

VETSSURVEY 2020 PART 1

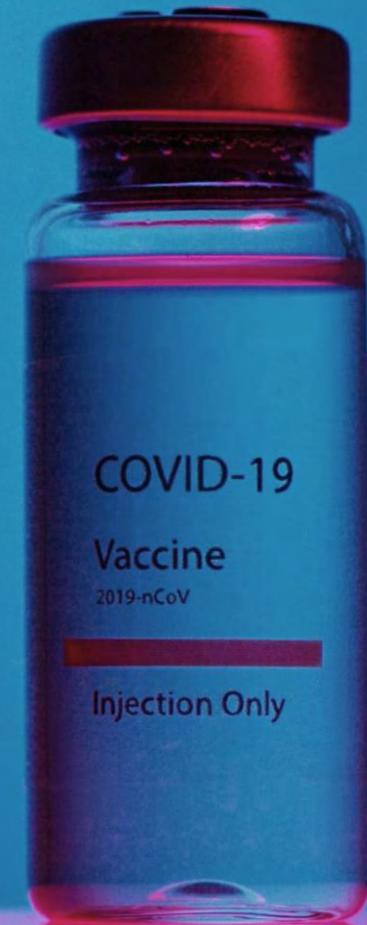
# C VID-19

*Global Pandemic impact on the veterinary market*

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LaDépêche  
Vétérinaire

bpt berufsbund praktizierender tierärzte e.v.

vet times

BVA 



WSAVA  
Global Veterinary Community

vet  
PRACTICE MAGAZINE



CANADIAN VETERINARY  
MEDICAL ASSOCIATION  
L'ASSOCIATION CANADIENNE  
DES MÉDECINS VÉTÉRINAIRES

LA SETTIMANA  
VETERINARIA  
SETTIMANA DI INFORMAZIONI PROFESSIONALI PER IL VETERINARIO

HOSSO **Clínico**



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

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Vetspanel 

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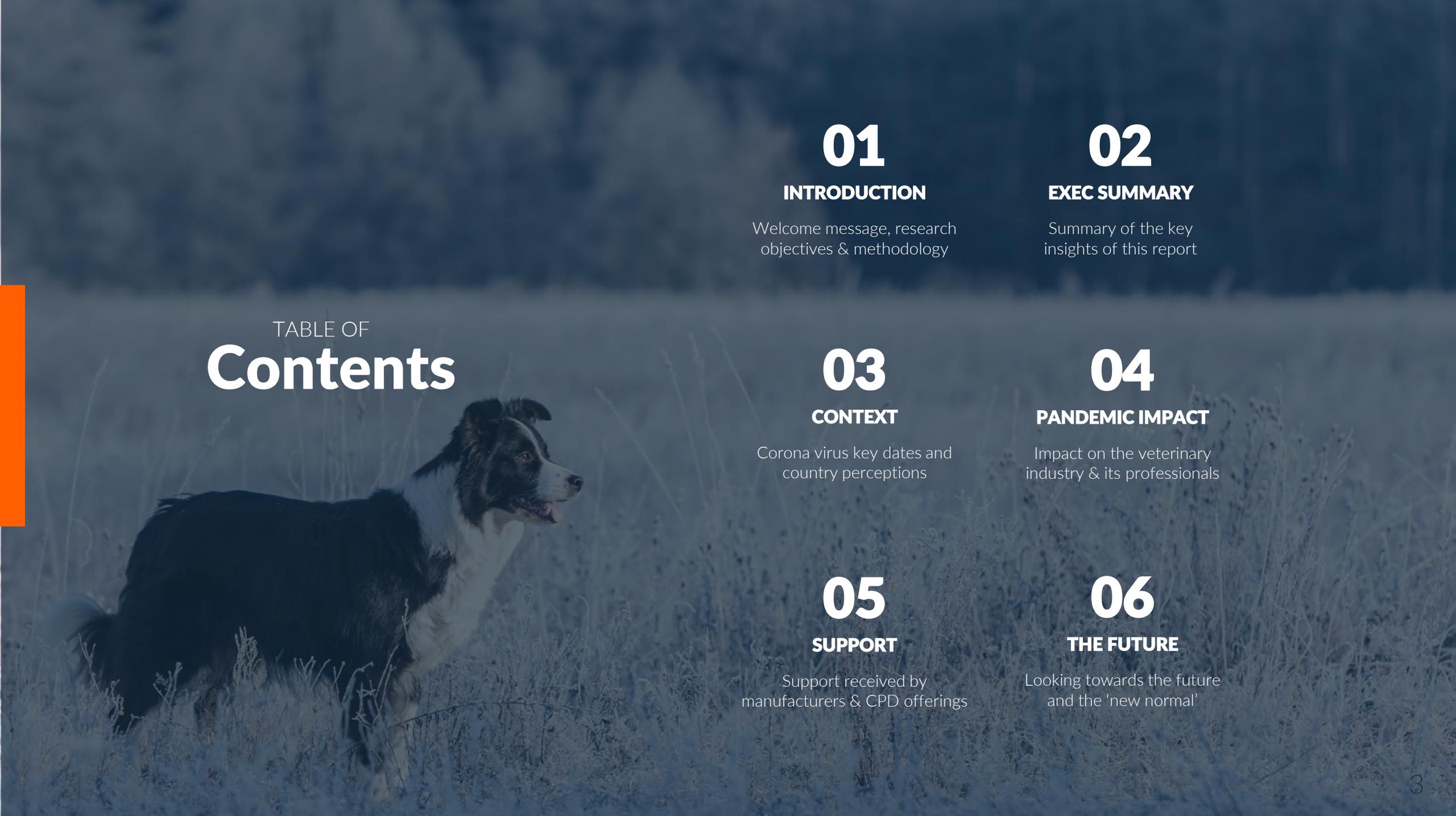


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# 01

CHAPTER 01

## INTRODUCTION & METHODOLOGY

# 2021

*Walking towards a better future for veterinary professionals and animals*

In March 2020 we embarked on a small project to track the impact of the pandemic on our Vetspanel members. We resolved to continue this for "as long as the pandemic lasts." Proof that researchers should not speak in haste.

In December 2020 we concluded the last wave of this project. In partnership with WSAVA, we have interviewed 5000 veterinary professionals in 91 countries.

The goal of this final survey was two-fold. First, to round up 2020 and take stock of where we are as we enter 2021. Second, covering future plans to help the veterinary industry make 2021 a better year.

We thank all 5000 respondents for sharing their experiences and opinions.

Sincerely,



A handwritten signature in black ink, appearing to read 'Carlos Michelsen'.

**Carlos Michelsen,**  
Managing Director, CM Research  
carlos.michelsen@cm-research.com



**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 1<sup>st</sup> until the 30<sup>th</sup> of November 2020



WHERE?

91 countries, covering six continents



WHO?

5,000 veterinary professionals (veterinarians, veterinary nurses and veterinary technicians)

# REGIONAL DEFINITIONS AND SAMPLE SIZES

## South America (n=420)

Argentina (n=55)  
Brazil (n=267)  
Chile (n=4)  
Colombia (n=65)  
Ecuador (n=23)  
Paraguay (n=2)  
Peru (n=3)  
Uruguay (n=1)

## Australia, New Zealand &

### Oceania (n=253)

Australia (n=236)  
Fiji (n=1)  
New Zealand (n=15)  
Solomon Islands (n=1)

## Western Europe (n=2965)

Austria (n=5)  
Belgium (n=66)  
Cyprus (n=1)  
France (n=430)  
Germany (n=277)  
Greece (n=16)

Ireland (n=8)

Italy (n=355)  
Luxembourg (n=1)  
Netherlands (n=60)  
Portugal (n=74)  
Spain (n=380)  
Switzerland (n=7)  
UK (n=1285)

## Nordics (n=69)

Denmark (n=29)  
Finland (n=12)  
Iceland (n=1)  
Norway (n=6)  
Sweden (n=21)

## Central America, Mexico & the Caribbean (n=102)

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)

## Asia (n=132)

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)

Thailand (n=4)

Turkey (n=2)  
UAE (n=7)  
Vietnam (n=1)

## Eastern Europe & Russia

(n=200)  
Belarus (n=2)  
Bosnia Herzegovina (n=1)  
Bulgaria (n=5)  
Croatia (n=4)  
Czech Republic (n=18)  
Estonia (n=8)  
Hungary (n=3)  
Latvia (n=3)  
Lithuania (n=2)  
North Macedonia (n=3)  
Poland (n=90)  
Romania (n=2)  
Russia (n=48)  
Slovakia (n=1)  
Slovenia (n=5)  
Ukraine (n=5)

## North America (n=815)

Canada (n=130)  
USA (n=685)

## Africa (n=32)

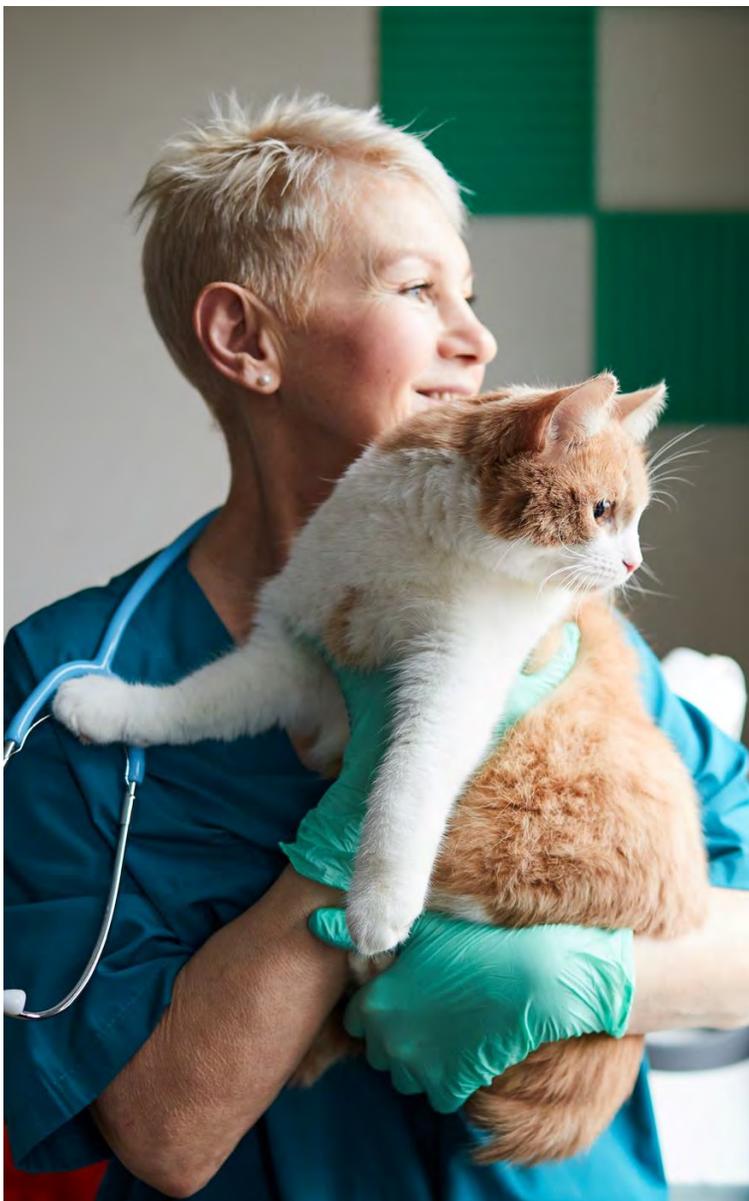
Botswana (n=1)  
Kenya (n=7)  
Mauritania (n=1)  
Namibia (n=1)  
Nigeria (n=4)  
Sierra Leone (n=1)  
South Africa (n=13)  
Tanzania (n=2)  
Uganda (n=1)  
Zambia (n=1)

## Other (n=7)

# 02

CHAPTER 02

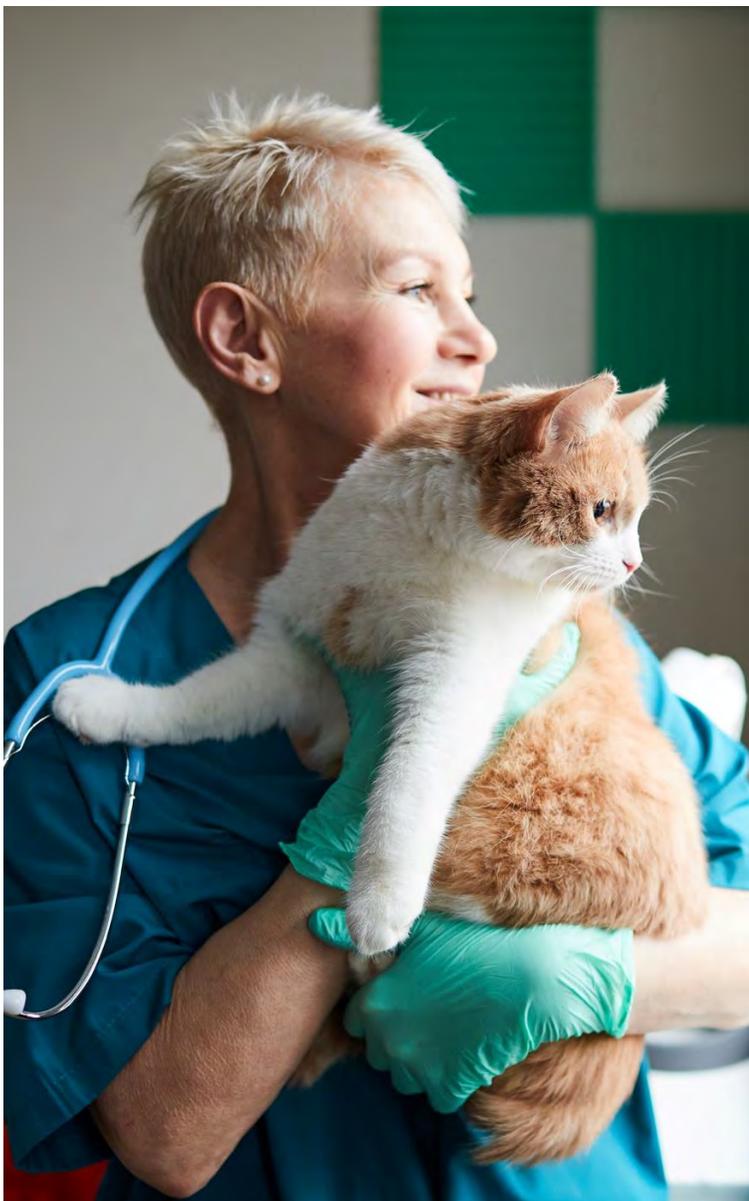
## EXECUTIVE SUMMARY



## EXECUTIVE SUMMARY (1 of 2)

### *Key points in this report*

- Virtually all veterinary clinics globally have **implemented new policies and procedures** as a result of the pandemic. Use of PPE and measures designed to limit footfall are the most common ones.
- In **Australia and the Nordics** there has, however, been a marked pulling back of footfall limiting measures compared to earlier points in the pandemic
- **Issues with stock and the supply chain have been widespread**, especially in North America. Pharmaceutical products and PPEs are the areas most affected.
- Clinic activities have also shifted, with offerings such as home visits and routine check-ups typically reduced or stopped altogether in most regions. Pet **vaccination levels have also dropped**, especially in Western Europe.



## EXECUTIVE SUMMARY (2 of 2)

### *Key points in this report*

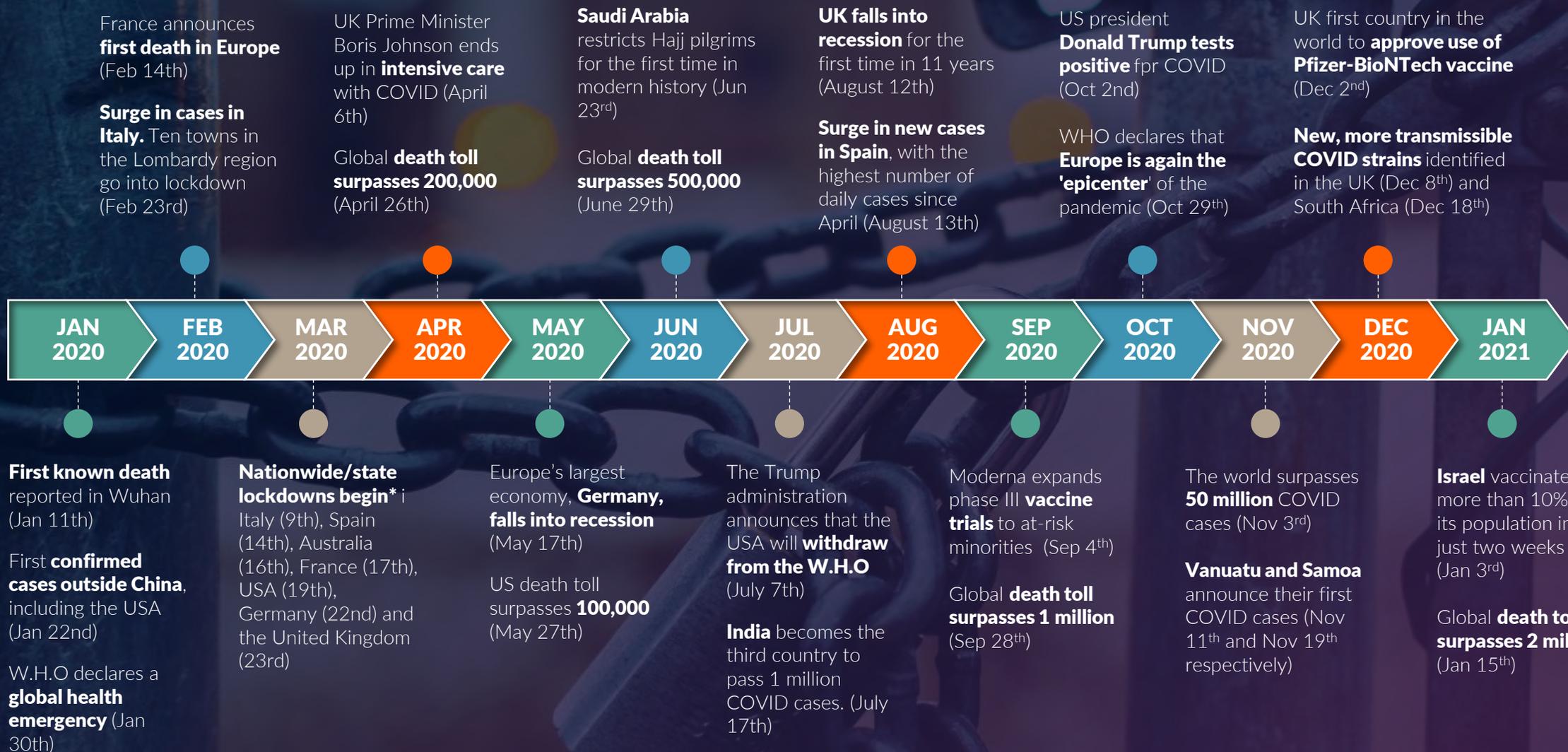
- With social distancing measures in place, clinics have also had to **adapt their communication channels** with both pet owners and manufacturers.
- Despite the challenges and new ways of working created by the pandemic, for many clinics **client numbers are increasing** – especially in North America and Australia.
- The **financial impact** on clinics has been varied, with certain regions/countries reporting notably better figures than others. **Australia and the USA** stand out as the two countries where clinics have seen the **strongest growth**.
- While veterinary professionals in Australia and New Zealand have a positive outlook on the future and believe we are now coming out of the pandemic, the **overall feeling globally is more pessimistic**.

# 03

CHAPTER 03

## PANDEMIC CONTEXT

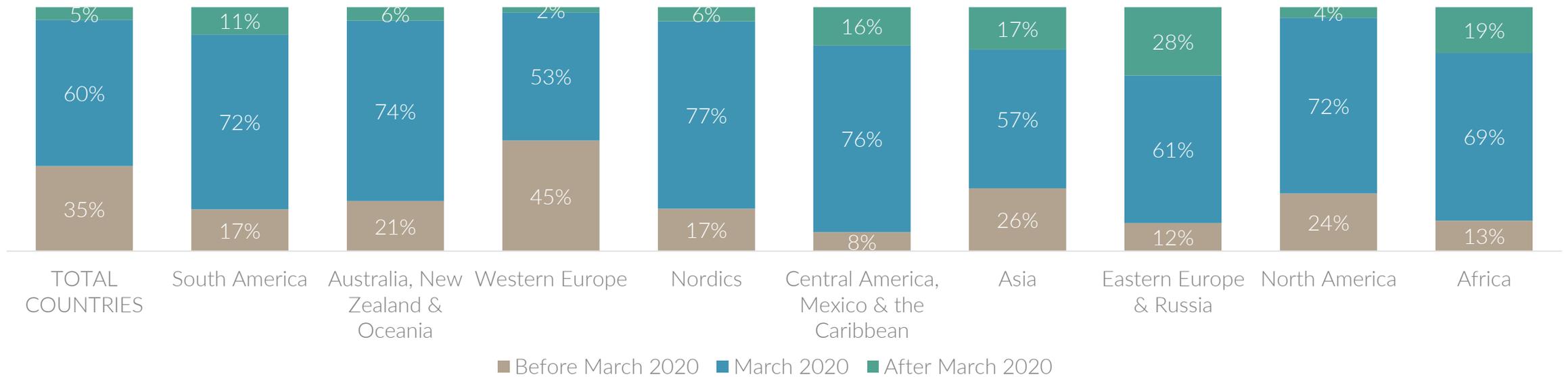
# Pandemic timeline



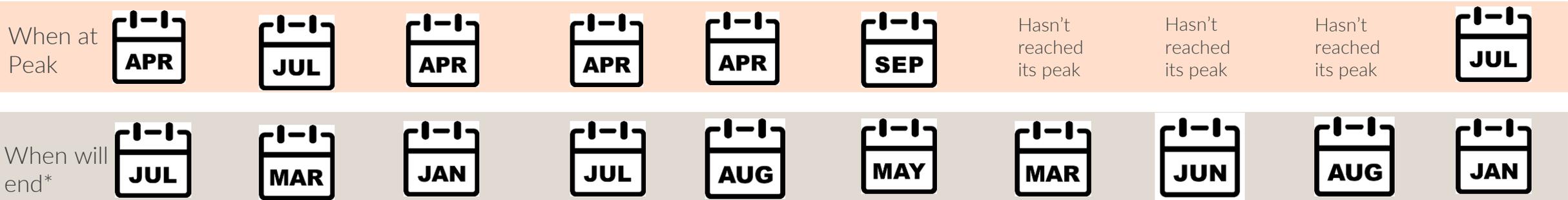
\* There is no official definition of what constitutes a 'lockdown', and dates may therefore differ slightly from other sources depending on interpretation.

