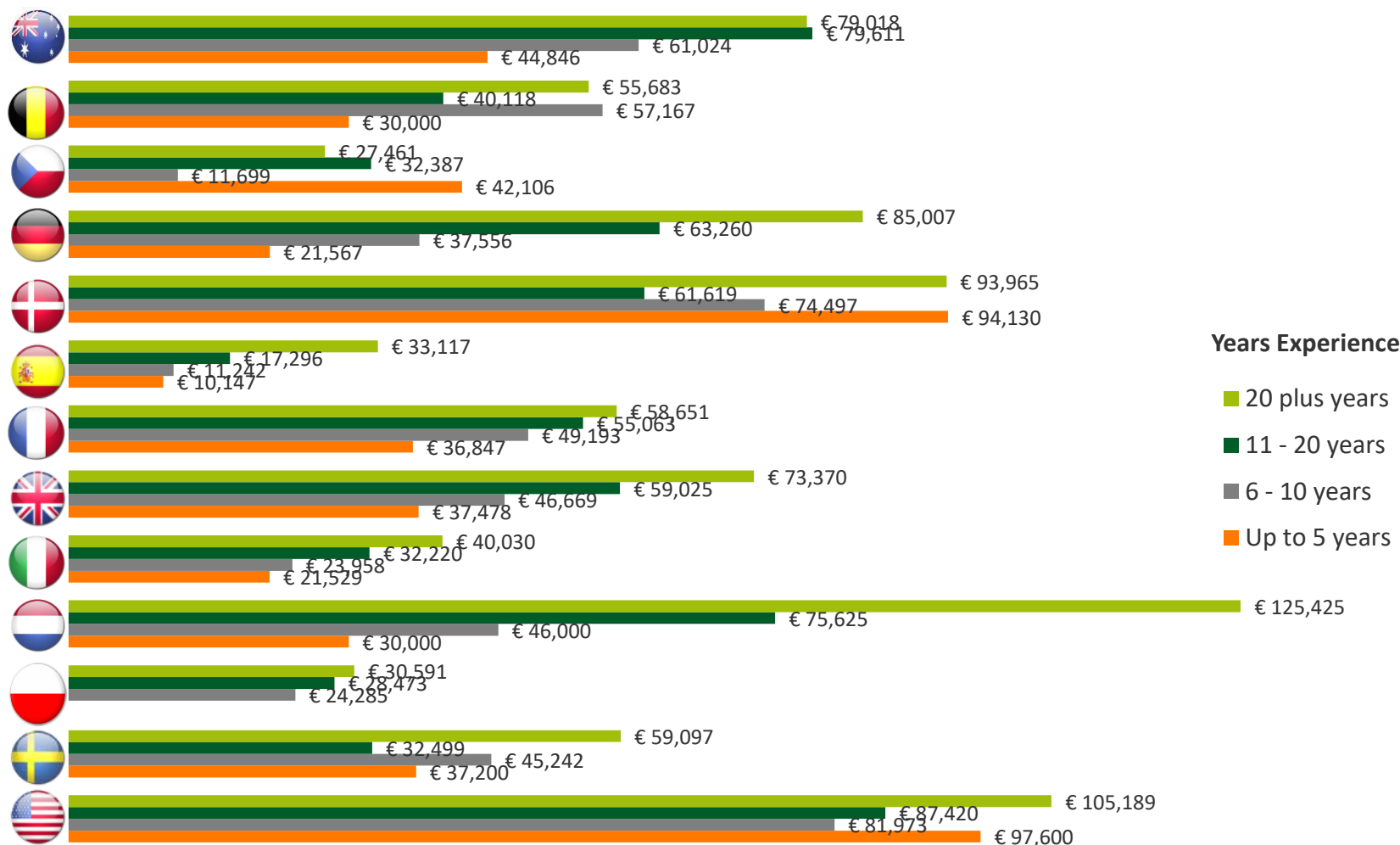
How much do you earn per year before taxes?



