VetsSurvey 2020

The Independent Global Veterinary survey since 2013

THE IMPACT OF COVID-19 ON THE VETERINARY PROFESSION: PAST, PRESENT AND FUTURE

WSAVA
Global Veterinary Community

Vetspanel

CM Research

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.

Carlos Michelsen
Managing Director

Abi Moorcock
Research Director

Maria Lindahl
Associate Director

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

VetsSurvey 2020

The Independent Global Veterinary survey since 2013

5,000
veterinary professionals

91
countries represented

6
continents covered

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

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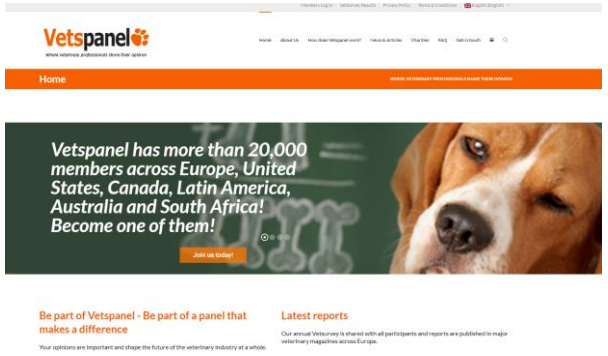
THE REPORTS USED AS BASIS FOR THIS PRESENTATION CAN BE FOUND AT

https://www.vetspanel.com/survey-results/



https://www.cm-research.com

- Covid 19 impact on veterinary practices and veterinarians
- Stress, work satisfaction and intention to leave the profession
- Long term career aspirations
- Current challenges
- The future of veterinary medicine
- Most positive impact on veterinary medicine
- CPD/CE
- Detailed demographics

THIS PRESENTATION HAS THREE PARTS

Past (pre pandemic)

The Present

The future (post-pandemic)

CHAPTER 01

THE PAST: WHERE WE’VE COME FROM

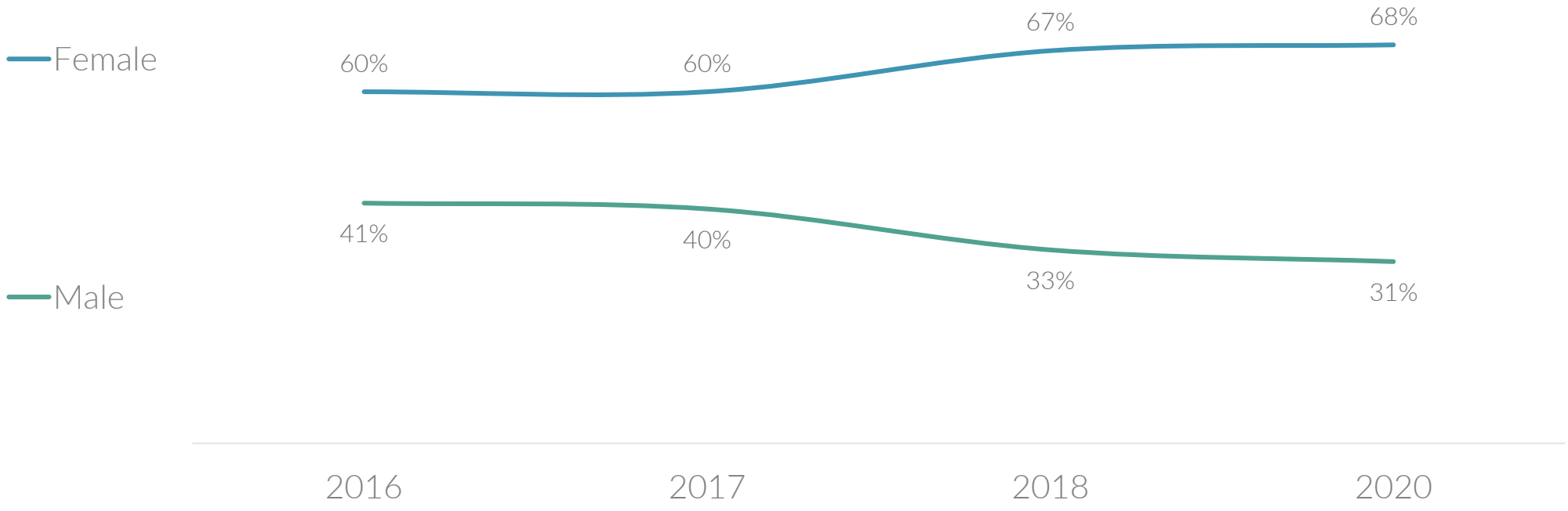
GENDER OF VETERINARY PROFESSIONALS OVER TIME

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

Gender distribution of the veterinary profession over time (%)

Global figures

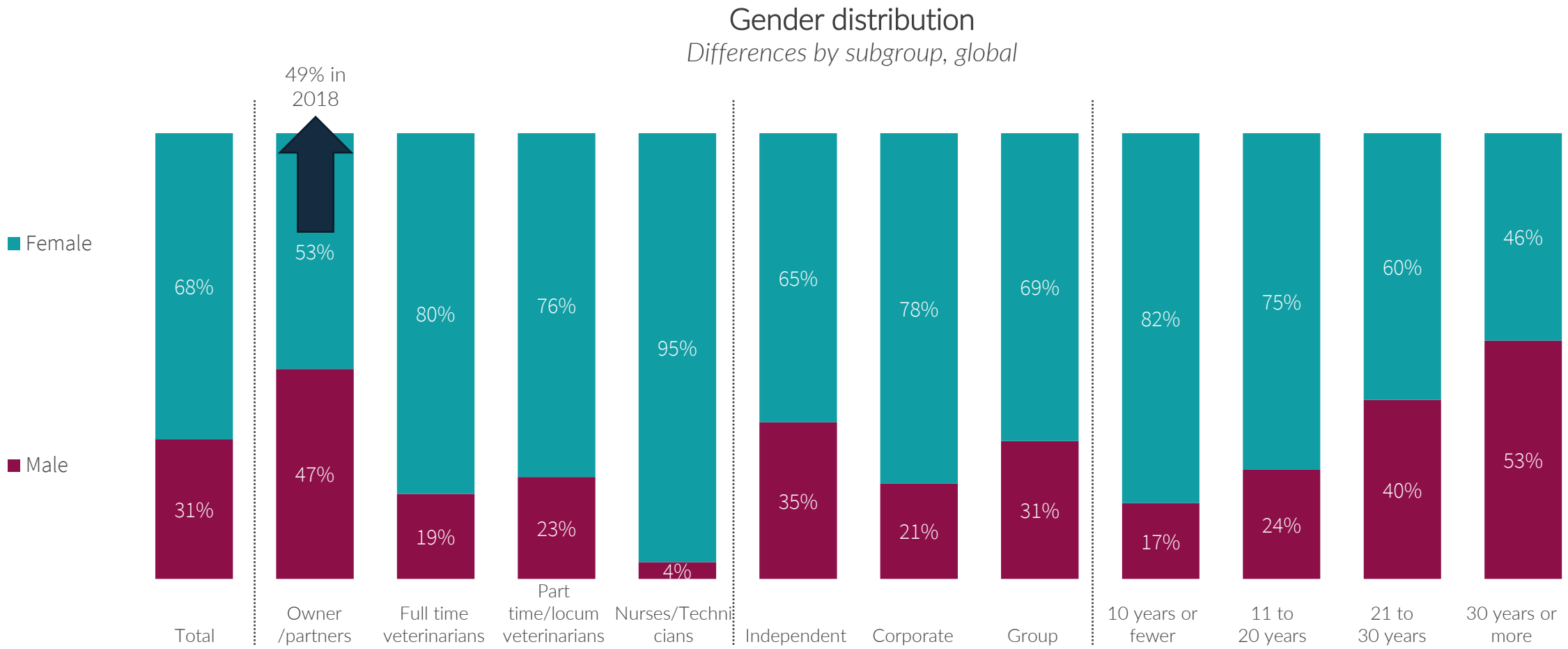
Prefer not to say & other genders added in 2020 (1% prefer not to say)



QGender: Are you? All answering (4760)