# WHEN DID CURRENT COVID SITUATION BEGIN?

While March 2020 was generally the start of the pandemic globally Western Europe was hit the earliest and Eastern Europe were the latest.



## RESPONDENT PERCEPTIONS OF TIMELINE

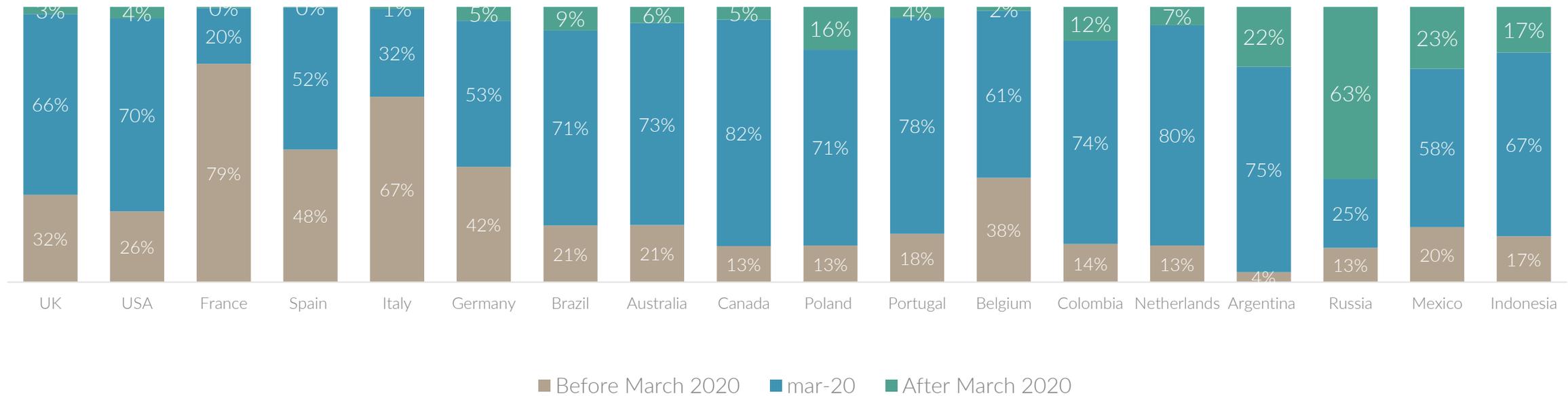


In your country in what month would you say the pandemic.....began?  
...was at its peak?... When will end?

\*date by which 50% think will end

# WHEN DID CURRENT COVID SITUATION BEGIN?

France and Italy had the earliest onset with Russia having the latest, and respondents still believing it hasn't reached its peak



## RESPONDENT PERCEPTIONS OF TIMELINE



In your country in what month would you say the pandemic.....began?  
...was at its peak?... When will end?  
N.B. Only countries where n > 30 displayed

# 04

CHAPTER 04

## COVID IMPACT ON VETERINARY INDUSTRY

CHAPTER 04

*Mapping out the pandemic*

# IMPACT

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In this section we investigate how the COVID-19 pandemic has impacted the veterinary industry worldwide. We delve into six different areas: the *personal* impact on veterinary professionals, impact on clinic life, impact on stocks & pricing, impact on practice finances & staffing, impact on clinical activities – and, finally, impact on clinic communication channels with both pet owners and suppliers.

# 04

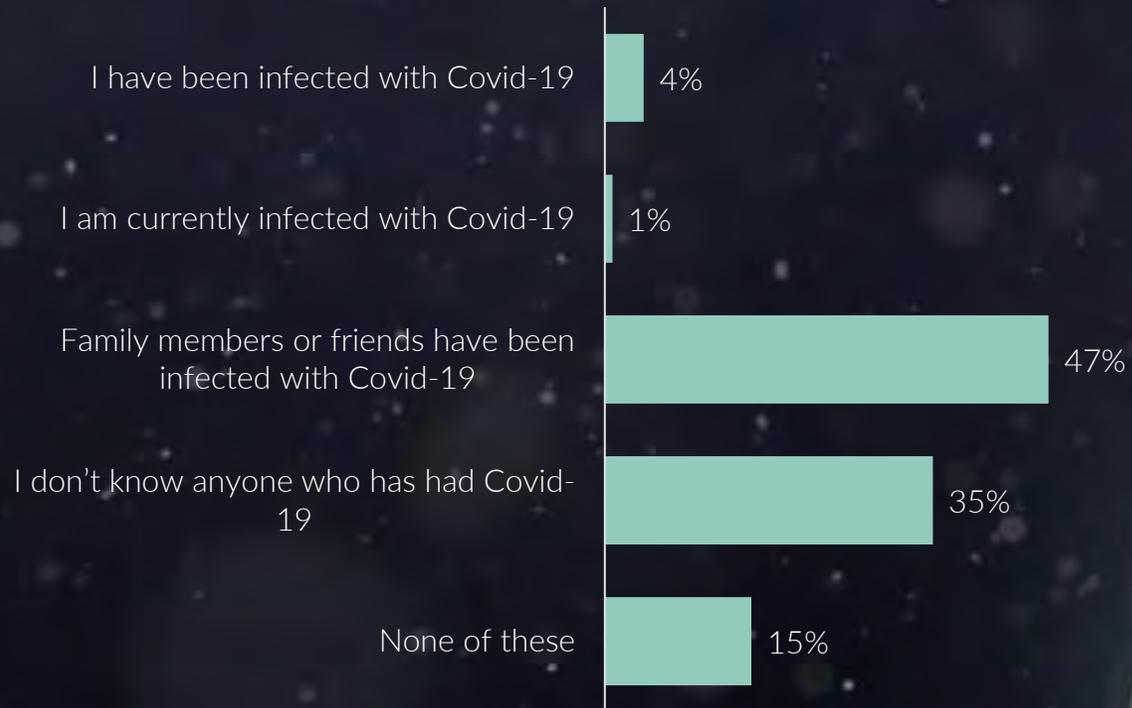
CHAPTER 4.1

**IMPACT ON VET PROFESSIONALS PERSONALLY**



# COVID INFECTION RATES

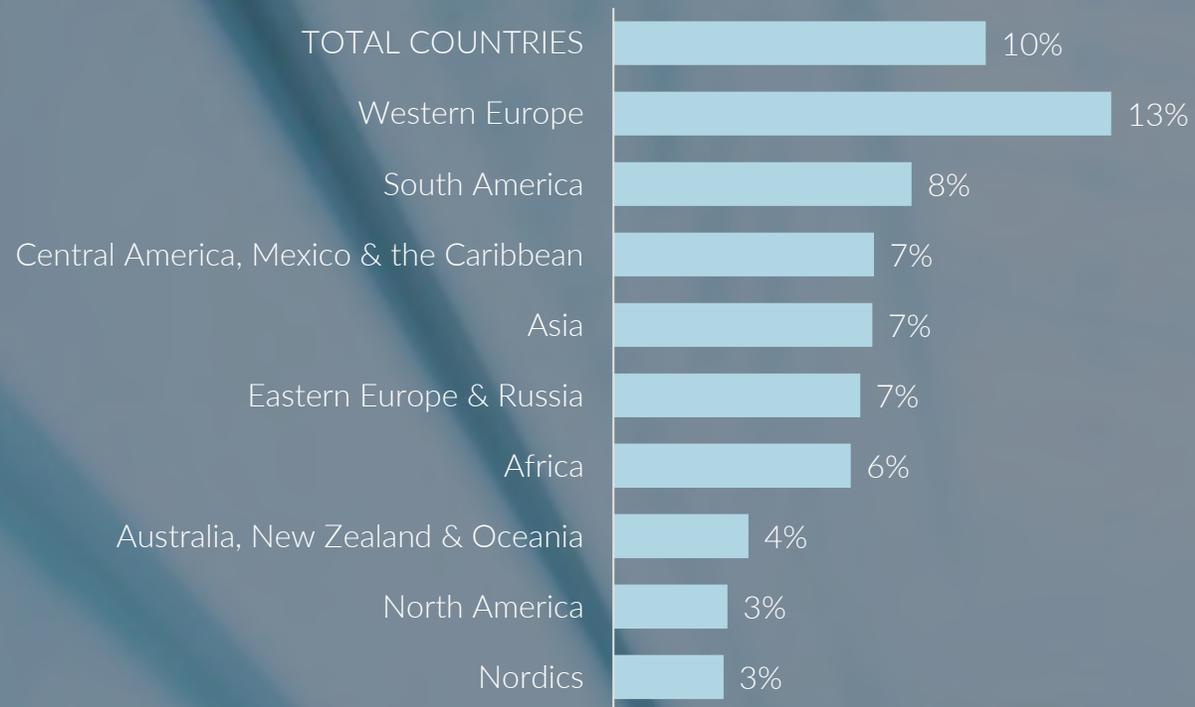
*% of veterinary professionals affected globally*



CTQ2a: VS3 Which of the following statements applies to you?

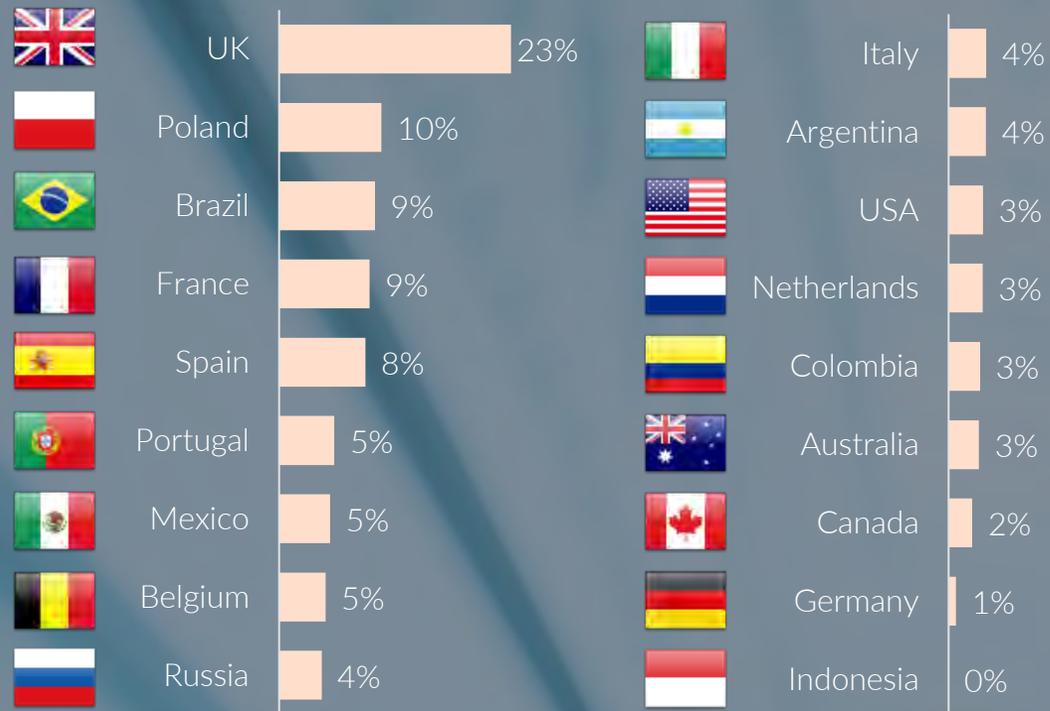
# CHANGE IN EMPLOYMENT STATUS

*% who have lost their job or been furloughed*



# CHANGE IN EMPLOYMENT STATUS

*% who have lost their job or been furloughed*

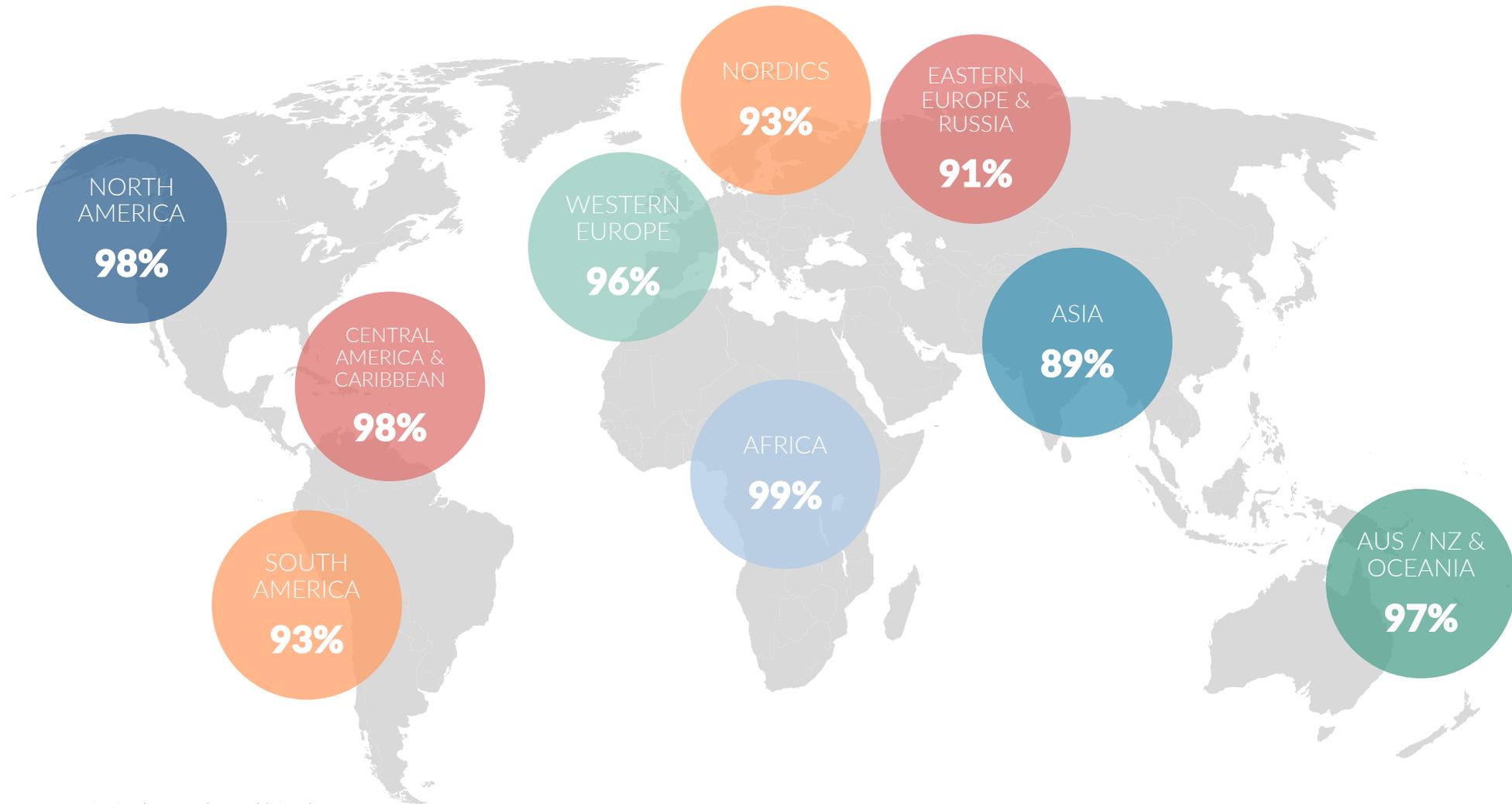


# 04

CHAPTER 4.2

**IMPACT ON CLINIC LIFE**

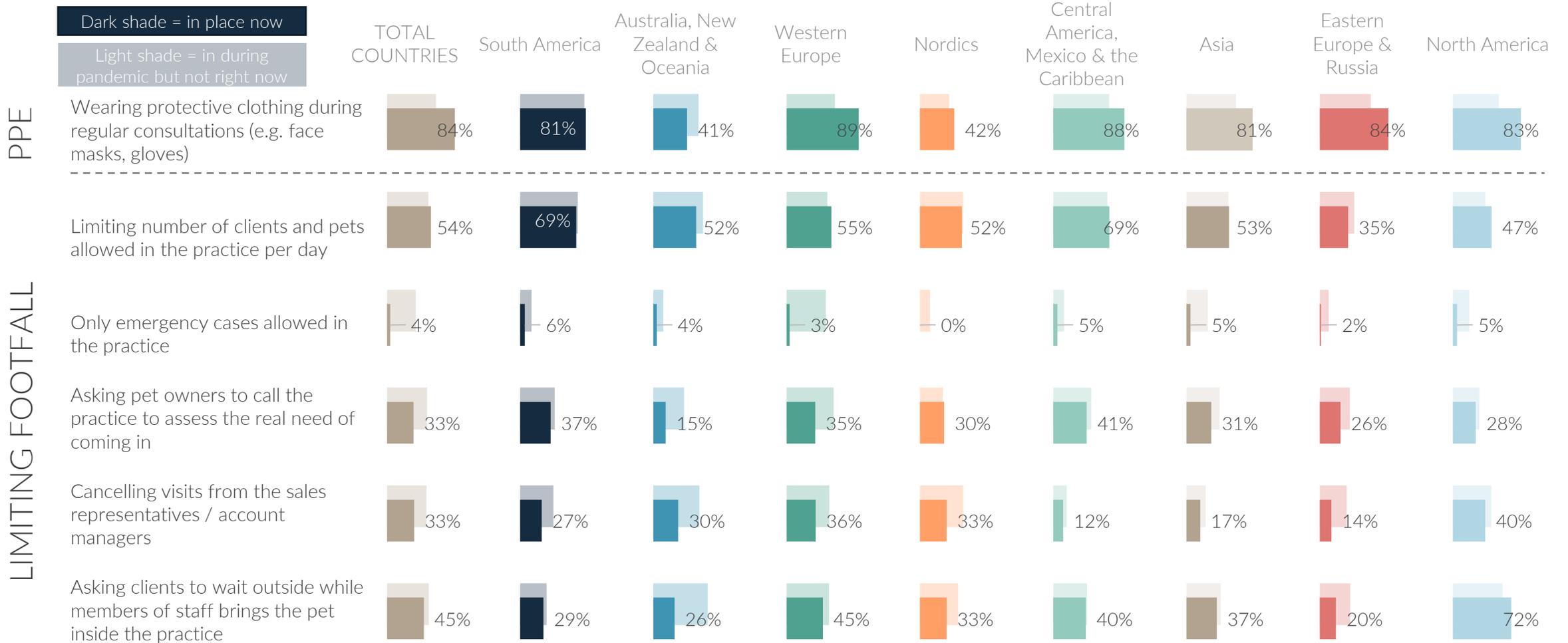
# VIRTUALLY ALL CLINICS HAVE IMPLEMENTED ADDITIONAL MEASURES OR POLICIES DUE TO THE OUTBREAK



CTQ2a: Has your practice implemented any additional measures or policies due to the outbreak?

# PPE & LIMITING FOOTFALL ARE THE MOST COMMON MEASURES

The Americas & Europe have put in place the broader array of measures. In Australia and the Nordics there has been a marked pulling back of footfall limiting measures compared to earlier points in the pandemic.