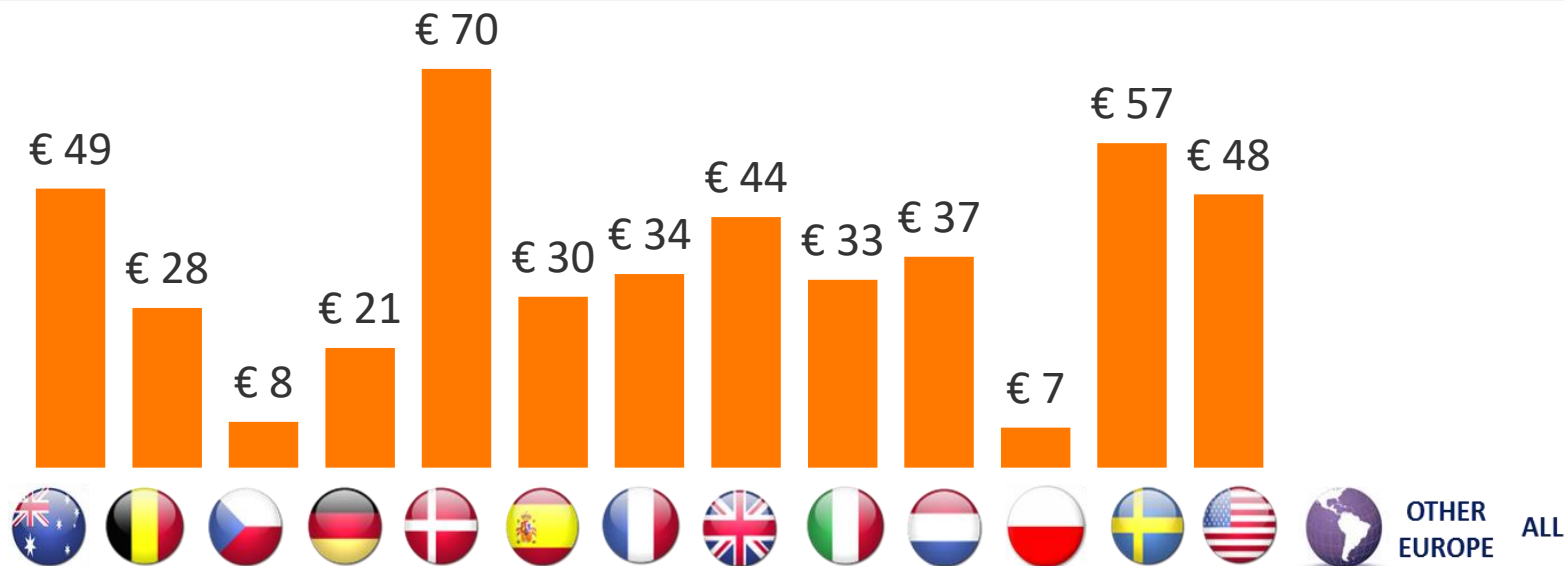
How much do you earn per year before taxes?



How much do you earn per year before taxes?