GENDER DISTRIBUTION BY SUBGROUP

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



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

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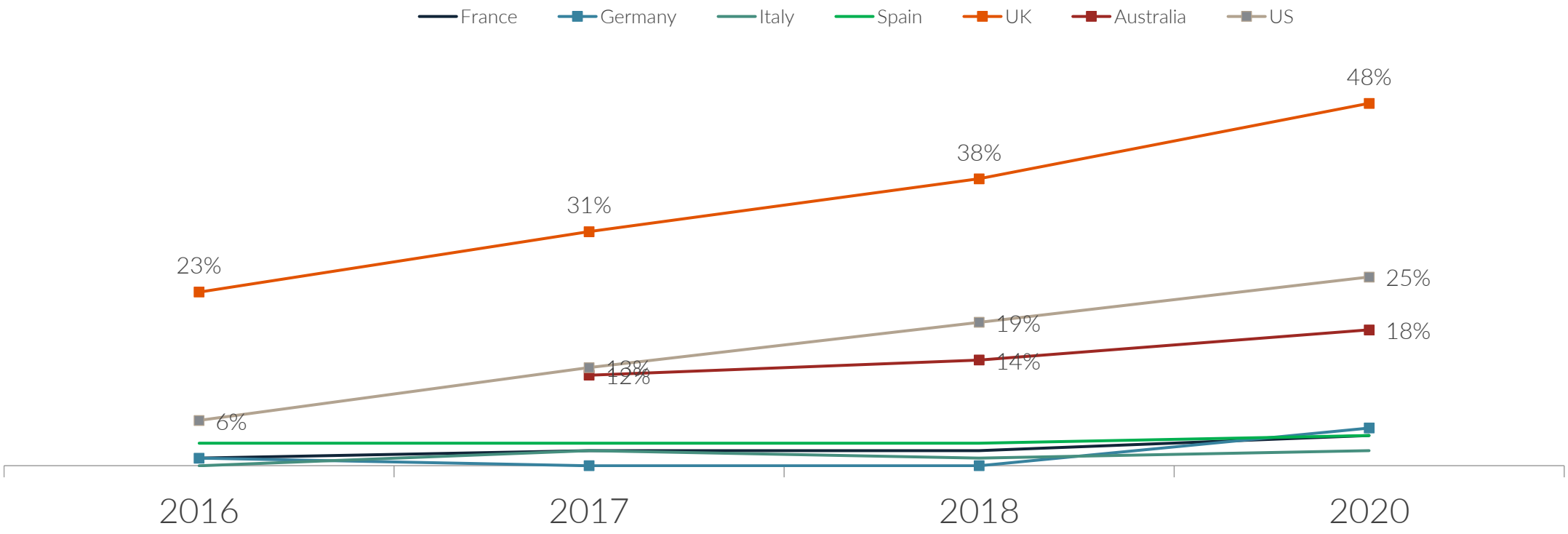
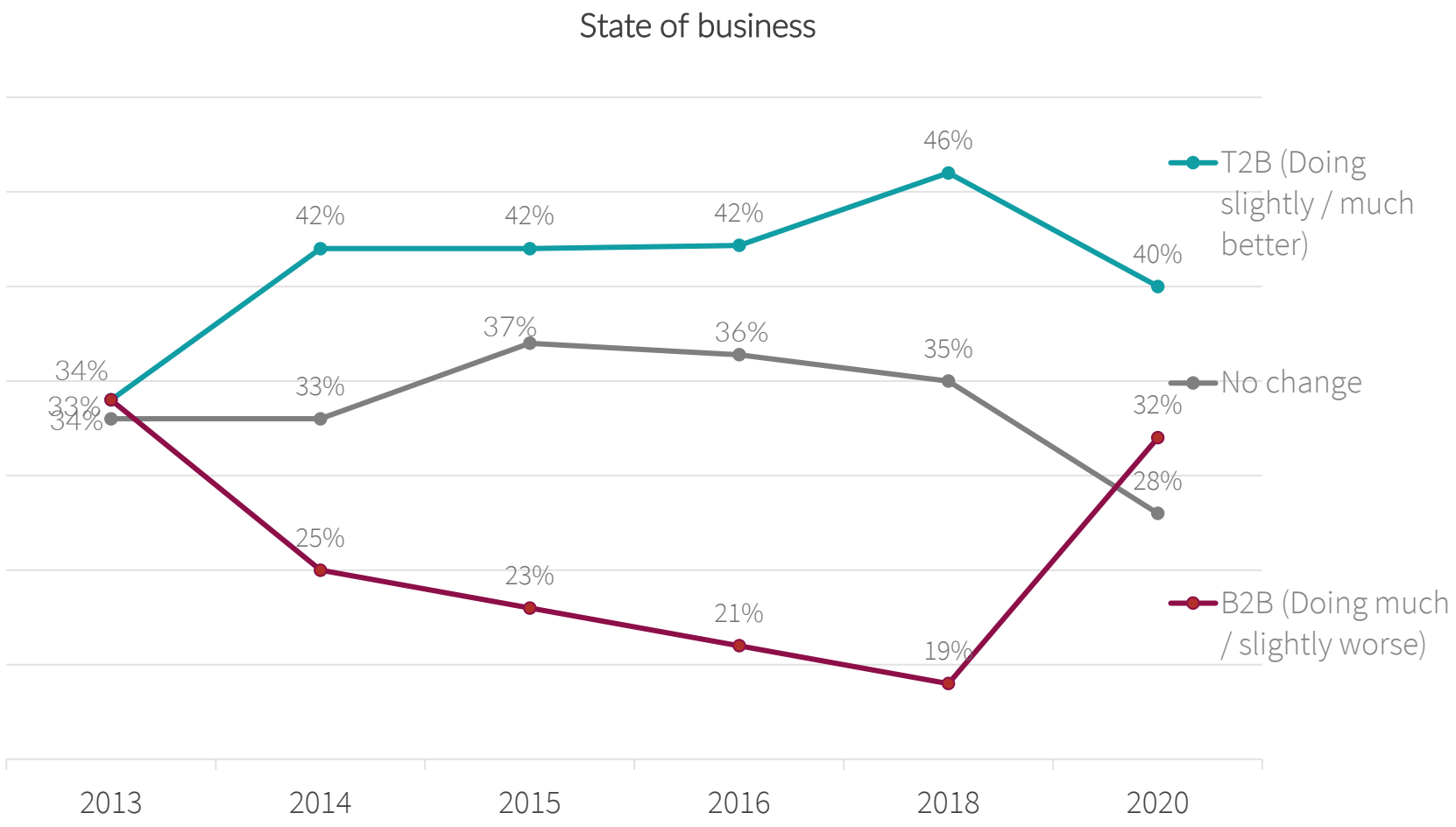
CORPORATISATION ACROSS TIME

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



FINANCIALS

Up to 2018 the financial performance of veterinarians had been steadily increasing



	VETS	NURSES
T2B (Doing slightly / much better)	50%	38%
B2B (Doing much / slightly worse)	17%	26%

BIGGEST CHALLENGES GLOBALLY

1. Too much work, not enough time — 66% ↑
2. Recruiting of staff — 39% ↑
3. Time management — 36% ↑
4. Staff management — 29%
5. Clients unable to pay bills — 36%
6. Compliance — 32%
7. Cost of medications, etc — 26%
8. Competition from other practices — 15% ↓