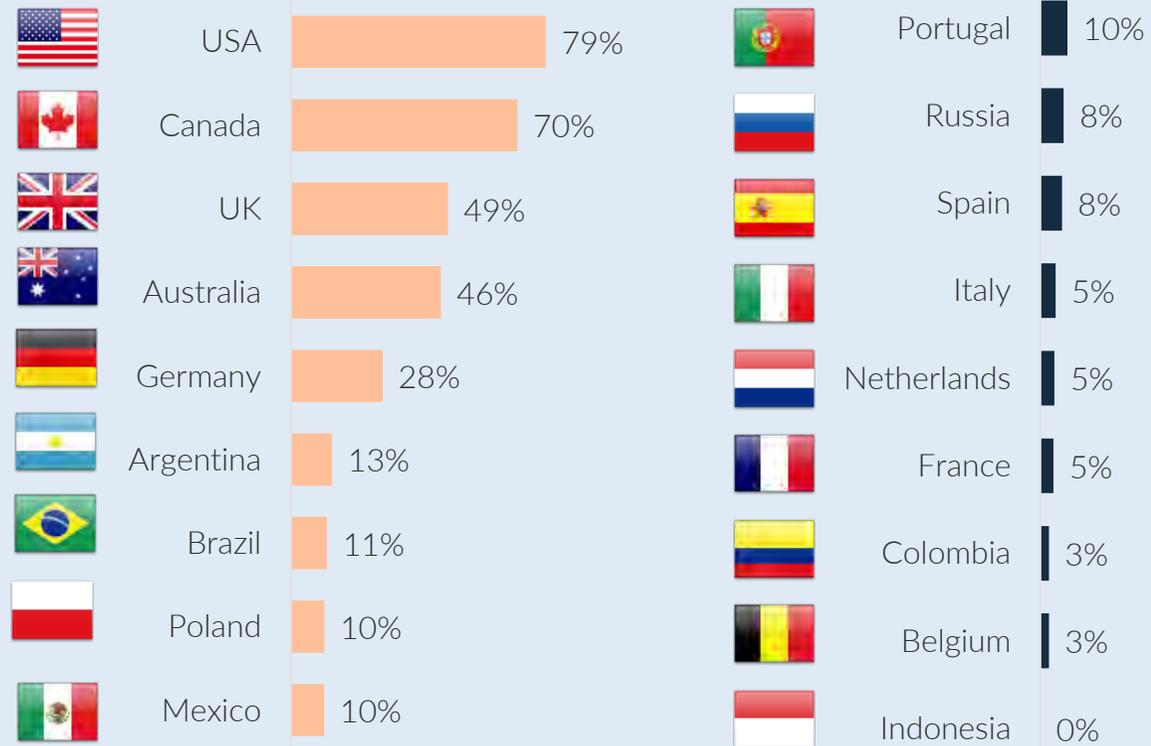


CTQ2b-Which, if any, of the following have happened in your practice during the pandemic but not anymore?  
 CTQ2c-Which, if any, of the following is happening in your practice now ?  
 N.B. Only regions where n > 30 displayed



# KERBSIDE APPOINTMENTS ARE OFFERED MOST IN ENGLISH SPEAKING REGIONS

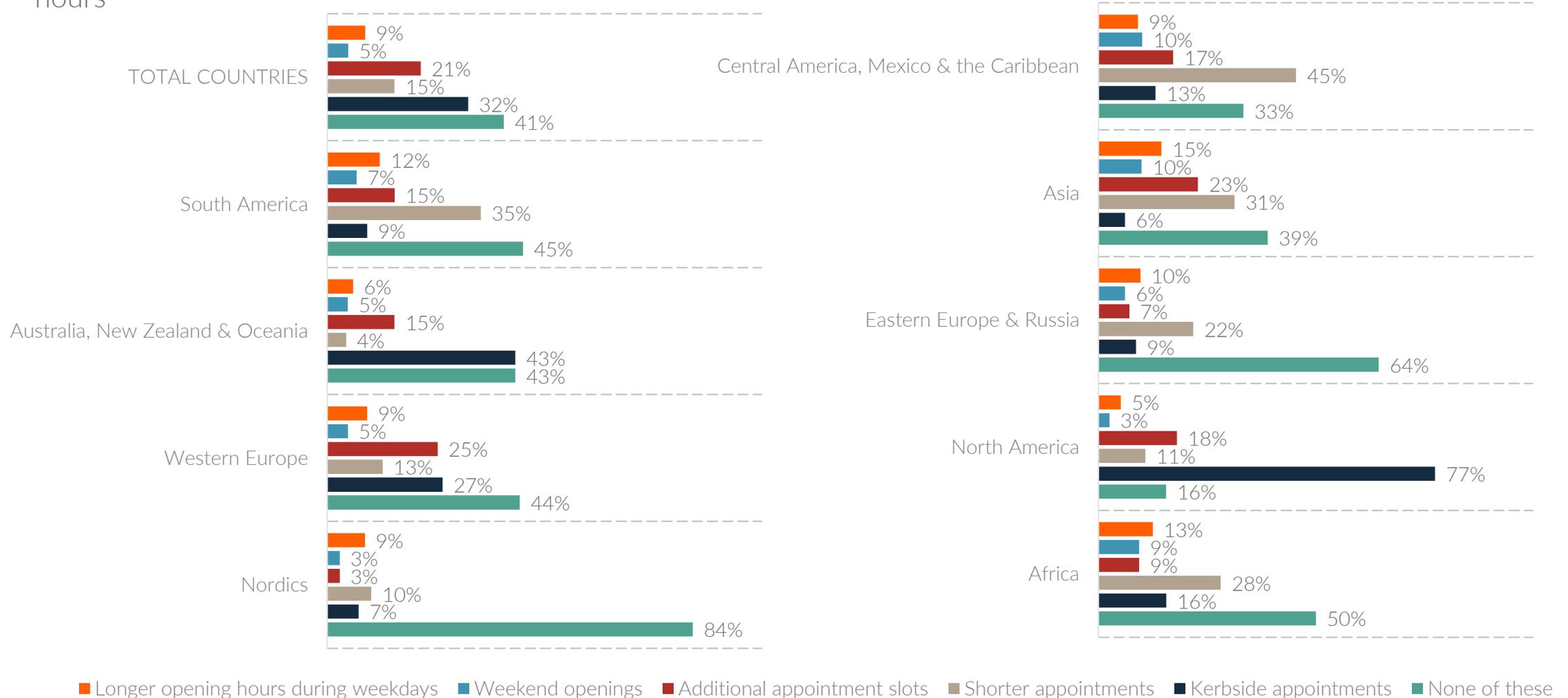
*% offering kerbside appointments*



NQ4 What changes, if any, have you made in the way you operate in practice compared to how you were operating before the outbreak?  
N.B. Only countries where n > 30 displayed

# IMPACT ON CLINIC OPENING HOURS & APPOINTMENTS

Nordic & Eastern Europe/Russia are the regions that have made the fewest changes to their appointments and opening hours

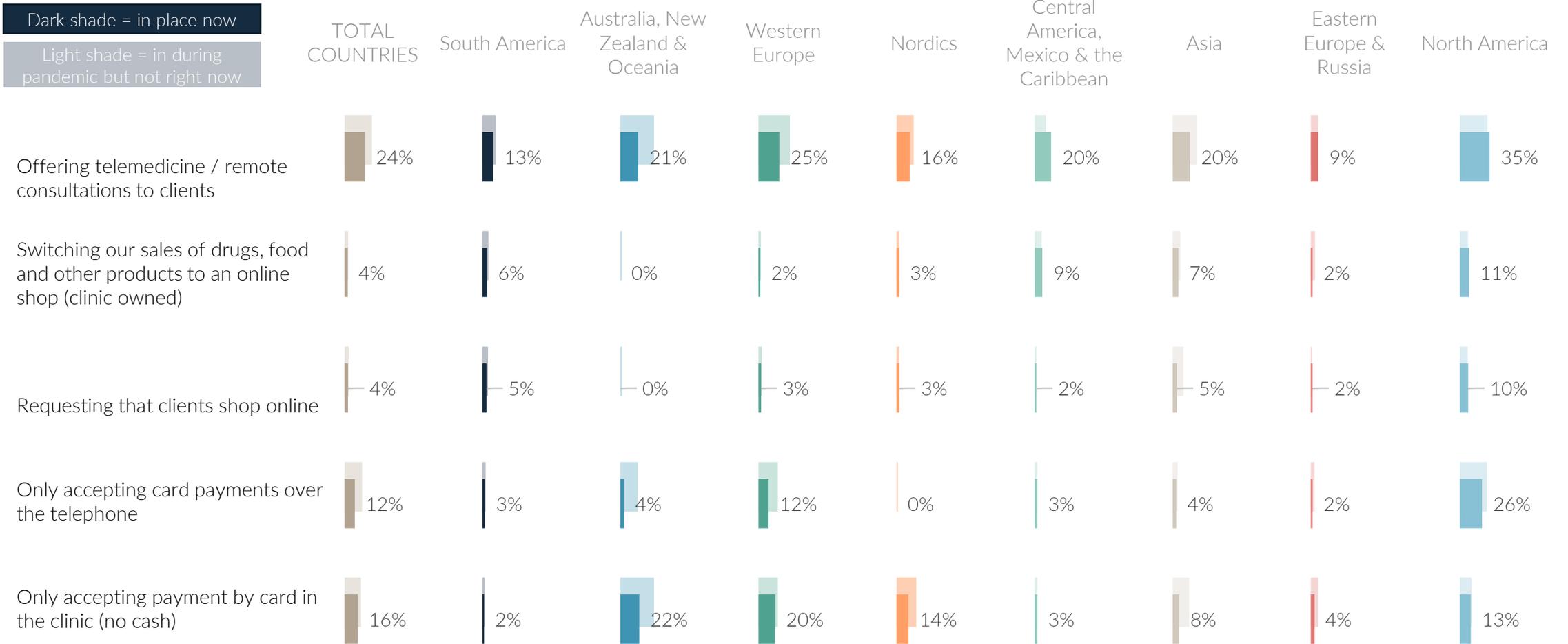


NQ4 What changes, if any, have you made in the way you operate in practice compared to how you were operating before the outbreak??

# MOST COUNTRIES HAVE PULLED BACK ONLINE MEASURES

North America is the only region to still be offering telemedicine at the same level. Card and telephone payments are lower now than at other points during the pandemic

ONLINE & REMOTE MEASURES



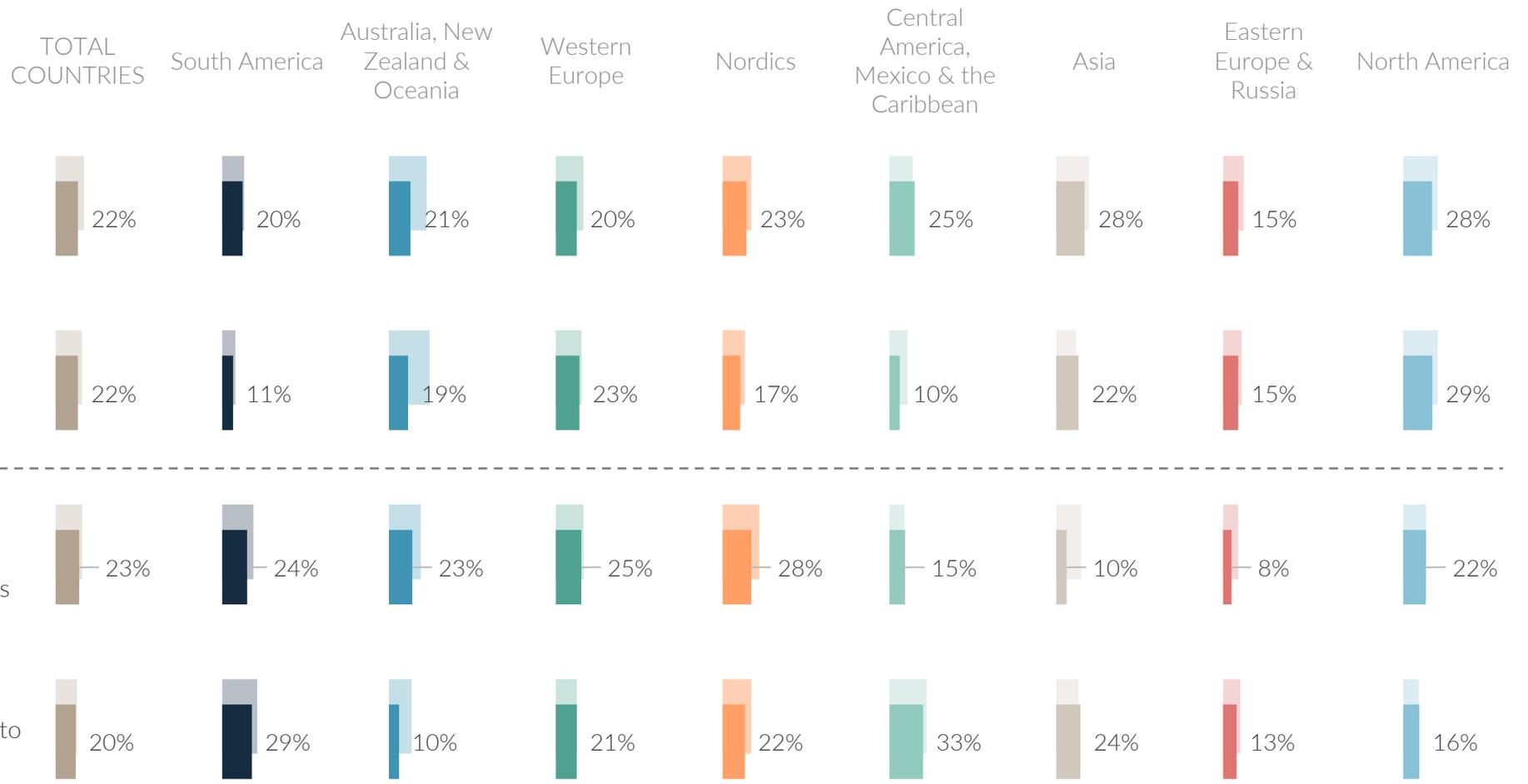
CTQ2b-Which, if any, of the following have happened in your practice during the pandemic but not anymore? CTQ2c-Which, if any, of the following is happening in your practice now? N.B. Only regions where n > 30 displayed

# MEASURES IN PLACE NOW VS. MEASURES NO LONGER IN PLACE

Dark shade = in place now  
Light shade = in during pandemic but not right now

PLANNING FOR SHORTAGES

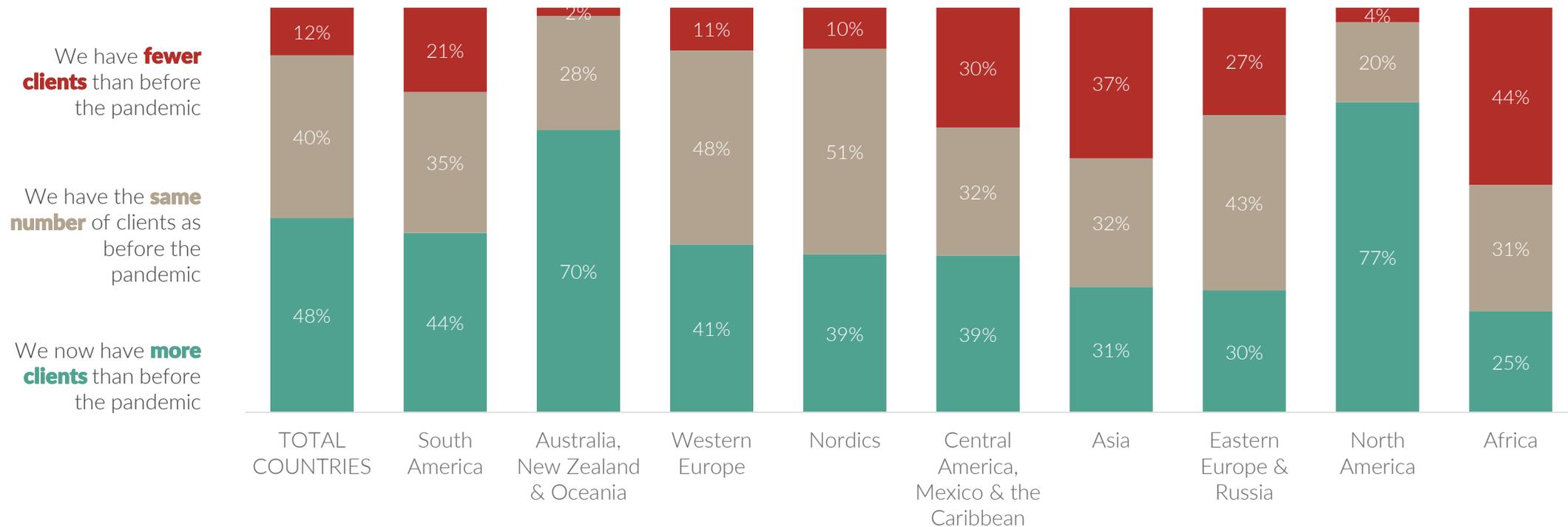
ADVICE



CTQ2b-Which, if any, of the following have happened in your practice during the pandemic but not anymore? CTQ2c-Which, if any, of the following is happening in your practice now? N.B. Only regions where n > 30 displayed

# CHANGES IN CLIENT LOAD BY REGION

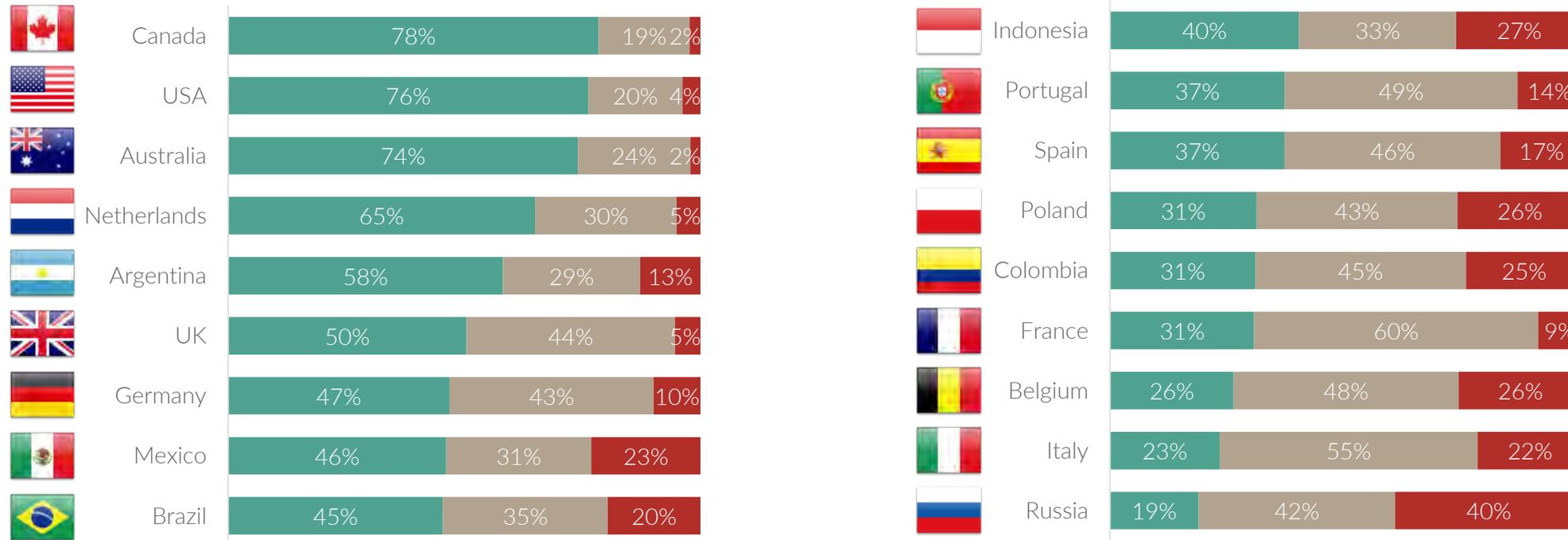
Despite the difficulties and new ways of working created by the pandemic, for many clinics client numbers are increasing – especially in North America and Australia



NQ7. Which of the following statements are true about your clinic's clients?

# CHANGES IN CLIENT LOAD BY COUNTRY

More than two in three in Canada, the US, Australia and the Netherlands report an increase in clients since before the pandemic. Russia reports the highest level of a reduction in client numbers.

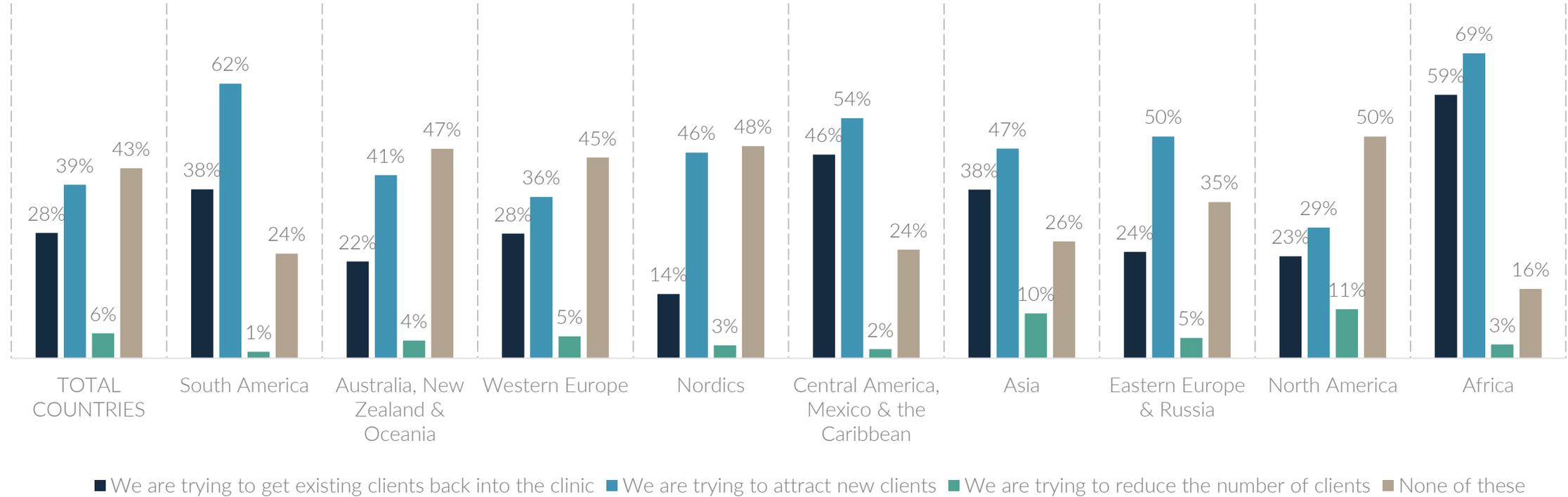


■ We now have **more clients** than before the pandemic
 ■ We have the **same number** of clients as before the pandemic
 ■ We have **fewer clients** than before the pandemic

NQ7. Which of the following statements are true about your clinic's clients?  
 N.B. Only countries where n > 30 displayed

# GETTING CLIENTS IN THE PRACTICE

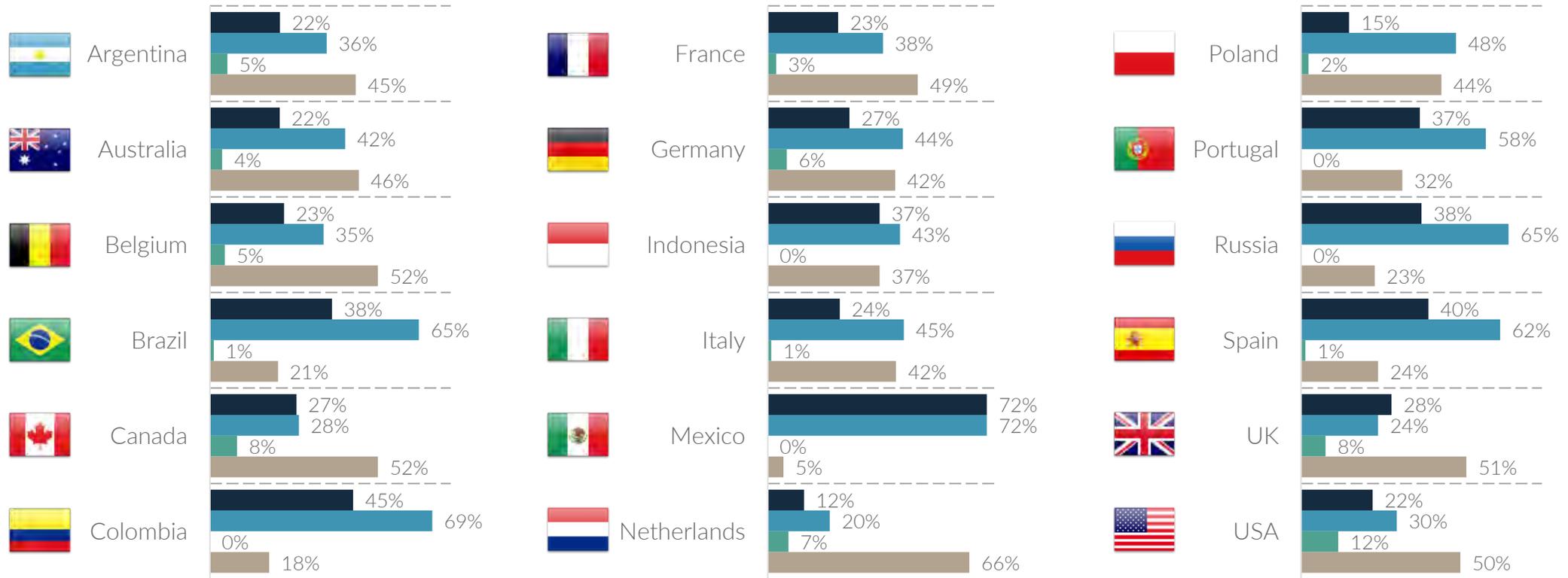
Despite the reported increases in client number, the focus for most clinics is still on engaging existing clients and getting new ones – or taking no action with regard to either increasing or reducing client numbers.