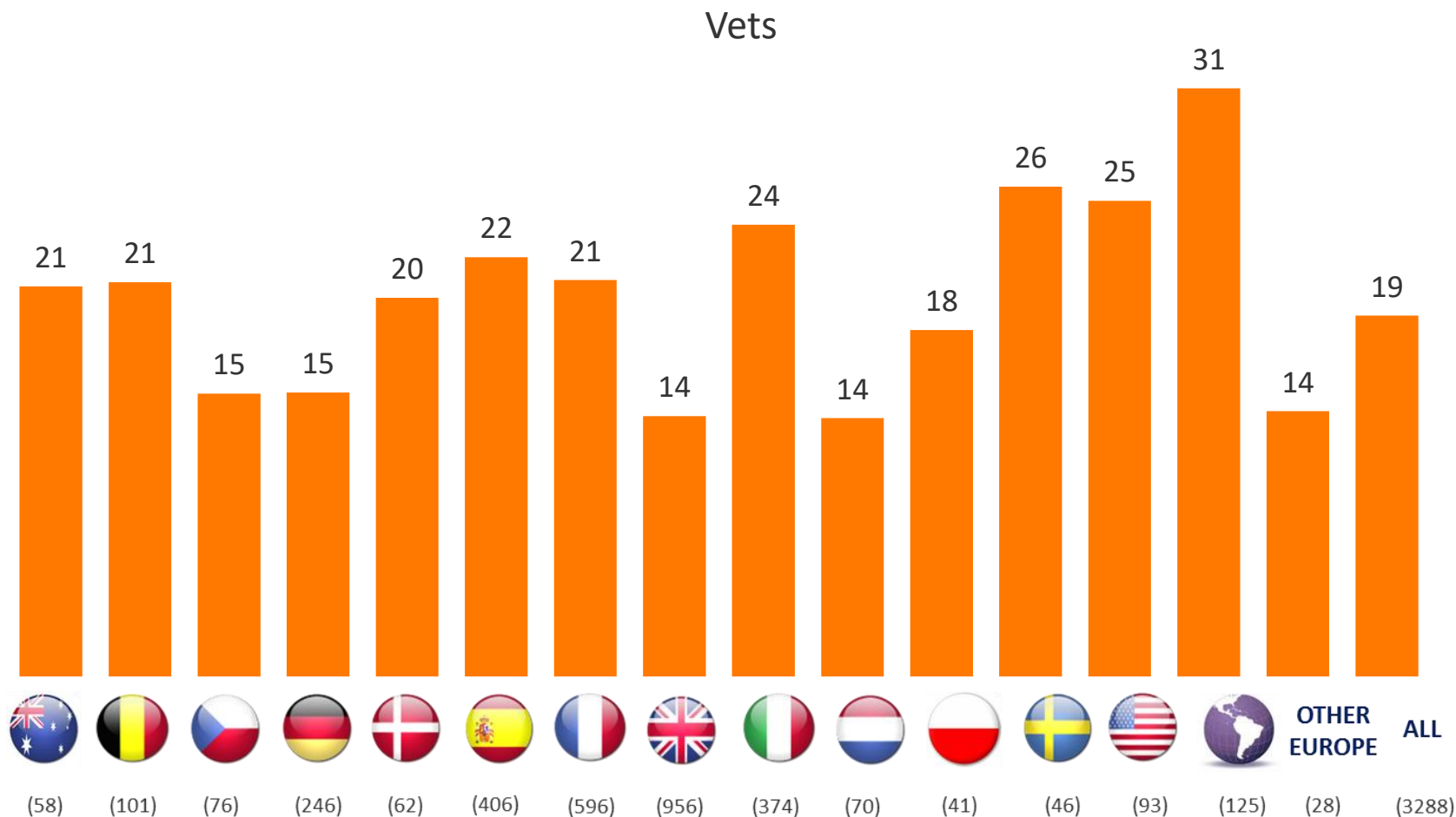
At the start of a course of treatment, what is your basic fee for the initial consultation for a dog or cat, excluding any treatment?