19%

of **owners/partners** say that "unhappy staff" is a current concern

54%

of **employed vets** at clinics say that "unhappy staff" is a current concern

66%

of **vet nurses** at clinics say that "unhappy staff" is a current concern

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56%
Stressed in 2015

59%
Stressed in 2018

64%
Stressed NOW

67%

Satisfied with job
in 2015

71%

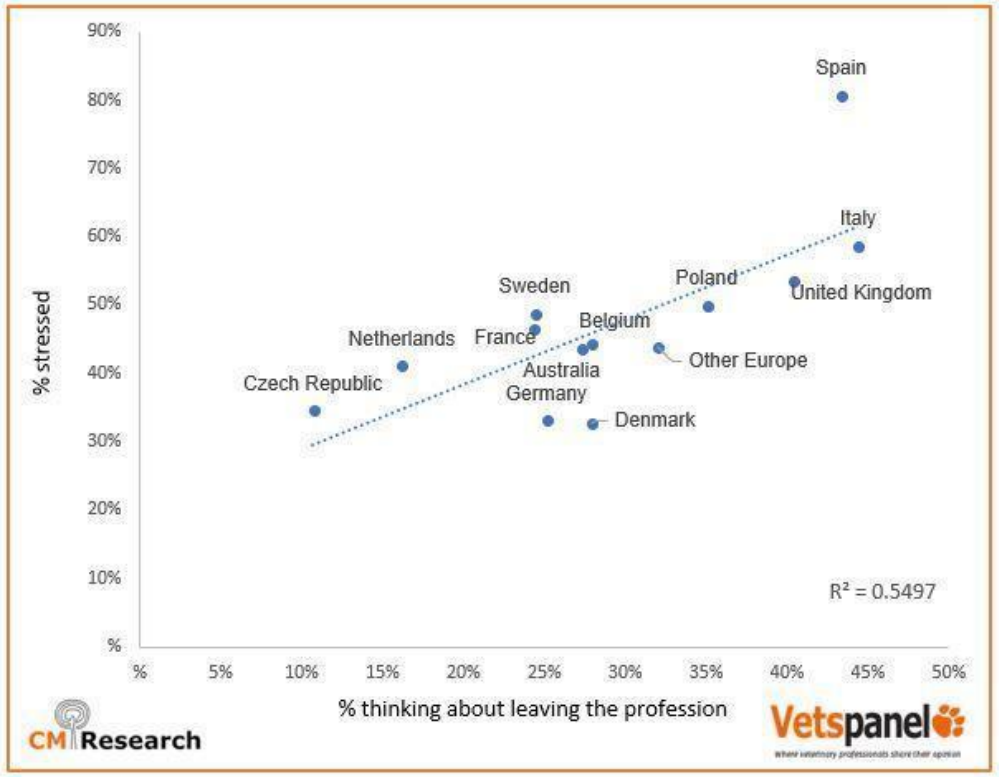
In 2018

53%

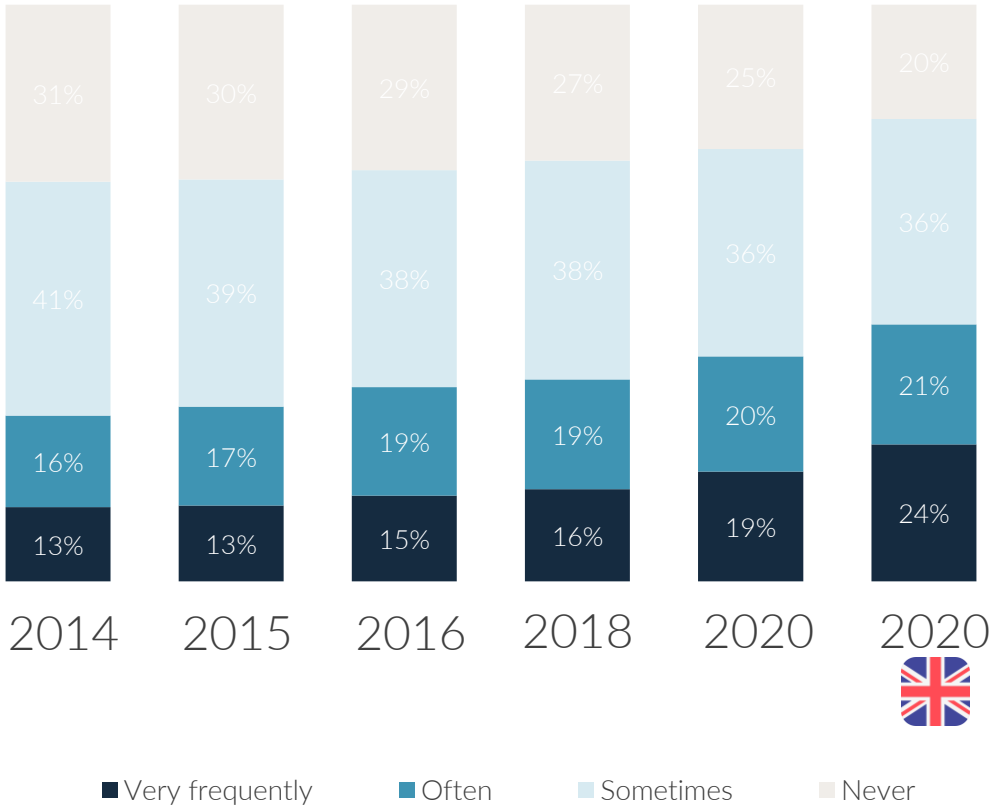
Satisfied with job
NOW

INCREASED WORKLOAD RESULTS IN HIGHER STRESS LEVELS

Stress then leads to profound job dissatisfaction and a deep questioning of career choice.



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

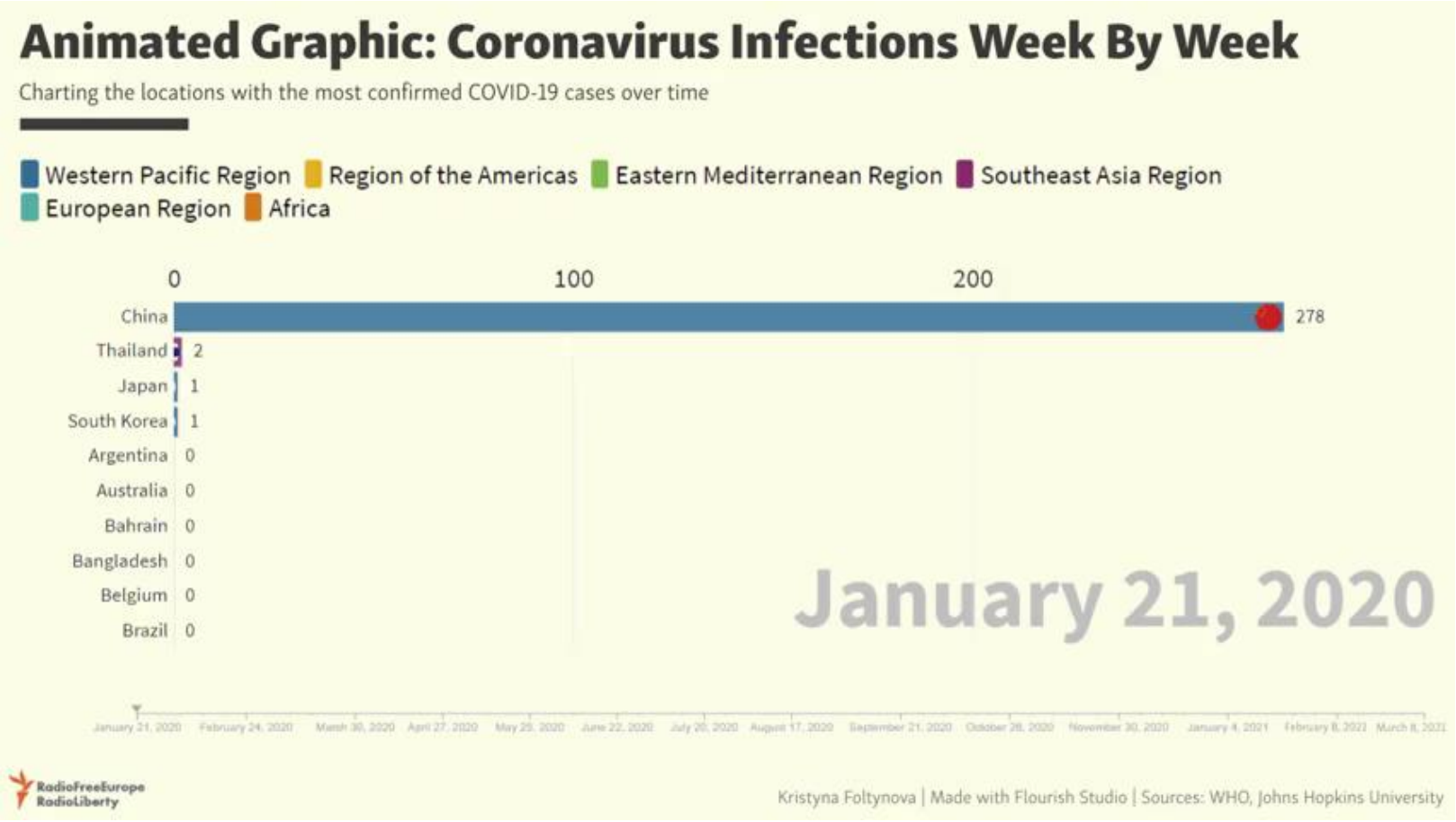


Data source: CM Vetsurvey, 2018

CHAPTER 02

THE PRESENT: WHERE WE ARE AT NOW

11 January 2020



123M

CASES

Number of confirmed cases of COVID-19 worldwide

2.7M

DEATHS

Number of confirmed deaths from COVID-19 worldwide

What has this meant for the veterinary industry? Let's look at the pandemic impact from 3 different angles