NQ8. And which of the below statements apply to your clinic?

# GETTING CLIENTS IN THE PRACTICE

Mexico in particular is actively trying to get old clients back into the clinics, or recruiting new ones.



■ We are trying to get existing clients back into the clinic ■ We are trying to attract new clients ■ We are trying to reduce the number of clients ■ None of these

NQ8. And which of the below statements apply to your clinic?  
N.B. Only countries where n > 30 displayed

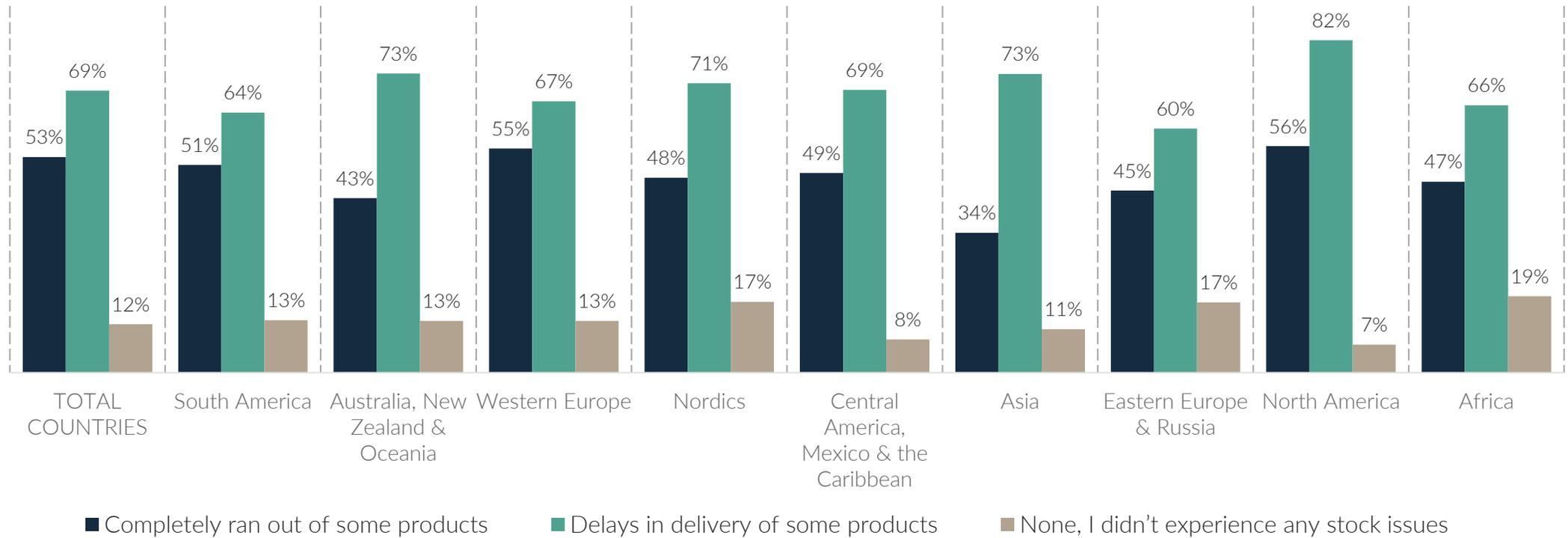
# 04

CHAPTER 4.3

**IMPACT ON STOCK & PRICING**

# IMPACT ON STOCK & PRODUCT SUPPLY BY REGION

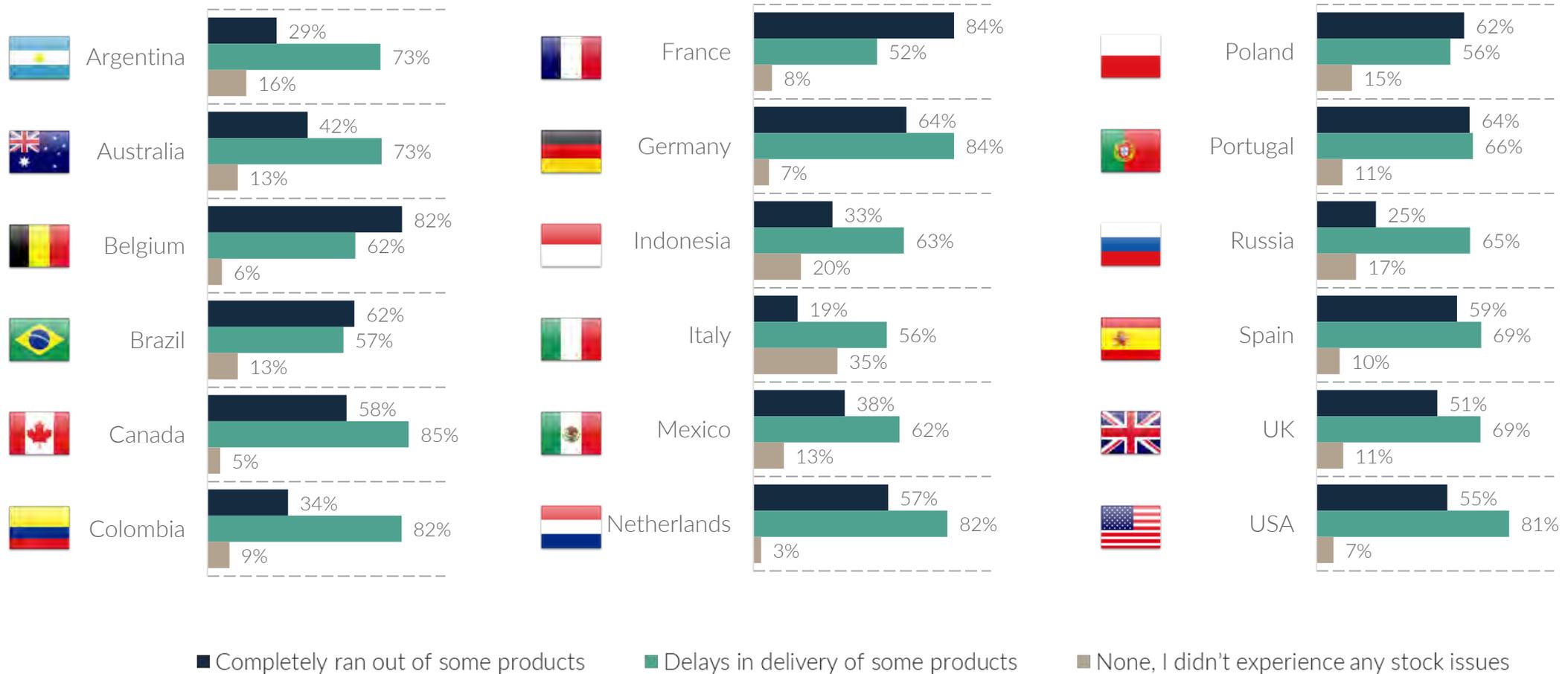
88% of veterinary professionals globally have experienced delivery delays and/or even completely running out of some products. North America has been the most affected, with only 7% reporting no stock issues at all.



NQ5 Which of the following stock / product supply issues have you experienced due to the coronavirus outbreak, if any?

# IMPACT ON STOCK & PRODUCT SUPPLY BY COUNTRY

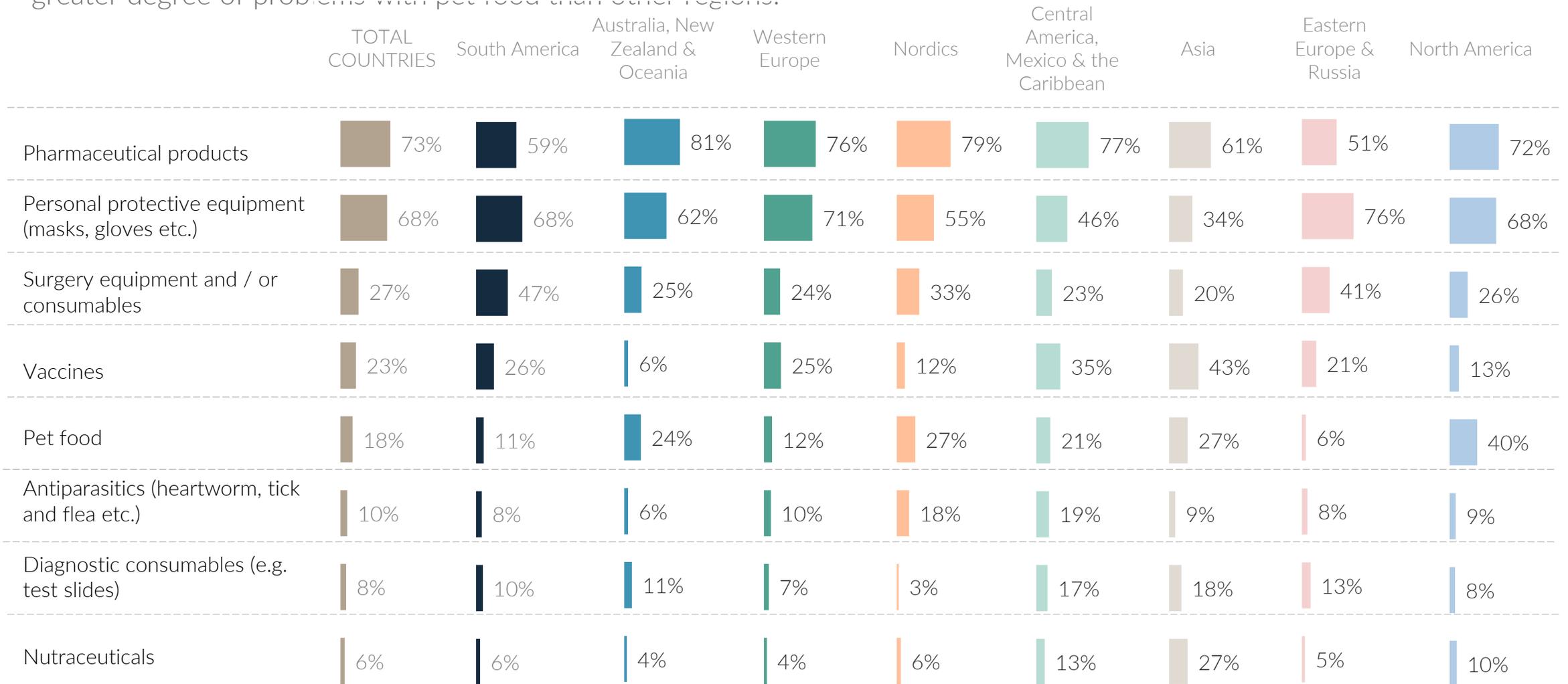
Italian veterinary clinics have experienced the *least* issues with the supply chain during the pandemic, with 35% completely unaffected – significantly higher than neighbouring countries and the global average.



NQ8. And which of the below statements apply to your clinic?  
 N.B. Only countries where n > 30 displayed

# MOST COMMON STOCK/SUPPLY ISSUES EXPERIENCED

Pharmaceuticals and PPE are the most common products affected by supply issues worldwide. North America has had a greater degree of problems with pet food than other regions.



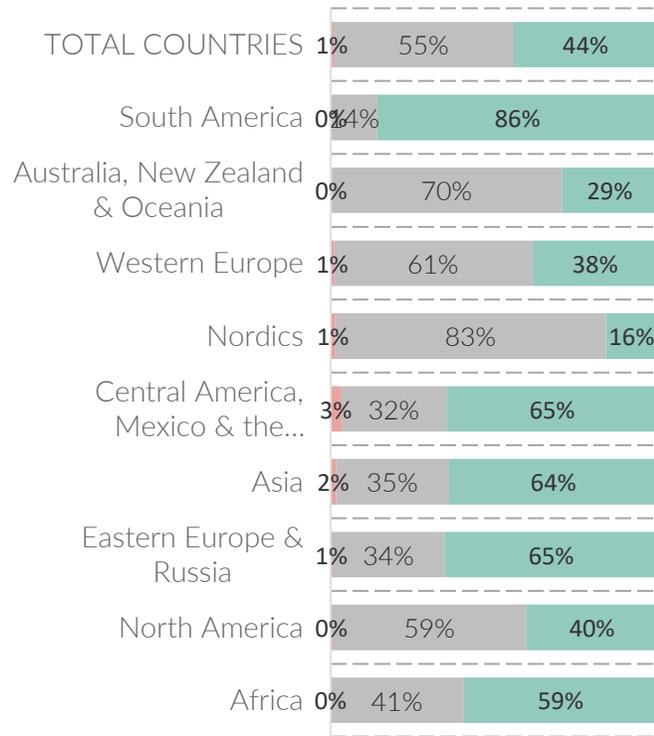
NQ6a Which types of products have you had supply issues with?  
N.B. Only regions where n > 30 displayed

# CHANGE IN MANUFACTURER PRICES BY REGION

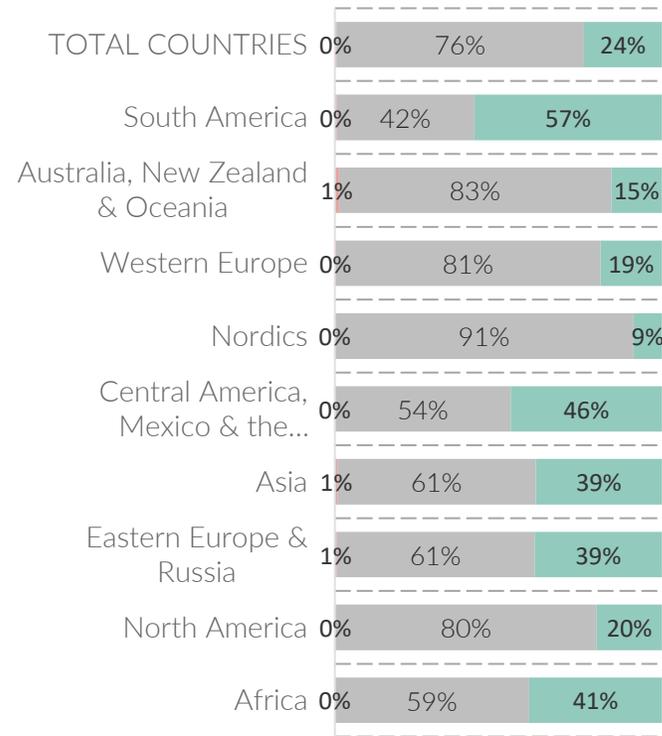
Medications is the area that has seen the most widespread rise in manufacturer pricing globally, followed by pet food. The Nordics stands out as the one region where prices have remained relatively static across the board.



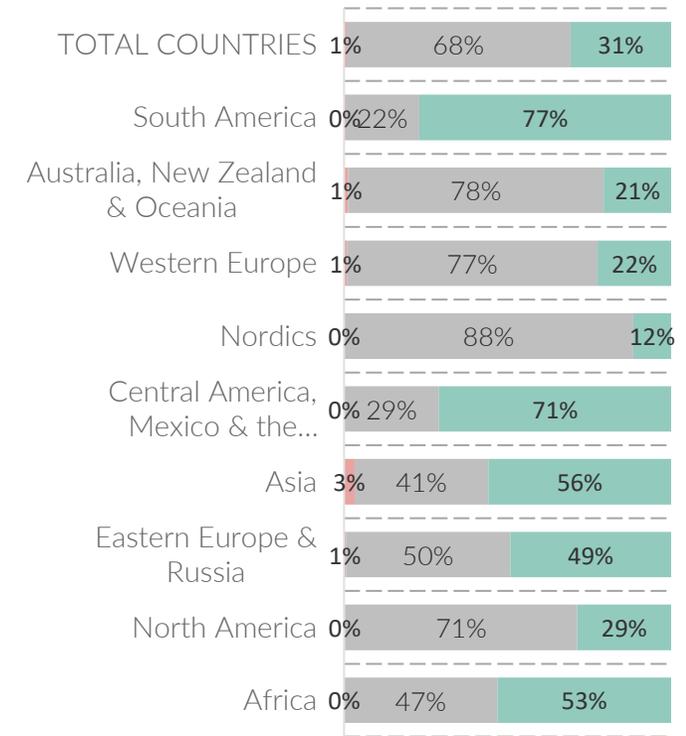
**Cost of medications**



**Cost of diagnostics**



**Cost of pet food**



■ Manufacturer prices have gone down    
 ■ Manufacturer prices have stayed the same    
 ■ Manufacturer prices have gone up

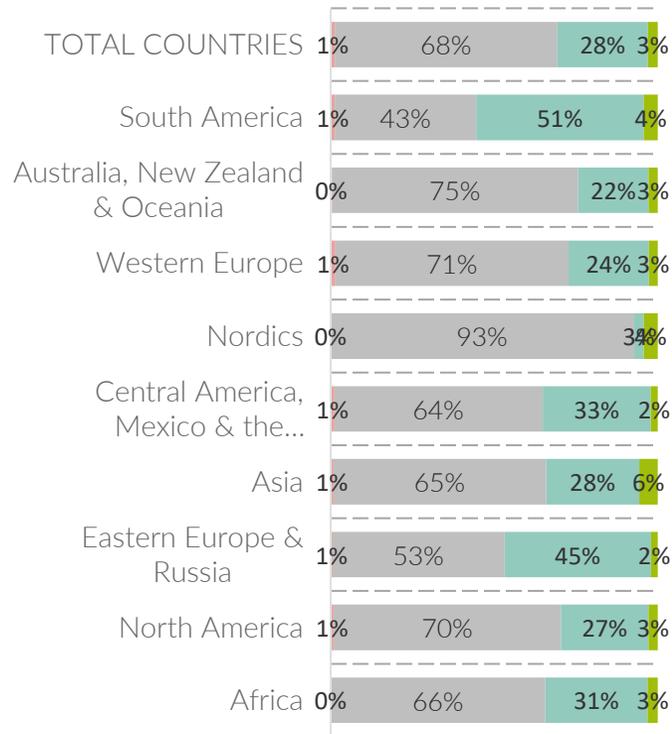
NQ10 Now thinking about how prices set by manufacturers for medications, diagnostic testing and pet food have evolved since the outbreak, would you say...?

# CHANGE IN CLINIC PRICES BY REGION

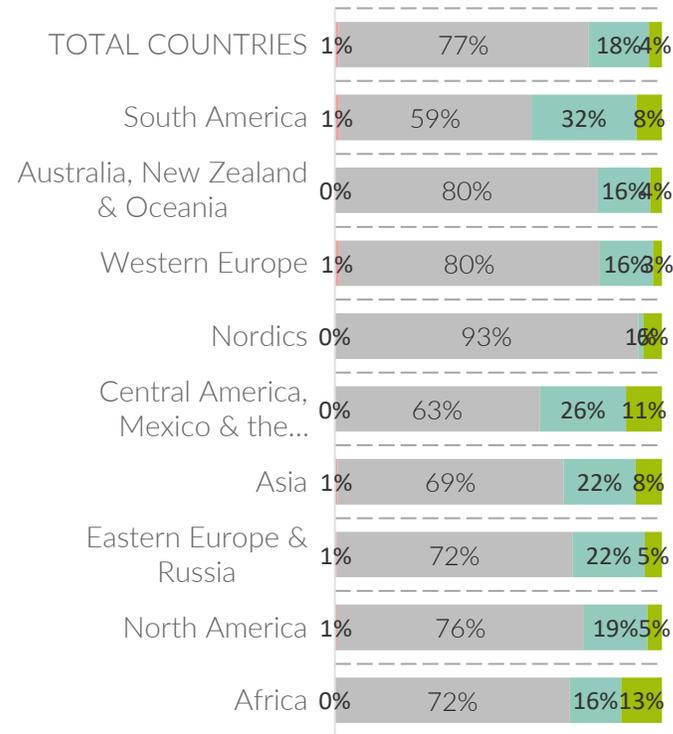
Prices charged by clinics to pet owners have seen less of an increase for these same areas, indicating that many clinics have chosen to absorb the price hikes themselves and take a margin hit, rather than transferring the cost over to clients.



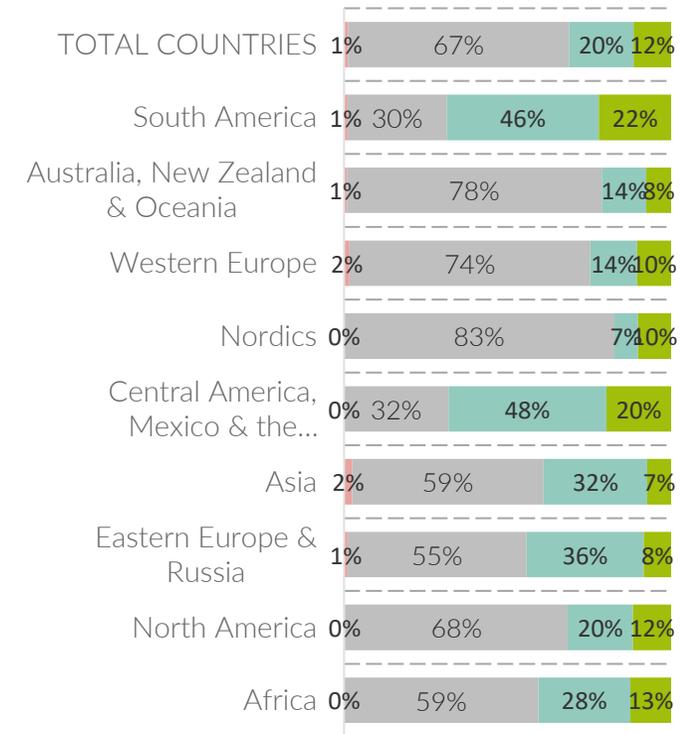
**Cost of medications**



**Cost of diagnostics**



**Cost of pet food**



■ Clinic prices have gone down    
 ■ Clinic prices have stayed the same    
 ■ Clinic prices have gone up    
 ■ Not applicable

NQ11 Now thinking about how much your practice charges to clients for different products and services, since before the outbreak, would you say...?

