



**VetsSurvey**  
**2021**

# **UNDERSTANDING THE VETERINARY PROFESSION**

A Report by CM Research & Vetspanel  
Written by Abi Moorcock, Naomi Potter & Dilek Kunduz-Kara





# INTRODUCTION, EXECUTIVE SUMMARY & METHODOLOGY

VetsSurvey is an annual unincentivized survey of veterinary professionals across the globe. The survey is sent out most years to every member of Vetspanel, our proprietary panel of veterinary professionals. In 2020, the reach of the survey was extended by a partnership with WSAVA and various local veterinary associations.

The purpose of the VetsSurvey is to provide a freely available resource for the veterinary industry, enabling greater understanding of the current challenges, forces and changes affecting the industry.

2020 marks the sixth year of the VetsSurvey; and what a year it has been. The topics covered in 2020 mark a departure from previous years. Due to the pandemic, we have focused our data gathering efforts on the impact of the global crisis we find ourselves in, alongside our usual coverage of veterinary professionals' demographics, market features and daily lives. We also devote more time to covering the mental health impact of the pandemic on a profession already under high pressure.

We wish to thank all the members of Vetspanel for their continuous support and participation in our research. It is thanks to you, through taking the time out of your busy schedules to share your experiences and points of view with us, that we are able to produce such work based on robust data.

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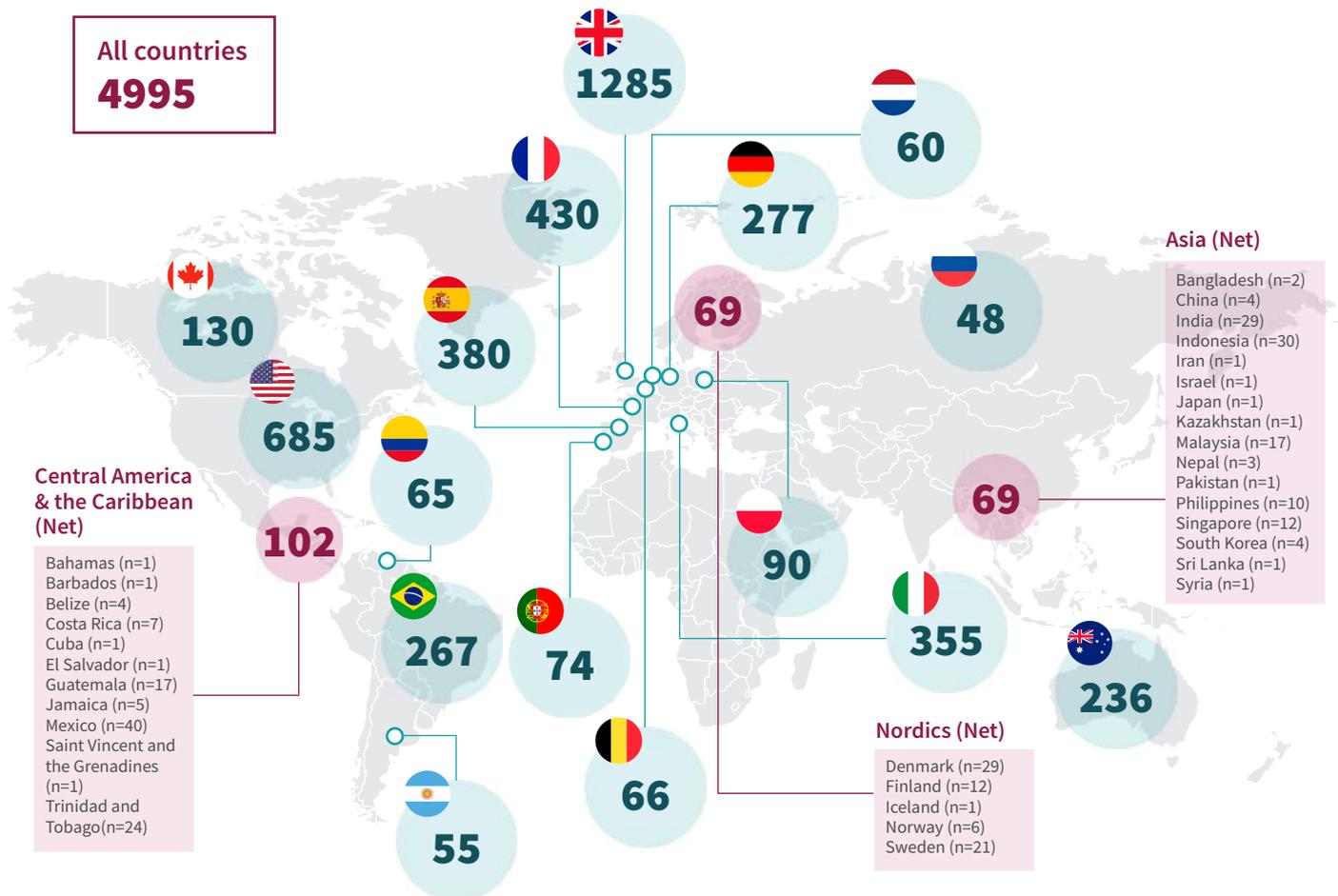
# Survey Methodology

The findings included in this report are based on the data collected in the latest Vetsurvey and are supplemented by any relevant data from the preceding years.

Since 2013 the Vetsurvey is conducted once a year and is sent out to all members of Vetspanel in a form of a 20-minute self-completion online questionnaire. The most recent survey was conducted in November 2020. After the initial invitation sent by e-mail, up to 4 e-mail reminders were released to those who had not yet completed the questionnaire.

All Vetspanel members are carefully screened veterinary professionals, including practising veterinarians, veterinary nurses / technicians, practice managers and others, none of whom receive an incentive for participation in this particular research. The majority of veterinarians deal with companion animals but a small proportion of large animal vets has also taken part in the survey.

The following map shows the countries and number of participants for this year's Vetsurvey:

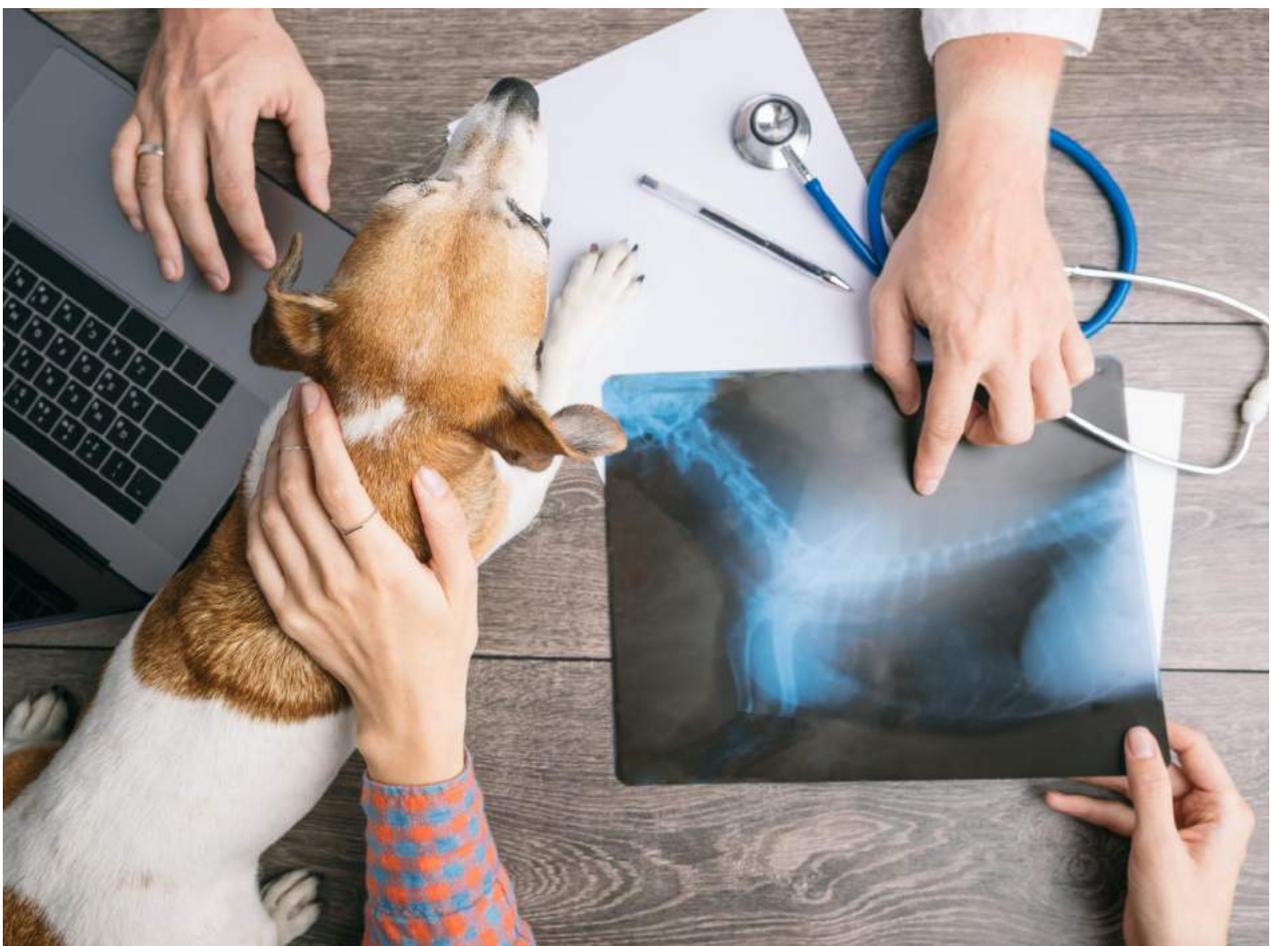


*Tab. X Fieldwork dates for each year of Vetsurvey.*

Year	Full time vets
2013	20th August to 20th October
2014	23rd October to 22nd December
2016	16th November to 16th February 2016
2017	14th March to 25th May 2017
2018	23rd May to 30th July 2018
2020	1st to 30th November 2020

### **PLEASE NOTE: GUIDE TO READING THE REPORT**

- Whilst the study has very broad global coverage (91 countries), we have focussed on the countries and regions with the largest sample sizes.
- A small proportion of participants have only partially completed the questionnaire, however, if deemed sufficient, their data was included in the analysis. This means that the base sizes for some of the questions will not be equal to the participants' totals. As necessary, the base sizes for each question in the following report have been included in all the charts and tables.



LaDépêche  
Vétérinaire

BVA 



WSAVA  
Global Veterinary Community

LA SETTIMANA  
VETERINARIA 



CANADIAN VETERINARY  
MEDICAL ASSOCIATION  
L'ASSOCIATION CANADIENNE  
DES MÉDECINS VÉTÉRINAIRES



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vet times

bpt bundesverband praktizierender tierärzte e.v.

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

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CM Research

Vetspanel 



# Executive Summary

## 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.
- Overall, most veterinarians work in independent practices. 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 & CPD

- 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 (26%).
- 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.

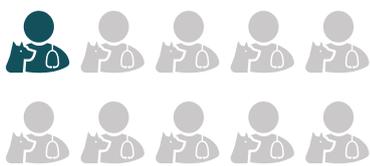
# DEMOGRAPHIC PROFILE OF THE RESPONDENTS



## Position in practice

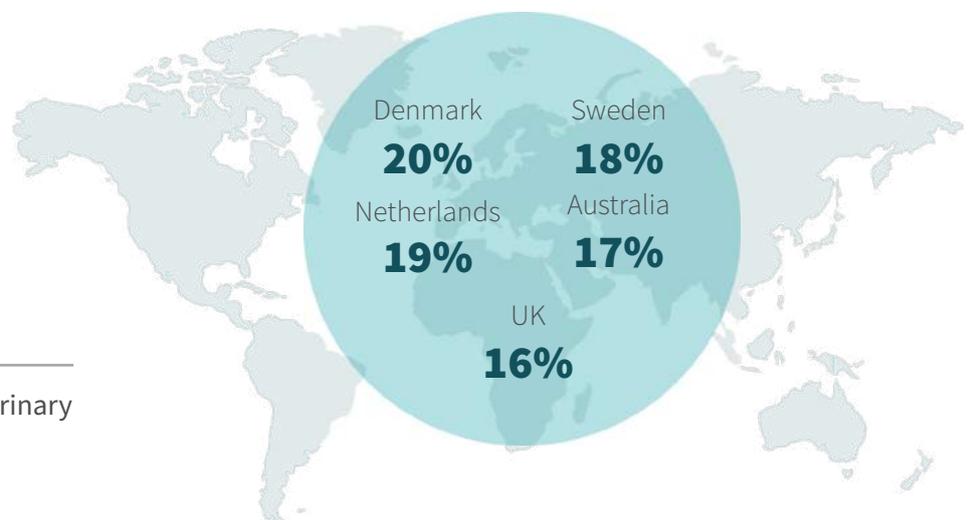
Majority of the survey respondents were full-time veterinarians – either in the position of an owner / partner or employed vets. Only one in ten (10%) veterinarians reported working part-time, with the highest proportion of part-timers being in Denmark (20%), the Netherlands (19%) and Sweden (18%), but also in Australia and the UK (17% and 16%, respectively).

Overall, 9% of respondents are veterinary nurses / technicians, with the highest number of nurses being from the UK, USA and Canada (around 15%).



**10%** veterinarians reported working part-time

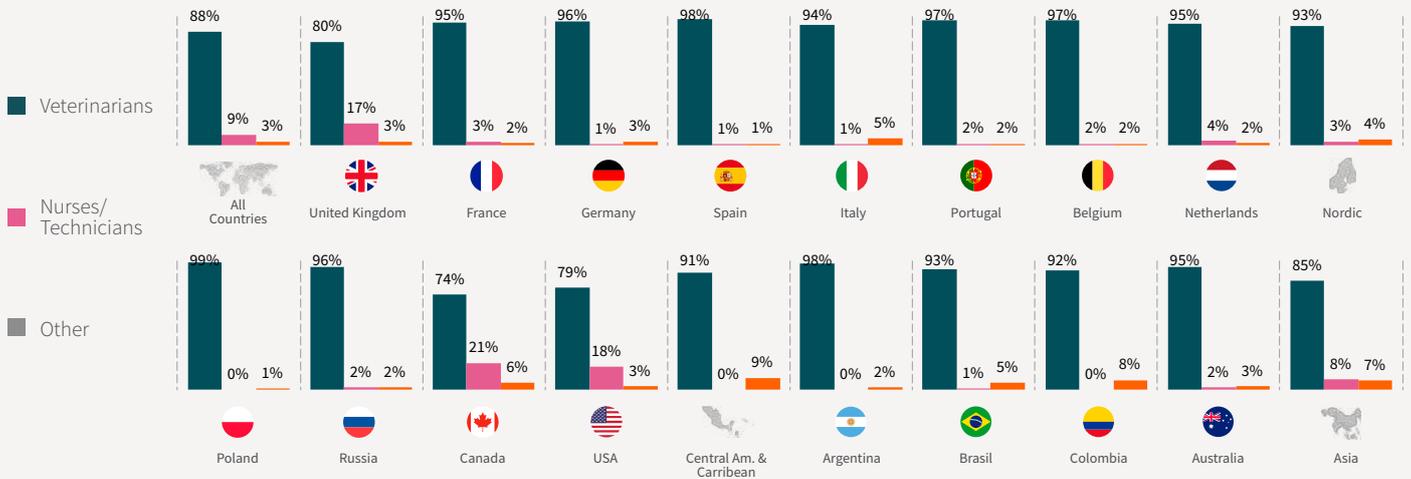
**9%** of respondents are veterinary nurses / technicians



## Role distribution by country/region in 2020

We spoke to mostly veterinarians across all countries. In the UK, US & Canada we reached a higher proportion of veterinary nurses and techs.

Role Distribution (%)

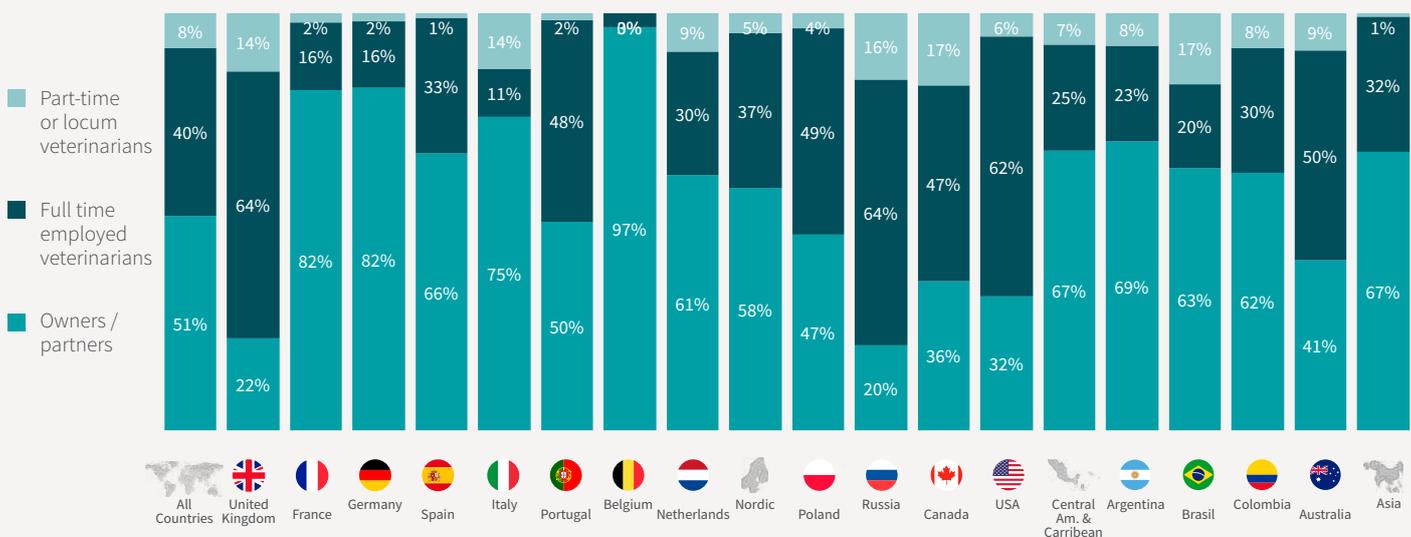


## 2020 distribution of owner/partners and employed vets

Expectedly, countries with higher levels of corporatisation, such as the UK and US, have a higher proportion of employed veterinarians vs. owners/partners. Countries with more independent practices (Germany, Belgium, Spain etc.) have higher numbers of owners/partners.

Owners/partners vs. employed vet distribution – 2020

By country & region

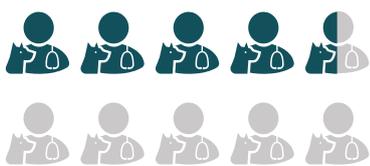




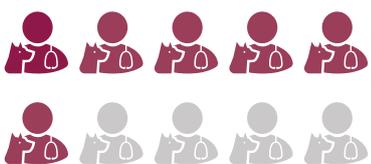
# Age and years of experience

Slightly under half (45%) of veterinarians responding to the survey are aged 40 or less, with a third (34%) aged between 30 and 39. The highest proportion of younger veterinarians (up to 40 years old) – two thirds or more – who participated live in Brazil (71%), USA (70%), Australia and Canada (66%).

Veterinary nurses tend to be younger, over half of them (58%) are aged 34 or less.

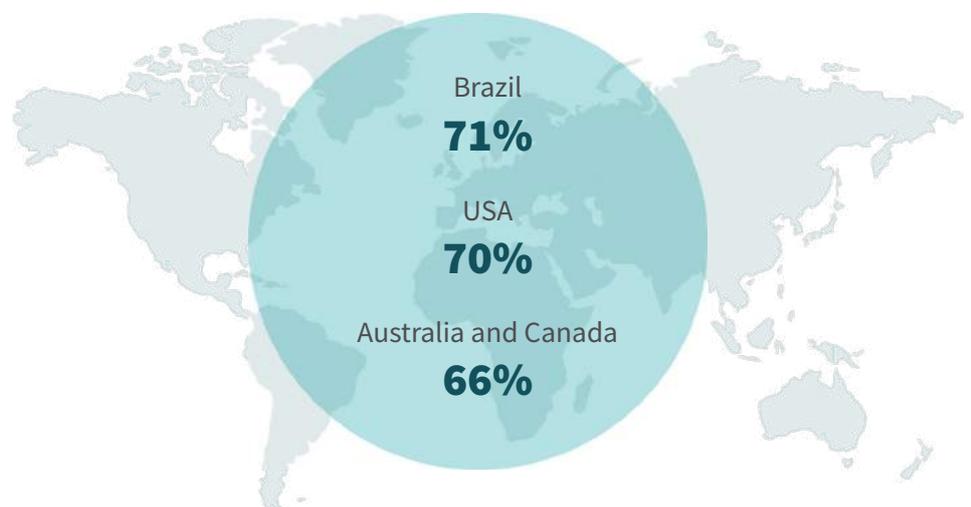


**45%** of veterinarians are aged 40 or less



**58%** of nurses are aged 34 or less

## The highest proportion of younger veterinarians (up to 40 years old)

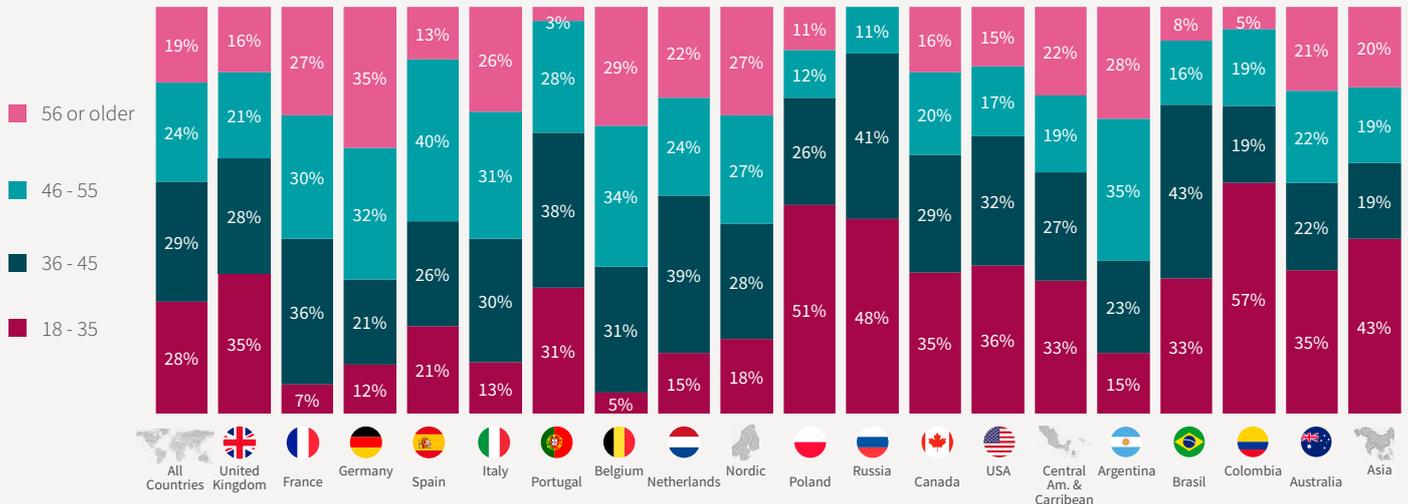


## Age distribution in 2020 by country & region

There is significant variance in age distribution across countries and regions. In Germany, around 1 in 3 (35%) veterinary professionals are 56 or older, whereas in Portugal it is only around 1 in 20 (3%). The UK, Portugal & Poland have the highest proportion of young (under 35) veterinary professionals in Europe, whilst Russia, Poland and Colombia stand out as the youngest veterinary markets surveyed.