1 The overall impact on everyday **clinic life** & operations

2 The impact of changing behaviours on pets & other **animals**

3 The subsequent personal & professional impact on veterinary **staff**

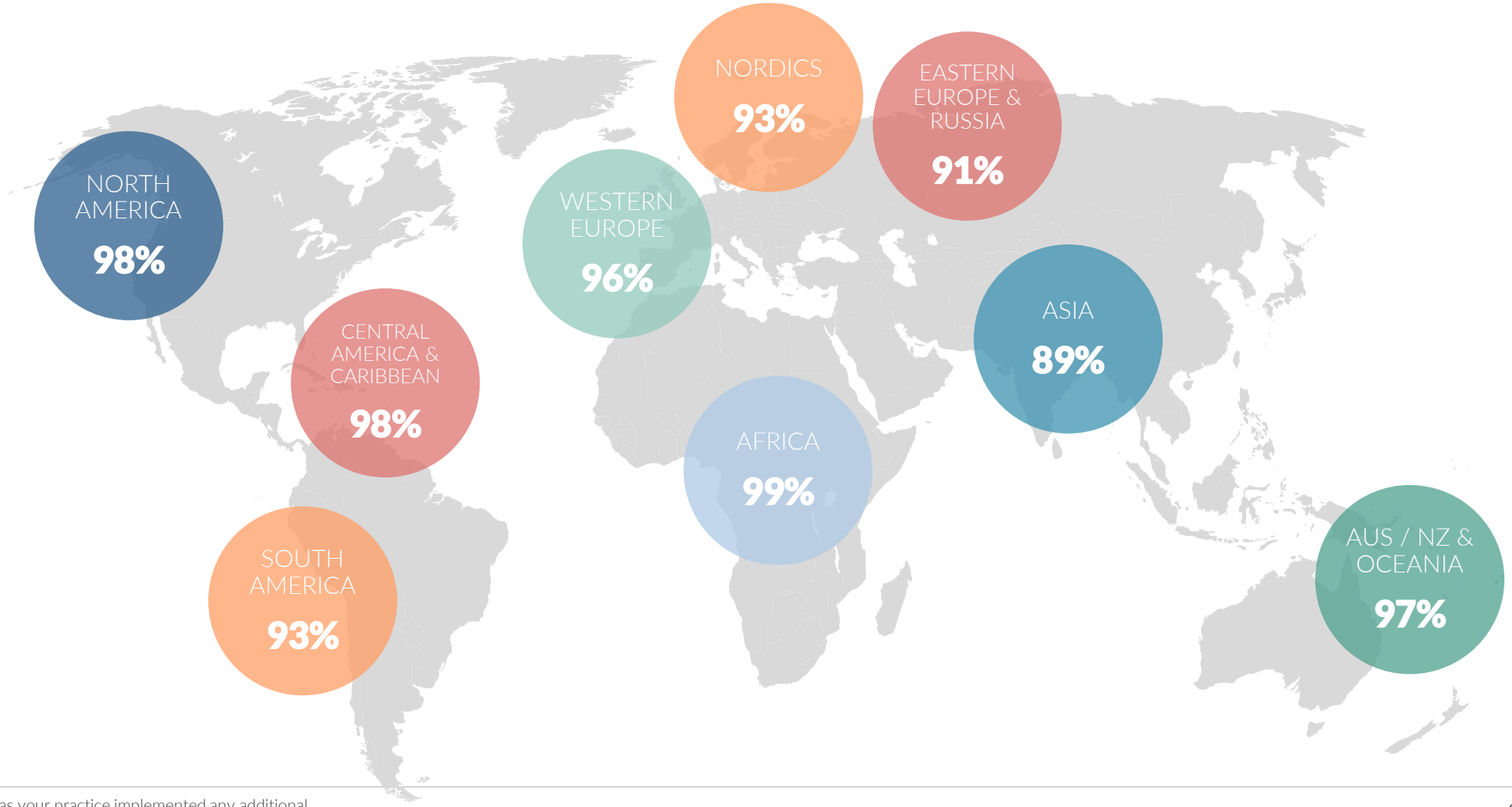
01

Impact of the pandemic on

CLINICS

How has the pandemic impacted everyday practices in veterinary clinics and what areas are most affected?

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 recently been a marked pulling back of footfall limiting measures compared to earlier points in the pandemic.

Dark shade = in place now

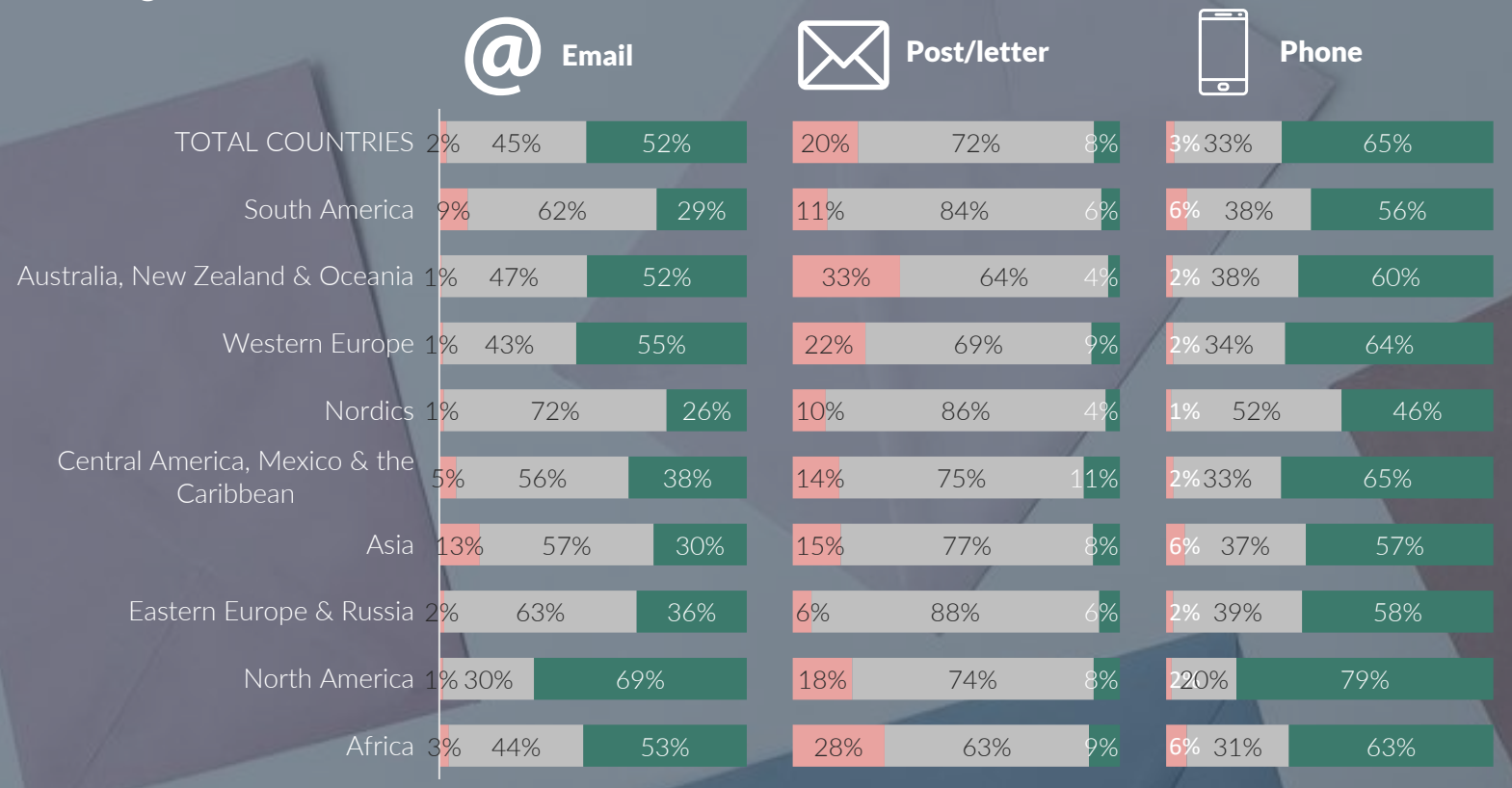
Light shade = in during pandemic but not right now