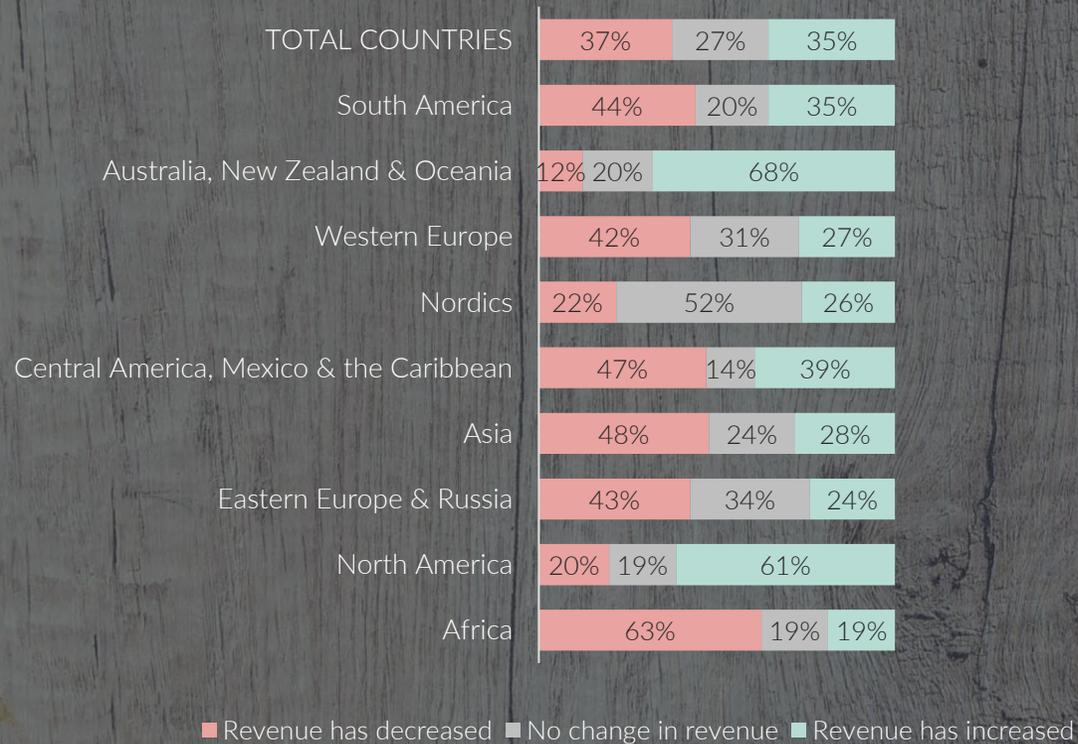
# 04

CHAPTER 4.4

**IMPACT ON PRACTICE FINANCES & STAFFING**

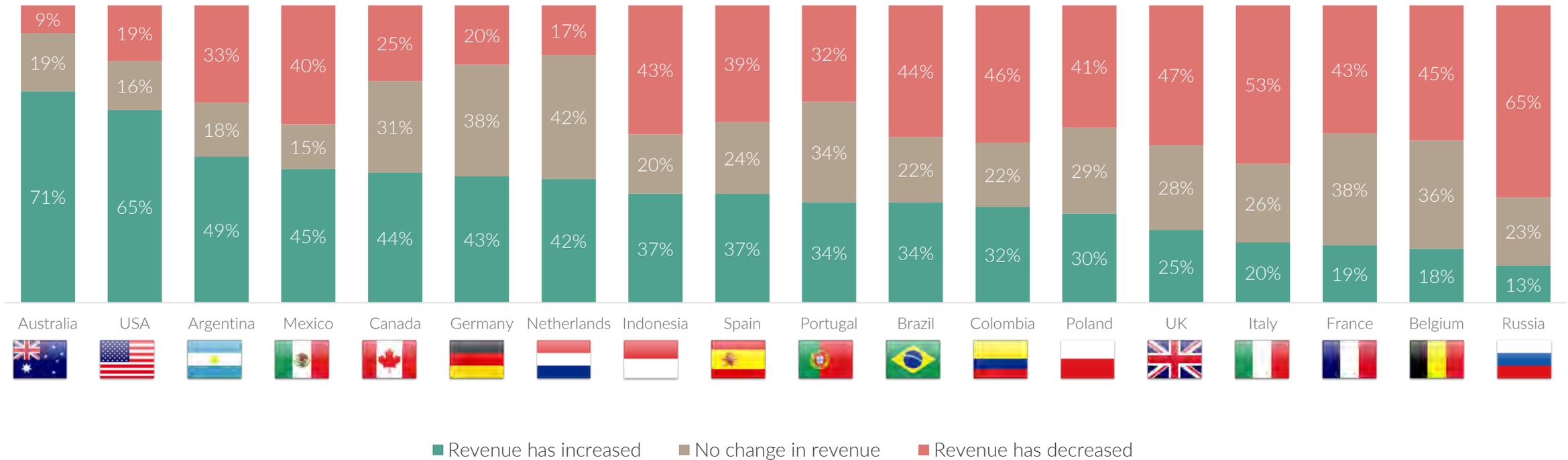
# IMPACT ON CLINIC REVENUE BY REGION

The financial impact on clinics has been varied, with certain regions/countries reporting notably better figures than others.



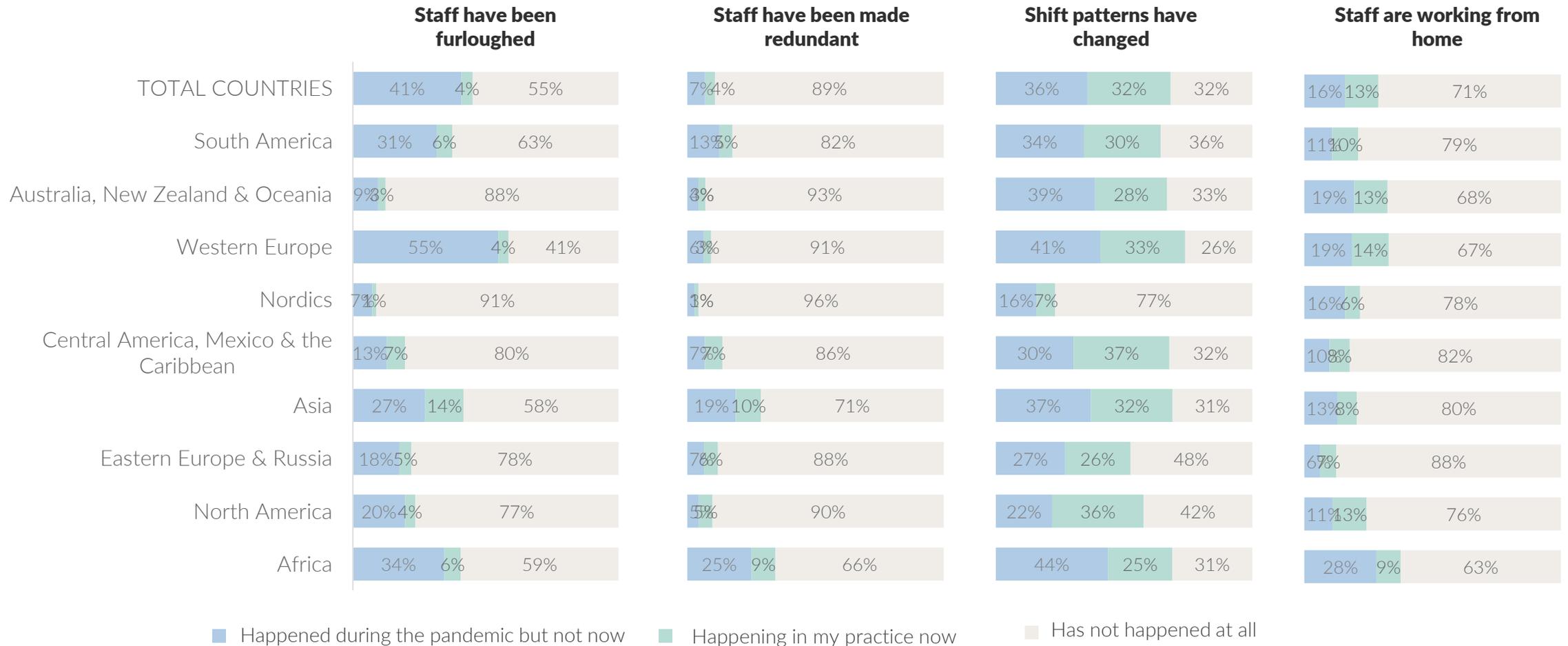
# IMPACT ON CLINIC REVENUE BY COUNTRY

Australia and the USA stand out as the two countries where clinics have seen the strongest growth. Russia and Italy instead recorded the largest share of clinics with decreasing revenue (65% and 53% respectively).



# IMPACT ON STAFFING BY REGION

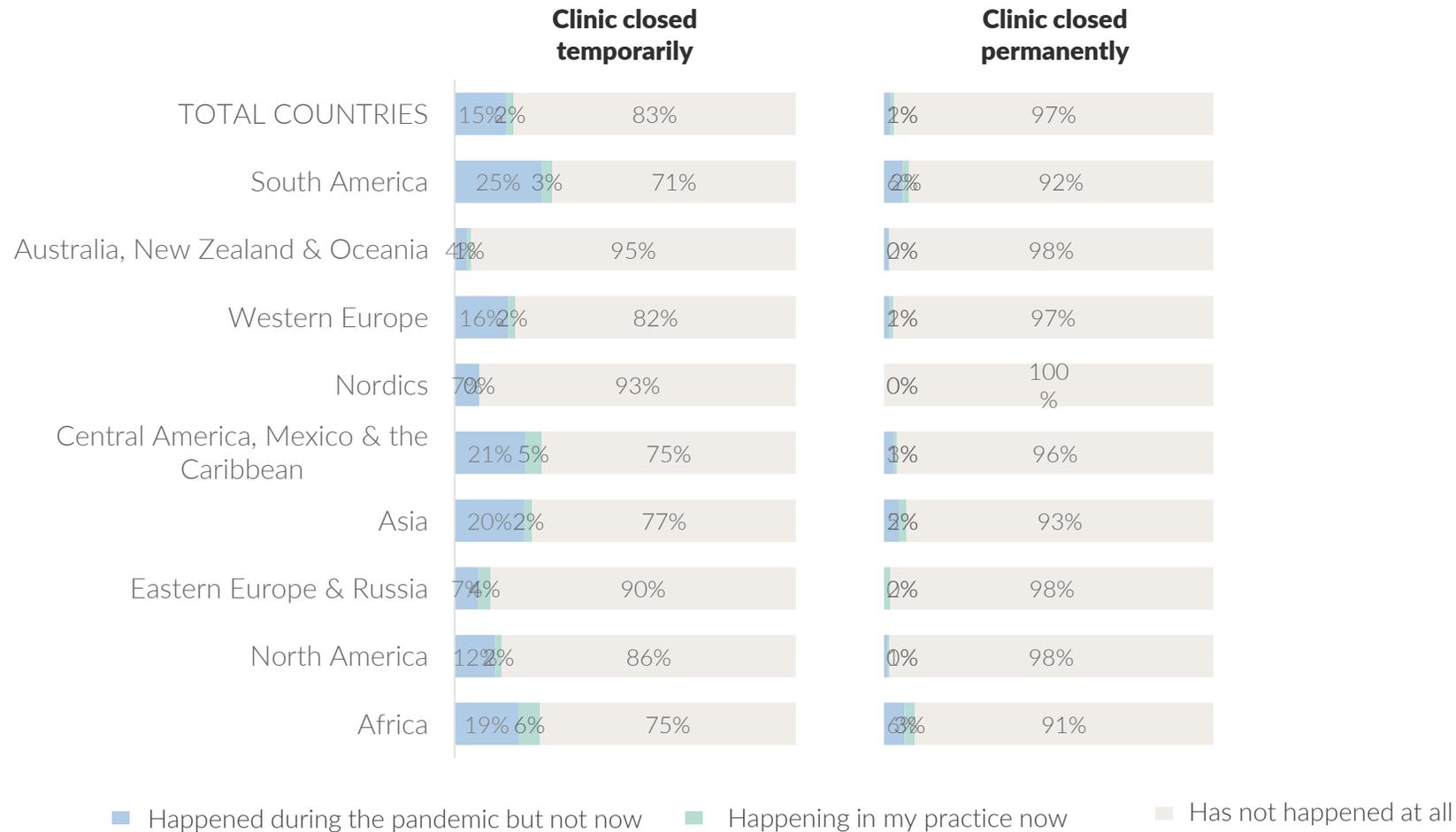
45% of clinics worldwide have furloughed staff at some point during the pandemic, with those in Western Europe being the most affected. Full redundancies have, however, been relatively rare.



CTQ3 And which of the following has happened in your clinic in relation to staffing?

# IMPACT ON STAFFING BY REGION

While 17% of global clinics have had temporary closures, very few have been forced to shut down permanently.



CTQ3 And which of the following has happened in your clinic in relation to staffing?

# 04

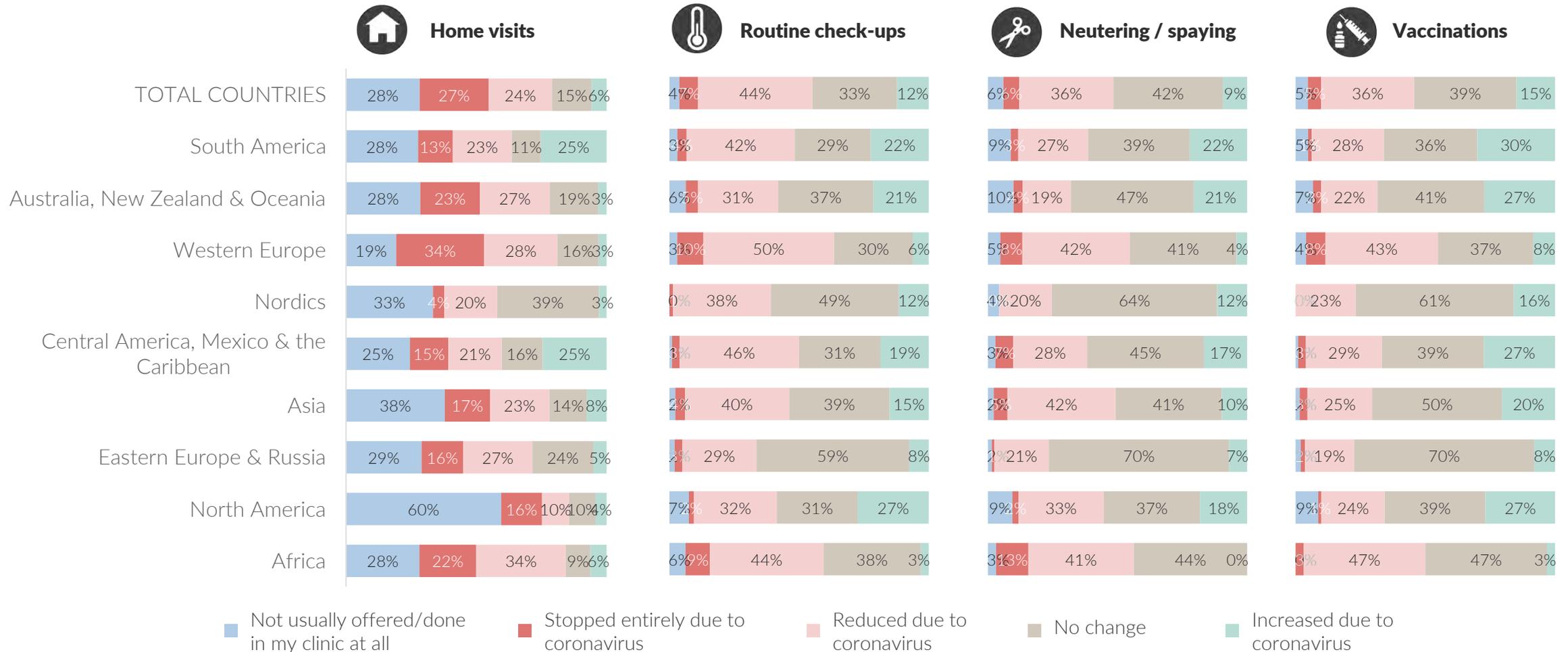


CHAPTER 4.5

**IMPACT ON CLINIC ACTIVITIES**

# CLINICAL ACTIVITIES WITH THE BIGGEST DECREASE DUE TO COVID-19

Home visits and routine check-ups have typically been reduced or stopped altogether in most regions in the wake of the coronavirus. Vaccination levels have also dropped, especially in Western Europe.

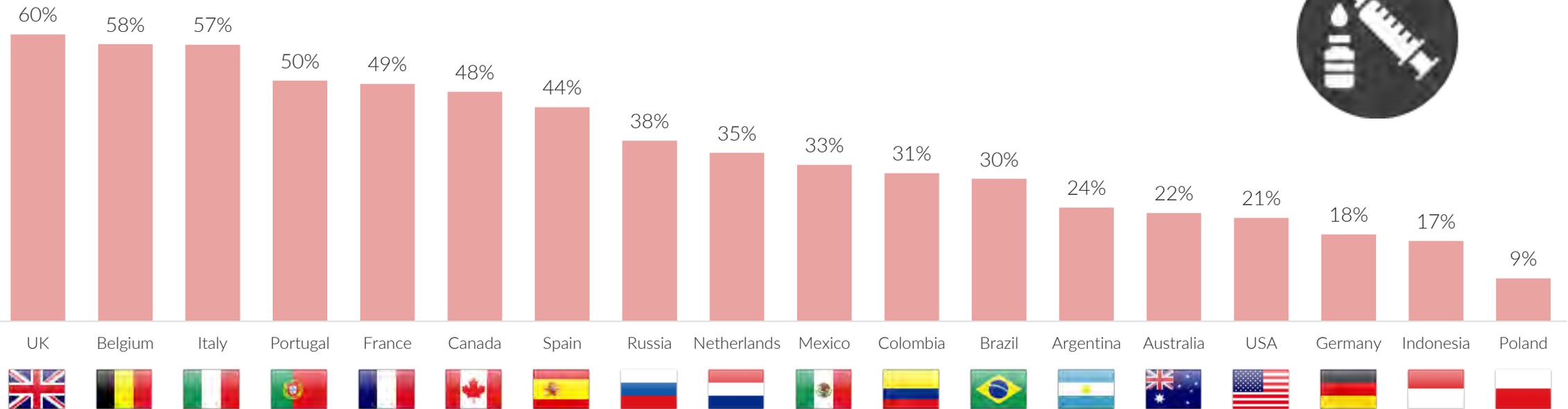


CTQ7 For each of the clinic activities below, please pick the option that best fits.

# DECLINE IN VACCINATIONS BY COUNTRY

In the UK, Belgium and Italy up towards 60% of veterinary professionals report a drop in vaccinations in their clinics, compared to just 10-20% in countries like Poland, Indonesia. Germany, USA and Australia.

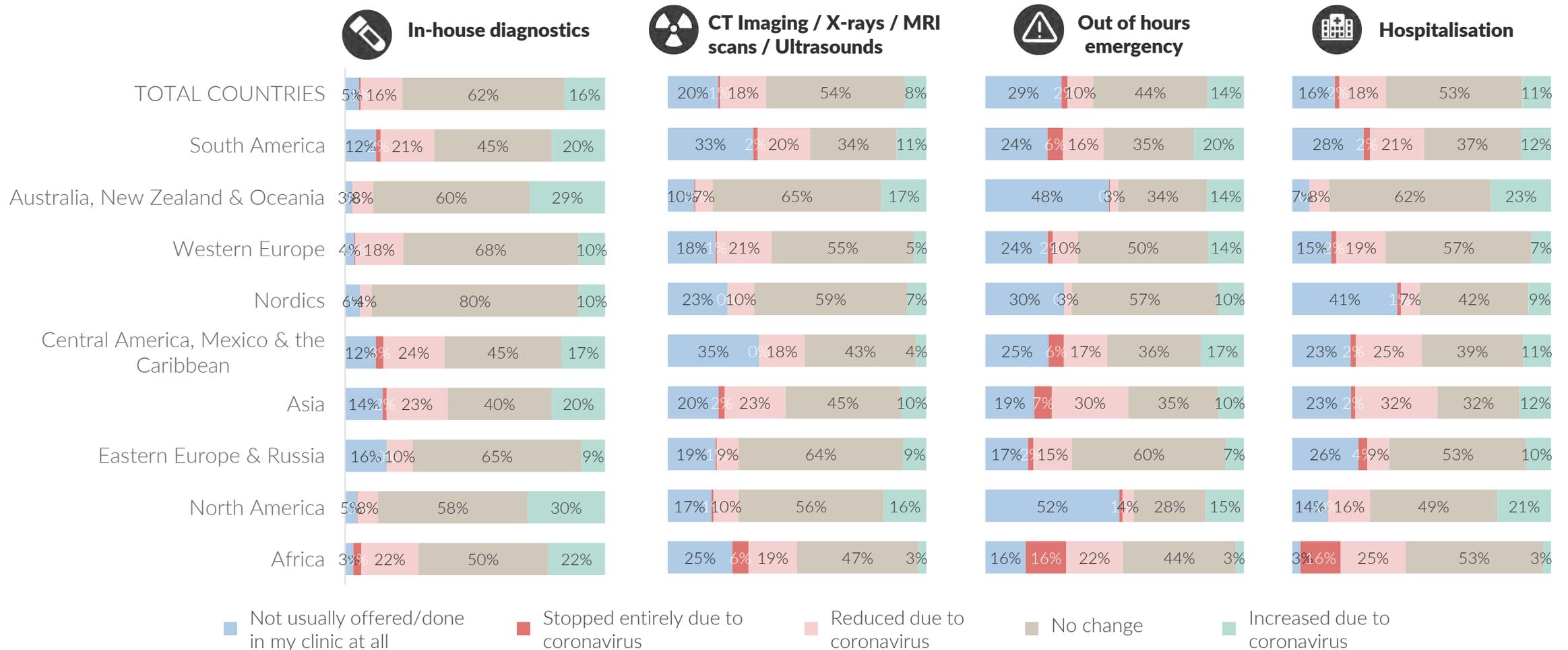
*% of veterinary professionals responding vaccinations have reduced/stopped altogether in their clinic during the pandemic*



CTQ7 For each of the clinic activities below, please pick the option that best fits - vaccinations.