### Age group distribution

By country & region



## Median age in 2020

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 tend to be older than employed veterinarians.

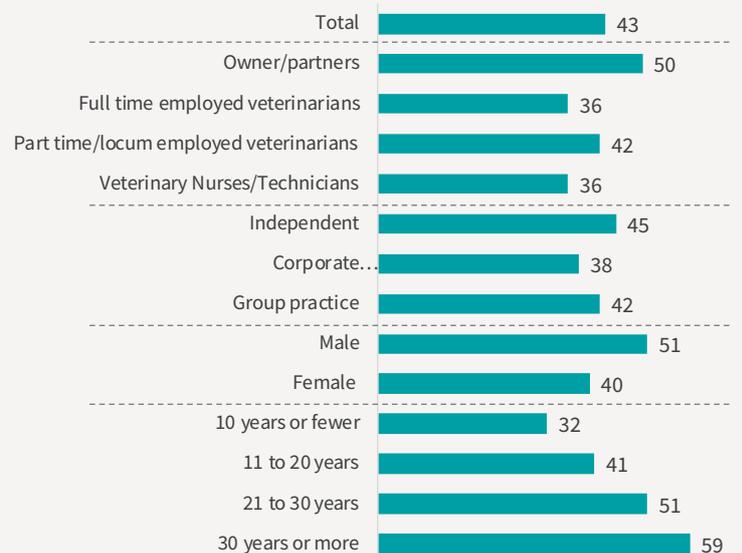
### Median age

By country & region



### Median age

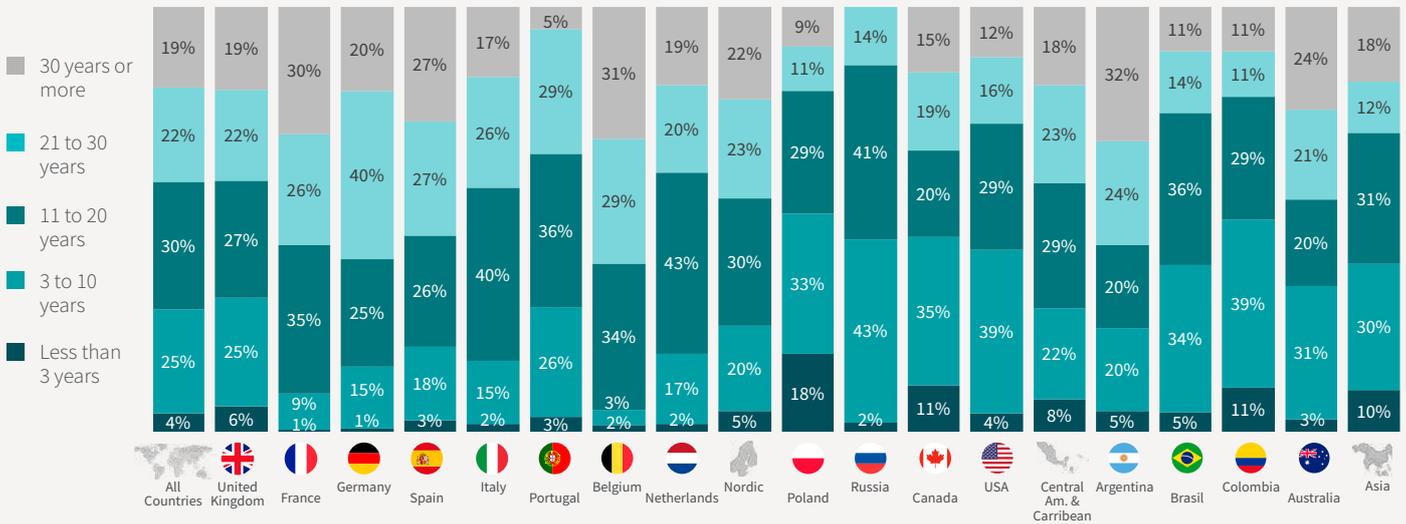
By subgroup – global (all countries)



## Years of experience in 2020 by country & region

Expectedly, years of experience correlates strongly with age. Veterinarians from Poland are the most likely to have less experience (under 10 years), whilst veterinarians in Germany, Belgium and Argentina are most experienced.

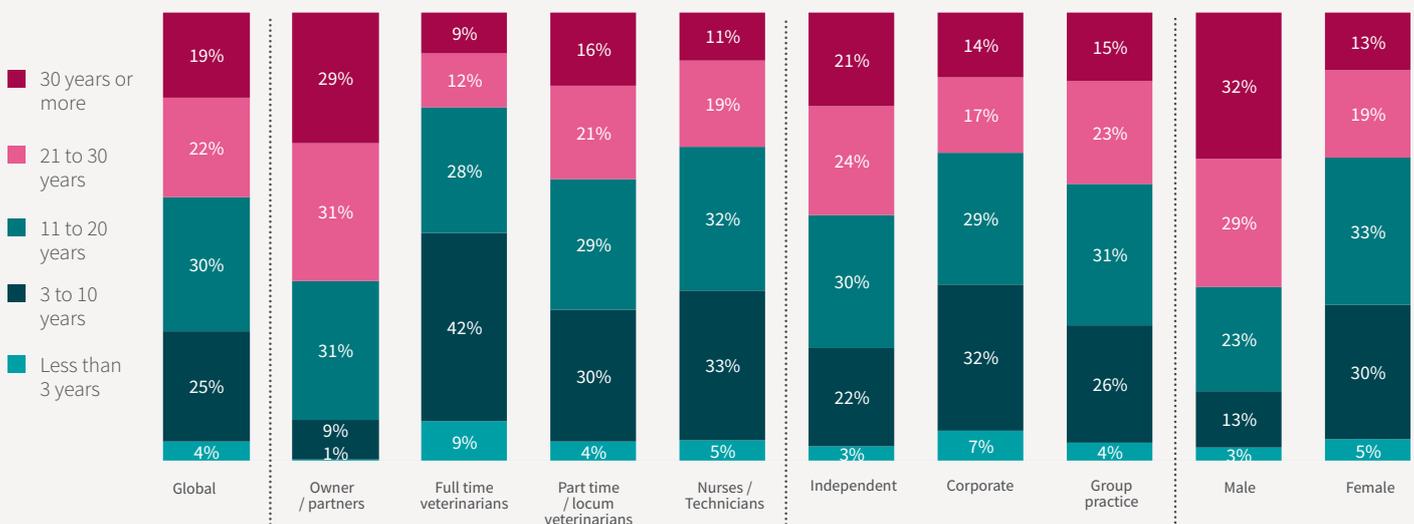
**Years of experience**  
By country & region



## Years of experience in 2020 by subgroup

Veterinarians that work in corporate practices are likely to have the least experience. Part time or locum veterinarians tend to have more experience than full time veterinarians, whilst female veterinarians are most likely to recently have entered the profession.

**Years of experience**  
By subgroup



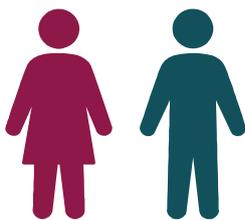


# Gender

## Czech Republic

**62%**

the highest proportion of male veterinarians



Almost balanced split between male and female

Italy, France, Spain, Eastern Europe and Latin America (excluding Brazil)

**48%**

The split between male and female owners / partners

The gender profile of the profession is predominantly female with two thirds of participating veterinarians, and those in other roles (practice managers etc.), being women. Nurses tend to be almost exclusively female.

A steady feminisation of the profession is evident when analysing the gender split by age groups, the data suggests an emerging pattern: while the older age groups (from 50 upwards) are in majority male, the younger age groups are steadily dominated by women, indicating that more and more women are entering the profession.

Czech Republic has the highest proportion of male veterinarians (62%), while in Italy, France, Spain, Eastern Europe and Latin America (excluding Brazil) the split between male and female vets is almost balanced. In the remaining countries at least 58% of the population of veterinarians are women, with the highest proportion being in Canada and USA (nearly 9 in 10).

The split between male and female owners / partners, even though very close to an even break (48%), is disproportional when compared to the overall gender profile of veterinarians where two thirds are women. In some countries the proportion of owners / partners who are female is even lower – this is especially evident in Czechia (34%), Spain (39%) and France (41%). However, in the USA, Canada and Sweden this proportion is considerably higher than the average – around 70% of owners / partners in these countries are women.

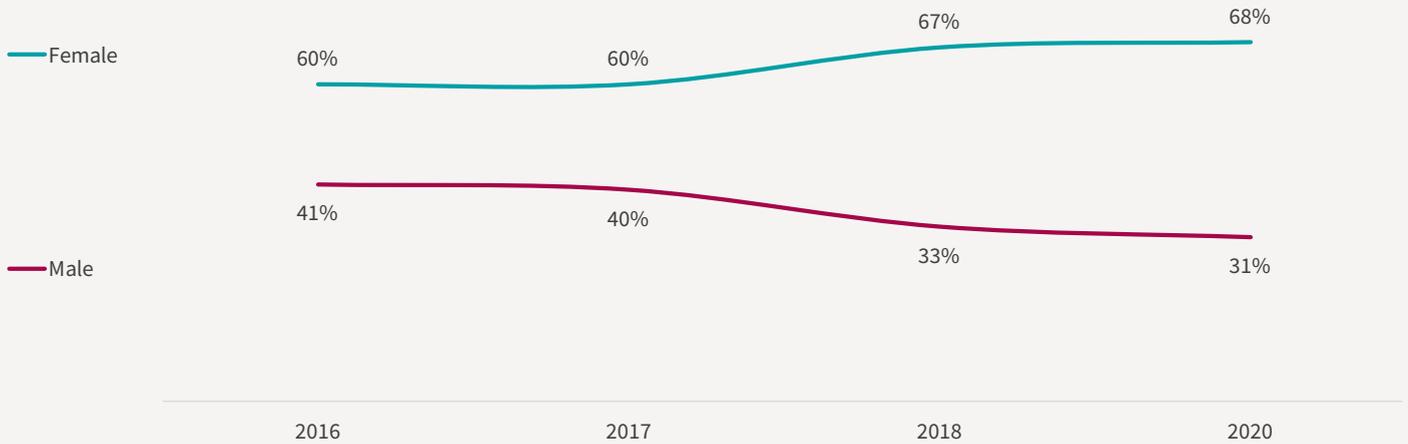
## Gender of veterinary professionals over time

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

### Gender distribution of the veterinary profession over time (%)

Global figures (all countries surveyed)

Prefer not to say & other genders added in 2020 (1% prefer not to say)

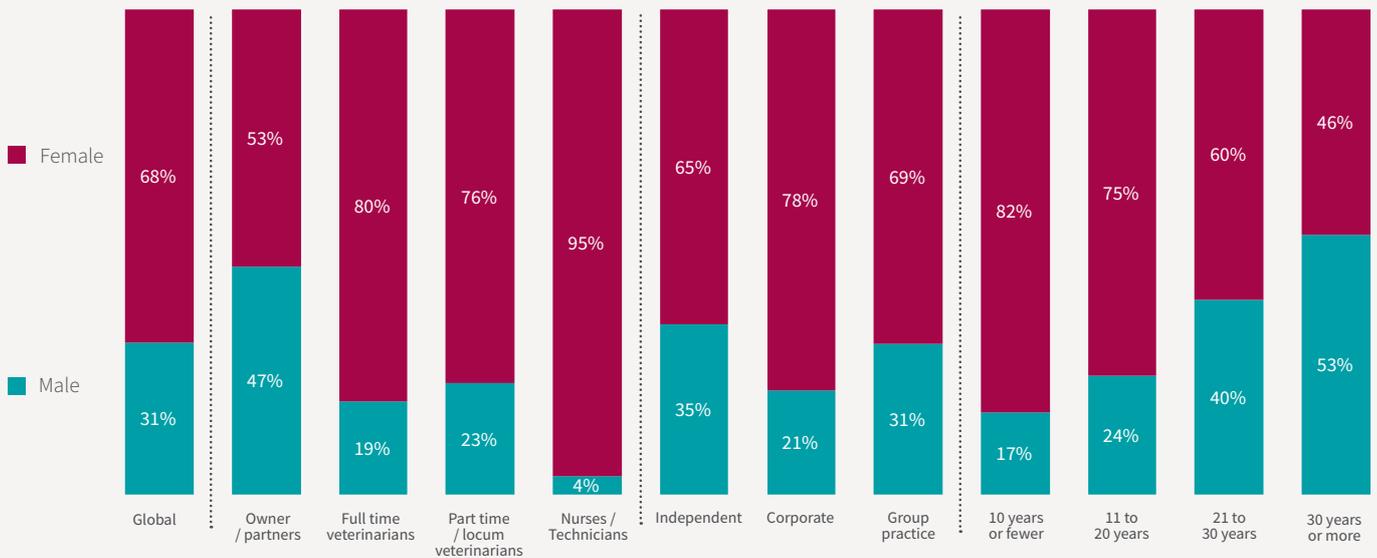


## Gender distribution by subgroup in 2020

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

### Gender distribution

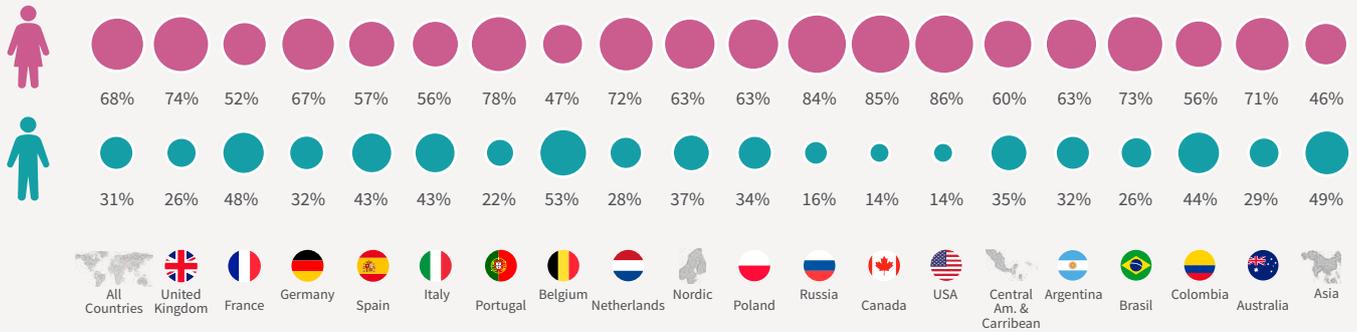
Differences by subgroup, global (all countries)



## Gender in 2020 by country

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

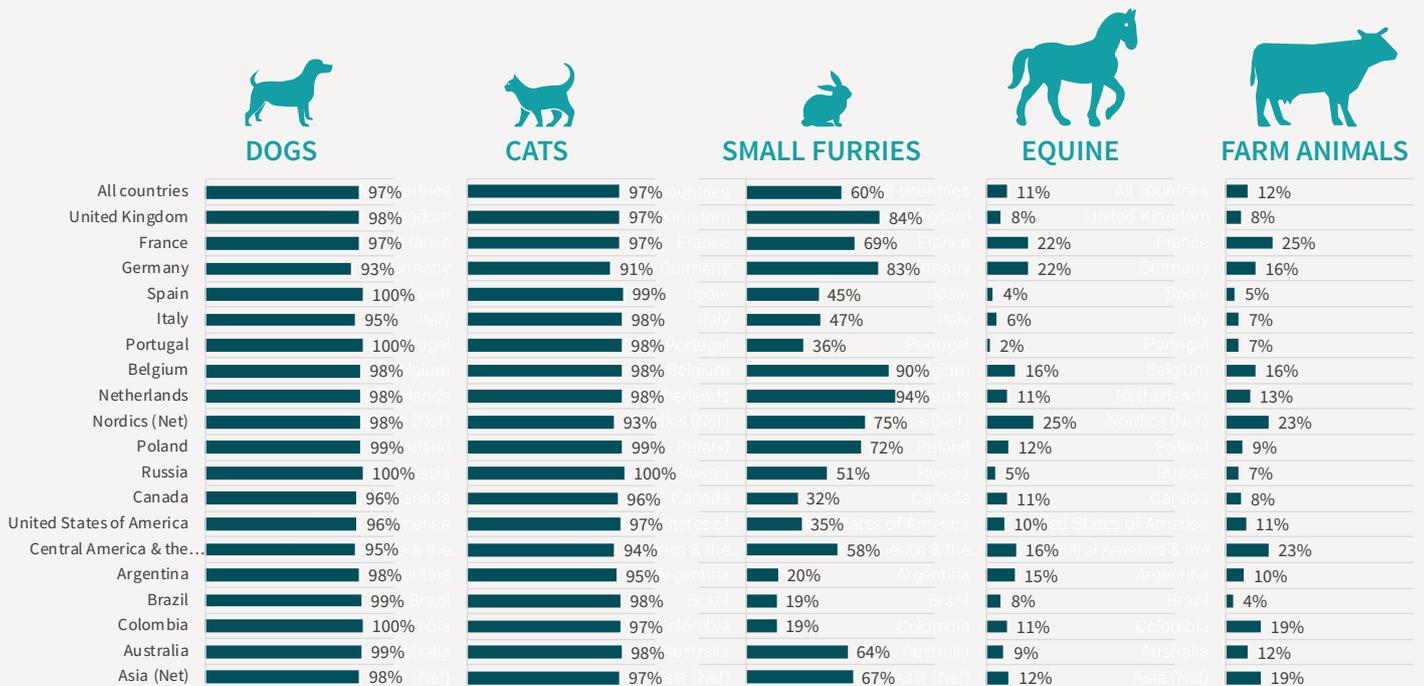
**Gender distribution**  
By country and region



## Species treated in 2020 by country & region

Most of the veterinary professionals surveyed are predominantly small animal focused. Veterinarians that took part from France, Germany, the Nordics and central America are most likely to also treat large animals.

**% vets/nurses/techs, across countries and regions, treating any.....**



# THE PRACTICE PROFILE



## Type of practice ownership

Globally practices remain mostly independent. 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. Spain, Argentina, Belgium, France, Poland and Russia and South American have the highest proportion of independents/privately owned practices.



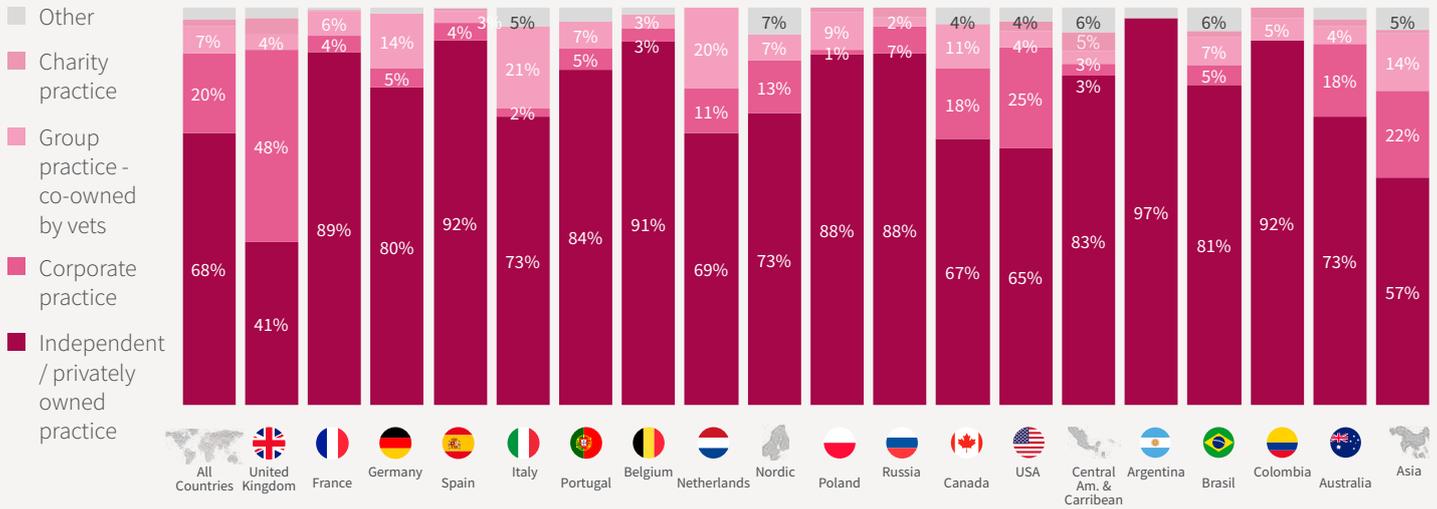
The highest proportion of corporate practices



## Practice ownership by country

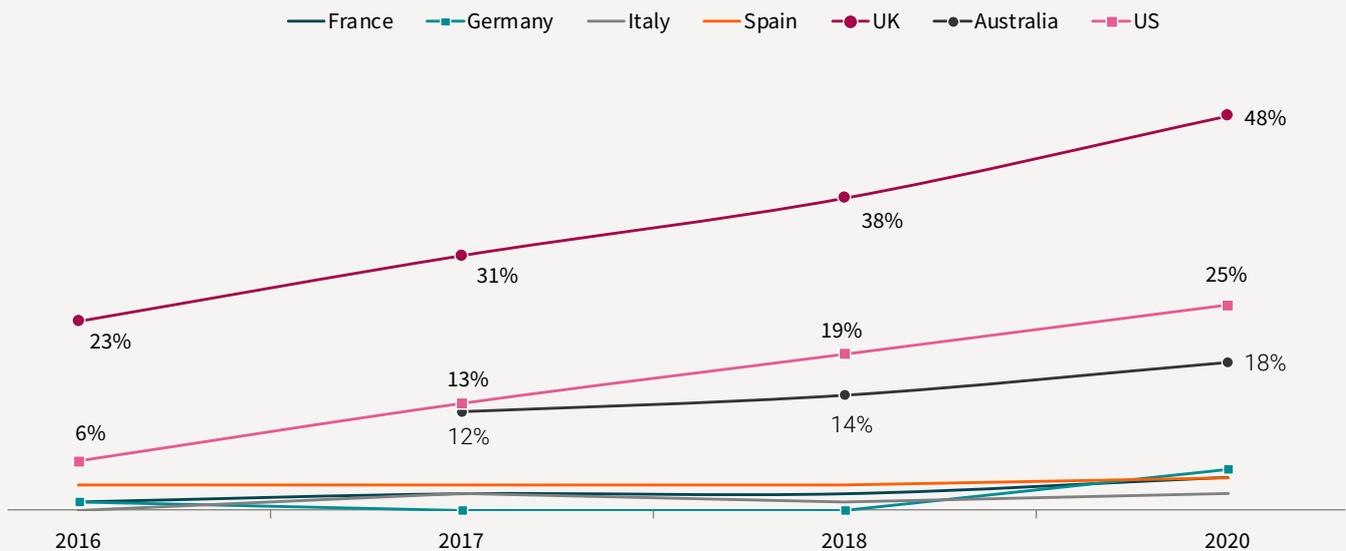
Overall, most veterinary professionals work in an independent/privately owned practice. Argentina, Colombia and Spain have the highest proportions with more than 9 in 10 working in independent/privately owned practices. On the other hand, almost a half (48%) in the UK work in corporate practices.