		TOTAL COUNTRIES	South America	Australia, New Zealand & Oceania	Western Europe	Nordics	Central America, Mexico & the Caribbean	Asia	Eastern Europe & Russia	North America
PPE	Wearing protective clothing during regular consultations (e.g. face masks, gloves)	84%	81%	41%	89%	42%	88%	81%	84%	83%
LIMITING FOOTFALL	Limiting number of clients and pets allowed in the practice per day	54%	69%	52%	55%	52%	69%	53%	35%	47%
	Only emergency cases allowed in the practice	4%	6%	4%	3%	0%	5%	5%	2%	5%
	Asking pet owners to call the practice to assess the real need of coming in	33%	37%	15%	35%	30%	41%	31%	26%	28%
	Cancelling visits from the sales representatives / account managers	33%	27%	30%	36%	33%	12%	17%	14%	40%
	Asking clients to wait outside while members of staff brings the pet inside the practice	45%	29%	26%	45%	33%	40%	37%	20%	72%

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

CHANGING COMMUNICATION CHANNELS WITH CLIENTS

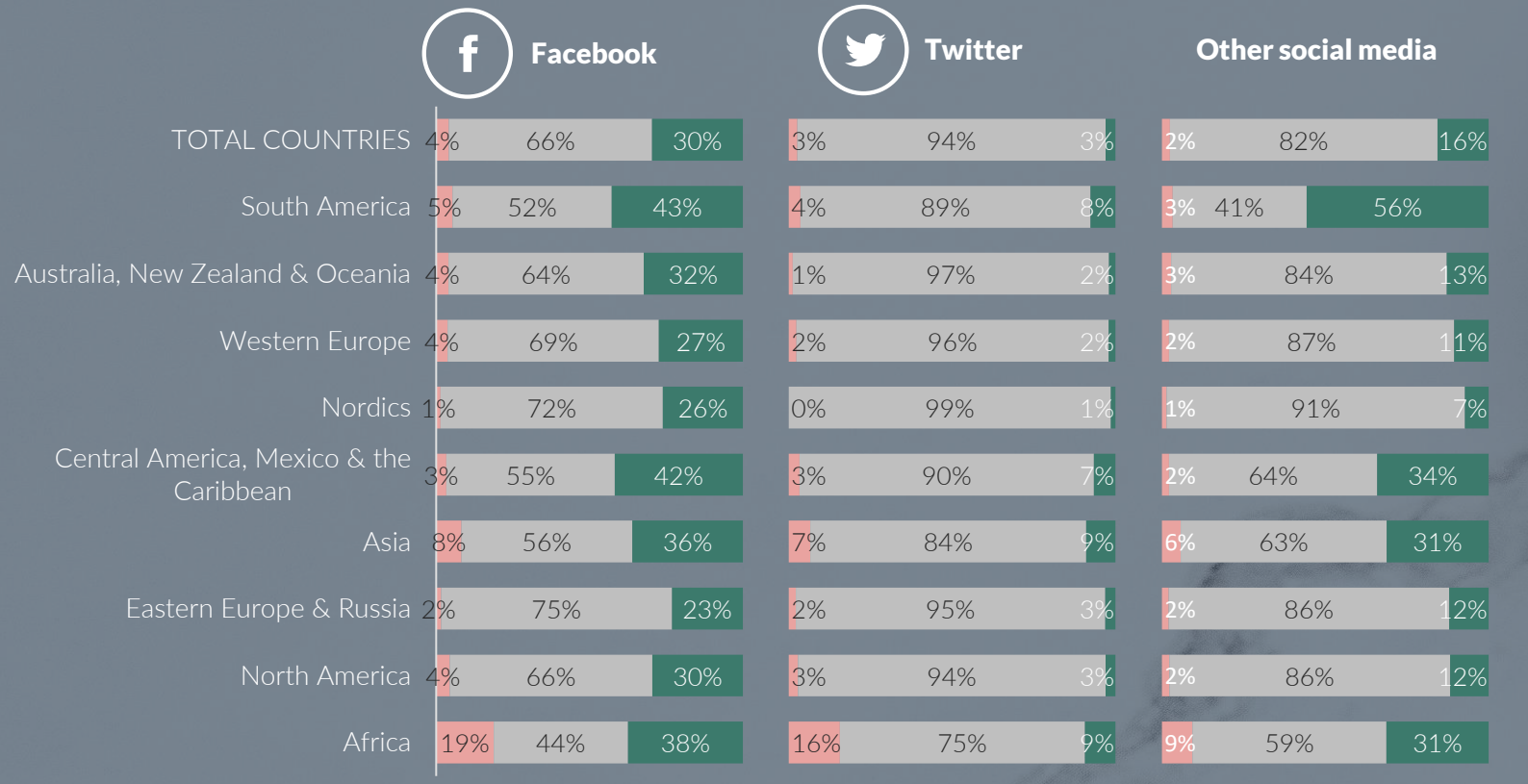
With social distancing measures in place, channels like email and phone have grown in importance for clinics when it comes to communicating with clients. 'Traditional' post/letters on the contrary continue to decline in favour of digital routes.



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? .

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

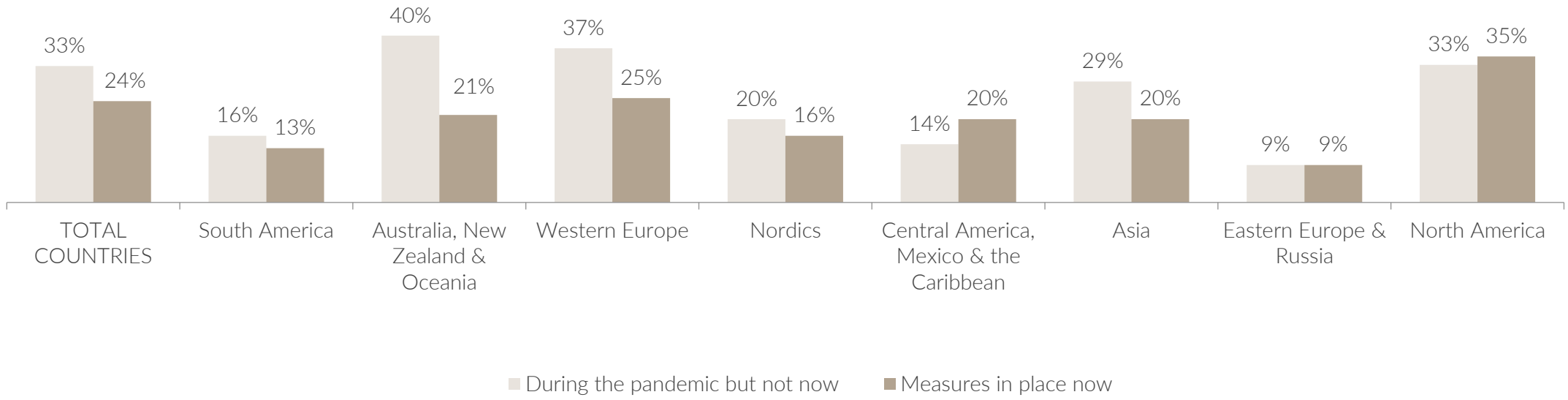
75%

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?