# IMPACT ON DIAGNOSTICS AND EMERGENCY / SERIOUS CASES

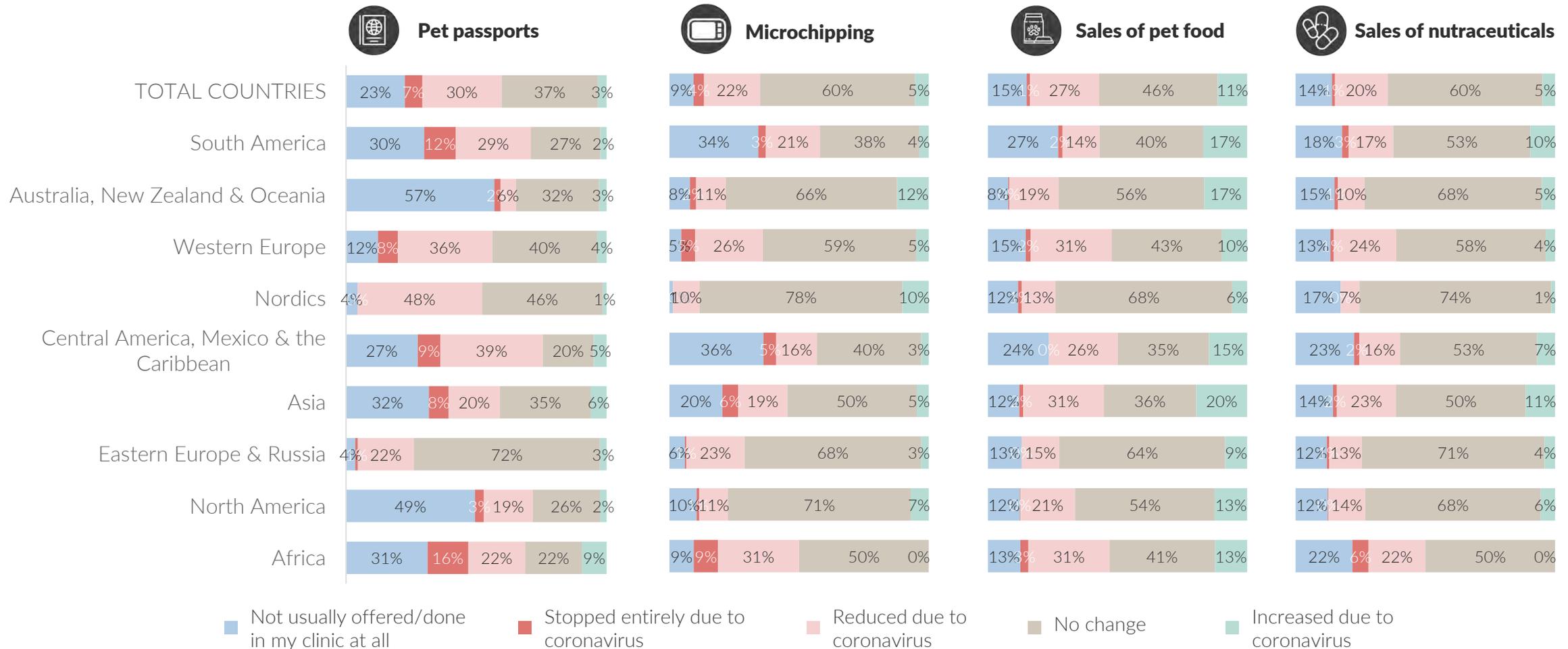
Diagnostics and treatment of emergency cases have in comparison remained largely unaffected at a global level.



CTQ7 For each of the clinic activities below, please pick the option that best fits.

# IMPACT ON PET PASSPORTS, MICROCHIPPING AND PET FOOD SALES

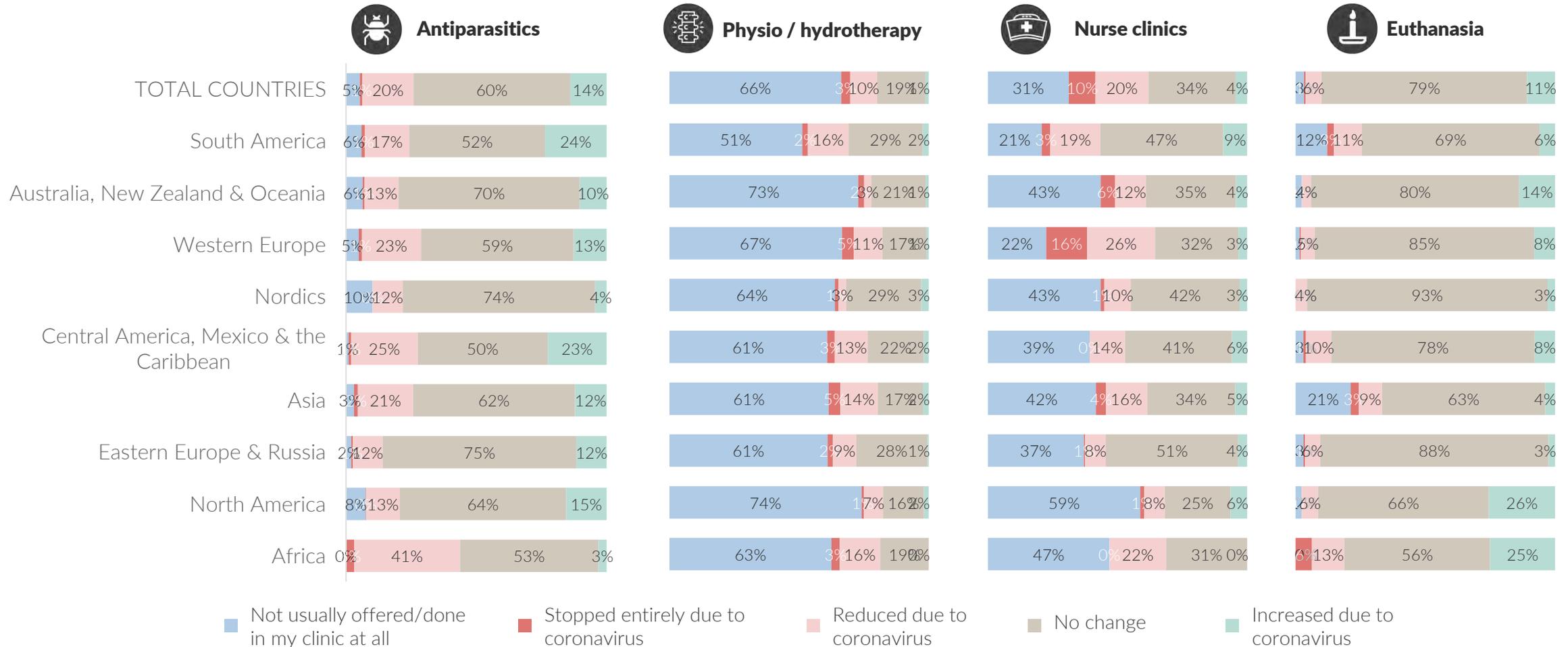
Those clinics who do issue pet passports have, unsurprisingly, typically seen a reduction in demand. Microchipping has also gone down.



CTQ7 For each of the clinic activities below, please pick the option that best fits.

# IMPACT ON PARASITICIDES, PHYSIO, NURSE CLINICS AND EUTHANASIA

Nurse clinics have been hit relatively hard in those practices where they are offered – especially in Western Europe. Worryingly, euthanasia has increased markedly in large markets like North America.



CTQ7 For each of the clinic activities below, please pick the option that best fits.

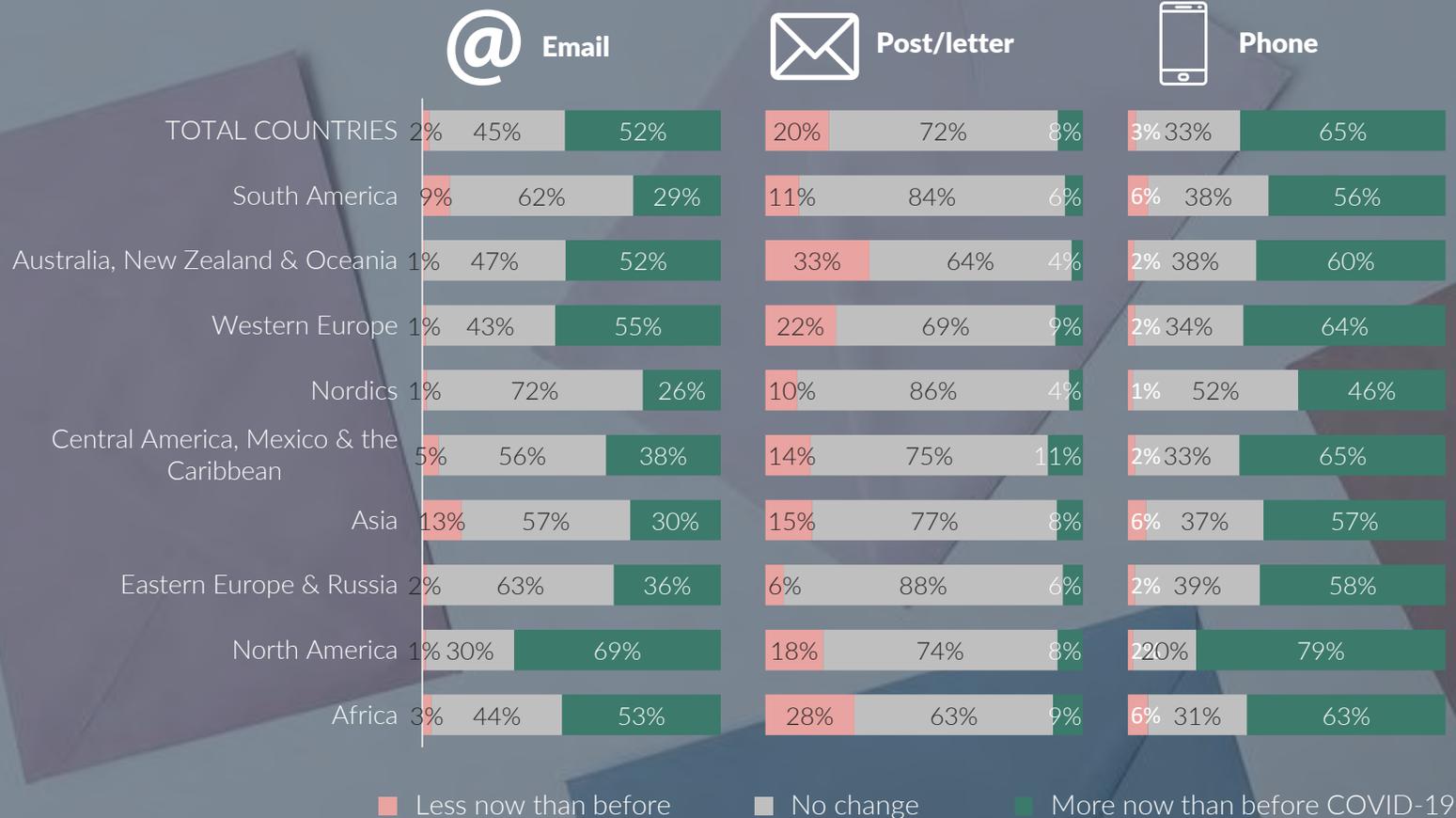
# 04

CHAPTER 4.6

**IMPACT ON COMMUNICATION CHANNELS**

# CONTACTING CLIENTS VIA POST, EMAIL & PHONE

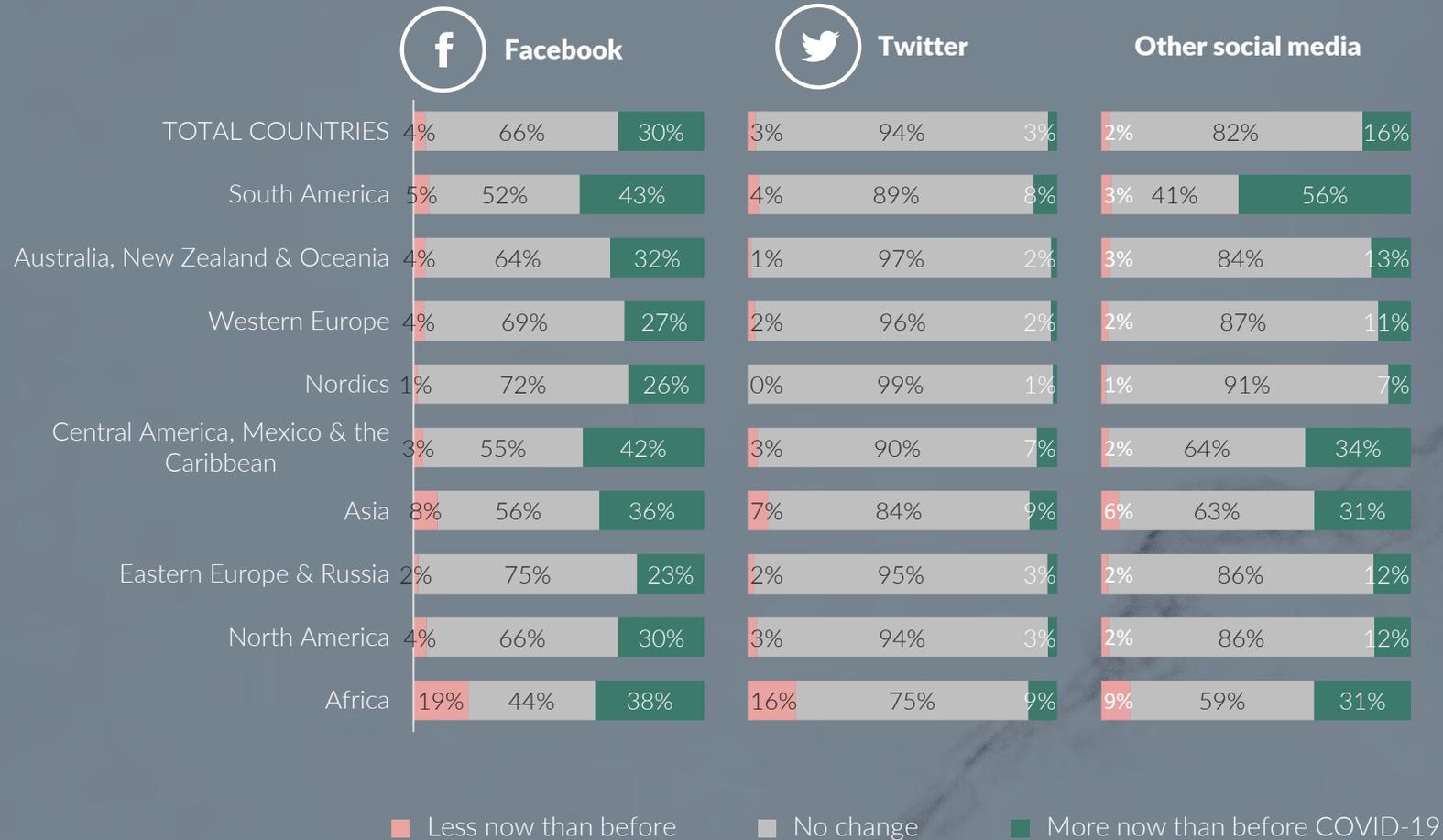
With social distancing measures in place, channels like email and phone have grown in importance for clinics when it comes to communicating with clients. 'Traditional' post/letters on the contrary continue to decline in favour of digital routes.



NQ12 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? .

# CONNECTING WITH CLIENTS VIA SOCIAL MEDIA

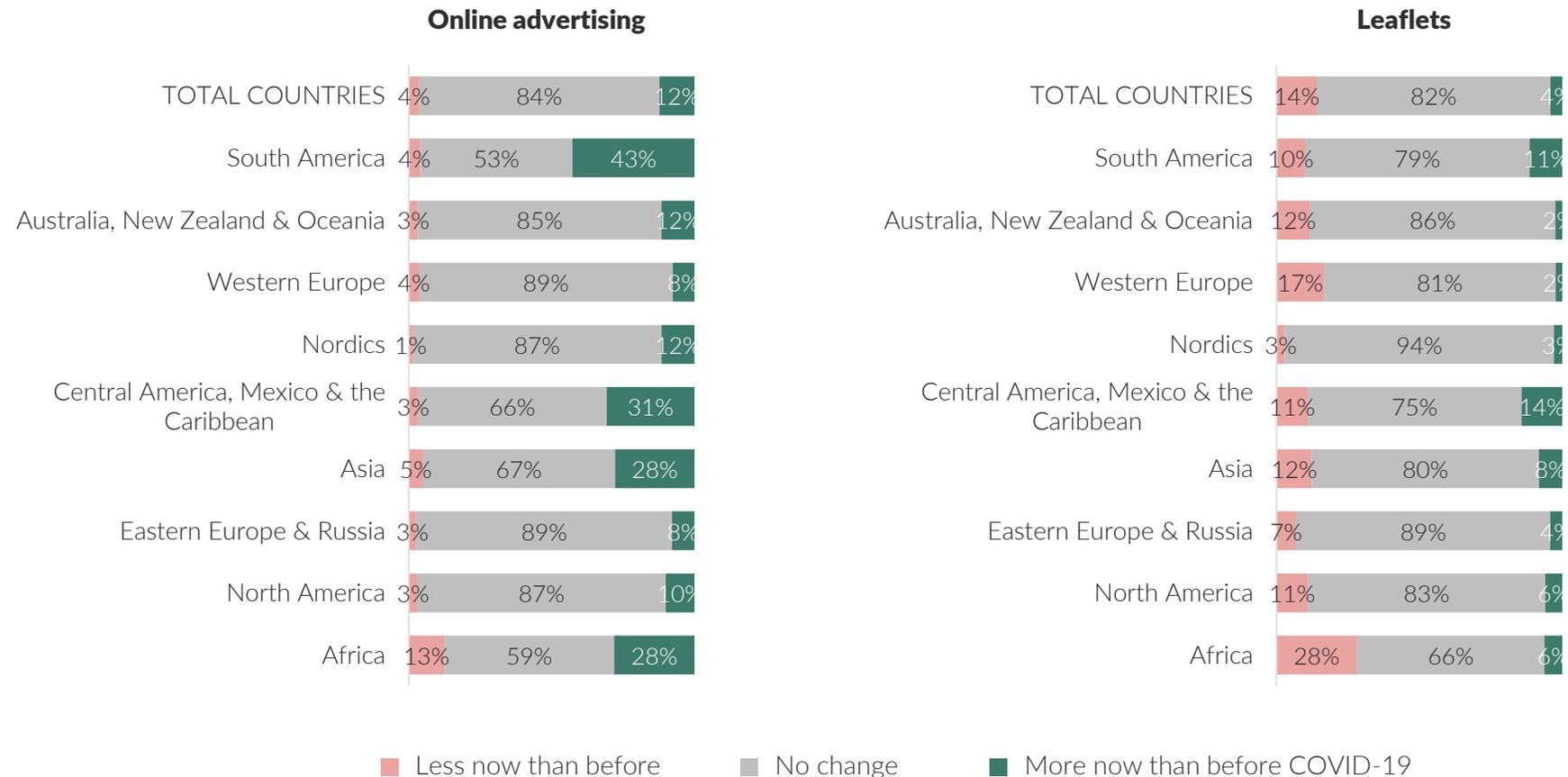
Facebook has grown the most across a majority of regions when it comes to clinic social media usage.



NQ12 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? .

# ONLINE ADVERTISING & DISTRIBUTION OF LEAFLETS

Clinic online advertising has also grown during the pandemic, especially in South America. Central America/Mexico/Caribbean, Asia and Africa.



NQ12 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? .



...and it's not just the way clinics  
communicate with *clients* that has changed:

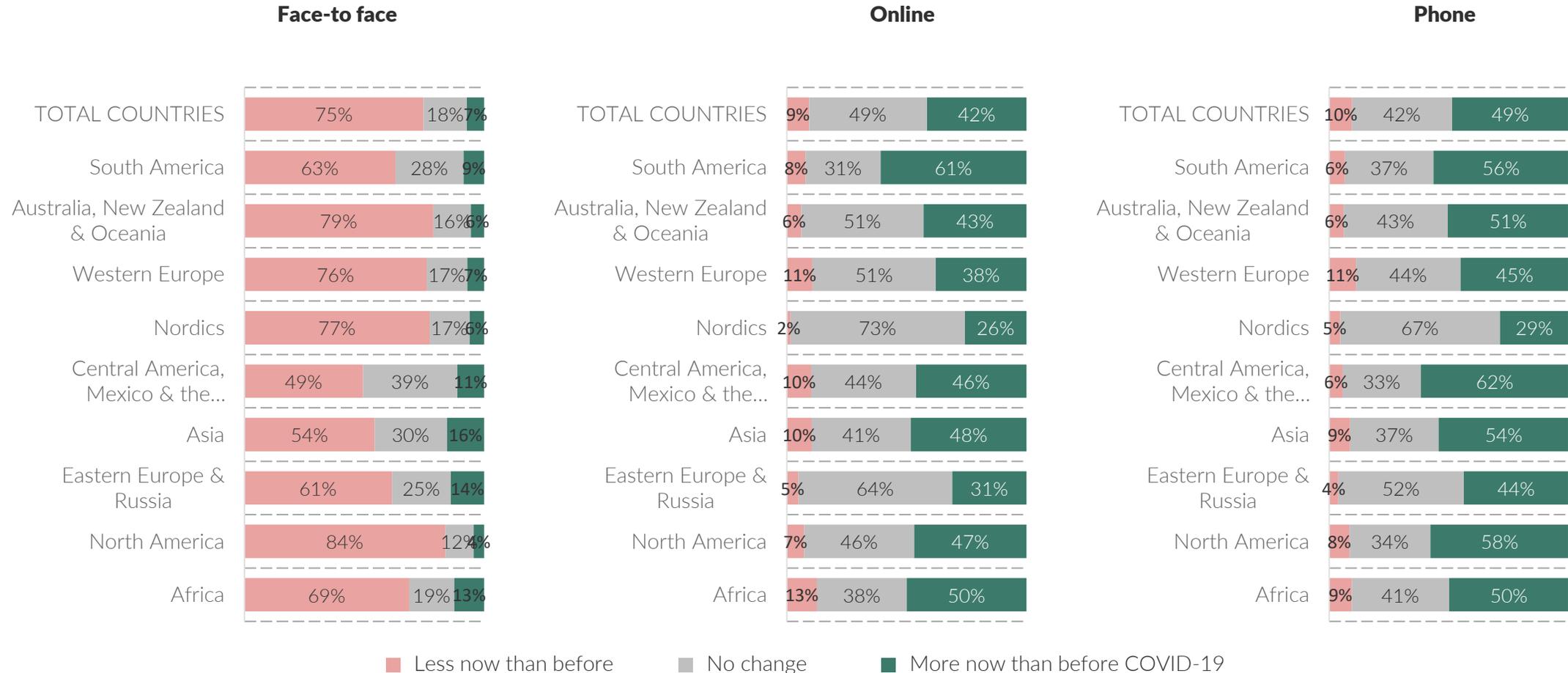
**75%**

of veterinary professionals  
globally have **reduced** or  
completely stopped **face-to-face  
meetings with manufacturers.**

NQ13 And how were you communicating with manufacturers before the Covid-19 outbreak compared to now?