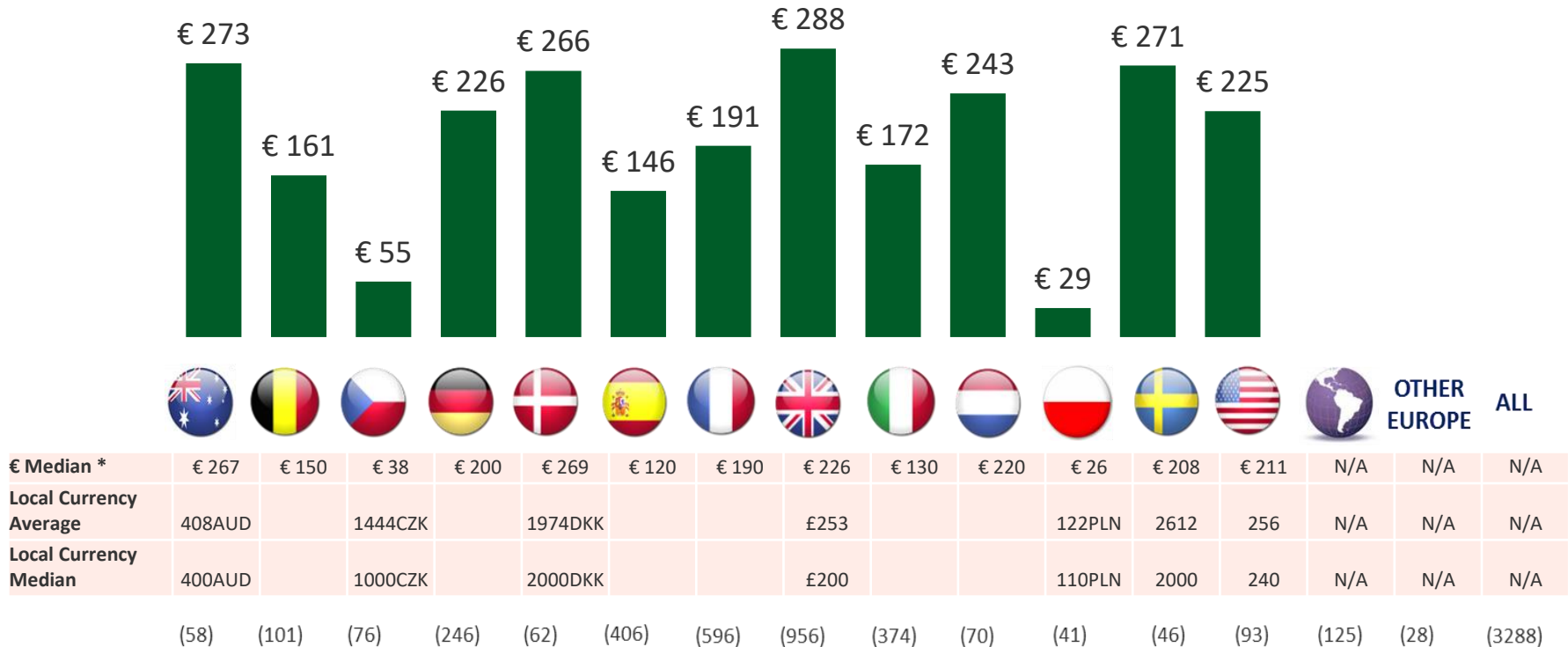
Median Hourly Rate €	€47	€28	€7	€20	€72	€30	€34	€35	€30	€38	€7	€60	€44	N/A	N/A	N/A
Local Currency Ave*	73AUD		200CZK		522DKK			£39			31PLN	585SEK	\$48	N/A	N/A	N/A
Local Currency Median*	70AUD		189CZK		535DKK			£31			30PLN	553SEK	\$44	N/A	N/A	N/A
	(58)	(101)	(76)	(246)	(62)	(406)	(596)	(956)	(374)	(70)	(41)	(46)	(93)	(125)	(28)	(3288)

*based on currency exchange rates from 06/ 2017

For how many minutes is this consultation scheduled to last?