OFFERING TELEMEDICINE / REMOTE CONSULTATIONS TO CLIENTS

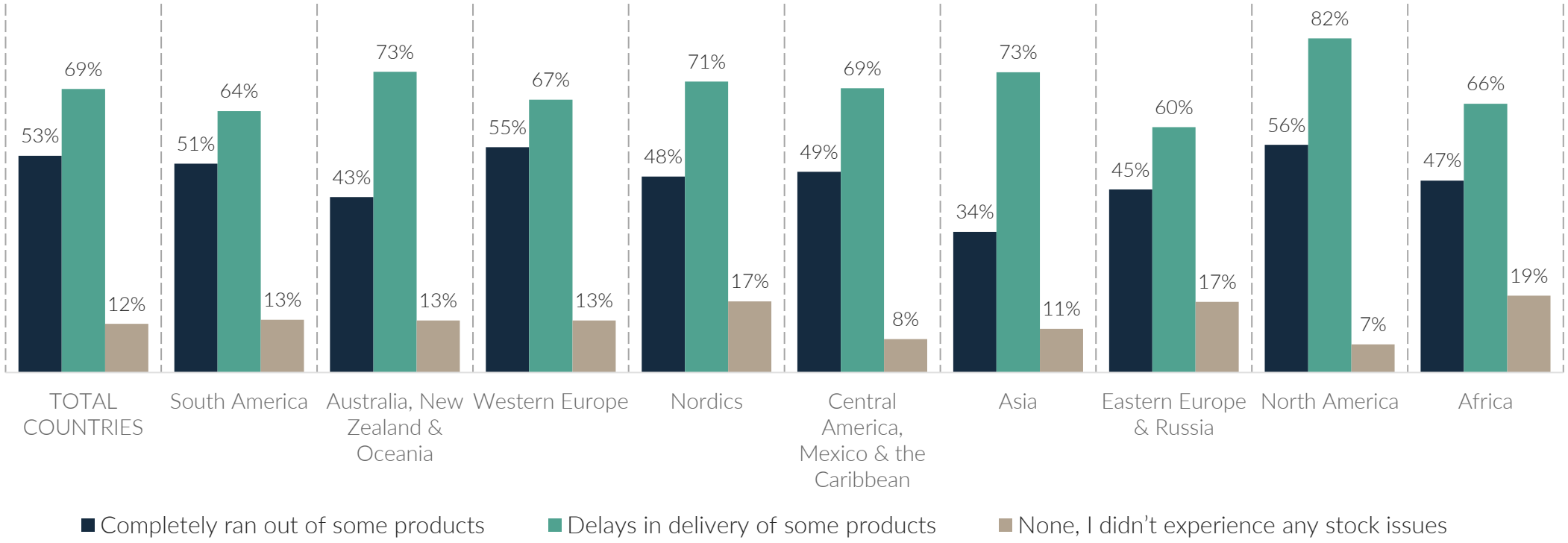
The usage of telemedicine has also been scaled back compared to earlier points in the pandemic. North America and Eastern Europe the only region to still be offering remote consultations at the same level.



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

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?

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.

	TOTAL COUNTRIES	South America	Australia, New Zealand & Oceania	Western Europe	Nordics	Central America, Mexico & the Caribbean	Asia	Eastern Europe & Russia	North America
Pharmaceutical products	73%	59%	81%	76%	79%	77%	61%	51%	72%
Personal protective equipment (masks, gloves etc.)	68%	68%	62%	71%	55%	46%	34%	76%	68%
Surgery equipment and / or consumables	27%	47%	25%	24%	33%	23%	20%	41%	26%
Vaccines	23%	26%	6%	25%	12%	35%	43%	21%	13%
Pet food	18%	11%	24%	12%	27%	21%	27%	6%	40%
Antiparasitics (heartworm, tick and flea etc.)	10%	8%	6%	10%	18%	19%	9%	8%	9%
Diagnostic consumables (e.g. test slides)	8%	10%	11%	7%	3%	17%	18%	13%	8%
Nutraceuticals	6%	6%	4%	4%	6%	13%	27%	5%	10%

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

02

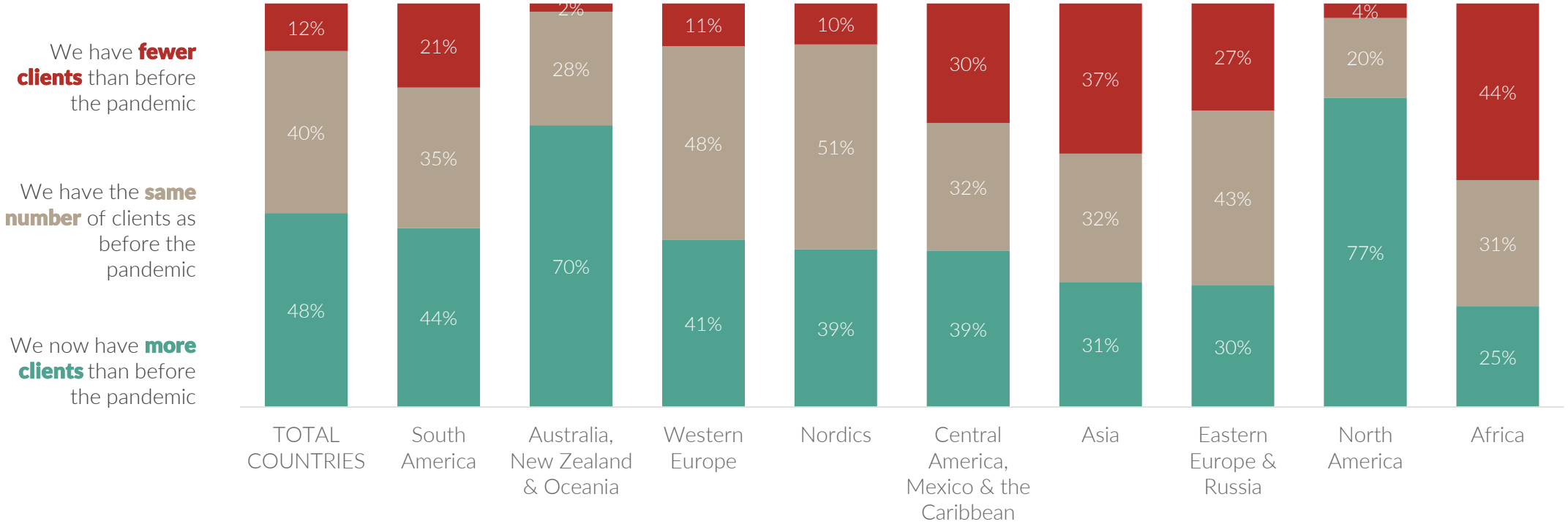
Impact of the pandemic on

ANIMALS

How has the pandemic impacted pet owner behaviour and, ultimately, the end clients of the industry: animals?

A SURGE IN PETS - CHANGES IN CLIENT LOAD BY REGION

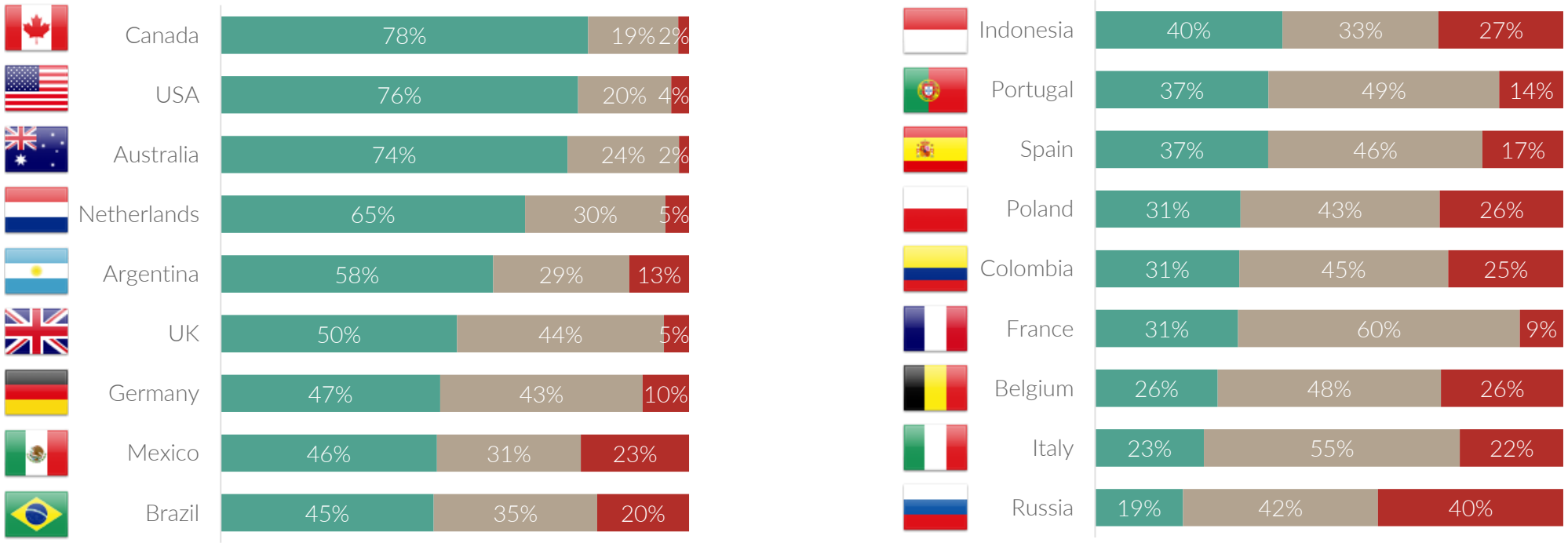
Despite the difficulties and new ways of working created by the pandemic, for many clinics client numbers are increasing – especially in North America and Australia



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

A SURGE IN PETS - 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.