# IMPACT ON COMMS CHANNELS WITH MANUFACTURERS BY REGION

With sales rep meetings getting reduced or cancelled across all regions, manufacturers have had to shift to online or phone contact with clinics during the pandemic.



NQ13 And how were you communicating with manufacturers before the Covid-19 outbreak compared to now?

# 05

CHAPTER 05

**SUPPORT DURING THE PANDEMIC**

CHAPTER 05

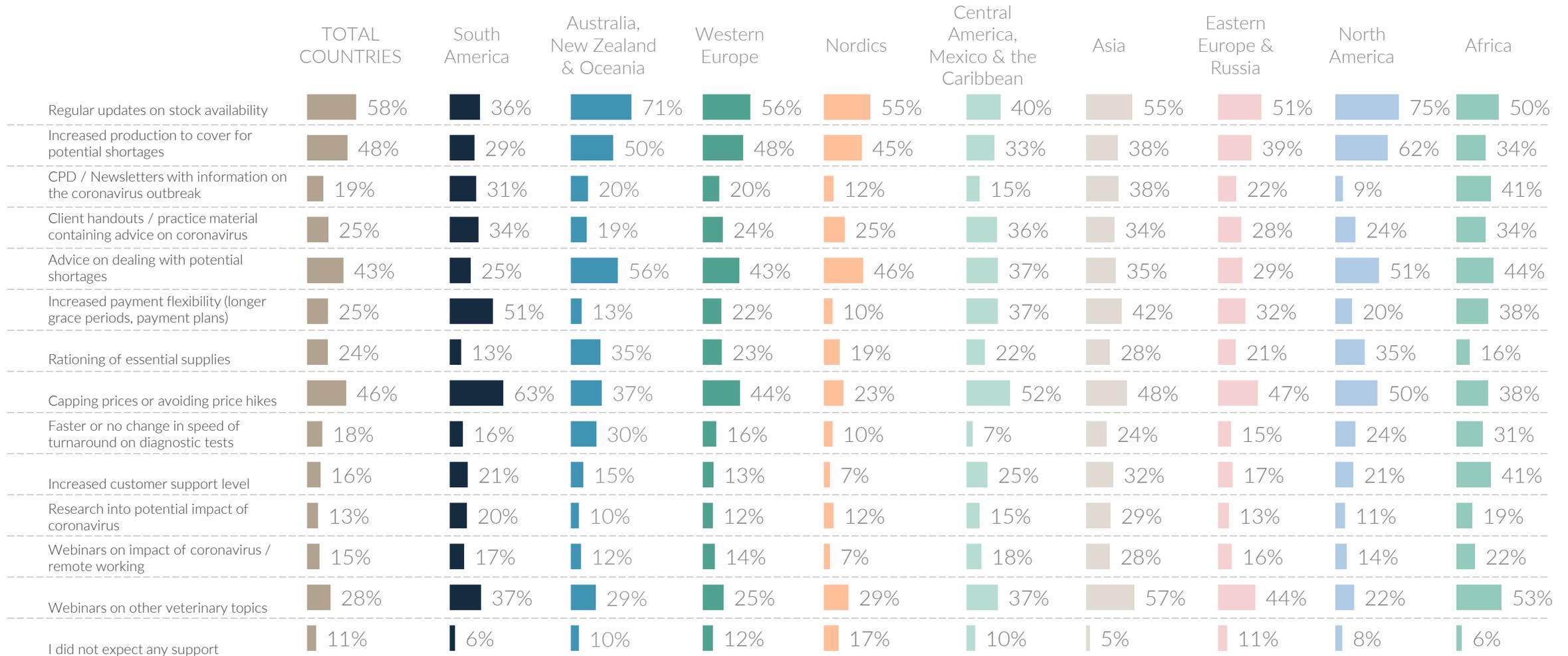
*Availability of*

# SUPPORT

In this section we take a closer look at the type of support veterinary clinics expected from manufacturers during these uncertain times – and what support they actually received. We also take a closer look at the Continuing Professional Development (CPD) offered, and the type of CPD formats veterinary professionals would most like to see in the future.

# THE SUPPORT CLINICS WANTED FROM MANUFACTURERS

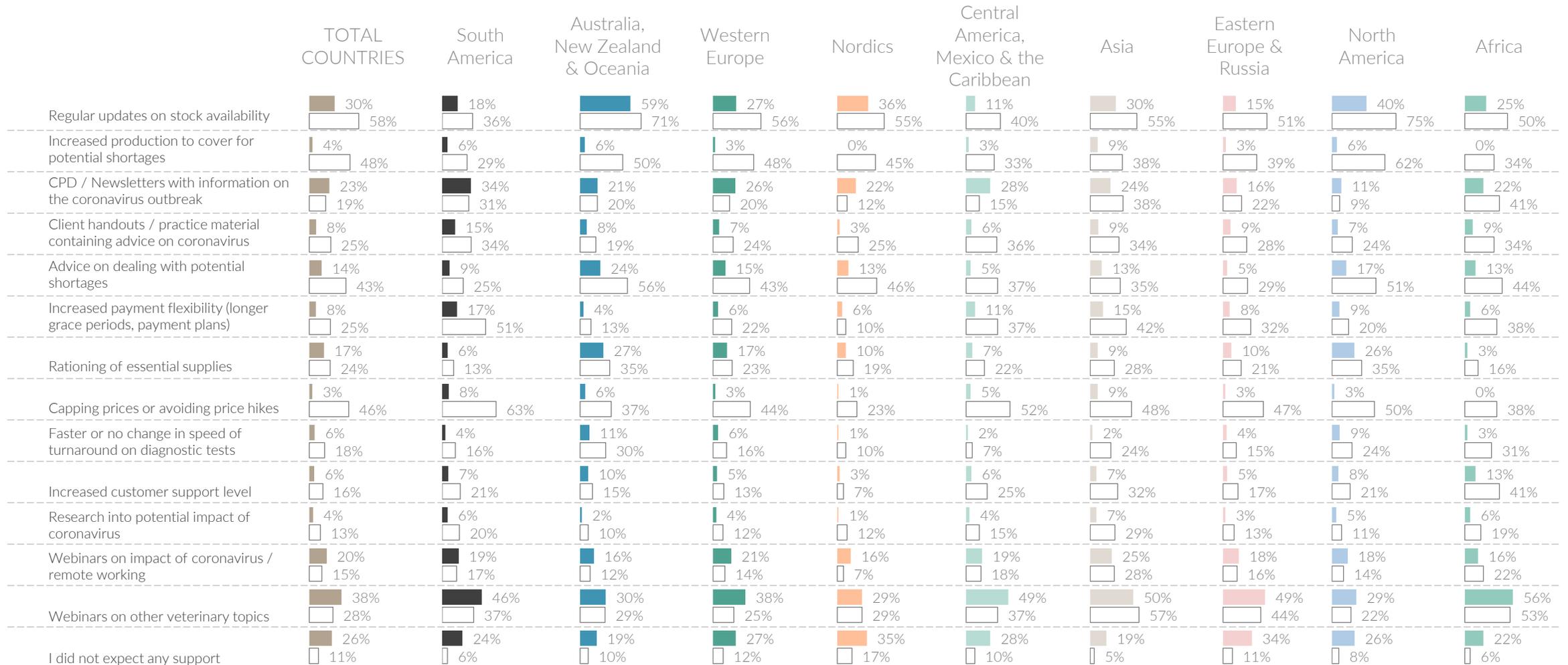
Support structures to prevent stock issues and capping/freezing prices was what most veterinary professionals wanted to see from manufacturers to help clinics during the pandemic.



CTQ8: What kind of support do you expect from the veterinary manufacturers and service providers in the face of the coronavirus outbreak?

# SUPPORT RECEIVED VS. SUPPORT WANTED

In most cases, there has been a clear gap between the support clinics wanted and the support they received from manufacturers. CPD and webinars are the only support broadly matching expectations.

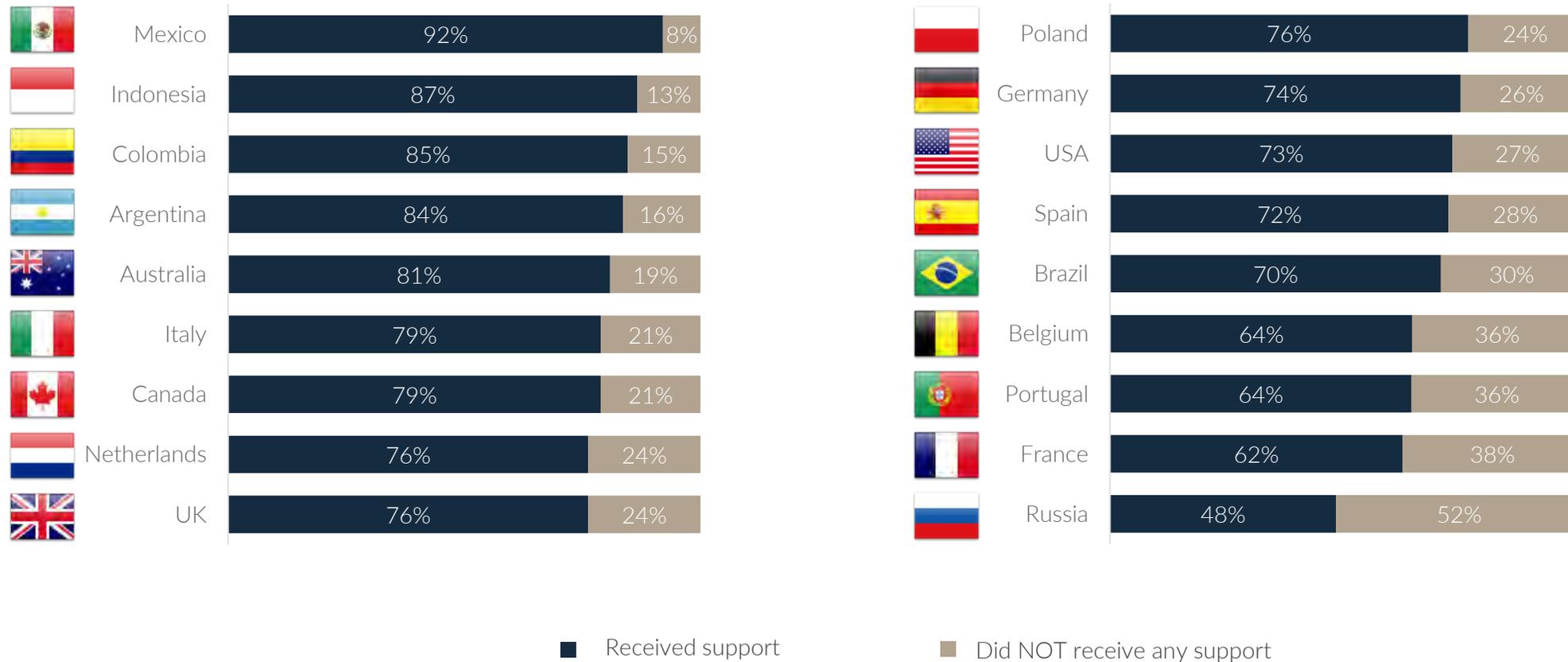


CTQ8: What kind of support do you expect from the veterinary manufacturers and service providers in the face of the coronavirus outbreak?  
 CTQ9: And which of these support types have you received, from any manufacturers and service providers?

Dark colour bar – Support received  
 No colour bar – Support wanted

# SUPPORT LEVELS BY BY COUNTRY

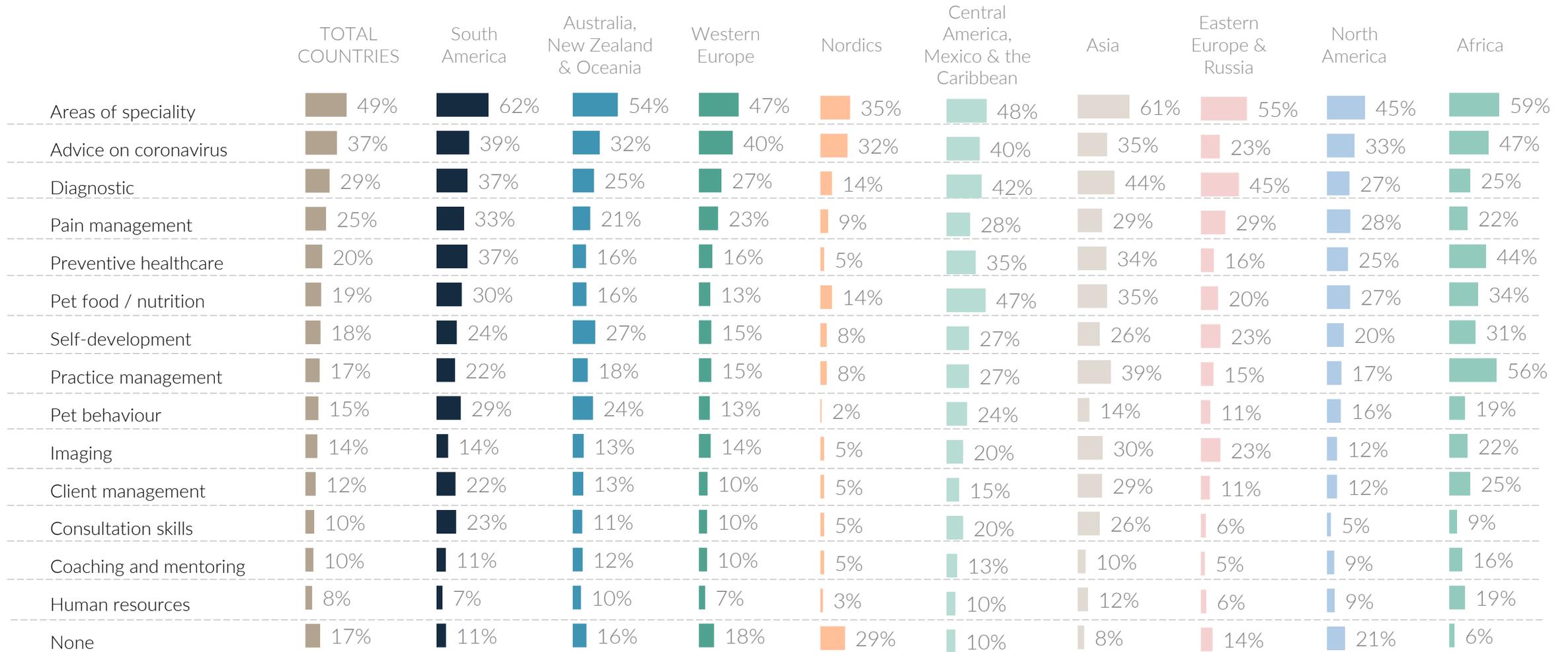
Overall, however, a majority of veterinary professionals in all countries bar Russia reported having received at least some level of additional support from their suppliers during these tough times.



CTQ9: And which of these support types have you received, from any manufacturers and service providers?  
 N.B. Only countries where n > 30 displayed

# CPD ATTENDED BY REGION

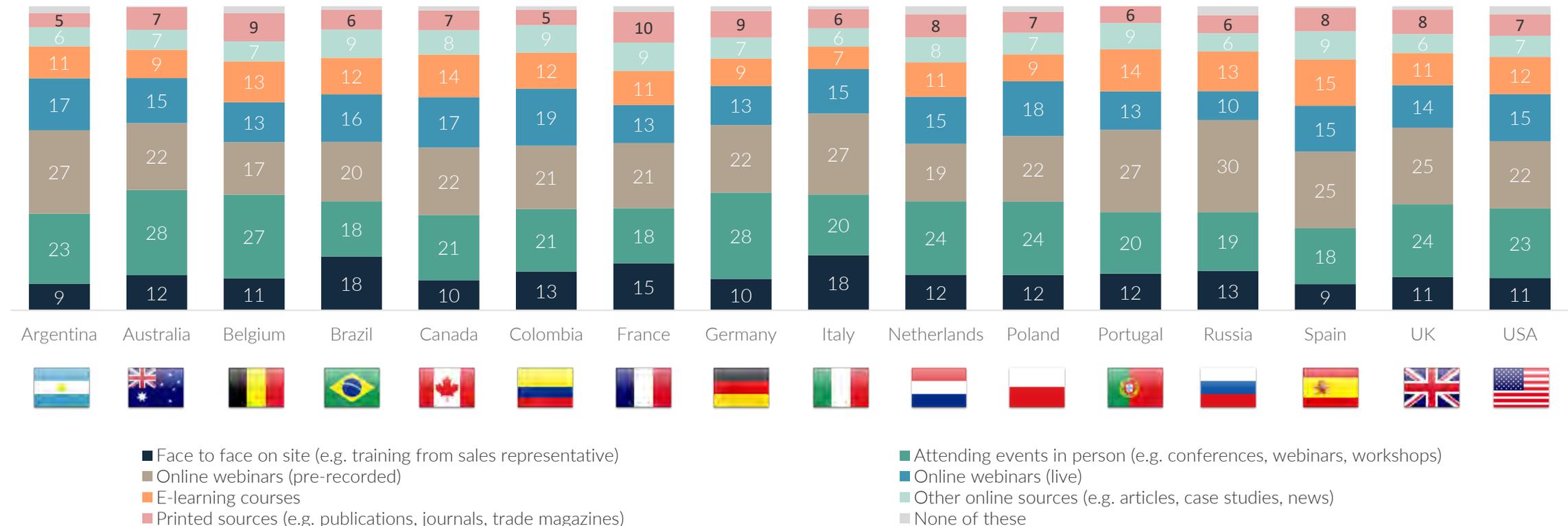
CPD has been a popular offering during this outbreak, with 83% of professionals having attended some form of professional development activity. Areas of speciality have been the most widely accessed topics.



NQ14 During the coronavirus outbreak, what continued professional education did you receive / attend?

# USEFULNESS OF CPD FORMAT BY COUNTRY

Webinars are typically seen as one of the most useful formats of delivery in most countries. There is a strong preference towards pre-recorded webinars rather than live ones, to allow for fitting it in around busy schedules.



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?  
 N.B. Only countries where n > 30 displayed

# 06

CHAPTER 06

## LOOKING TOWARDS THE FUTURE

CHAPTER 06

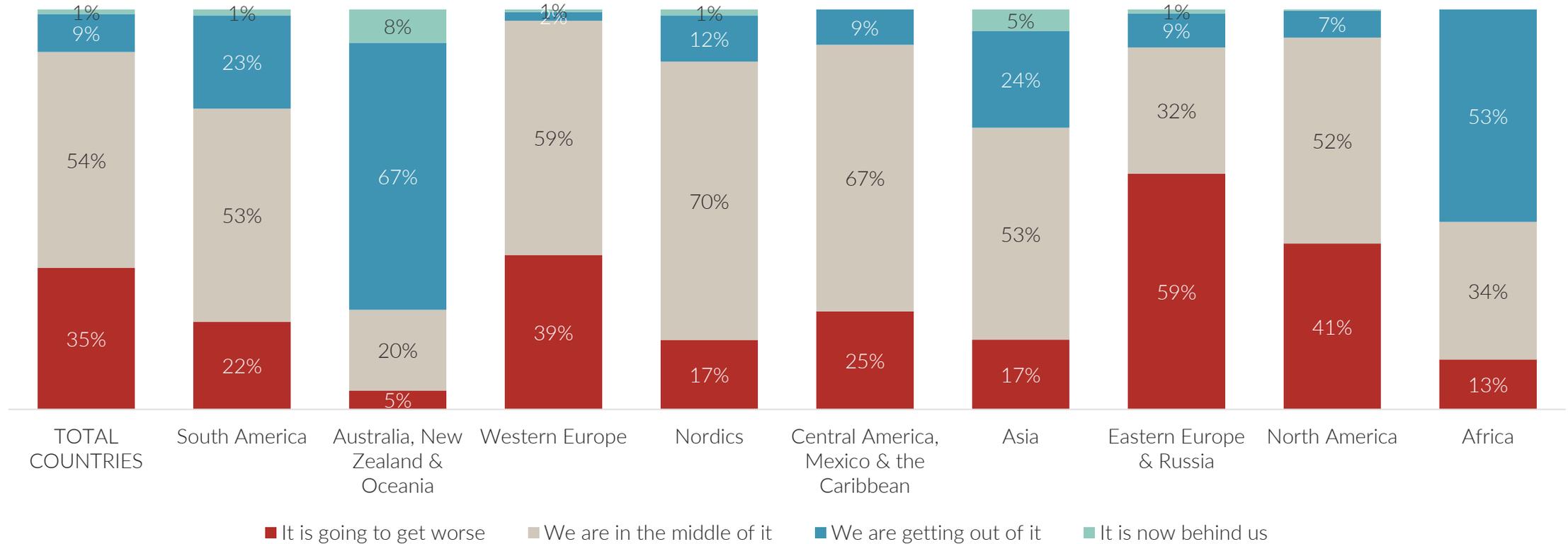
*Looking towards the*

# FUTURE

In this final section we now instead turn our eyes towards the future. How do veterinary professionals feel about the future? Will we soon see an end to the pandemic? And how has this past year affected individual career aspirations and clinic staffing plans?