Practice ownership  
By country & region



## 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.





## Size of practice

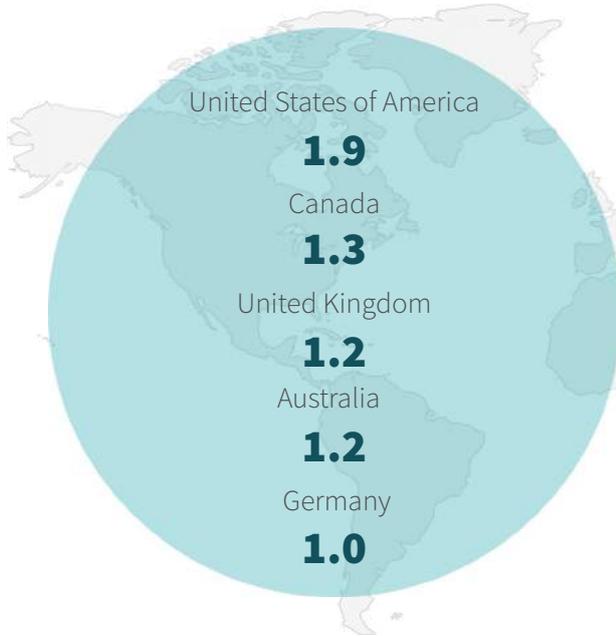
Unsurprisingly, larger practices are found in the countries with higher levels of corporatisation. The UK, US, Australia and Canada have the largest practice size, whereas Belgium, Colombia and Argentina have the smallest practices.

	Total	Full time vets	Part time vets	Full time nurses	Part time nurses	Other staff
All countries	19.6	4.9	1.8	5.4	1.9	5.5
United Kingdom	32.2	7.3	2.6	8.7	3.2	10.4
France	8.5	3.2	1.0	2.9	1.1	0.3
Germany	9.5	2.7	1.0	2.7	1.3	1.7
Spain	6.3	3.2	0.7	1.2	0.4	0.8
Italy	6.2	3.2	1.7	0.4	0.2	0.7
Portugal	10.2	4.3	0.6	2.2	0.1	3.0
Belgium	2.7	1.7	0.2	0.3	0.3	0.1
Netherlands	13.9	2.3	3.4	1.8	5.5	0.9
Nordics (Net)	17.4	5.0	2.1	5.0	2.8	2.6
Poland	5.9	2.8	0.7	1.3	0.3	0.8
Russia	32.6	12.5	4.6	8.5	1.4	5.6
Canada	21.4	4.5	1.8	5.9	1.6	7.6
United States of America	32.0	5.9	1.5	11.1	2.5	10.9
Central America & the Caribbean (Net)	10.4	5.3	1.2	1.1	0.4	2.4
Argentina	3.7	1.1	1.7	0.2	0.4	0.3
Brazil	11.4	3.2	2.5	1.0	0.6	4.2
Colombia	3.8	1.7	0.5	0.6	0.2	0.7
Australia	25.1	5.9	3.1	7.1	5.4	3.7
Asia (Net)	20.2	5.3	1.8	4.8	1.1	7.2

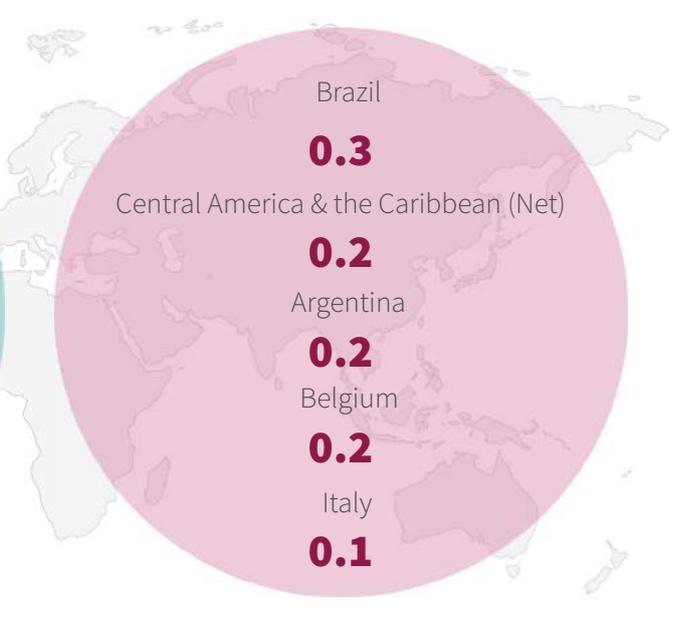
The most well supported veterinarians, with 1.5 or more nurses, techs and other staff per veterinarian are in the US, Canada, United Kingdom, Asia and Australia.

The least well supported veterinarians are in Italy, Argentina, Belgium, Central America and Spain .

### Top 5 countries with highest ratio of vets (full time) vs nurses (full time)



### Top 5 countries with the lowest ratio of vets (full time) vs nurses (full time)



# STATE OF BUSINESS



## Practice finances and staffing

**2020 certainly brought a year of challenges. The stresses of this year have been reflected in our performance outlook measures - finance and staffing.**

This year we saw a significant increase in those who felt they were doing worse financially than the previous year (32% 2020, compared to 19% 2018) and a drop in those who felt they were performing better (40% 2020, compared to 46% in 2018). This is in stark contrast to the trend prior to 2020, as the proportion of veterinary professionals saying they were doing better than the previous year had been on the rise.

# 2018

**19%**

**46%**



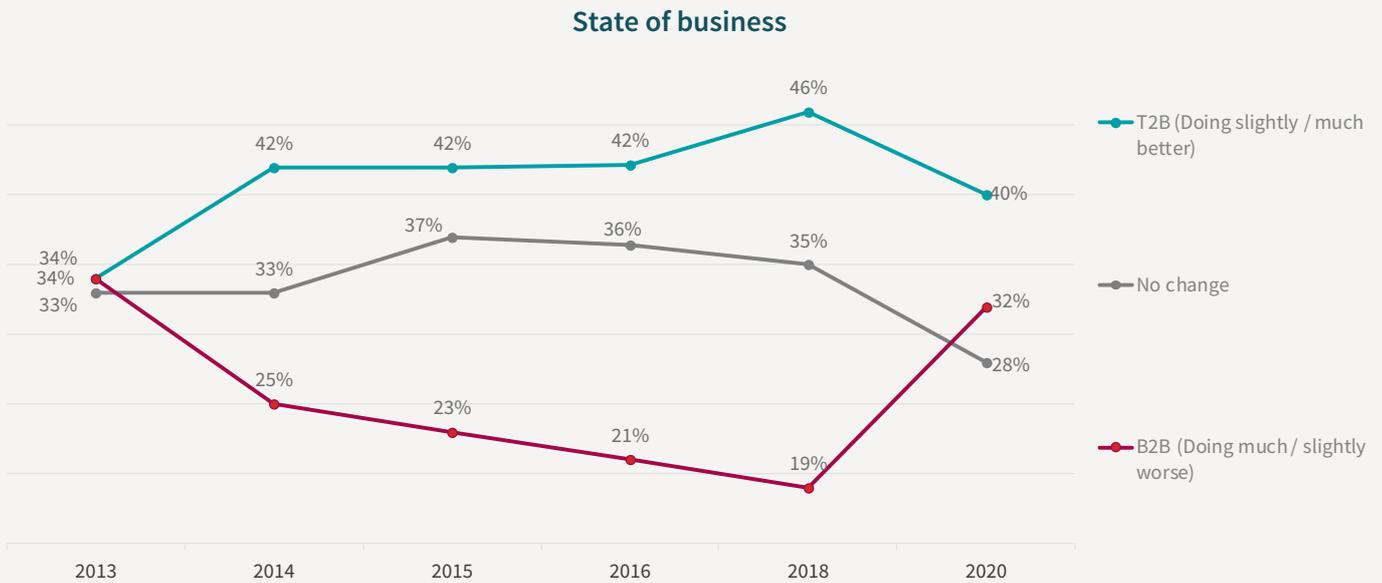
# 2020

**32%**

**40%**

## 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.



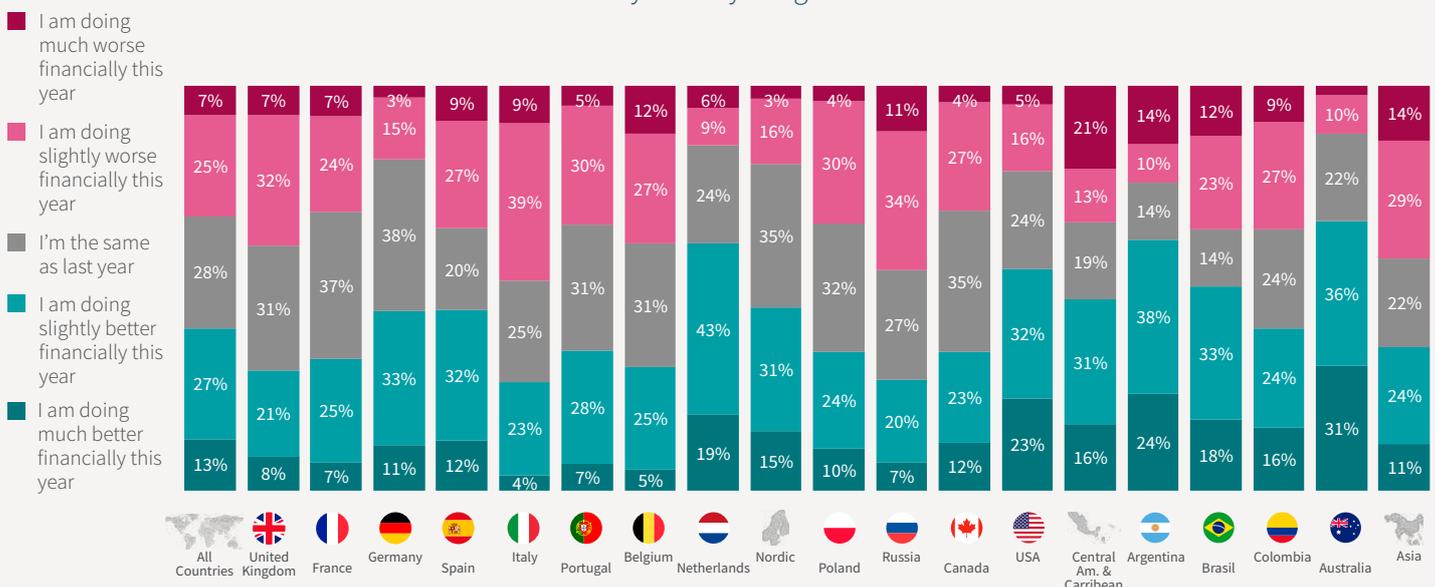
Regionally, there is little difference in financial impact but on a country level Italy reports exceptionally high proportions of veterinary professionals who say they are worse off this year (48%, compared to the global average of 32%).

## 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



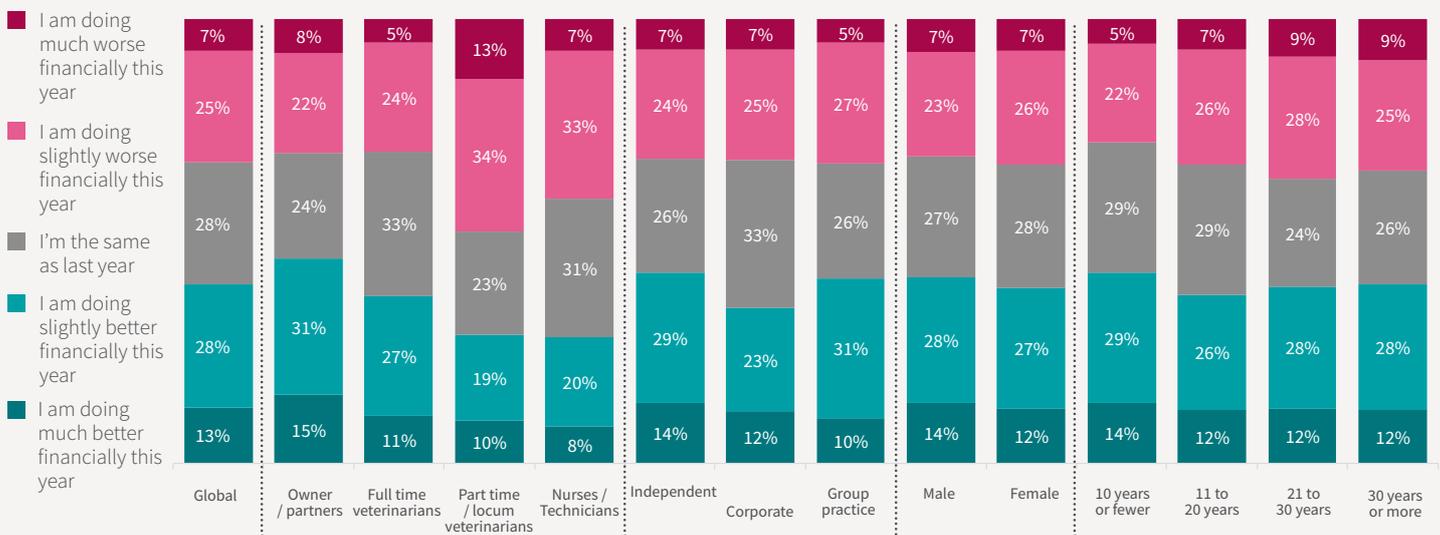
There are some differences by subgroup: part-time veterinarians are most likely to say that they are doing worse financially (48% part-time veterinarians say they are doing worse than last year, compared to 30% for full-time veterinarians), suggesting that this group of veterinary professionals has been hit particularly hard.

However, some seem to have weathered the storm better than others. Those who work for independent clinics are significantly more likely to say they are doing better than last year (43% for Independent/Privately owned practices compared to 35% for corporate practices), but no more likely to say they are doing worse.

## Current financial state by subgroup

### Current financial state

Differences by subgroup, global (all countries)

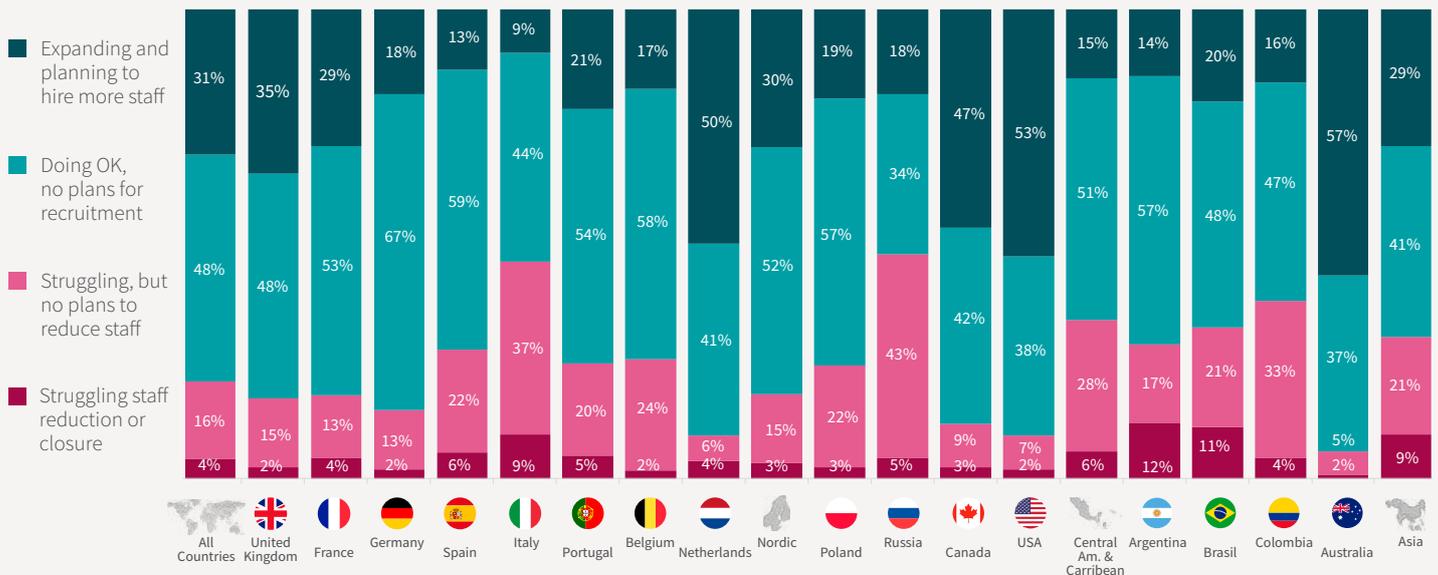


Our second key question that summarises the performance outlook in 2020 focuses on staffing. We asked veterinary professionals whether their clinic intends to expand by hiring staff, reduce staff as they are struggling or maintain current staffing levels. Globally, 2020 was a year of stasis – most practices have no plans to grow or reduce staffing levels.

In North America and Australia, New Zealand, and Oceania the findings were more positive – in these markets over 50% stated that their practice intends to expand and hire more staff (52% North America, 54% Australia, New Zealand and Oceania, compared to the global average of 31%).



### Recruitment plans By country & region

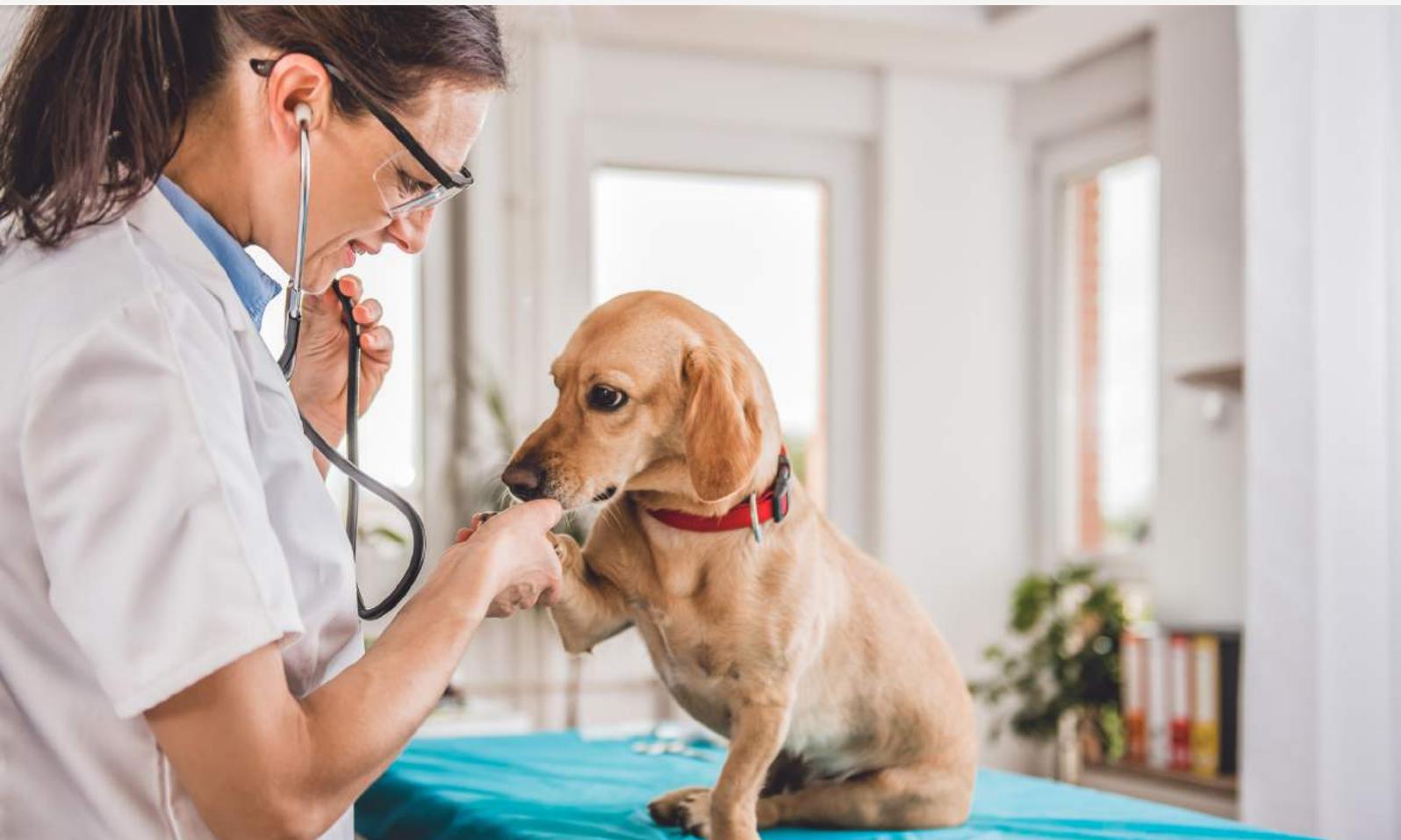
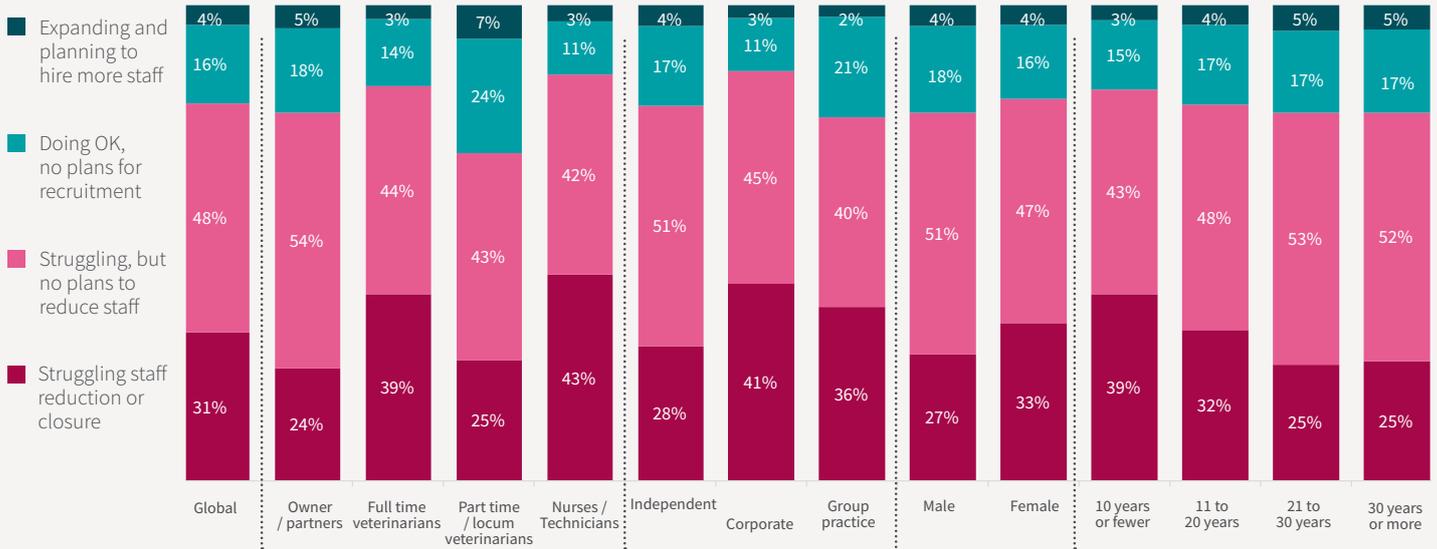


Independent practices are more likely to say they are struggling (21% vs. corporates 14%) whereas corporate practices are more likely to say they are expanding and plan to hire more staff (independents 28%, corporates 41%).