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

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SHARE
TWEET
EMAIL

7 ON YOUR SIDE

Puppies in high demand and short supply this coming Christmas amid COVID-19 pandemic

By Michael Finney and Randall Yip

GERMANY

COVID: Demand for dogs and cats surges in Germany

Prices for puppies and kittens are exploding on the internet, and animal shelters and breeders have been inundated with inquiries. But the boom has its downsides for the animals.

Coronavirus U.S. map World map Vaccine tracker Vaccine FAQ Variants FAQ A pandemic year Coronavirus Living

Road to Recovery

So many pets have been adopted during the pandemic that shelters are running out

"They're going like hot cakes," said one operator of an animal shelter in Maryland

Dog owners scared to walk their pets due to rise of kidnappings in lockdown

'Having my dog stolen was definitely the worst, stressful and most heart-breaking situation I have ever had to go though'

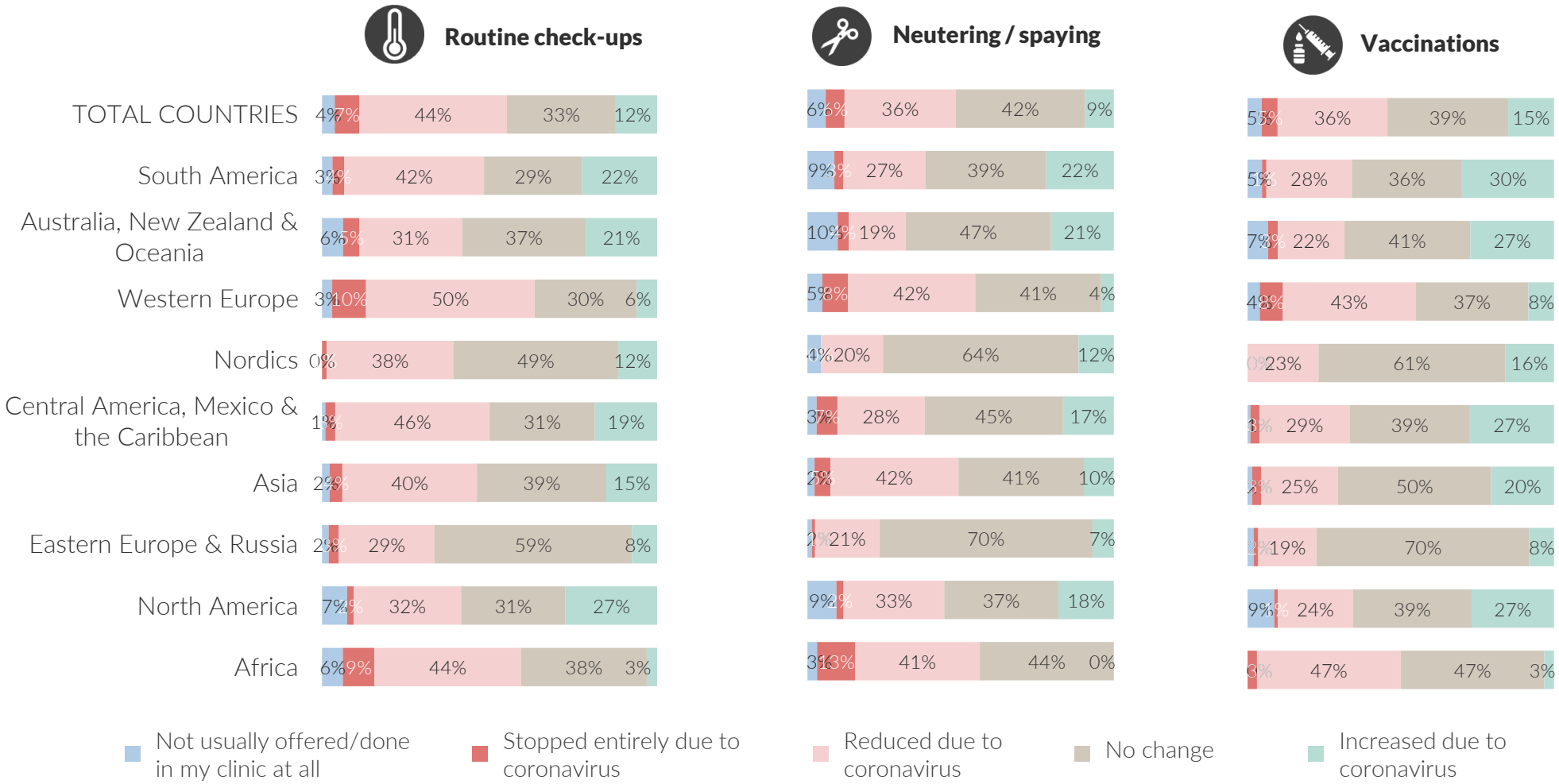
Coronavirus: Lockdown year 'worst ever' for dog thefts

By Amy Woodfield
BBC News, East Midlands

17 October 2020

...AND PETS ARE ALSO GETTING LESS PREVENTATIVE CARE

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.

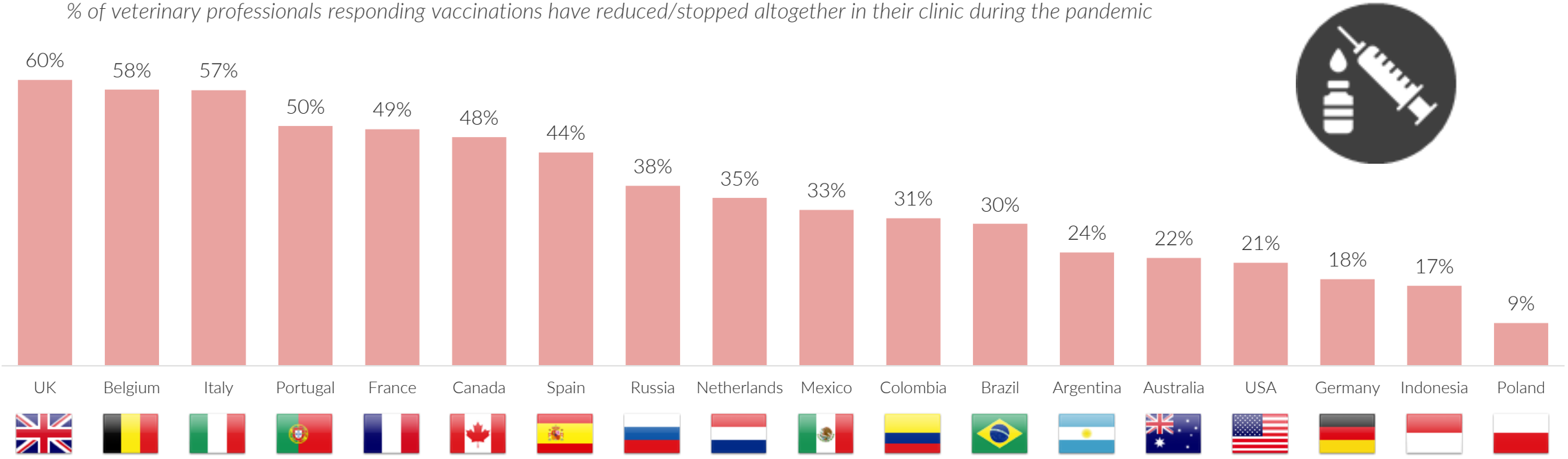


CTQ7 For each of the clinic activities below, please pick the option that best fits.