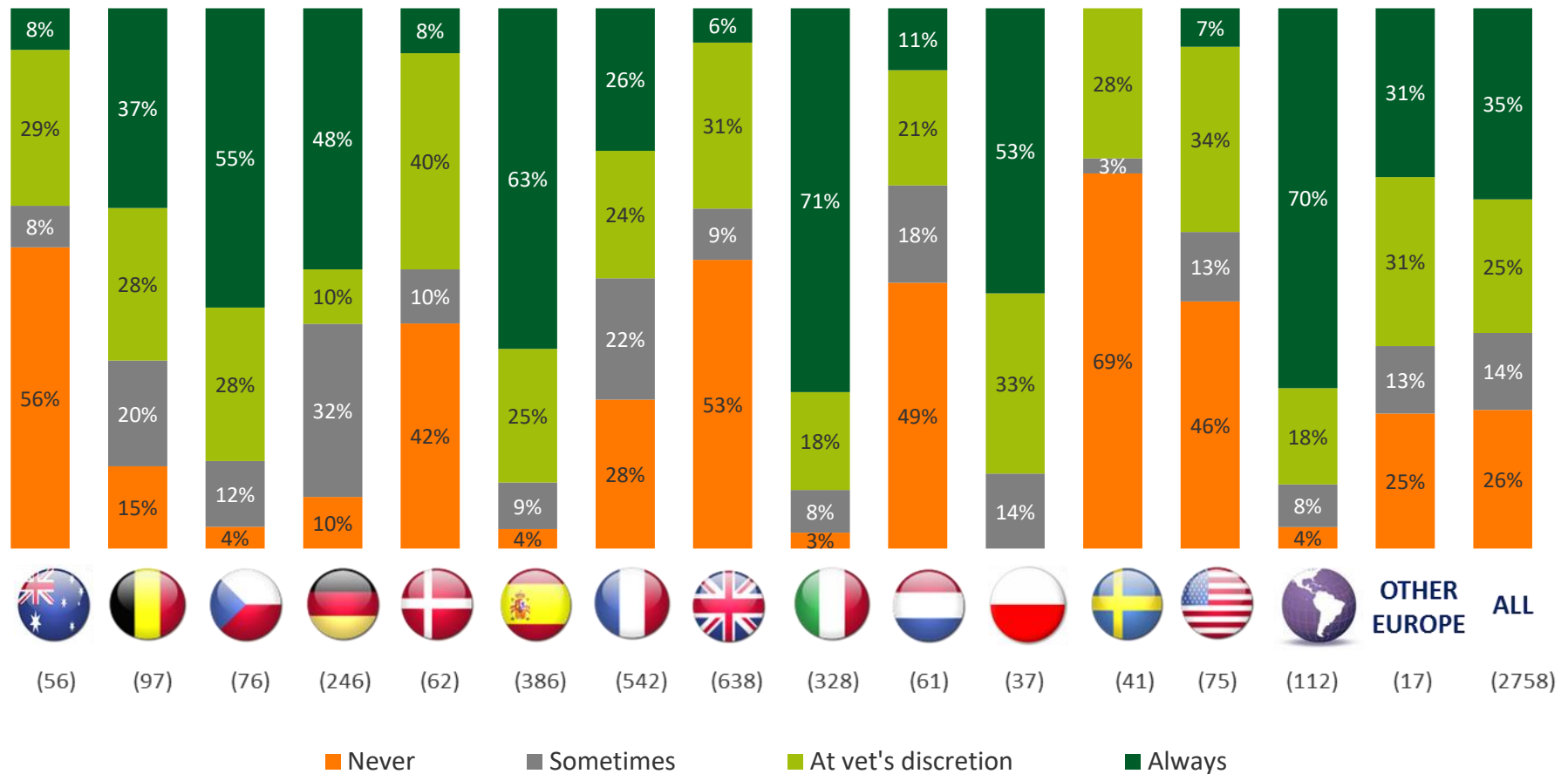
What is your hourly rate for small animal surgery?