Emergency practices are also more likely than other kinds of practices to say they are expanding (56% vs. speciality 39% and general 30%).

### Current financial state

Differences by subgroup, global (all countries)



# COMMUNICATION



How veterinary professionals interact with clients, individuals & companies in the veterinary industry changed dramatically as a result of COVID-19 with greater uptake of virtual and remote methods of communication and a sharp decline in face-to-face contact. To assess this impact, we first asked veterinary professionals about current methods of contacting clients and then asked about their interactions with manufacturers.

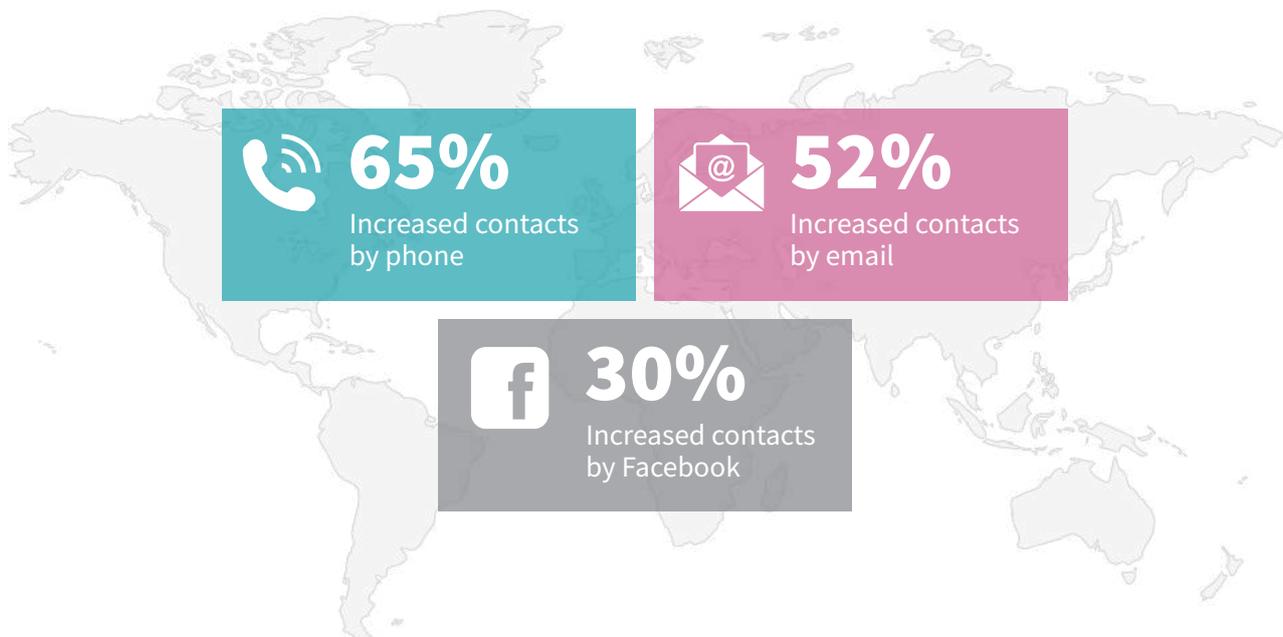
Globally, contacting clients by telephone has increased most noticeably - 65% of veterinary professionals say that contacting clients by phone has increased since COVID-19. Closely following this, over half (52%) say that email usage has increased while a third (30%) say that they are contacting clients via Facebook more now than before COVID-19. 1 in 5 (20%) say that their usage of post / letters has decreased while 14% say they use less leaflets than before the pandemic.

In North America the proportion of veterinarians who say that telephone usage to contact clients has increased (79%) is significantly higher than the global average (65%). The same is true for email (69% compared to a global average of 52%), suggesting that the shift in communication methods has been more active in this market than in others.

South America and Central America, Mexico and the Caribbean favour Facebook when communicating with clients, with 43% and 42% respectively saying they use this method more now than before COVID-19 which is significantly higher than the global average of 30%.

Use of post / letters decreased most notably in Western Europe (22%) and Australia, New Zealand and Oceania (33%). The United Kingdom and Canada is driving email usage (74%, 75%) alongside the US (68%). The same story is true for increases in telephone usage (81%, 82%, 78%).

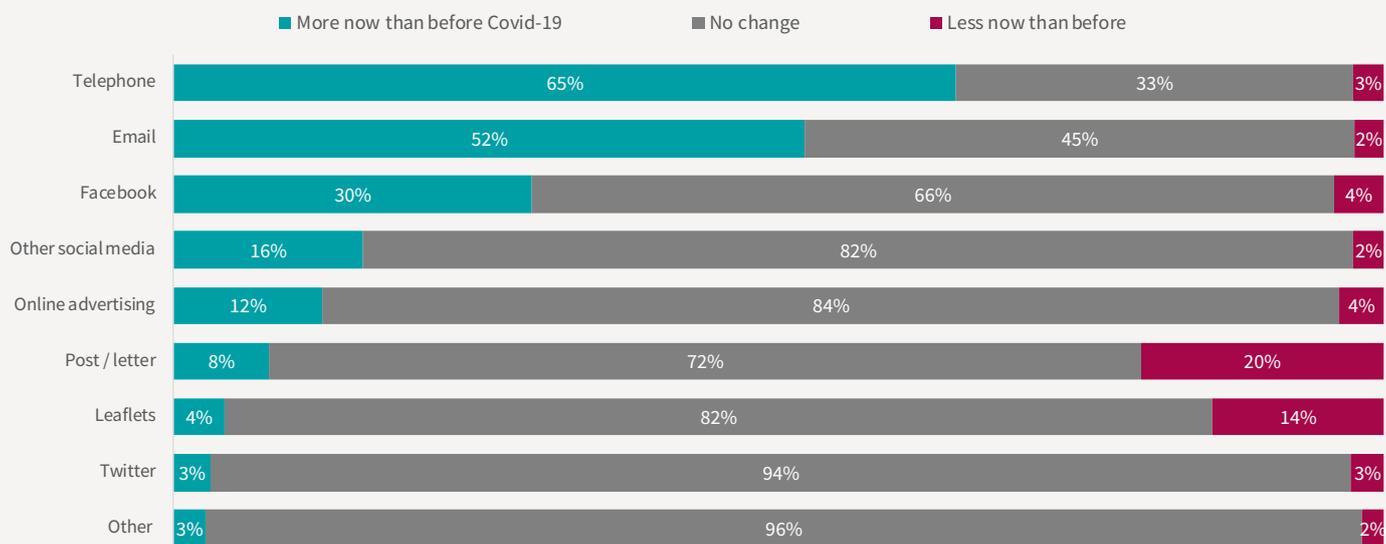
Corporates are king when it comes to championing the switch in communication methods with clients. Veterinary professionals who work in corporate practices are significantly more likely to say they use more email (corp. 73%, ind. 46%), telephone (corp. 80%, ind. 61%) and Facebook (corp. 33%, ind. 29%) than independents, when compared to before COVID-19.



## Contacting clients

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

### Contacting clients Global



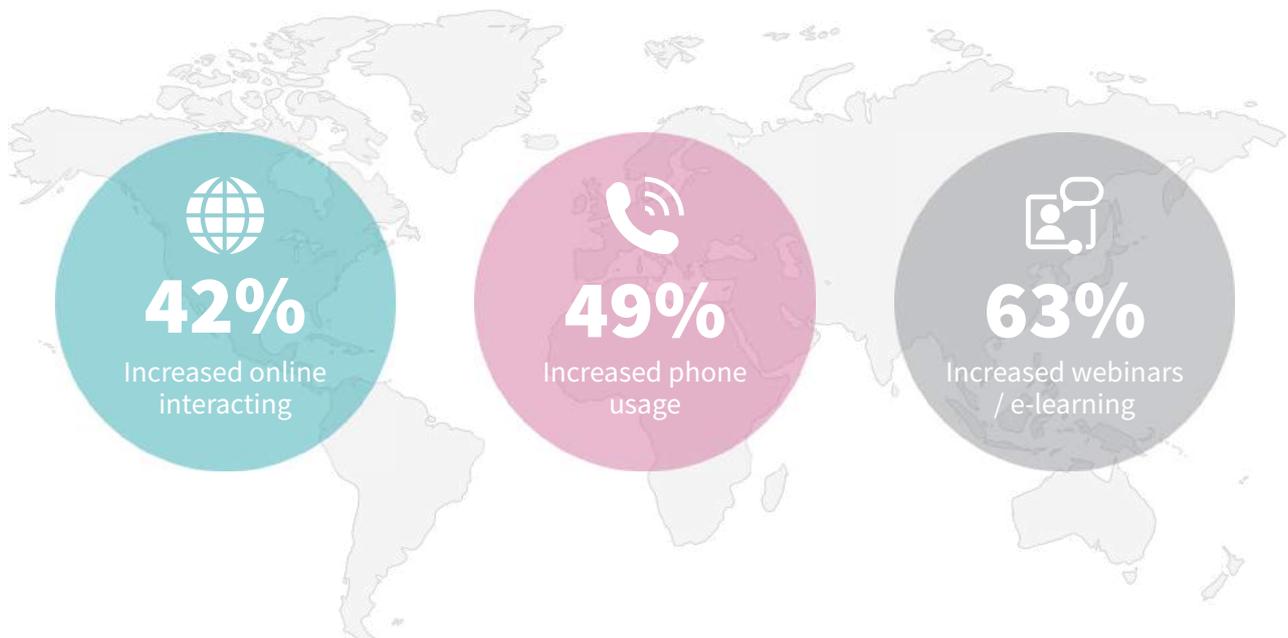
NQ2. Thinking about the time before the Covid-19 outbreak, compared to now/today, how has your clinic's usage of each of these ways of contacting clients changed?



Ways of interacting with veterinary manufacturers have also changed. Most noticeably on a global level is that 75% say that face to face meetings have decreased. The drop in face to face meetings is largest in North America (84%) and Western Europe (76%).

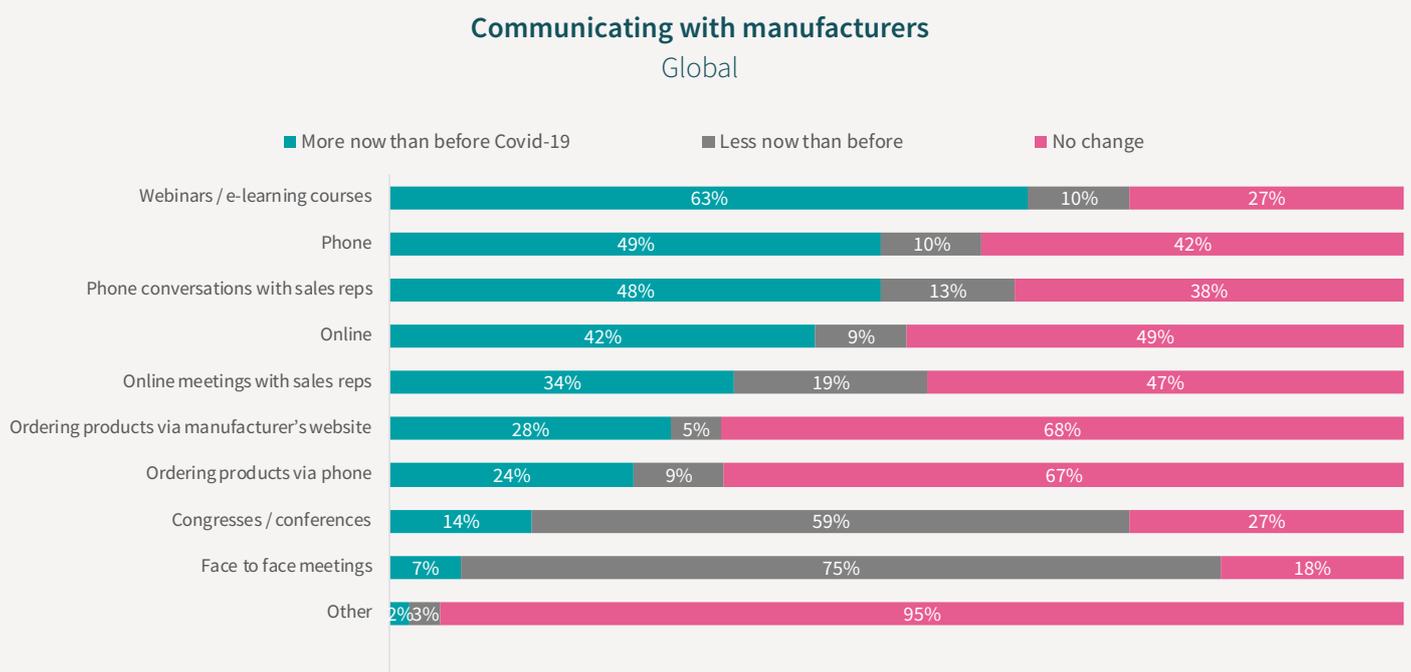
On a global level, half say that online (42%) and phone usage (49%) have increased. Two thirds (63%) say that webinars / e-learning has increased while 59% say that congresses / conferences have decreased.

Conversations with sales reps are now more likely to take place over the phone (48% say this has increased) but online meetings have not increased at quite the same rate (34%).



## Communicating with manufacturers

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



NQ3. And how were you communicating with manufacturers before the Covid-19 outbreak compared to now?



# CPD

Continuous education continued as close to normal as can be expected in 2020 with the biggest addition being specific advice relevant for the pandemic. Although the top subject for CPD was still areas of speciality (attended by 49%) more than a third (37%) attended additional education on this new subject - advice on coronavirus.

Although attendance of CPD on coronavirus was high globally there are some market differences. Significantly more veterinary professionals in Western Europe (40%) said that they received CPD on advice on coronavirus than any other region. This was largely driven by high proportions attending CPD on coronavirus advice in Spain (55%) and UK (49%). Canada (52%) is also high. Interestingly, those who work for corporate practices are significantly more likely to have received advice on coronavirus (42% compared to 32% for independents) than those who work for an independent clinic.

Advice on coronavirus was attended equally across all job roles. However, for other CPD subjects there were some role differences. Practice owners and partners were more likely to have attended CPD on human resources (10%), practice management (25%), diagnostics (31%) and client management (16%) than other job roles while employees were more likely to attend for self-development (20%) and for areas of speciality (53%) than others. Overall, nurses and technicians were the least likely to attend any CPD at all, with over a quarter saying they had not done so (28%).

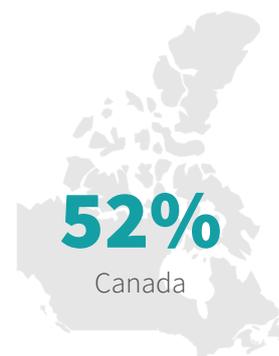
Areas of speciality as a top subject for CPD

**49%**

Additional education on advice on coronavirus

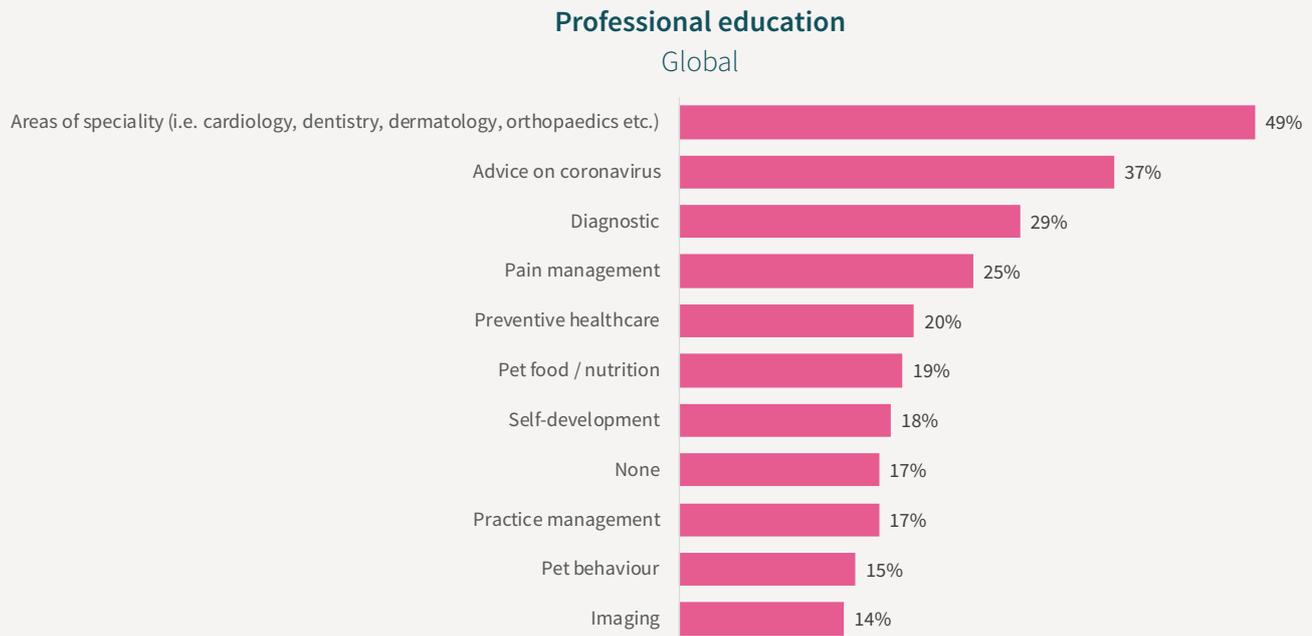
**37%**

## ATTENDANCE OF CPD ON CORONAVIRUS

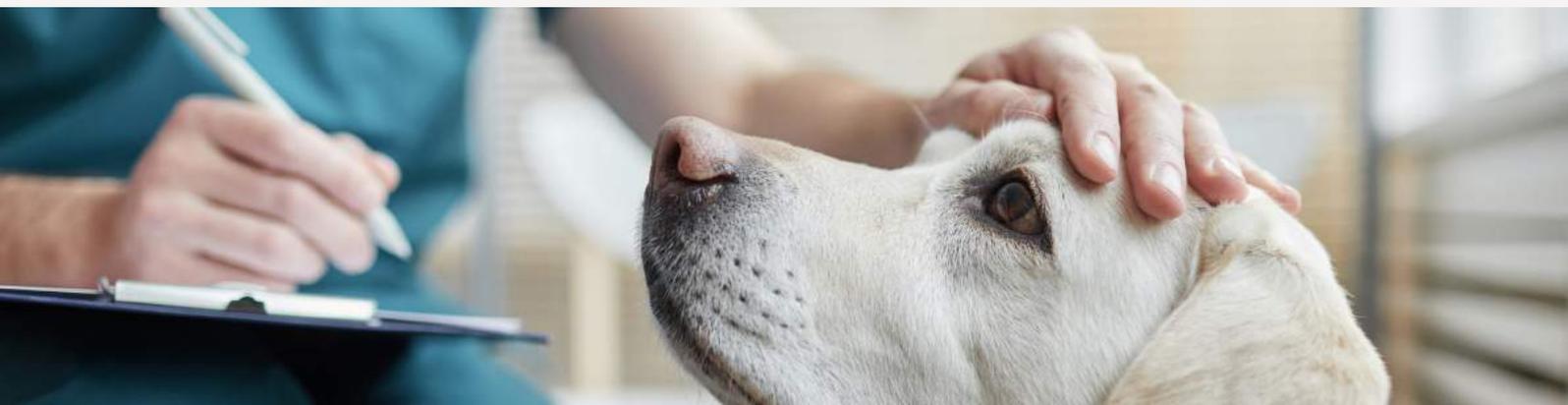


## Professional education

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.



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



We also asked veterinary professionals to rate the usefulness of different methods of CPD delivery by allocating 100 points across a variety of options.

Overall, pre-recorded online webinars (23.1) came out on top as the most useful method of CPD delivery – reflecting the change in preference for online and remote interactions. However, this is followed by attending events in person (22.4) which points to a hunger for in-person education. Preference for attending events in person is driven by Australia, New Zealand and Oceania (27.2) as well as the Nordics (29.5). Pre-recorded webinars are favoured in Western Europe (24.3) – in particular Italy (26.6) and the UK (25.3).

Least useful sources include other online sources (7.4) and printed sources (7.6).