# WHAT NEXT – IS THE END OF THE PANDEMIC IN SIGHT?

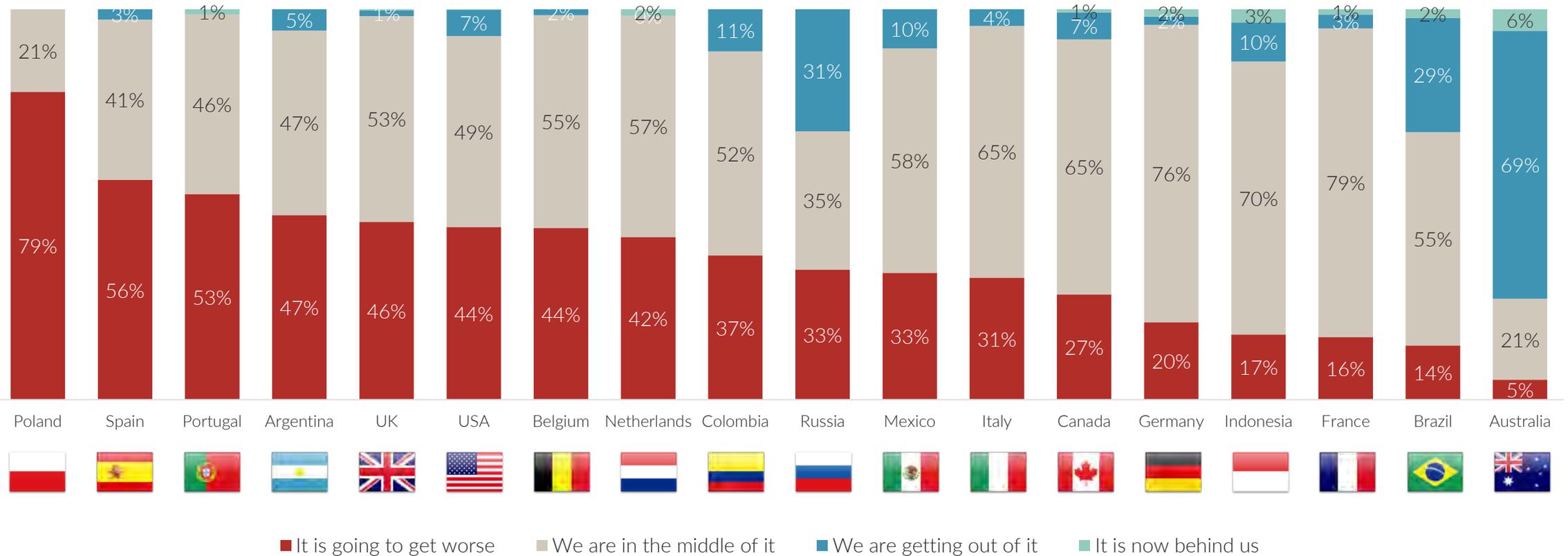
Veterinarians in Eastern Europe the most pessimistic about the future whiles those in Australia and New Zealand the most optimistic. Overall vets globally feeling they are still in the middle of the COVID-19 pandemic.



How would you describe the Covid-19 situation in your country?

# PANDEMIC PERCEPTIONS BY COUNTRY

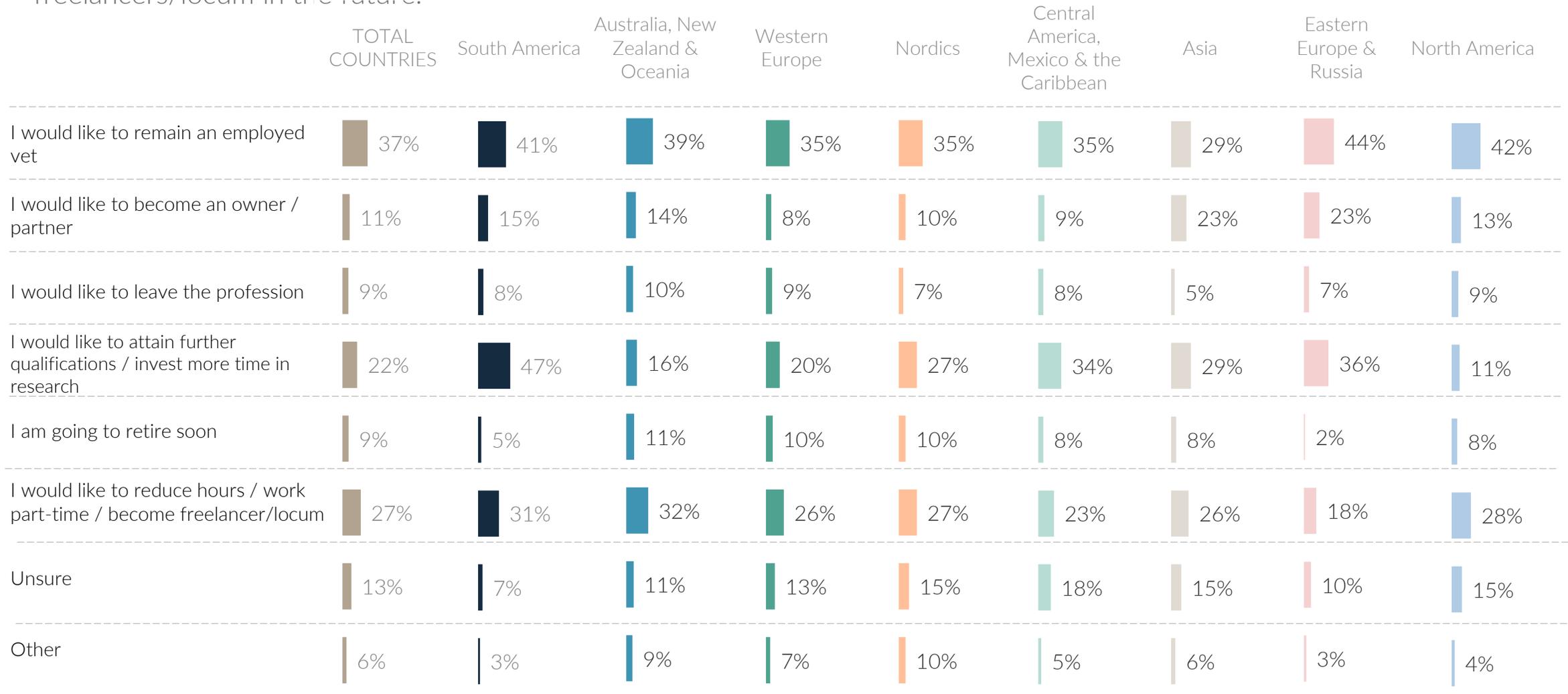
Poland by far the most pessimistic country. Australia stand alone perceiving COVID is on it's way out although Brazil and Russia are also optimistic.



How would you describe the Covid-19 situation in your country?

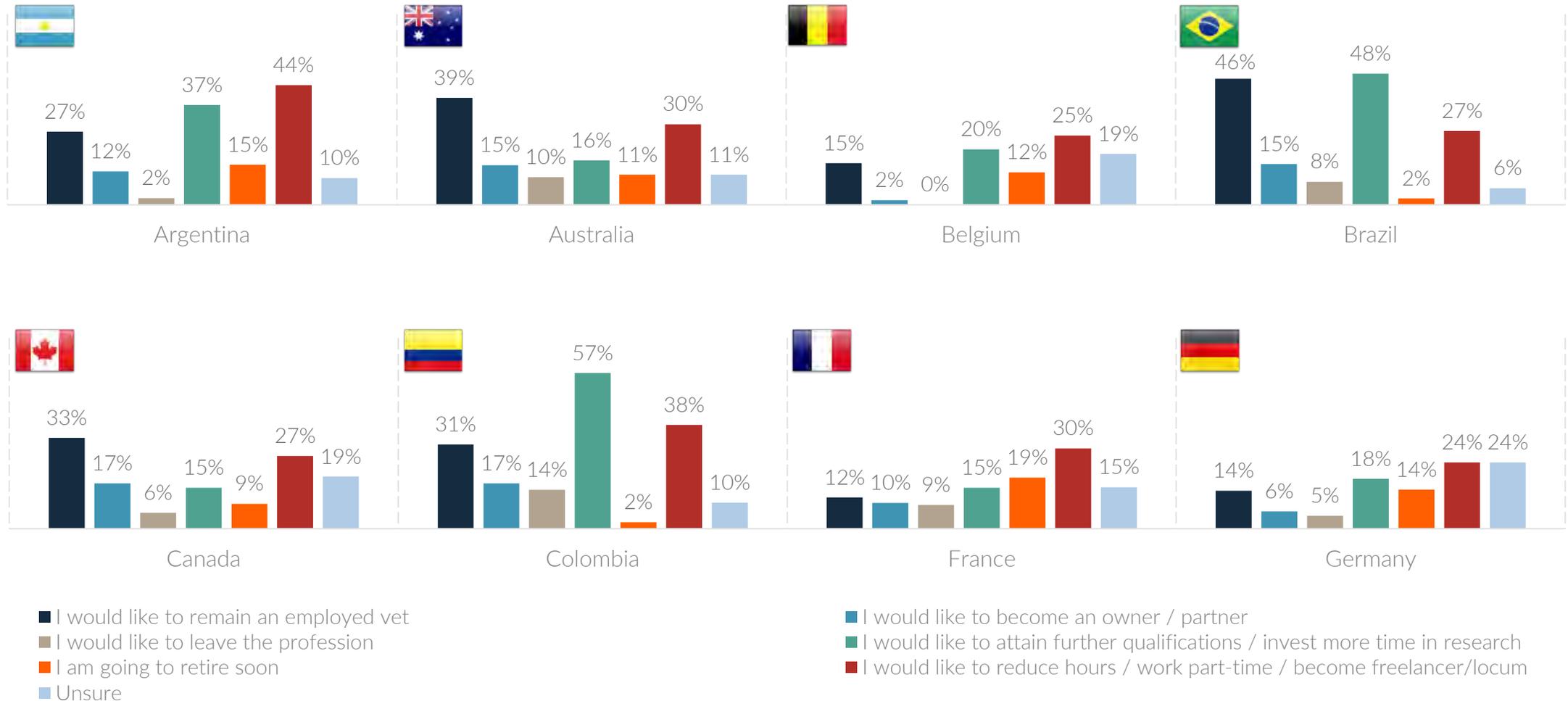
# FUTURE CAREER ASPIRATIONS – BY REGION

While most respondents aspire to continue being employed vets, as many as 27% intend to reduce their hours or become freelancers/locum in the future.



# FUTURE CAREER ASPIRATIONS – BY COUNTRY

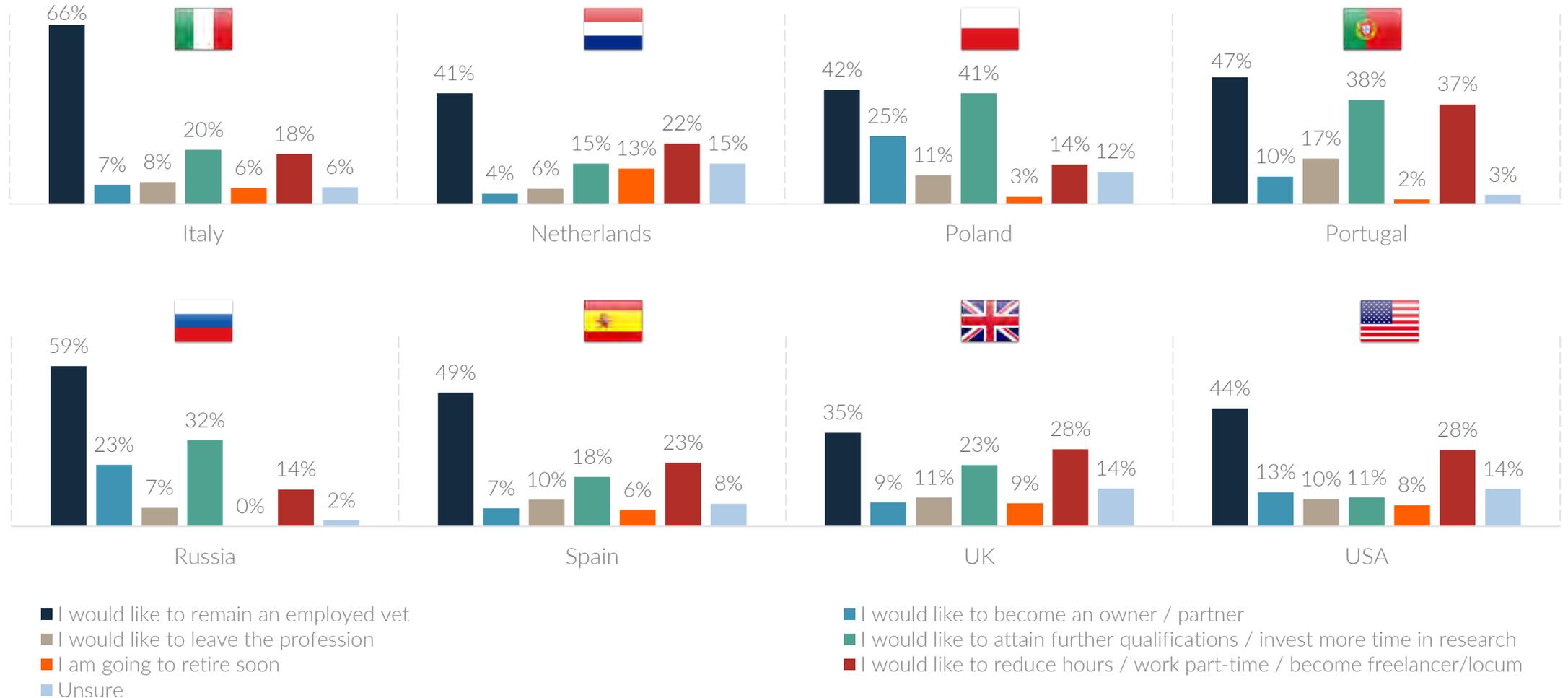
South American countries have a higher proportion of veterinarians who want to attend further qualifications or move more towards research.



VS8 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

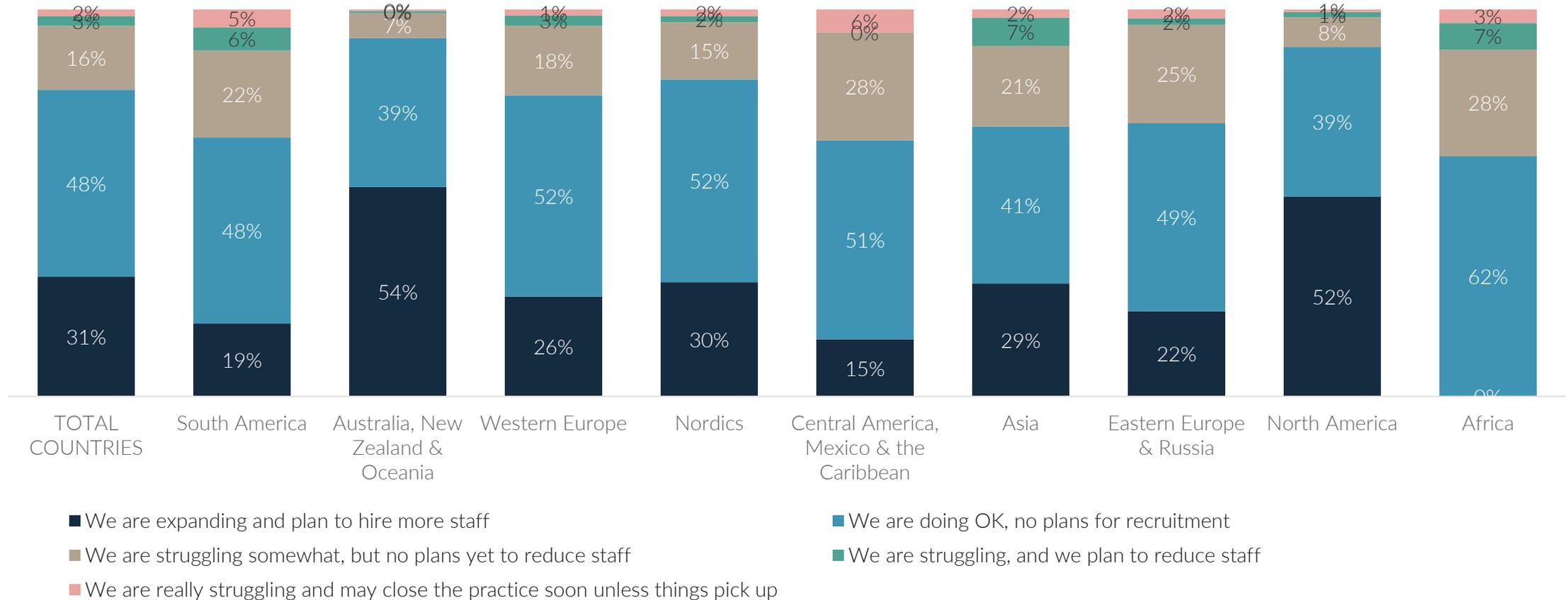
Portuguese veterinarians meanwhile are the most dissatisfied overall, with 17% reporting they want to leave the profession.



VS8 Considering the pandemic and its effect, what are your long-term career aspirations?  
 N.B. Only countries where n > 30 displayed

# PLANNED RECRUITMENT BY REGION

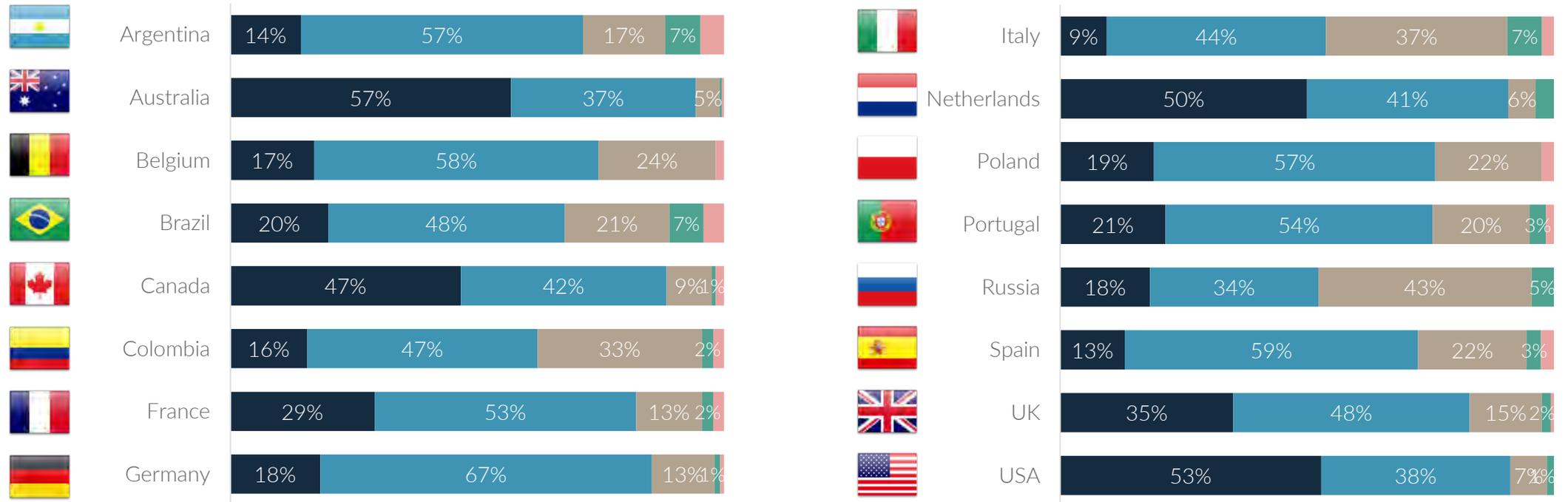
48% of clinics globally claim to be doing ok, with no plans for future recruitment. Australia/New Zealand Oceania and North America stand out as regions with the most positive outlook, with 1 in 2 clinics having expansion plans.



VS2 Where do you place your practice on the following scale?

# PLANNED RECRUITMENT BY COUNTRY

Netherlands too is reporting high levels of expansion plans, in contrast to its European neighbours who all have a more cautious outlook.



- We are expanding and plan to hire more staff
- We are doing OK, no plans for recruitment
- We are struggling somewhat, but no plans yet to reduce staff
- We are struggling, and we plan to reduce staff
- We are really struggling and may close the practice soon unless things pick up

CTQ9: And which of these support types have you received, from any manufacturers and service providers?  
 N.B. Only countries where n > 30 displayed

## THANK YOU

*Questions? Contact us at:*



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# 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**



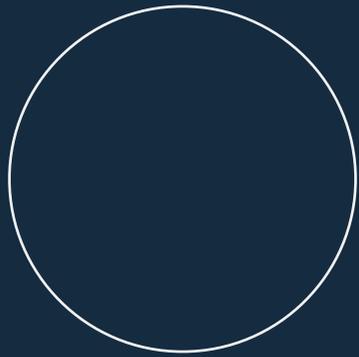
Concept database of over **350** new veterinary concepts



Present at **industry** conferences worldwide



**Six** office dogs, many home cats, some chickens



# APPENDIX

*Sample breakdown*

<b>SAMPLE BREAKDOWN (% OF RESPONDENTS)</b>	TOTAL COUNTRIES	South America	Australia, New Zealand & Oceania	Western Europe	Nordics	Central America, Mexico & the Caribbean	Asia	Eastern Europe & Russia	North America	Africa
<b>SPECIES FOCUS</b>										
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%
<b>ROLE</b>										
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%

QAnimals What percentage of your professional time consists of treating each of the following?

QRole Which of the following best describes your current role?

<b>SAMPLE BREAKDOWN (% OF RESPONDENTS)</b>	TOTAL COUNTRIES	South America	Australia, New Zealand & Oceania	Western Europe	Nordics	Central America, Mexico & the Caribbean	Asia	Eastern Europe & Russia	North America	Africa
<b>PRACTICE TYPE</b>										
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%
<b>PRACTICE OWNERSHIP</b>										
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%
<b>PRACTICE LOCATION</b>										
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%

QOwnership Which of the following best describes the ownership of your practice?  
 QPracType Which of the following best describes the type of practice you work in?  
 QLocation Which of the following best describes the area where your practice is located?