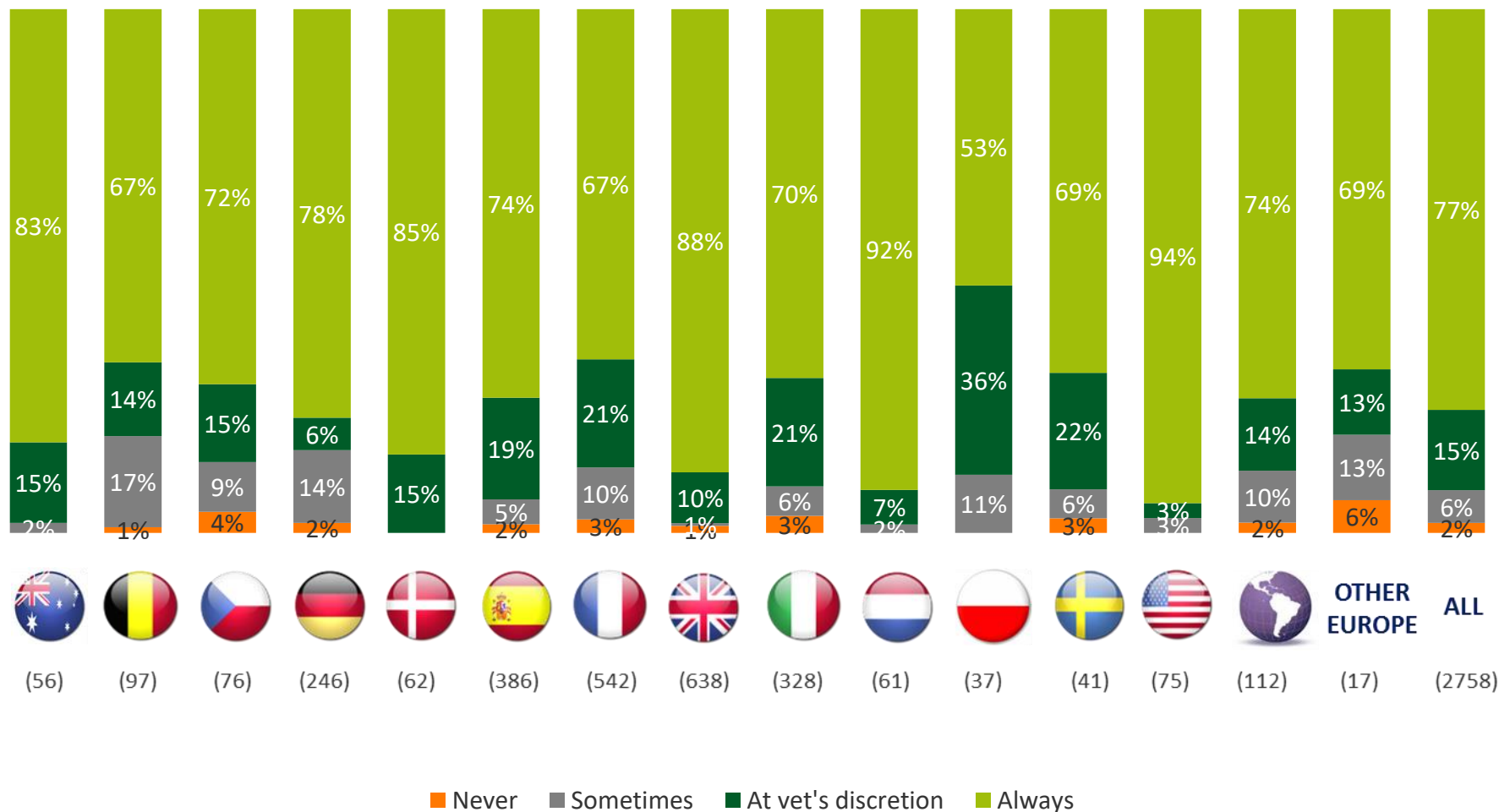
*based on currency exchange rates from 06/ 2017

Antibiotics and Analgesics

What is your practice policy over the use of antibiotics in routine small animal neutering?



What is your practice policy over the use of analgesics in routine small animal neutering?



Suppliers



If you had a choice and could easily find a replacement for the products they supplied, which, if any, of the following companies would you stop dealing with?