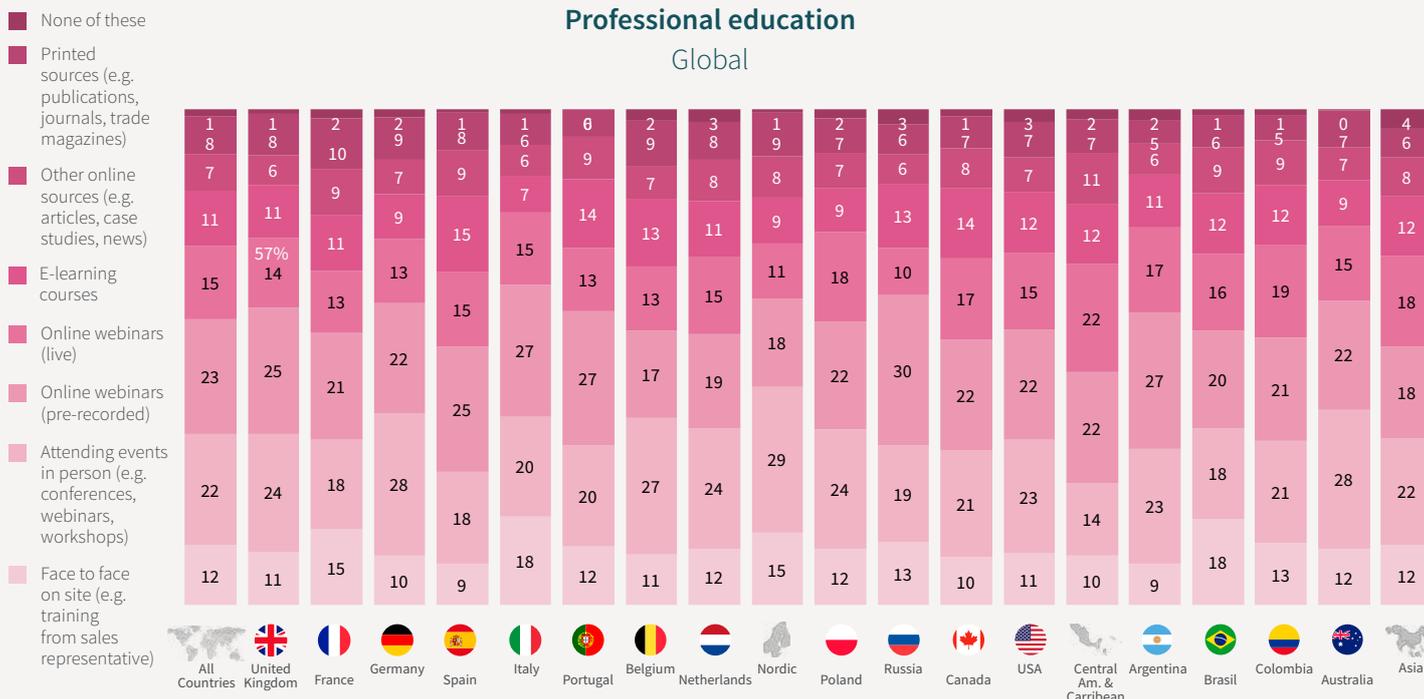
**23.1** pre-recorded online webinars



**22.4** attending events in-person

# 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.



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?



# CHALLENGES FACING PRACTICES

## TOP 5 BIGGEST CHALLENGES IN 2020



In 2020 we see a major shift in the key challenges facing veterinary practices across the world. Whilst the key challenge remains the high workload, its magnitude is now much higher than we have previously seen. Globally the proportion of veterinarians who state that the biggest challenge their practice faces is too much work has risen from over a third in 2018 (37%) to more than half in 2020 (53%). Time Management is the second top challenge mentioned, seeing a rise from 30% in 2018 to 40% today.

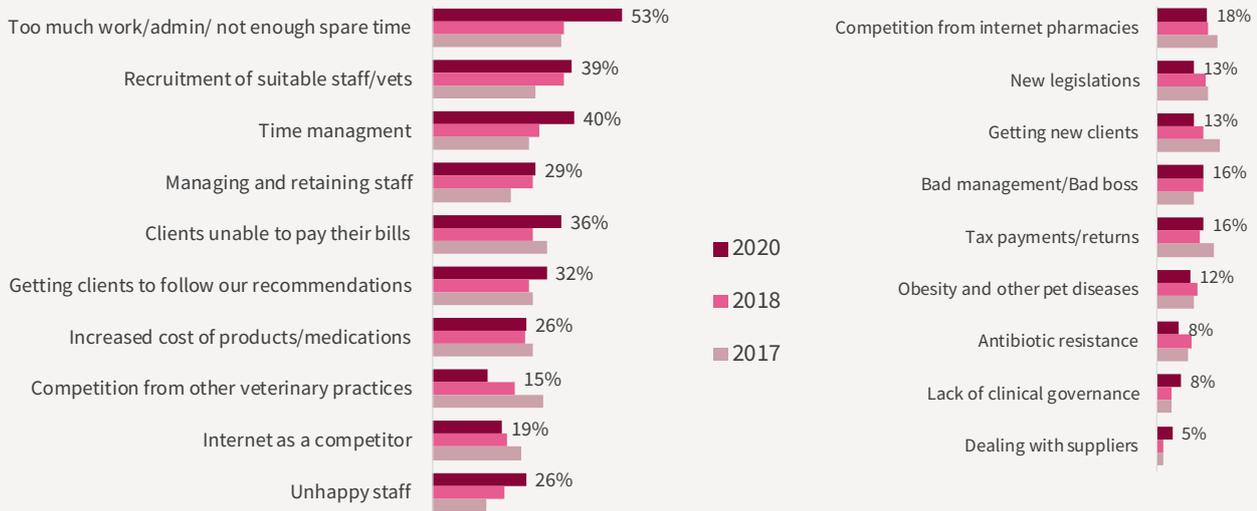


## Biggest challenges over time

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

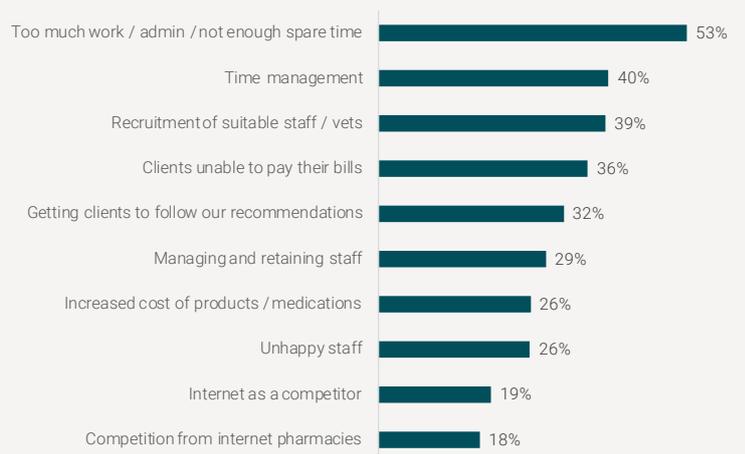


## Top 10 in 2018 vs Top 10 in 2020

### Top 10 challenges in 2018



### Top 10 challenges in 2020



In 2018 recruitment and staff management was the second highest area of challenge, where we had seen a year-on-year increase regarding staffing concerns.



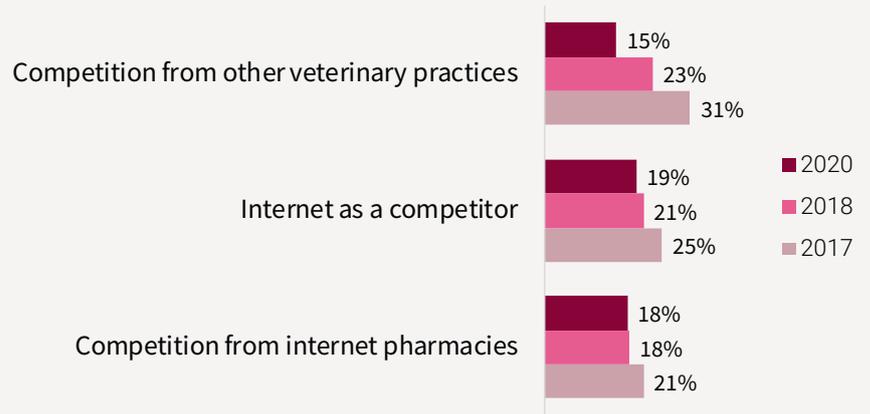
This year we see a marked drop of both recruitment and management & retention of staff as a key challenge facing practices.

However, though recruitment, management & retention are no longer a growing concern, we start to see an upwards trend regarding challenges in staff morale. Since 2017 the percentage of veterinary professionals stating that “unhappy staff” is a key challenge has increased from 15% to 26%.

Whereas staffing took the second spot for biggest challenge in 2018, it is now replaced by challenges surrounding clients. “Clients unable to pay their bills” has increased from 25% in 2018 to 36%, and “getting clients to follow our recommendations” has increased at a similar rate; from 22% to 32%. This is likely linked both to the financials pressures brought about by the pandemic, as well as the increases in client load and pet populations that we have been seeing across the past year.

	2017	2018	2020
Clients unable to pay their bills	<b>30%</b>	<b>25%</b>	<b>36%</b>
Getting clients to follow our recommendations	<b>28%</b>	<b>22%</b>	<b>32%</b>

In 2020 we see competition becoming less relevant – both from other practices & from the internet. This is likely due to the growing demand for veterinary services during the pandemic, and the greater need to adapt to new technology and online services.





# Regional differences

There are some clear regional differences.

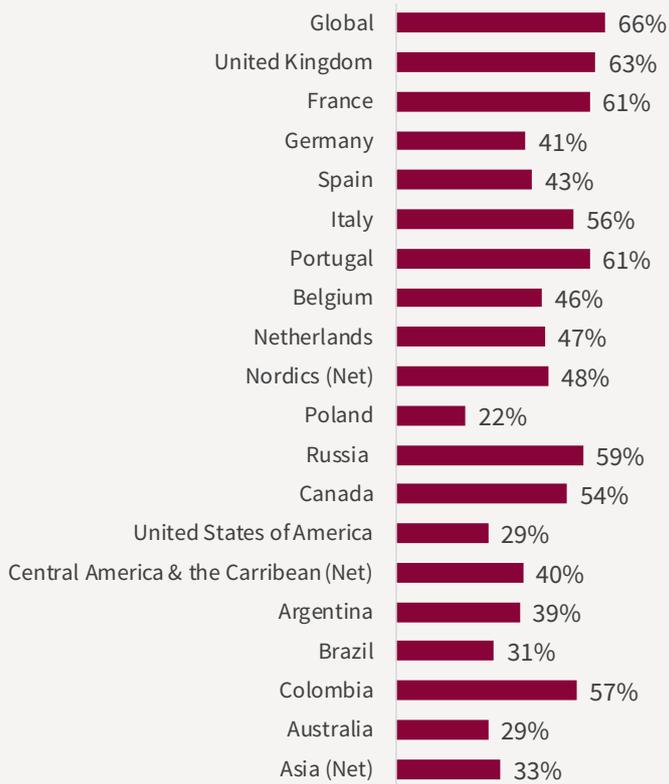
## Time management

In most countries, having too much work or admin and not enough spare time are 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.

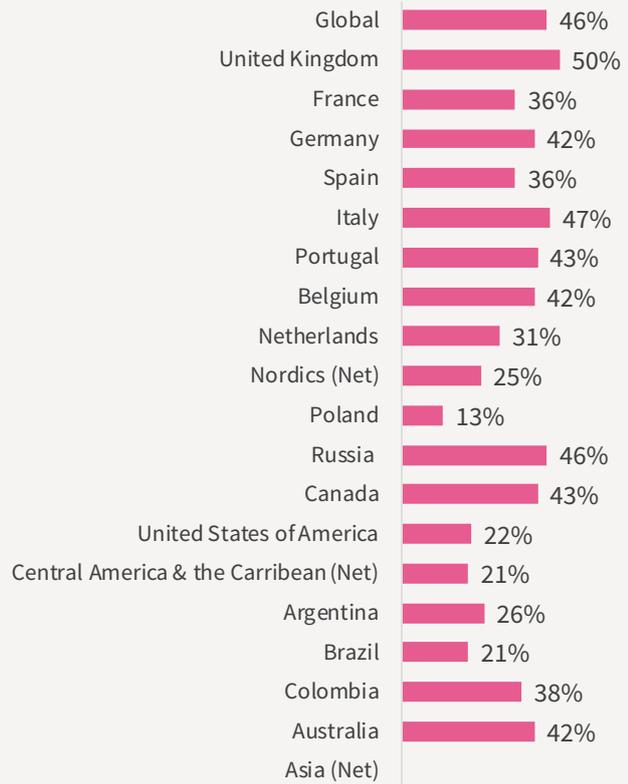
### TOP 5 MOST OVERWORKED



## Too much work, not enough spare time



## Time management



VS1. What would you say are the biggest challenges facing your vet practice at this moment?

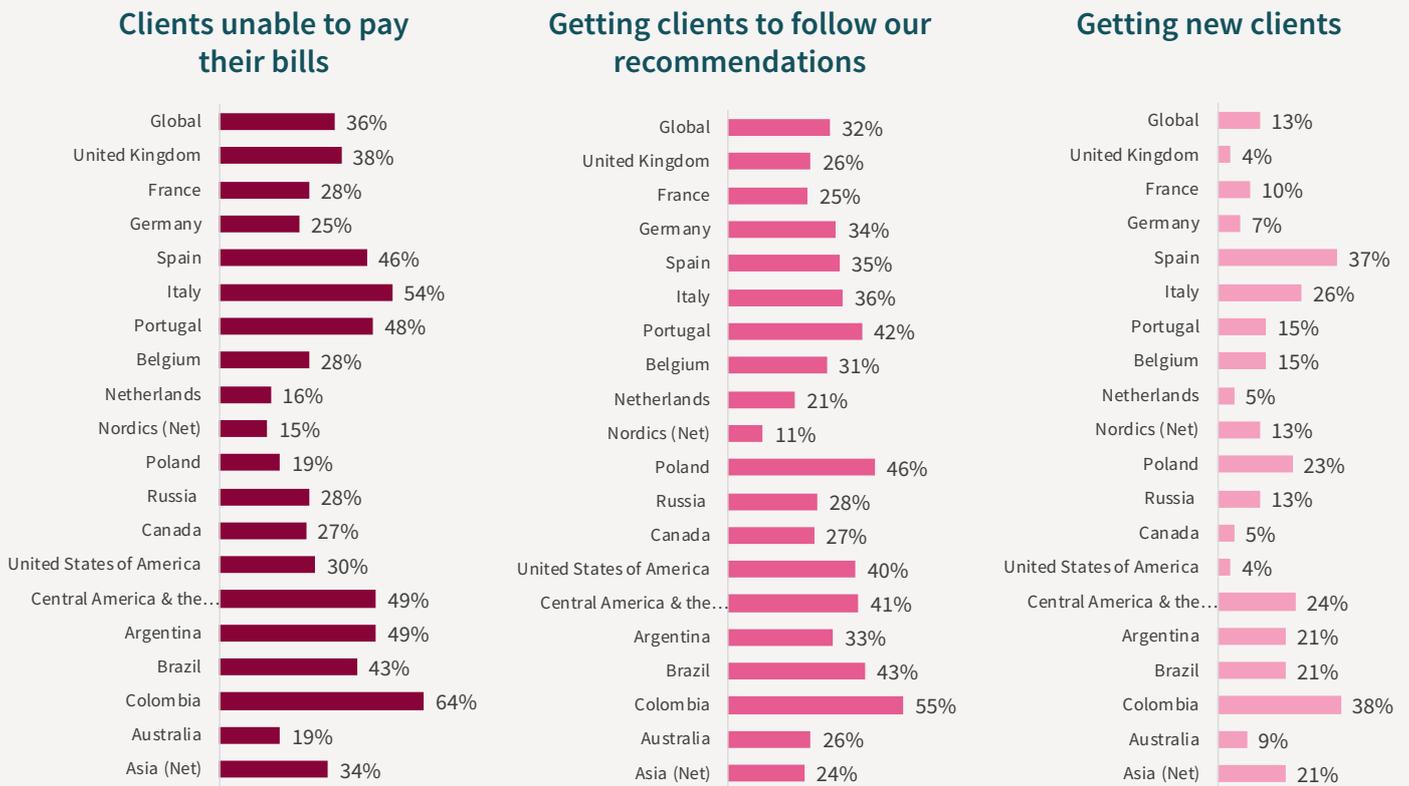


## Clients

In Italy & Spain getting clients to pay their bills is a key issue more than in any other countries in Europe, along with trying to get more clients. This speaks to how the pandemic has hit these countries.

However, in Poland compliance is the key client challenge, where nearly half (46%) of veterinarians say that “getting clients to follow our recommendations” is a challenge facing them.

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.



VS1. What would you say are the biggest challenges facing your vet practice at this moment?

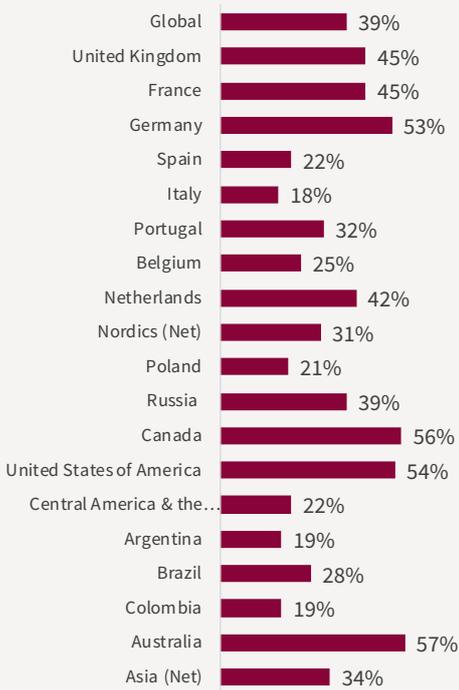


# Staffing

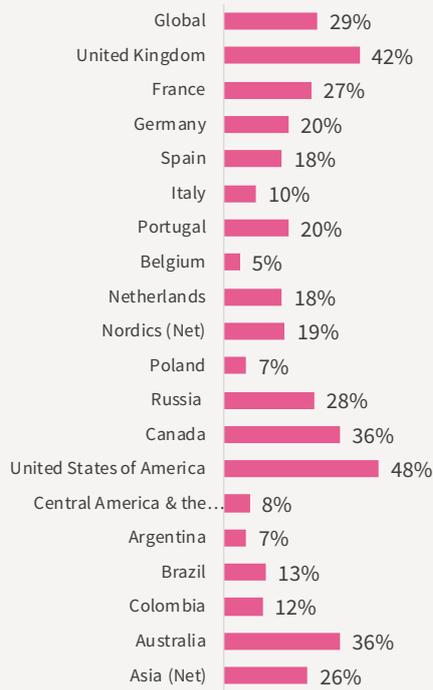
Australia & Canada are reporting the highest levels of staff recruitment issues with 57% and 56% respectively. The US, Germany, France, Netherlands and the UK are also struggling with recruitment. Retention issues are highest in the UK and US.

Unhappy staff is unsurprisingly also an issue in countries where there are recruitment challenges; especially the UK, US & Canada

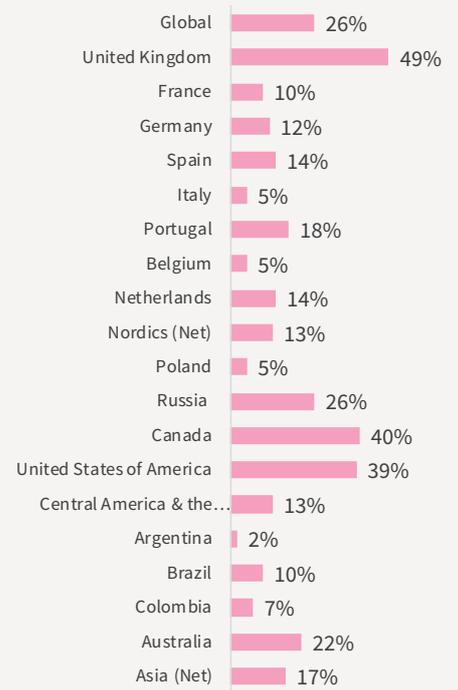
## Recruitment of suitable staff



## Managing and retaining staff



## Unhappy staff



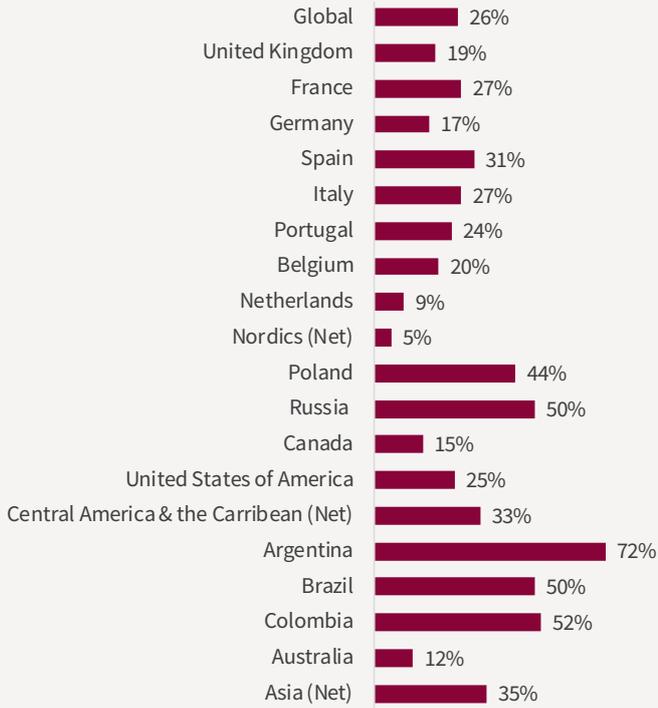
VS1. What would you say are the biggest challenges facing your vet practice at this moment?



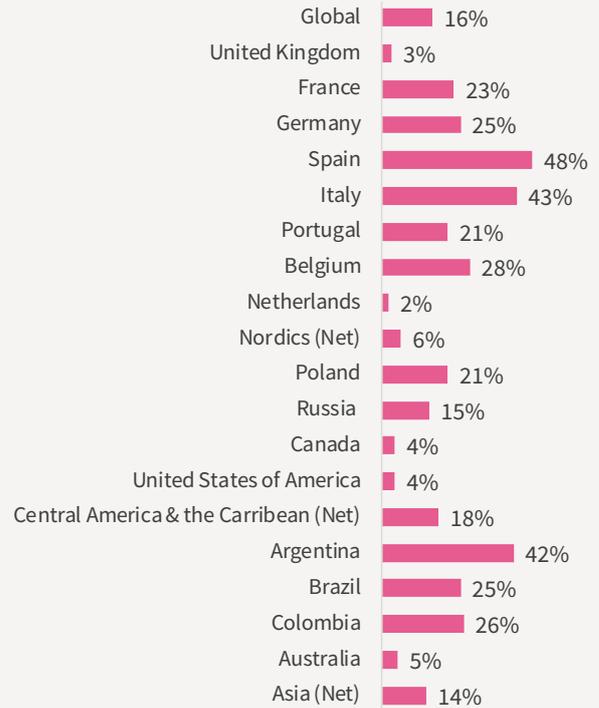
## Costs & finances

South America & Eastern Europe are the regions with the biggest financial challenges at the moment, with nearly three quarters in Argentina & around a half in Brazil, Colombia & Russia saying that rising costs of products and medication are among the biggest challenges they face.

### Increased cost of products/medicines



### Tax payments/returns



VS1. What would you say are the biggest challenges facing your vet practice at this moment?