	Australia	Belgium	Czech Republic	Germany	Denmark	Spain	France	United Kingdom	Italy	Hungary	Poland	Sweden	United States	South America	OTHER EUROPE	ALL
Bayer	7%	16%	21%	10%	3%	15%	27%	5%	9%	16%	16%		11%	16%	6%	13%
Royal Canin	9%	30%	17%	15%	16%	22%	13%	5%	4%	18%	22%	2%	1%	19%	12%	12%
IDEXX	14%	5%	11%	9%	3%	13%	17%	8%	10%	7%	16%	5%	8%	12%	0%	11%
Hill's	11%	20%	12%	13%	5%	13%	9%	7%	6%	20%	14%	7%	3%	13%	18%	10%
Zoetis (Pfizer)	13%	8%	14%	19%	3%	5%	10%	4%	7%	8%	8%	0%	4%	12%	6%	8%
Virbac	9%	4%	5%	1%	5%	8%	15%	2%	7%	10%	14%	2%	3%	9%	6%	7%
Dechra	7%	6%	16%	5%	3%	4%	8%	3%	16%	7%	8%	0%		13%	0%	7%
Merial	9%	5%	7%	5%	6%	7%	9%	3%	7%	7%	8%	0%	9%	7%	0%	6%
MSD	5%	1%	7%	5%	8%	6%	7%	5%	5%	7%	5%	0%	1%	5%	0%	5%
Boehringer Ingelheim	7%	4%	5%	4%	10%	4%	8%	3%	6%	8%	5%	0%		4%	0%	5%
Ceva	7%	6%	7%	3%	3%	4%	6%	2%	5%	10%	5%	0%	1%	7%	0%	4%
Vetoquinol	7%	1%	5%	5%	2%	3%	7%	2%	2%	7%	3%	7%		11%	0%	4%
None of these	63%	43%	49%	50%	66%	50%	42%	71%	52%	56%	49%	68%	69%	43%	71%	54%
	(56)	(97)	(76)	(246)	(62)	(386)	(542)	(638)	(328)	(61)	(37)	(41)	(75)	(112)	(17)	(2758)

What % of the products do you currently sell or recommend/prescribe are from these companies?



	Australia	Belgium	Czech Republic	Germany	Denmark	Spain	France	United Kingdom	Italy	Netherlands	Poland	Sweden	United States	South America	OTHER EUROPE	ALL
Merial	6%	9%	7%	6%	6%	10%	13%	5%	12%	5%	6%	5%	11%	12%	6%	9%
Zoetis (Pfizer)	9%	10%	11%	8%	2%	9%	9%	8%	9%	7%	9%	1%	16%	13%	3%	9%
MSD	5%	10%	7%	9%	9%	8%	9%	9%	8%	14%	8%	6%	0%	6%	3%	8%
Royal Canin	7%	10%	7%	6%	10%	8%	8%	6%	8%	7%	10%	20%	5%	8%	10%	7%
Virbac	5%	9%	4%	6%	9%	7%	10%	6%	6%	6%	4%	5%	4%	9%	2%	7%
Bayer	6%	5%	5%	6%	6%	7%	4%	8%	11%	4%	9%	3%	6%	10%	4%	7%
Wholesalers	20%	7%	12%	20%	6%	2%	0%	7%	6%	23%	4%	0%	6%	6%	19%	7%
Hill's	7%	9%	4%	3%	12%	8%	7%	4%	7%	7%	2%	11%	8%	5%	10%	6%
Boehringer Ingelheim	11%	5%	3%	6%	7%	4%	6%	7%	4%	5%	5%	6%	8%	3%	3%	5%
Ceva	2%	4%	5%	5%	2%	7%	9%	3%	5%	3%	5%	4%	2%	2%	2%	5%
IDEXX	6%	5%	2%	3%	8%	5%	3%	6%	4%	7%	1%	4%	9%	2%	6%	4%
Vetoquinol	1%	6%	7%	3%	3%	4%	6%	4%	4%	2%	12%	2%	2%	2%	4%	4%
Dechra	0%	4%	2%	3%	9%	5%	3%	6%	3%	4%	2%	7%	2%	0%	7%	4%
Norbrook	3%	1%	11%	1%	1%	1%	0%	5%	0%	0%	1%	0%	0%	0%	4%	2%
Purina	0%	1%	2%	0%	0%	2%	1%	1%	3%	0%	4%	1%	4%	9%	1%	2%
Nutravet	0%	1%	0%	0%	0%	0%	0%	1%	0%	0%	1%	5%	0%	1%	1%	0%
Albrecht	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
All others	4%	7%	9%	5%	8%	6%	3%	4%	5%	6%	14%	6%	8%	5%	9%	5%
	(56)	(97)	(76)	(246)	(62)	(386)	(542)	(638)	(328)	(61)	(37)	(41)	(75)	(112)	(17)	(2758)

Thank You



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