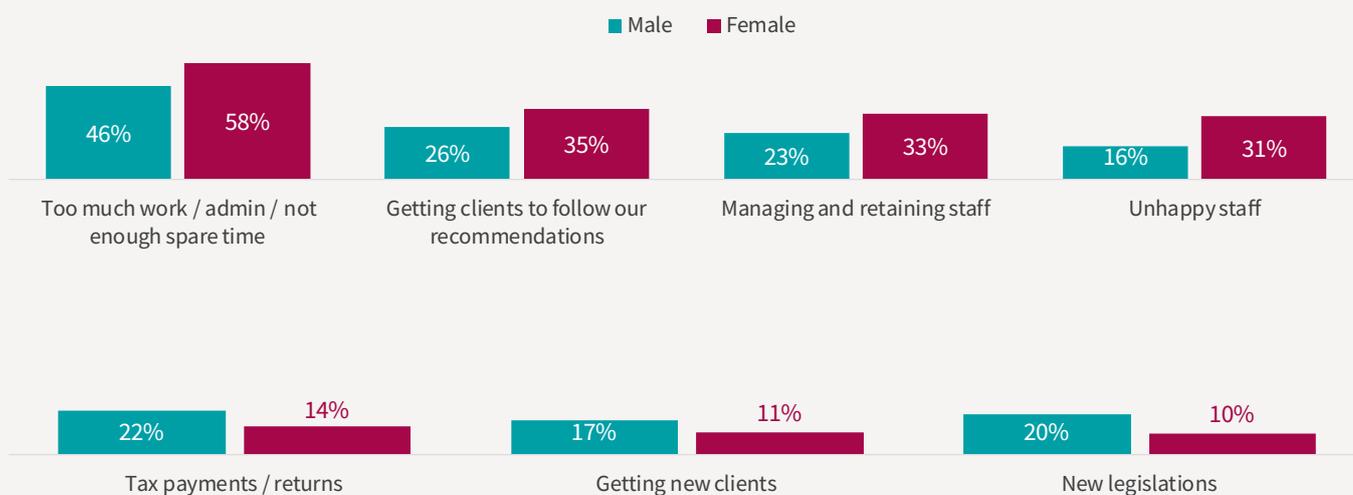


# How challenges differ by group

There are some clear differences in magnitude of the challenges veterinary professionals face when we look at various subgroups.

## Gender

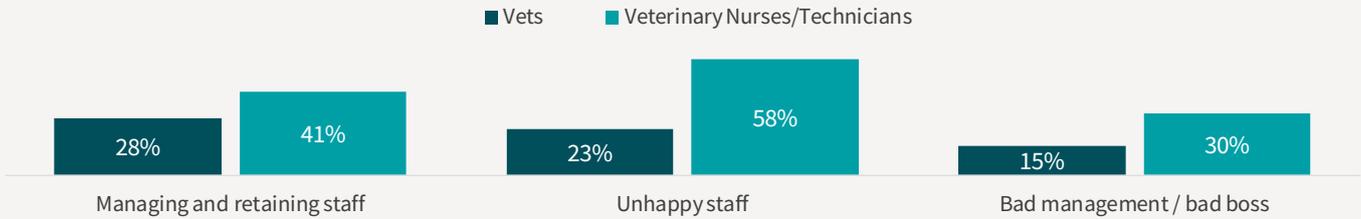
Challenges around time and staff are reported more strongly by female veterinary professionals than male veterinary professionals. Male veterinarian professionals are more likely to be concerned with financial or commercial challenges (though workload remains the top issue for males too).



VS1. What would you say are the biggest challenges facing your vet practice at this moment?

## Role

There is a striking difference between veterinarians and nurses/techs when it comes to staff happiness. Nurses and technicians are more than twice as likely to mention unhappy staff as an issue as compared to veterinarians.



VS1. What would you say are the biggest challenges facing your vet practice at this moment?



# VETERINARY WELLBEING & CAREER PLANS



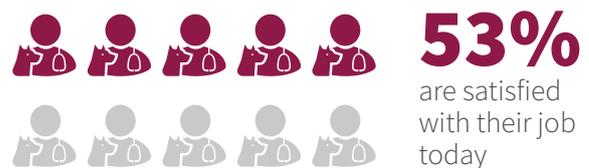
The following chapter provides a close look at job satisfaction and stress levels of veterinary professionals and compares today's scores to pre-Covid-19 days. It also explores the current levels of burnout, compassion fatigue, and disinterest in work, which are related to important factors such as job performance and employee turnover. We also explore the impact of work-life balance on veterinary professionals' likelihood to leave the profession and focus on long-term career aspirations.



# Job Satisfaction

## Veterinary professionals are most satisfied in the Nordics & Netherlands

Overall, veterinary professionals rated their job satisfaction level relatively high before Covid-19. Seven out of ten (70%) state they are ‘very satisfied’ or ‘somewhat satisfied’ with their jobs. However, this reduces to around a half (53%) when asked about today’s job satisfaction levels across all countries. In pre-Covid-19 scores, the Netherlands has the highest number of satisfied professionals at 91%, followed by Nordic countries (including Finland, Iceland, Norway, Sweden) at 85%. The Netherlands & Nordics remain the most satisfied countries today, with the Nordics seeing only a small drop in satisfaction levels. The Netherlands drops 15 percentage points (from 91% to 76%). When comparing before Covid-19 to today’s scores, the most dramatic decline comes from Russia with a decrease of 29% (from 77% to 48%), followed by the United Kingdom where the number of satisfied professionals drops from almost three quarters (71%) to less than half (44%).



■ HIGHEST JOB SATISFACTION RATE

■ LOWEST JOB SATISFACTION RATE

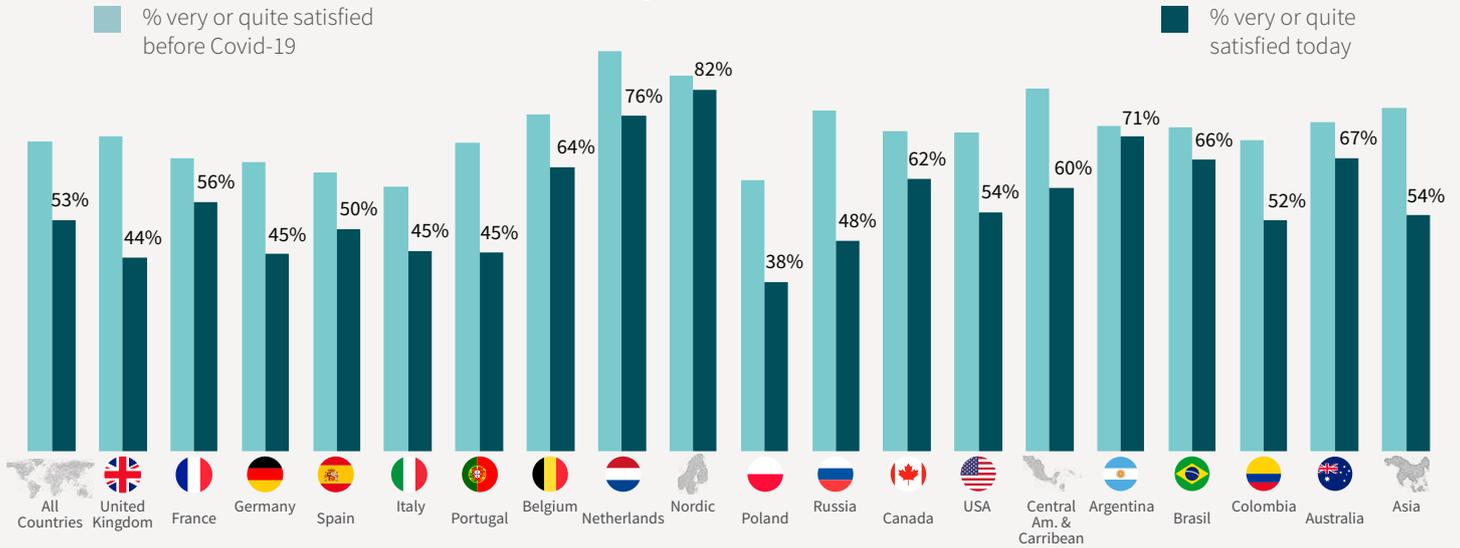


## Job Satisfaction levels

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%.

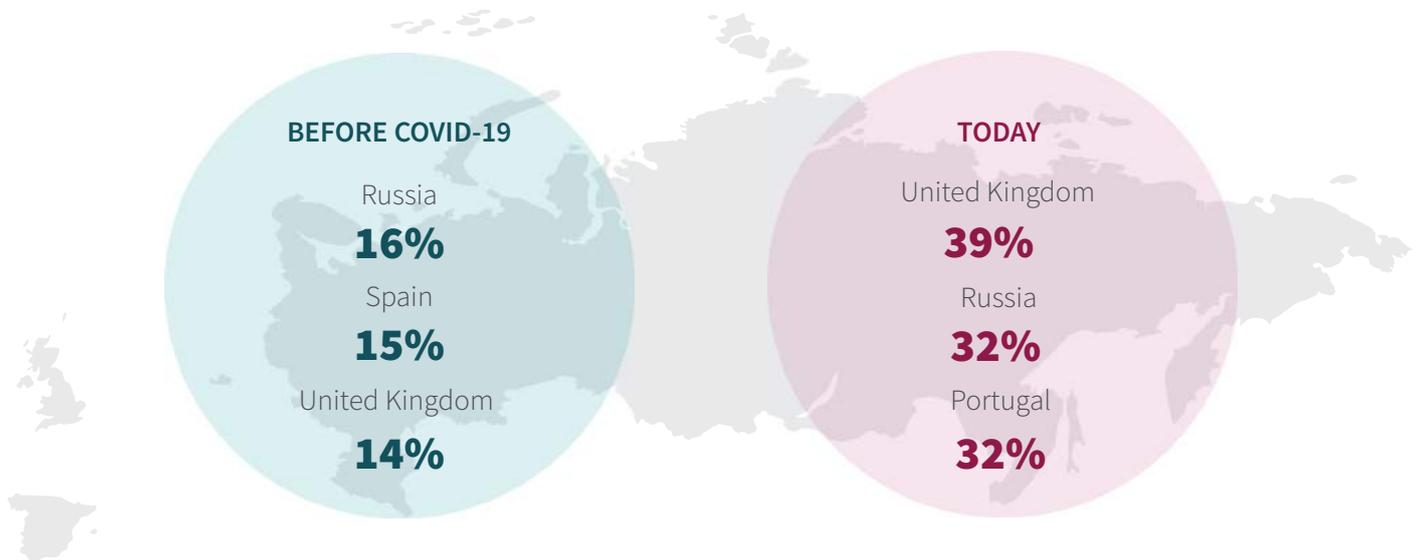
### Job satisfaction levels Pre-Covid 19 vs. Today

All regions and countries



## The least satisfied veterinary professionals are from Russia, Spain and the United Kingdom

On the other hand, the proportion of dissatisfied professionals increases from 11% to almost a quarter (26%) when comparing pre-Covid-19 to today's scores globally. Before Covid-19, the most dissatisfied professionals are from Russia (16%), Spain (15%), and the United Kingdom (14%). Similar to the pre-Covid-19 picture, the United Kingdom (39%) and Russia (32%) have the highest proportion of dissatisfied professionals in today's scores with around 3 in 10 veterinary professionals stating they are 'very dissatisfied' or 'somewhat dissatisfied' with their jobs in both countries. The largest rise in the level of dissatisfaction occurs in the United Kingdom with an increase of a quarter (25%) when comparing pre-Covid-19 to today's scores.



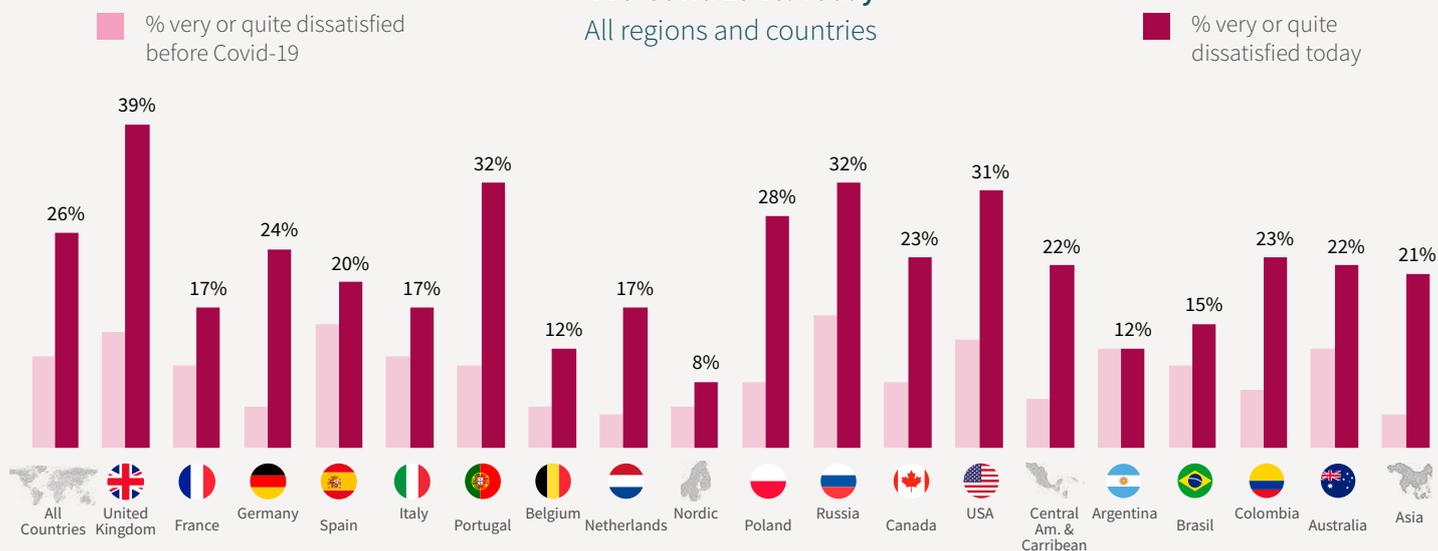
## Job dis-satisfaction levels

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.

### Job dissatisfaction levels

#### Pre-Covid 19 vs. Today

All regions and countries



## Veterinary nurses and technicians are the least satisfied group of veterinary professionals

We compared satisfaction ratings among key groups to identify which groups are more, or less, satisfied than other groups. Results suggest that more than a half of practice owners or partners are ‘very satisfied’ or ‘somewhat satisfied’ with their jobs (58%), which is significantly higher compared to full-time and part-time veterinary employees (49%), and veterinary nurses and technicians (40%). Moreover, veterinary nurses and technicians score significantly lower than all other groups with 4 in 10 (41%) stating they are ‘very dissatisfied’ or ‘somewhat dissatisfied’. Another interesting finding is that professionals working in independent/privately owned practices are significantly more likely to be satisfied with their jobs compared to corporate practice employees (55% vs. 45%). On the other hand, almost 1 in 3 professionals (37%) in corporate practices state that they are ‘very dissatisfied’ or ‘somewhat dissatisfied’, which is significantly higher than independent/privately owned practices (23%) and group practices (26%). When taking a closer look into gender differences, we see that male veterinary professionals are significantly more satisfied (57%) than female veterinary professionals (51%). We also see that satisfaction tends to rise in line with years of experience, since participants who have 30 years or more experience scored significantly higher in ‘very satisfied’ (21%) compared to professionals with 10 years or less experience (15%).

### VERY / SOMEWHAT SATISFIED

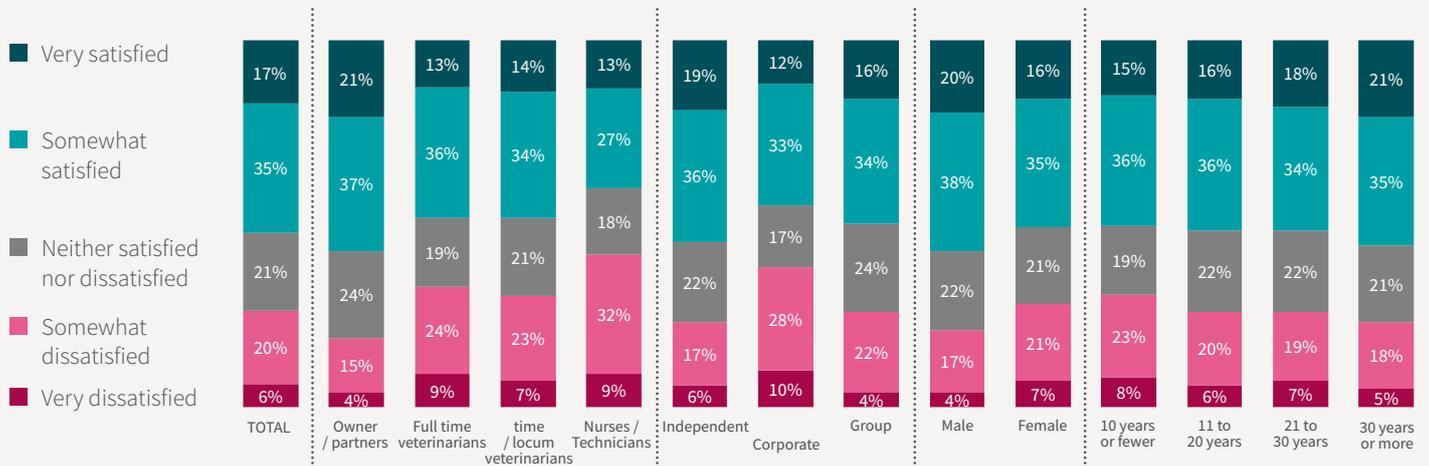


## Job satisfaction by subgroup

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



# Stress levels

The most notable finding regarding stress levels is the gap between pre-Covid-19 and today's scores. Before the pandemic only 7% of professionals state they are 'very stressed' and 29% 'quite stressed' across all countries. It might be worth to note here that, this indicates a decline in stress levels compared to VetsSurvey 2018 results as 17% of the veterinary professionals reported 'very stressed' and 41% were 'somewhat stressed' at that time. A dramatic increase is seen when looking at today's stress levels, as more than a quarter (26%) say they are 'very stressed', and almost 4 in 10 (38%) are 'quite stressed'.

**7%**

Very stressed before Covid -19

**29%**

Quite stressed before Covid -19

**26%**

Very stressed today

**38%**

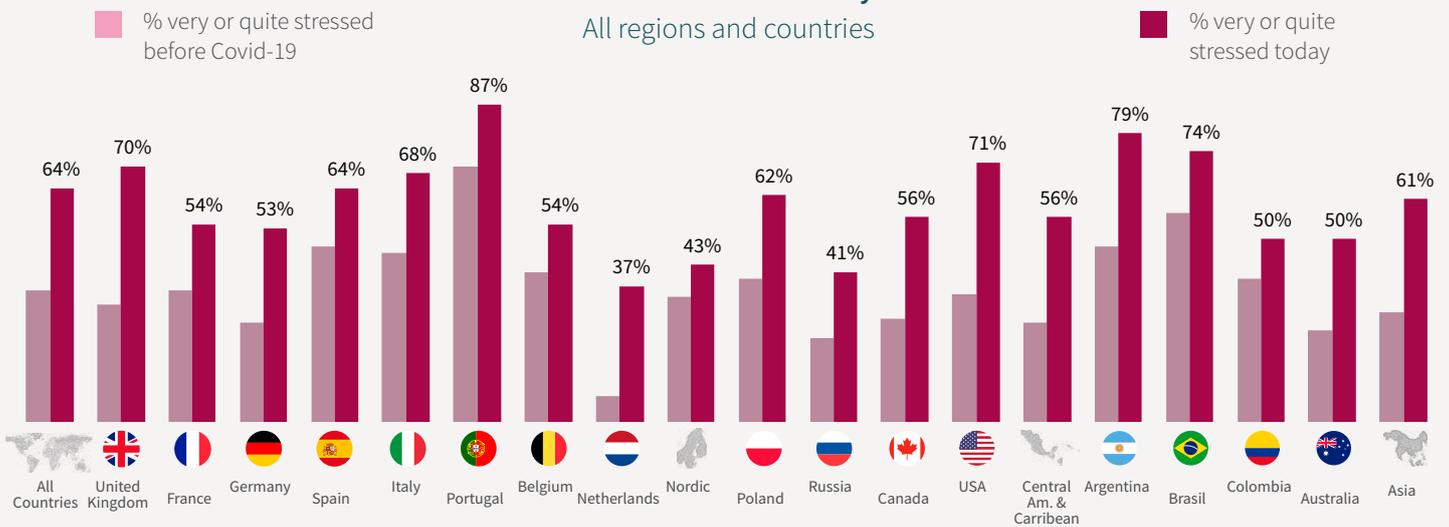
Quite stressed today



## Job stress levels

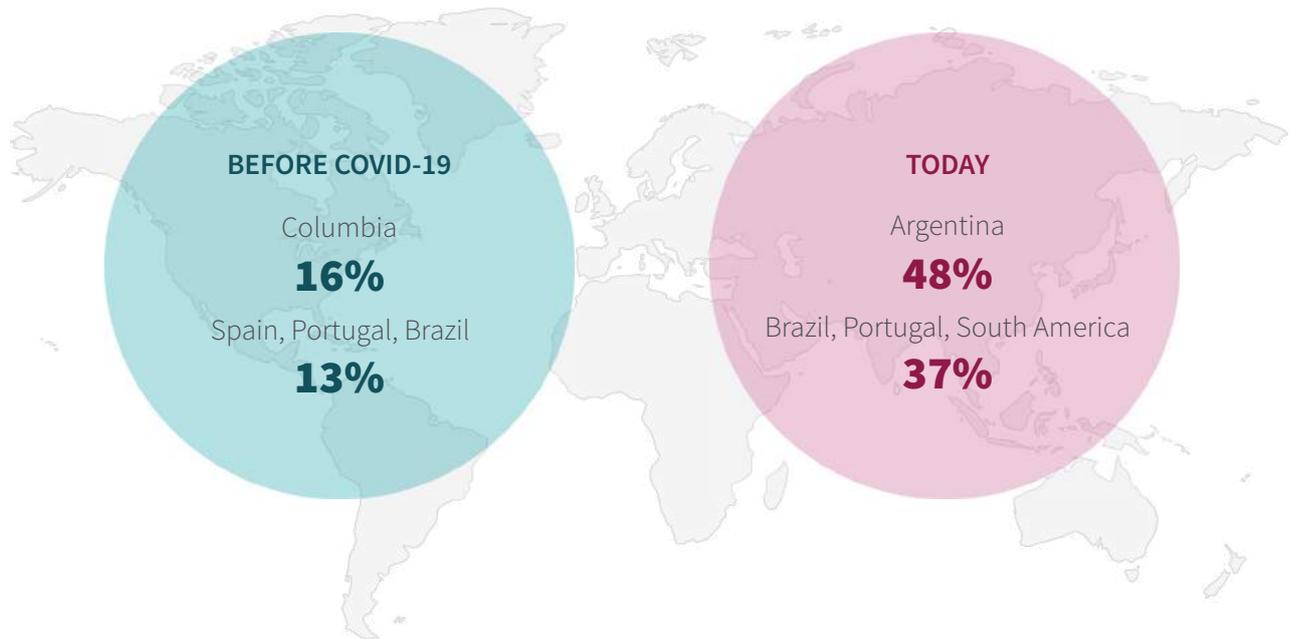
The pandemic has increased the stress levels in all countries/regions. The countries reporting the highest levels of stress are Portugal, Argentina, Brazil, the US and the UK. The countries/regions with the biggest differences between Pre-Covid and today times are the UK, the US, Argentina and Asia.

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



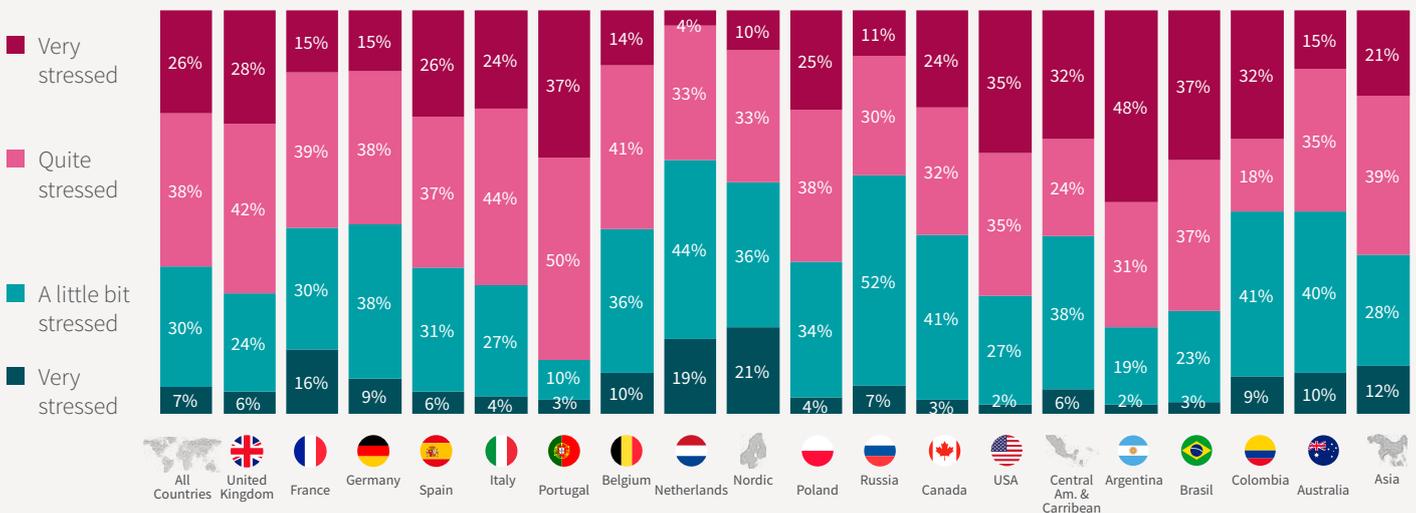
## South America reports the highest stress levels

Colombia has the highest pre-Covid-19 proportion with 16% being 'very stressed' followed by Spain, Portugal, and Brazil with 13% each. When focusing on the country differences in today's stress levels, Argentina comes first with almost a half (48%) stating they are 'very stressed' followed by Brazil (37%), Portugal (37%), and South America (including Argentina, Brazil, Colombia, Chile, Ecuador, Paraguay, Peru, Uruguay) with 37%. The most dramatic rise in stress levels occur in Argentina with an increase of 41% (from 7% to 48%), followed by the United States of America with an increase of 31% (from 4% to 35%) and North America (Canada and The United States of America) with an increase of 29% (from 5% to 34%).



## Job Stress levels by country

Job stress levels today  
By country & region



## The most satisfied countries are also the ones with the fewest stressed professionals

Professionals claiming that they are ‘not at all stressed’ are in the same countries as those with high job satisfaction. Netherlands (28%), Russia (27%), and Nordic countries (25%) have the largest proportion of unstressed professionals before Covid-19. Moreover, Netherlands (19%) and Nordic countries (21%) maintain their position at the top in today’s scores; however, Nordic countries have a smaller decrease than Netherlands when comparing pre-Covid-19 to today’s results.



## Female identifying veterinary professionals report higher stress levels than male identifying veterinary professionals

Looking at today's scores to compare subgroups, veterinary nurses and technicians have significantly higher stress levels compared to other groups as almost 4 in 10 state that they are 'very stressed' (38%). Furthermore, the stress levels of female veterinary professionals are relatively high; the majority of female professionals are either 'very stressed' (28%) or 'quite stressed' (40%), which is significantly higher than the percentage of 'very stressed' or 'quite stressed' male professionals (54%). Finally, experience has a positive impact on stress levels as veterinary professionals with 30 years or more experience are significantly less stressed with 12% saying they are 'not at all stressed' compared to all other groups.



**68%**

very or quite stressed



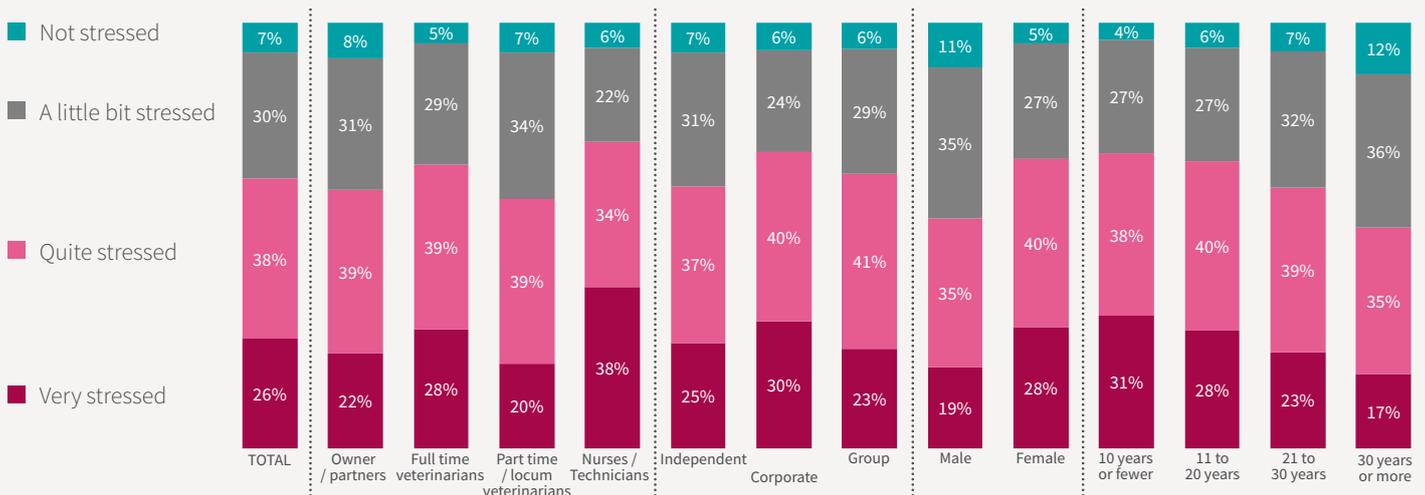
**54%**

very or quite stressed

### 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



# Burnout & Compassion Fatigue

Along with the job satisfaction and stress levels, veterinary professionals are asked the extent to which they are experiencing burnout, compassion fatigue, and disinterest in work currently. A 10-point scale is used where 0-2 points means 'not at all', whereas 9-10 means 'completely'.

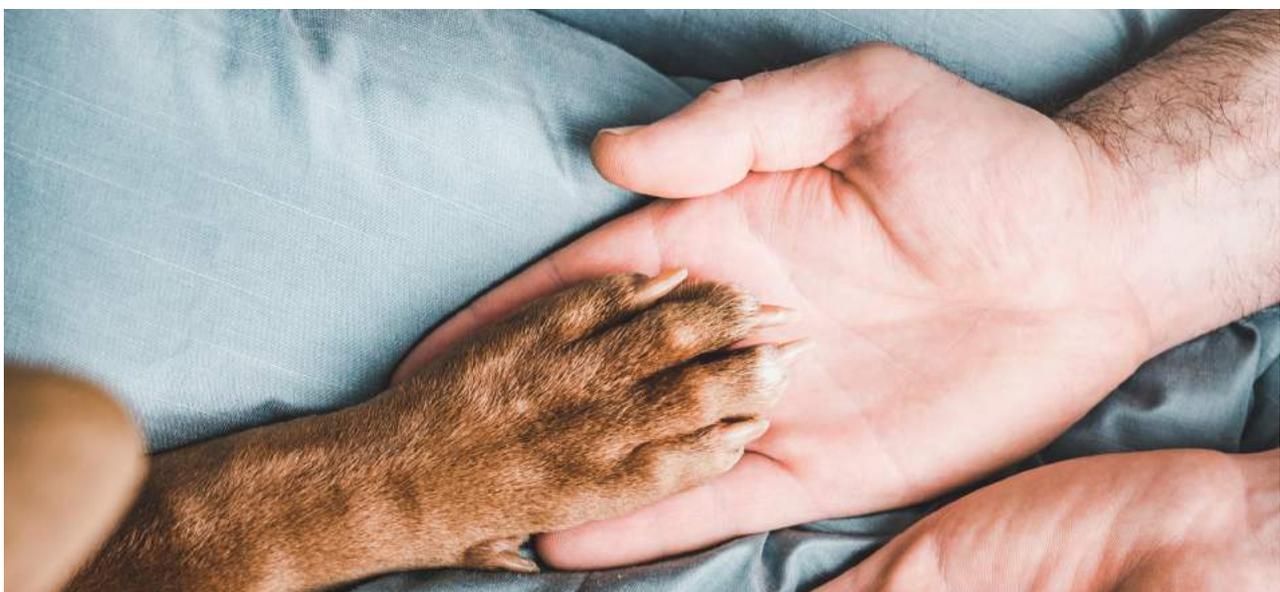
## *What is burnout?*

Burnout is a condition that affects those in highly stressful and risky jobs. It is the next level up from chronic stress. It's what happens when you reach a point of mental and physical exhaustion - and you keep going. Christina Maslach, one of the key researchers of burnout characterises it as a triptych of symptoms: exhaustion, cynicism and perceived lack of efficacy.



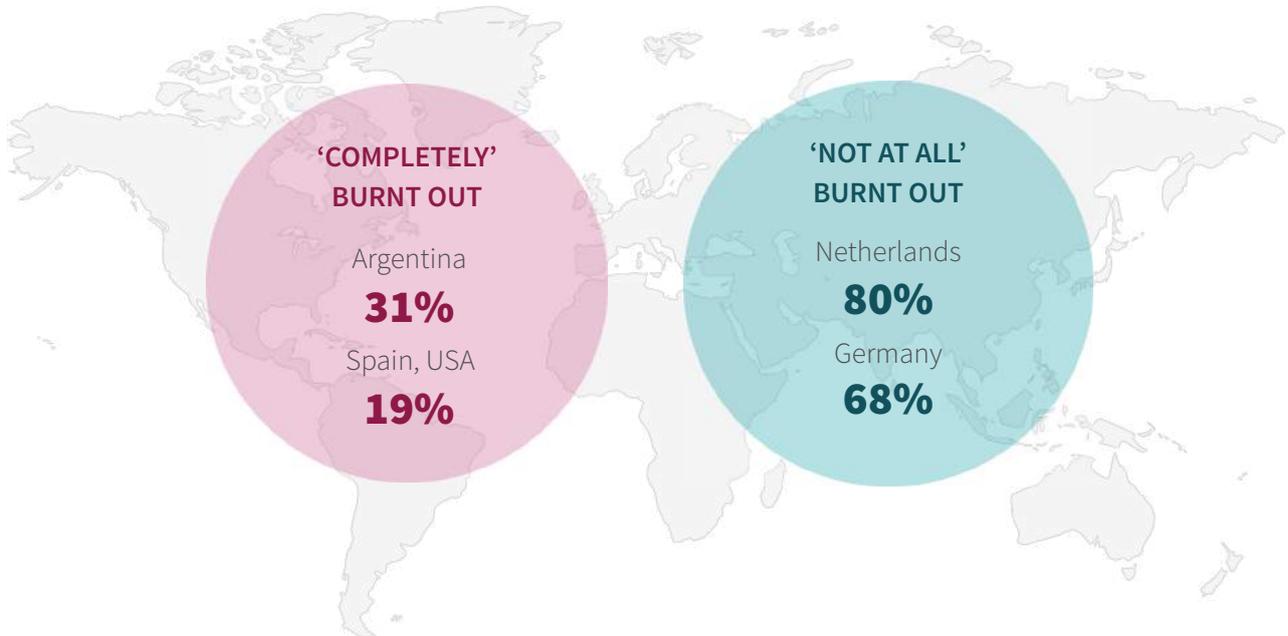
## **BURNOUT**

This is the first time we have attempted to measure Burnout levels among veterinary professionals. We found that around 1 in 10 (12%) are reporting a high level of burnout (9 or 10). A higher proportion (39%) state they are 'not at all' burnt out. The remainder of our veterinary professionals place themselves somewhere in the middle. With this benchmark in mind, let's review some key country and demographic differences.



## Argentina reports the highest level of burnout, followed by Spain and the US

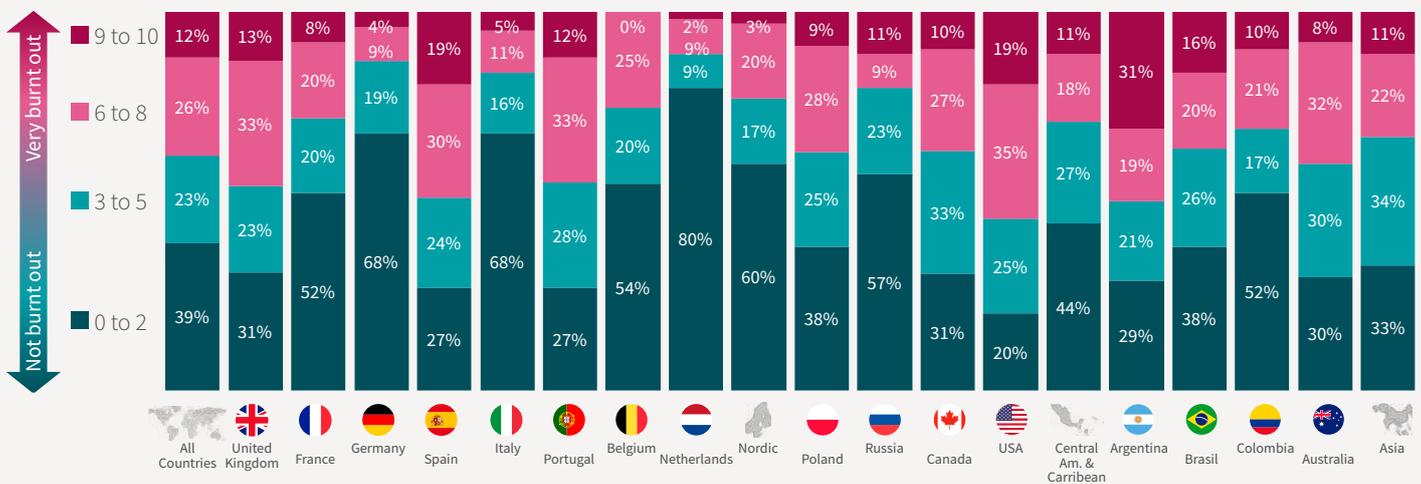
Looking at the country differences, nearly one in three (31%) veterinary professionals in Argentina are ‘completely’ burnt out, followed by Spain and the United States of America (19% both). On the other hand, most of the professionals in the Netherlands and Germany are ‘not at all’ burnt out (80% and 68% respectively).



### Burnout levels by country

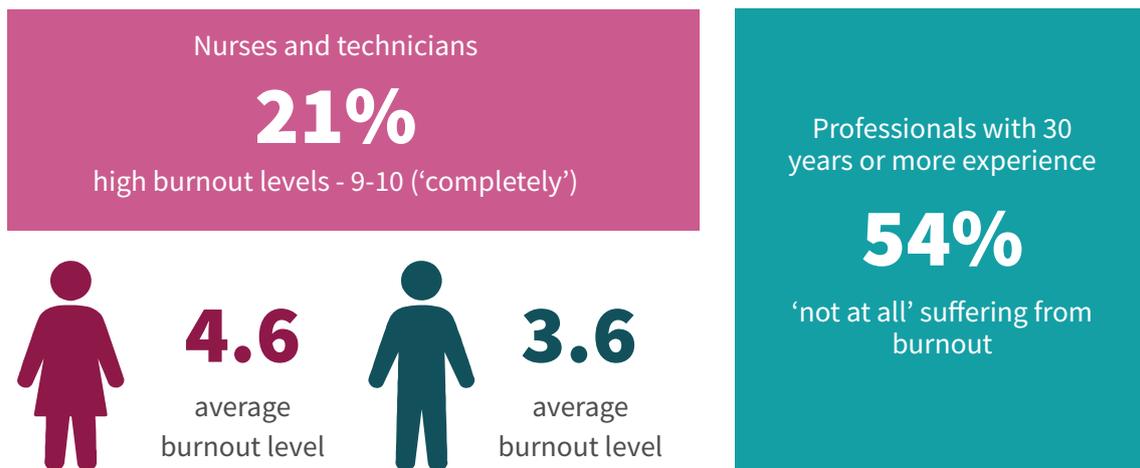
There are levels of burn out across countries. The US is reporting to be burnt out, followed by Argentina where the population is split 50/50. Aside from those two countries, Spain and the UK are showing the highest levels of burn out, while Germany, Italy and The Netherlands are showing the lowest.

Burnout levels  
By country & region



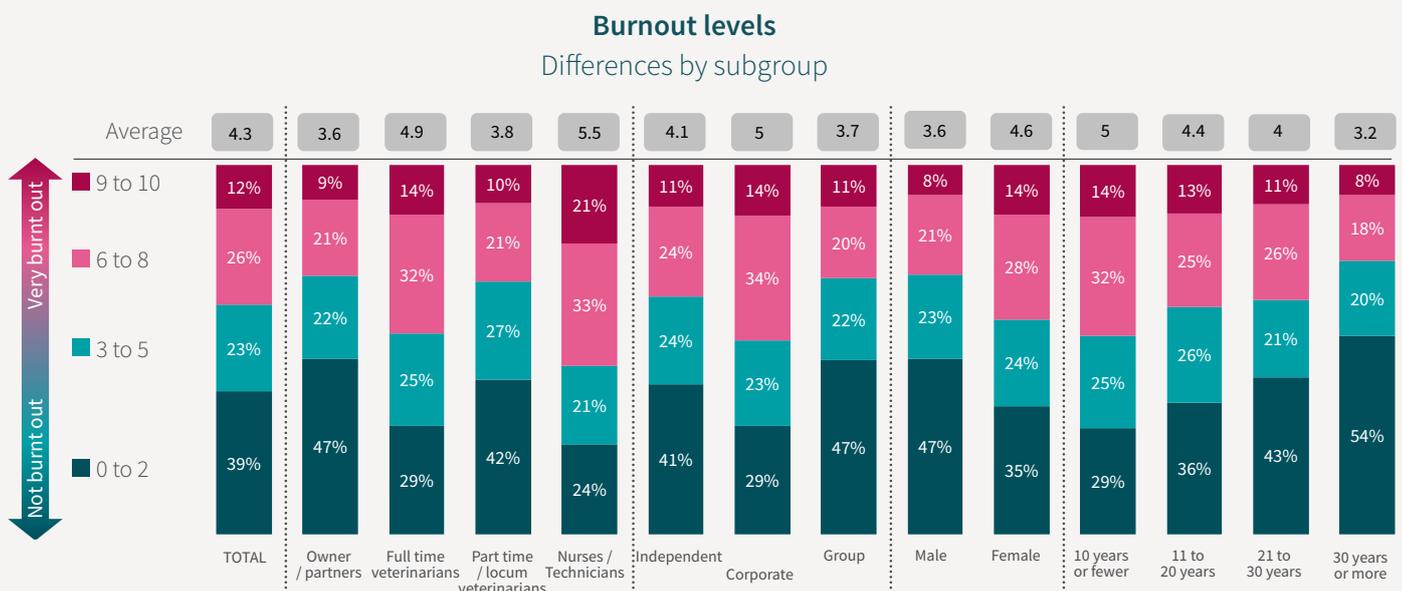
## Veterinary nurses and technicians are experiencing the highest levels of burnout

As expected, there are significant differences across subgroups. First, veterinary nurses & technicians are more likely to experience high burnout levels with almost a quarter (21%) rating themselves at 9-10 ('completely'). Additionally, compared to male veterinary professionals, female professionals are significantly more prone to burnout with 14% stating they are 'completely' burnt out, and more than a quarter (28%) rating themselves at 6-8. On the other hand, time spent in the profession has a positive impact on burnout levels. More than a half (54%) of professionals with 30 years or more experience state that they are 'not at all' suffering from burnout, which is a significantly higher proportion compared to all other groups.



### 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 10 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.



## What is compassion fatigue?

Compassion fatigue is often referred to as the “negative cost of caring”. It is a state reached when jobs that demand a high level of physical and emotional work become overwhelming. The strain of caring for those suffering (including animals) results in diminished capacity for compassion, or extreme fatigue brought on by too much caring. It is easy to see how Compassion Fatigue is a condition that affects many healthcare professionals, including, of course, veterinary professionals.



## COMPASSION FATIGUE

The global average of compassion fatigue is 3.8. Overall, the number of professionals that are ‘completely’ suffering from compassion fatigue are quite low (9%), whereas almost half of the professionals (43%) claiming they are ‘not at all’ experiencing it. The highest proportion of veterinary professionals experiencing compassion fatigue at 9-10 levels (‘completely’) are in Argentina, Spain, and Colombia with 24%, 19% and 17% respectively. Also, almost seven in ten state that they are ‘not at all’ experiencing compassion fatigue in France (72%), Italy (71%), and Germany (67%).



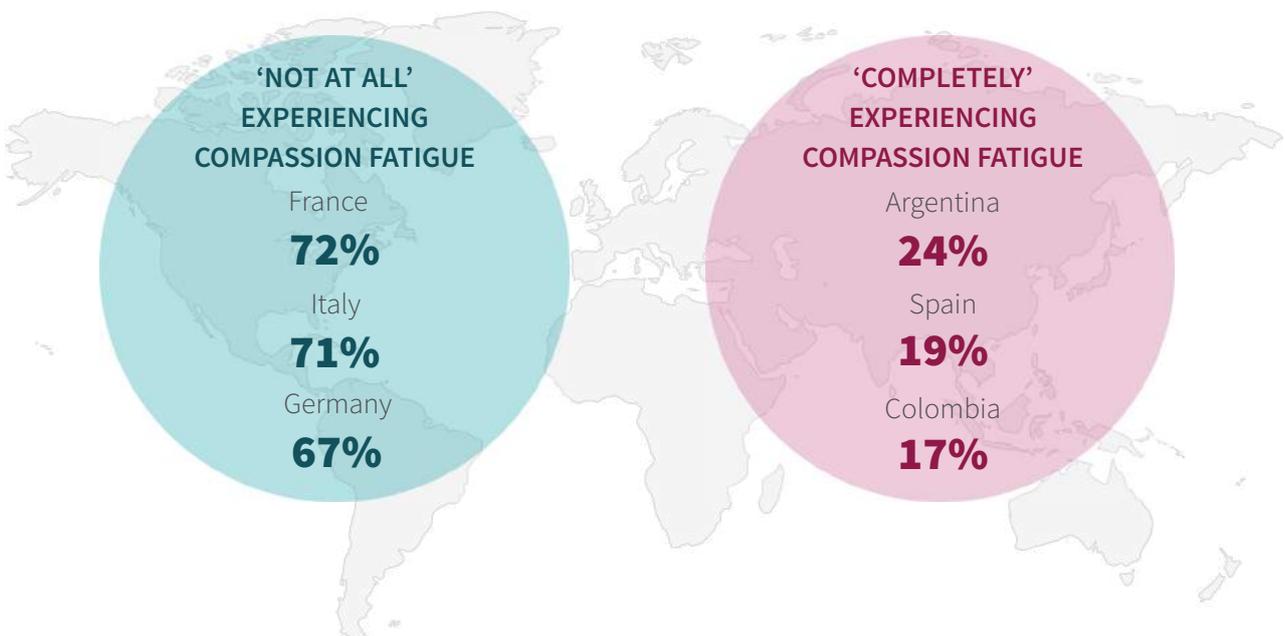
**43%**

“Not at all”  
experiencing fatigue



**9%**

“Completely”  
suffering from fatigue

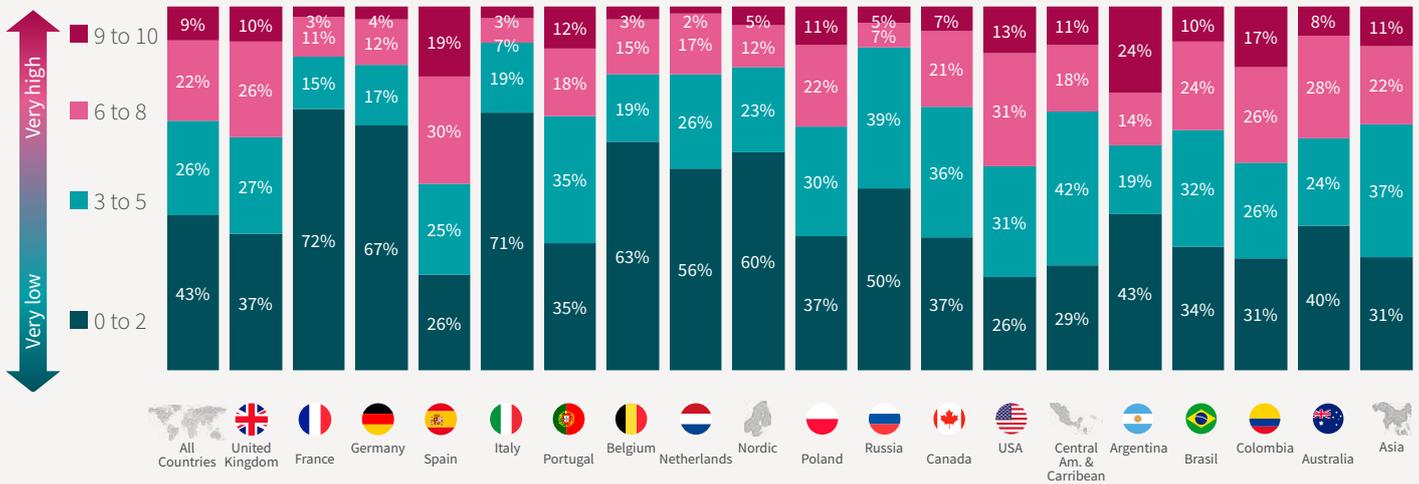


## Compassion fatigue levels by country

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



Focusing on the significant differences among subgroups, half of the practice owners or partners (51%) are 'not at all' experiencing compassion fatigue, which represents a significantly higher proportion compared to all other groups. The likelihood of experiencing compassion fatigue is significantly higher in female veterinary professionals compared to male professionals (24%) as 35% of female professionals rate at 'somewhat' or 'completely'. Finally, results suggest that experience level has an impact on compassion fatigue since professionals with 30 or more years of experience are more likely to rate themselves at 0-2 ('not at all') compared to all other groups.

Practice owners or partners  
**51%**  
 are 'not at all' experiencing compassion fatigue

**58%**  
 Professionals with 30 years or more experience  
**rate 0-2**  
 'not at all' suffering from compassion fatigue



**24%**

in comparison with male professionalas

**35%**

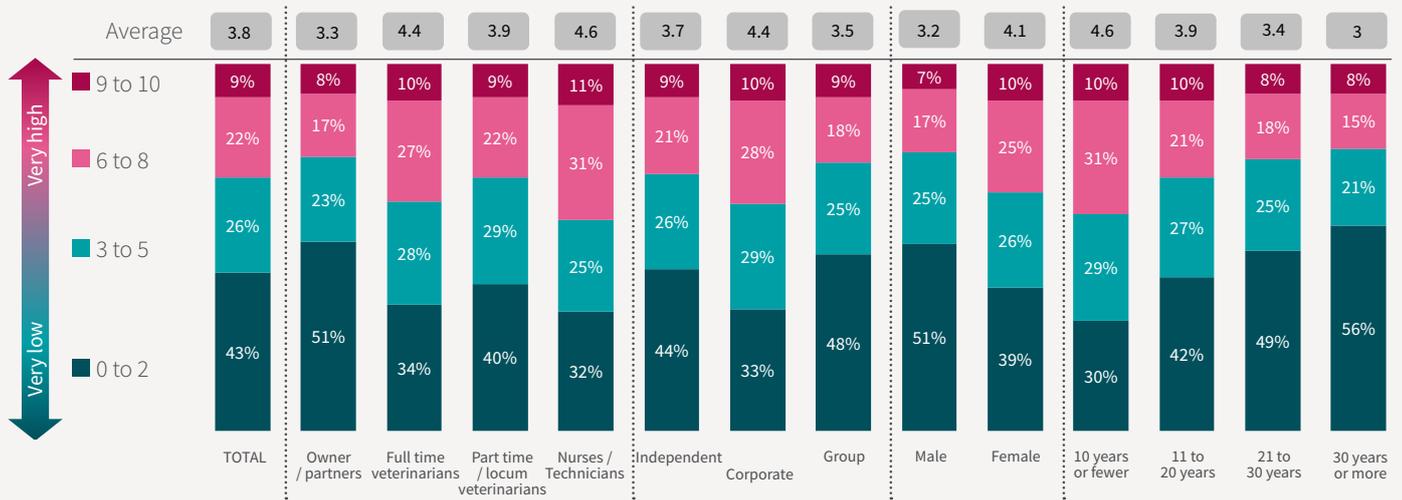
rate at 'somewhat' or 'completely'

# 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





## Thoughts about leaving the profession to achieve a better work-life balance

# 74%

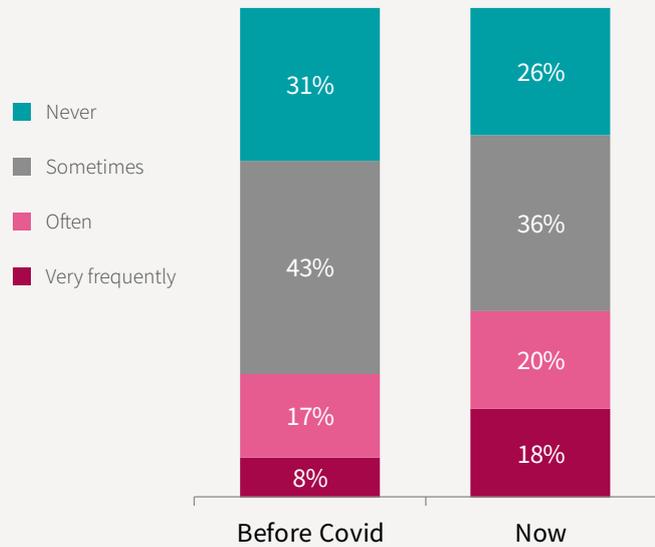
**of veterinary professionals at least occasionally think about leaving the profession**

Along with low job satisfaction, high levels of job stress, burnout, compassion fatigue and disinterest in work are known to lead to intention to leave the veterinary profession. Global pre-covid-19 results reveal that almost three in ten professionals (31%) ‘never’ think of leaving the profession, which is higher than today’s post-Covid-19 score (26%). To put it another way, nearly three quarters (74%) of veterinary professionals at least occasionally think about leaving the profession to get a better work-life balance.



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

Global



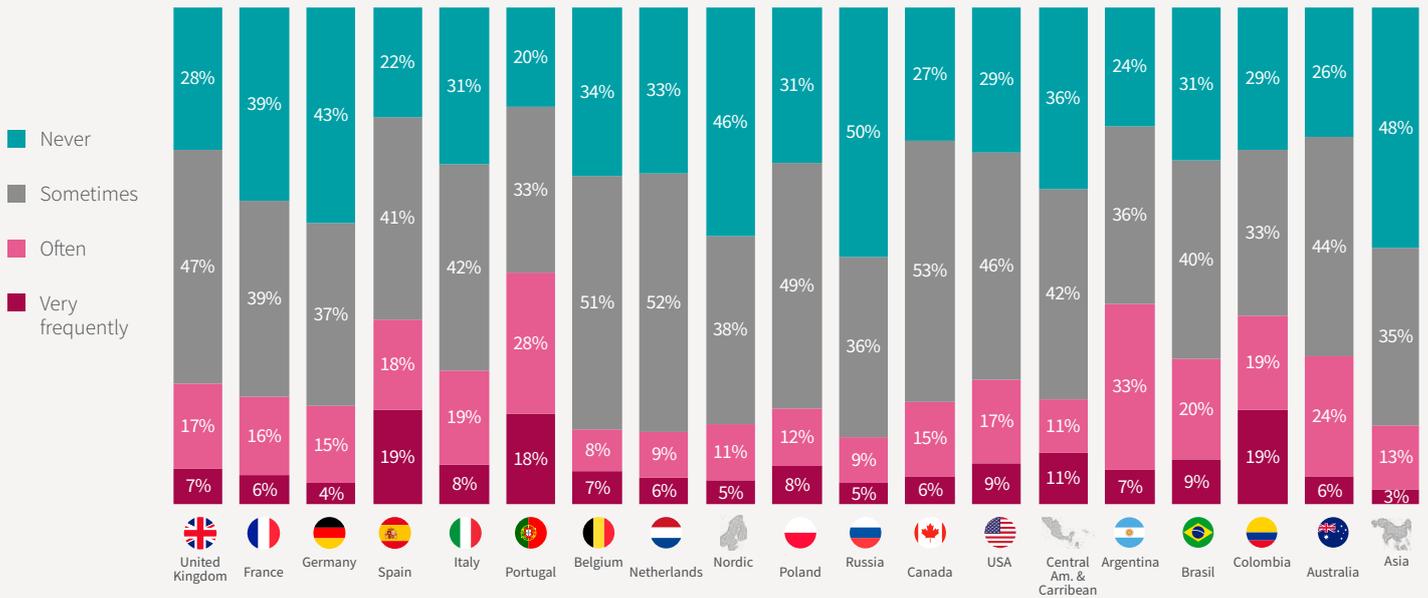
Countries that experience the highest levels of wellbeing challenges unsurprisingly also think about leaving the veterinary profession the most.

Above, we have seen that France, Germany, the Netherlands, and Nordic countries score well on these well-being measures, suggesting that they may be less troubled by thoughts about leaving the profession to achieve a better work-life balance. Supporting this, the data reveals that around four out of ten professionals in Nordic countries (44%), Germany (40%), and France (38%) state they have ‘never’ had a thought about leaving the profession. On the other hand, Portugal (46%), Argentina (40%), and Colombia (38%) have the highest proportion of veterinary professionals who are ‘often’ or ‘very frequently’ thinking about quitting before Covid-19, and they remain the top three countries when looking at today’s scores (52%, 54%, and 48% respectively). Another interesting finding is that the United Kingdom has the most dramatic increase in ‘very frequently’ thinking about quitting when comparing pre-Covid-19 to today’s scores (7% vs. 24%).



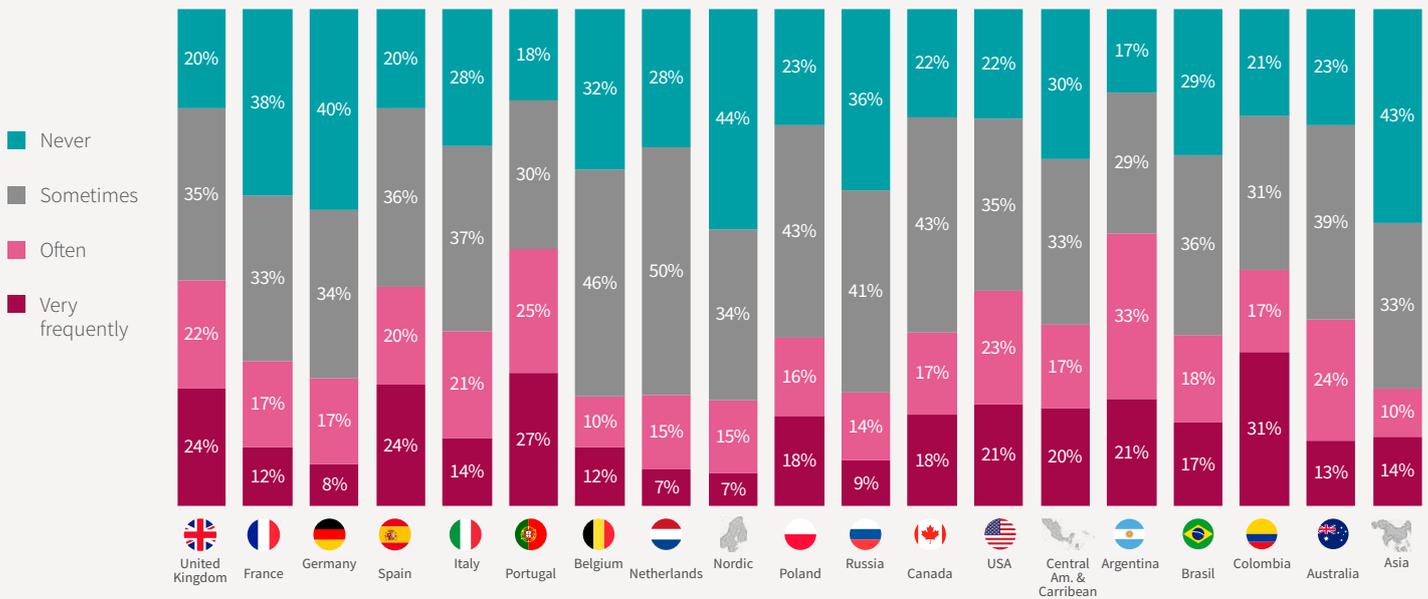
## Frequency of considering leaving: **before Covid**

All countries and regions



## Frequency of considering leaving: **now**

All countries and regions





## Employed veterinarians and nurses/technicians have thoughts of leaving more often

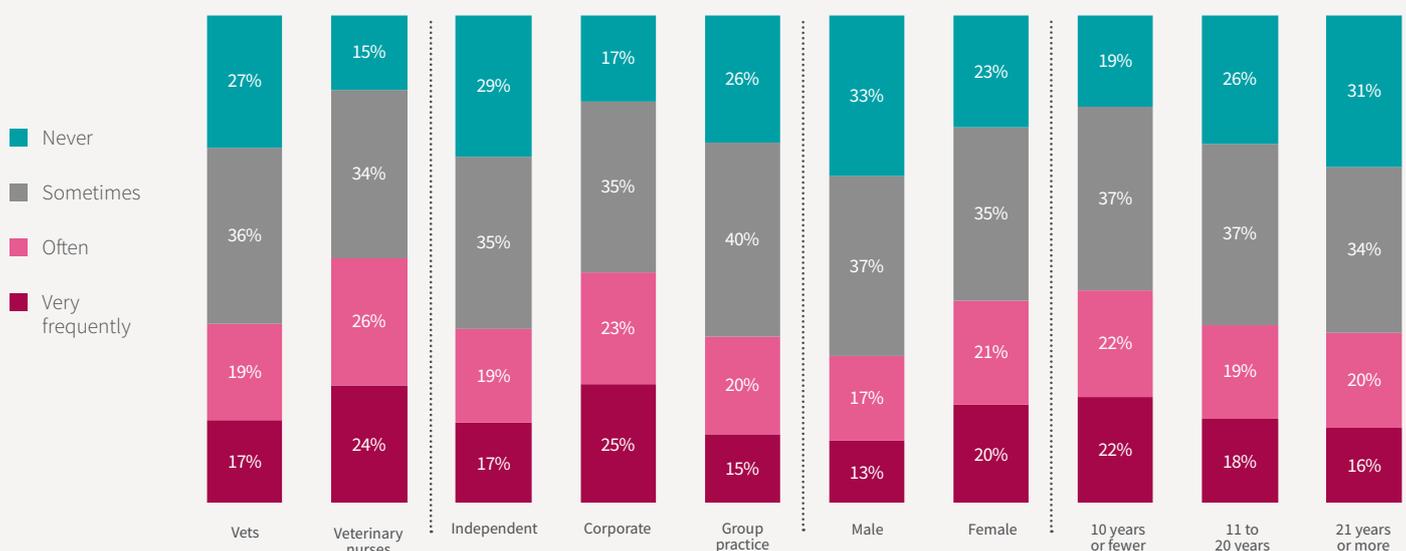
Subgroup analysis shows that current role affects thoughts about leaving the profession to obtain a better work-life balance. First, over four in ten full-time and part-time veterinarians, and half of all veterinary nurses and technicians think about it 'often' or 'very frequently', which is significantly higher than practice owners or partners (31%). Moreover, the numbers of practice owners or partners saying that they 'never' thought about quitting (34%) are significantly higher than these groups.

## Corporate & charity practice employees are more likely to think about leaving the veterinary profession

Intention to leave the profession is significantly higher among professionals working in corporate (25%) or charity practices (28%) than professionals working in independent/private (17%) or group practices (15%). Also, one in five (20%) female professionals are thinking about quitting 'very frequently', which is significantly higher compared to male professionals (13%). Finally, the numbers of professionals stating they 'never' think about leaving the profession increases with level of experience in the role.

### Frequency of considering leaving: **Now**

By subgroup





## Long-term career aspirations

Findings show that practice owners/partners are more likely to be satisfied with their jobs and less likely to be troubled by job stress, burnout, compassion fatigue, disinterest in work, and thoughts of leaving the profession than veterinarian employees. But how do these features impact career aspirations of employed veterinarians?

Overall, around four in ten (37%) employed veterinarians would like to maintain status quo. However, over a quarter (27%) would like to reduce working hours.

18% of currently employed veterinarians want to become an owner/partner. The highest proportions of veterinarians willing to become an owner/partner are in Poland and Russia at 25% and 23% respectively. This drops to only 2% in Belgium.

**4/10**

(37%)

employed veterinarians  
would like to maintain  
status quo

**1/4**

(27%)

would like to reduce  
working hours

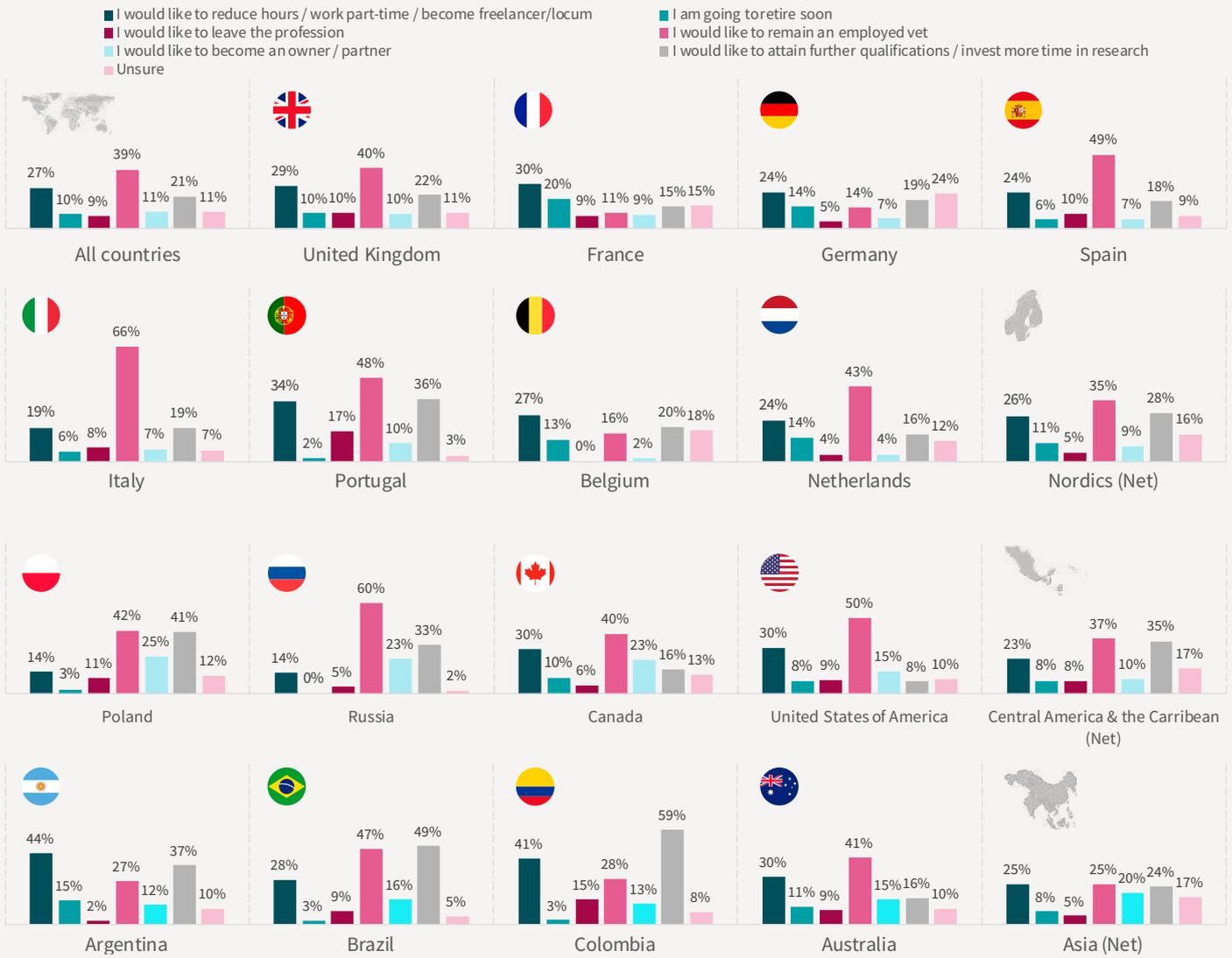
**18%**

of currently  
employed  
veterinarians want  
to become an owner/  
partner

# 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





Almost four out of ten (43%) female employees would like to stay in employment, which is significantly higher than male professionals (32%). Also, more female employees are willing to reduce working hours compared to their male colleagues (28% vs. 25%). As expected, experience impacts long-term career aspirations. Almost half of veterinary employees with 10 years or less experience would like to remain an employed vet, whereas two out of ten (22%) consider pursuing the practice ownership / partnership, which is significantly higher compared to other groups.

## 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