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.

THE **PANDEMIC PET GENERATION -** WHAT WILL THE OUTCOME BE WHEN NORMALCY RETURNS?

- Will new owners who acquired their pet as an impulse purchase during the pandemic remain committed once ‘normal’ life sets in?

- Will we see an increase in disease outbreaks in e.g. Western Europe as a result of falling vaccination rates?

- Will we see a sharp rise in behavioural issues as a result of e.g. separation anxiety and undersocialised puppies?

CM Research

03

Impact on veterinary

STAFF

What has been the toll on clinic staff on both a personal and professional level?

Stress levels are higher than ever before...

36%

BEFORE COVID

% of veterinary professionals being 'quite/very stressed'

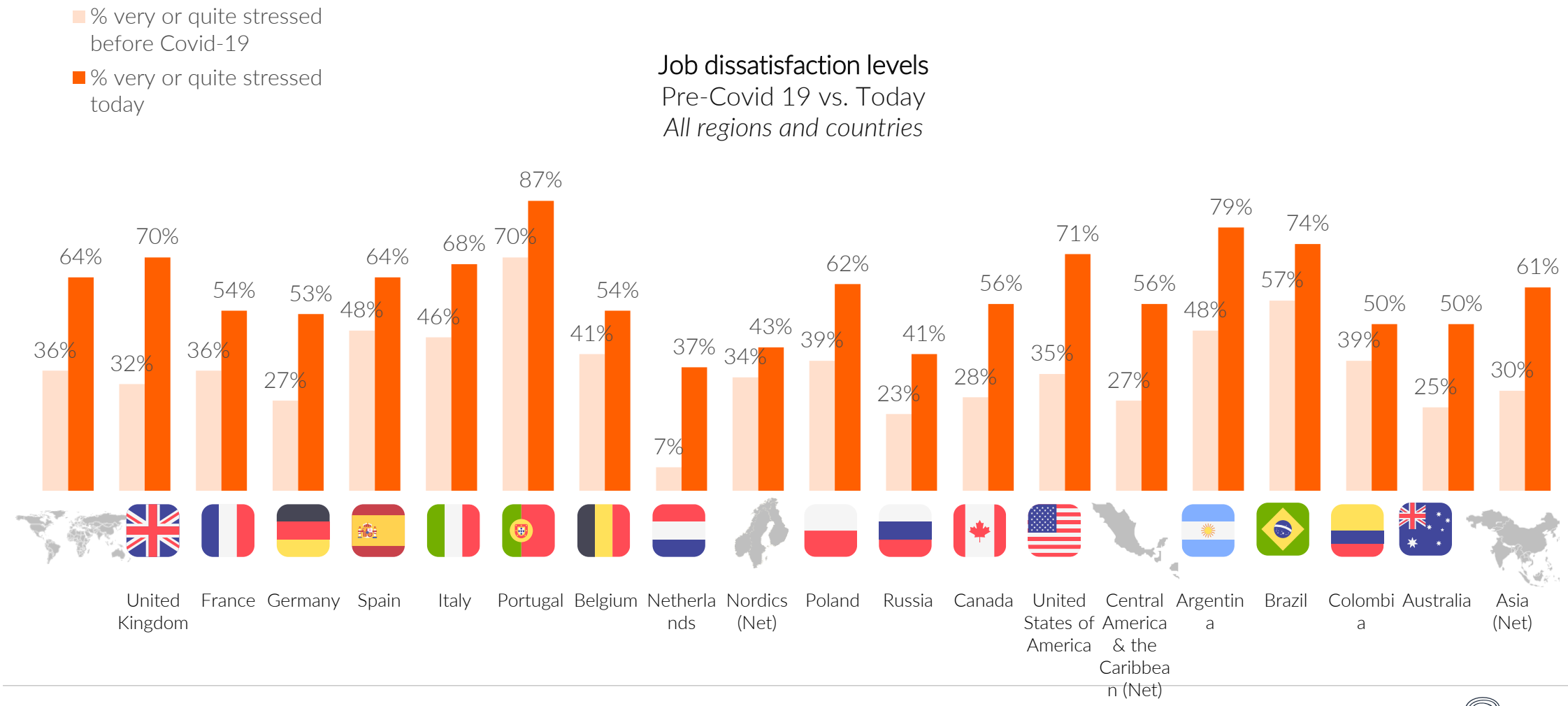
64%

NOW

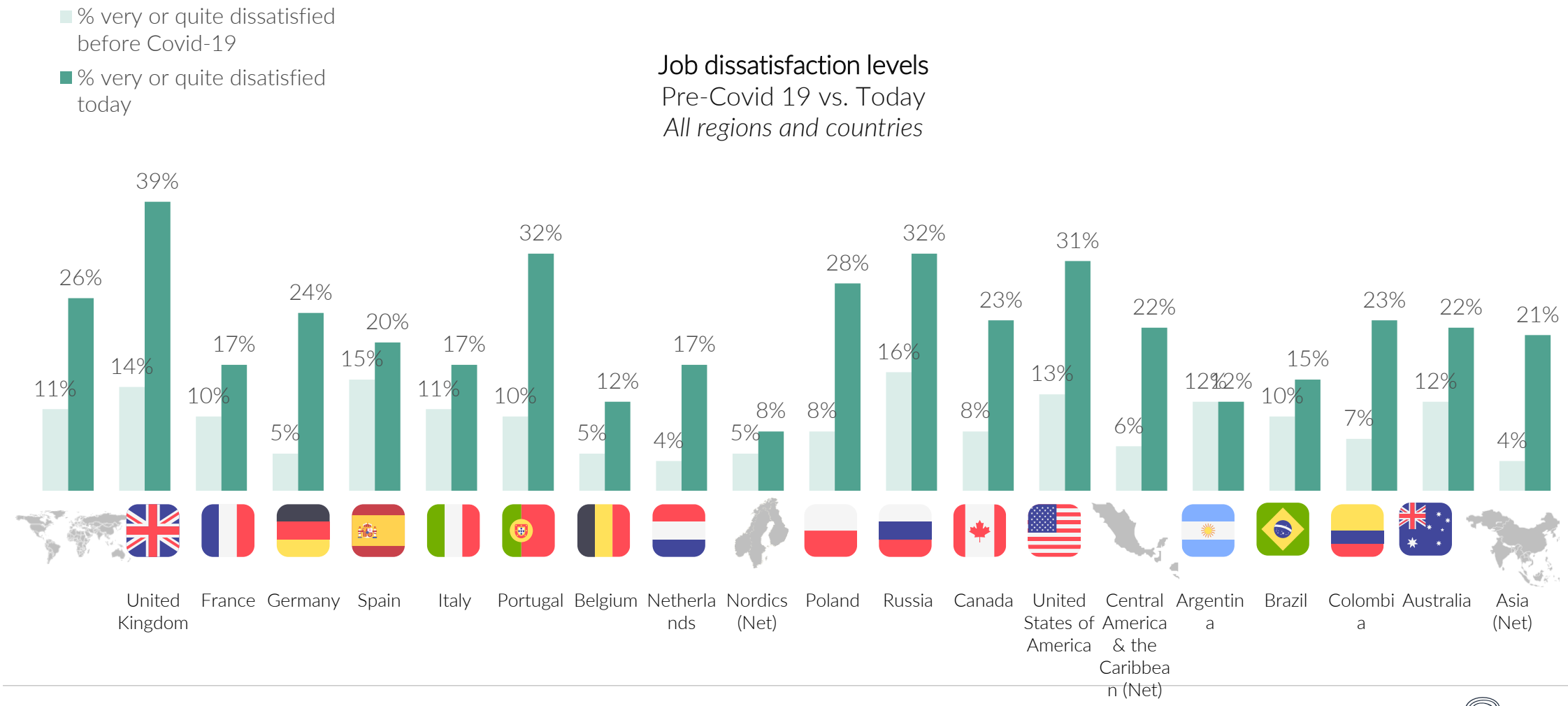
% of veterinary professionals being 'quite/very stressed'

AND THIS RISE IN STRESS LEVELS IS CONSISTENT ACROSS ALL REGIONS…

In some countries stress levels have more than doubled since the COVID-19 outbreak started



JOB DIS-SATISFACTION LEVELS



'On a scale of 0-10, to what extent would you say you are currently experiencing burnout?'

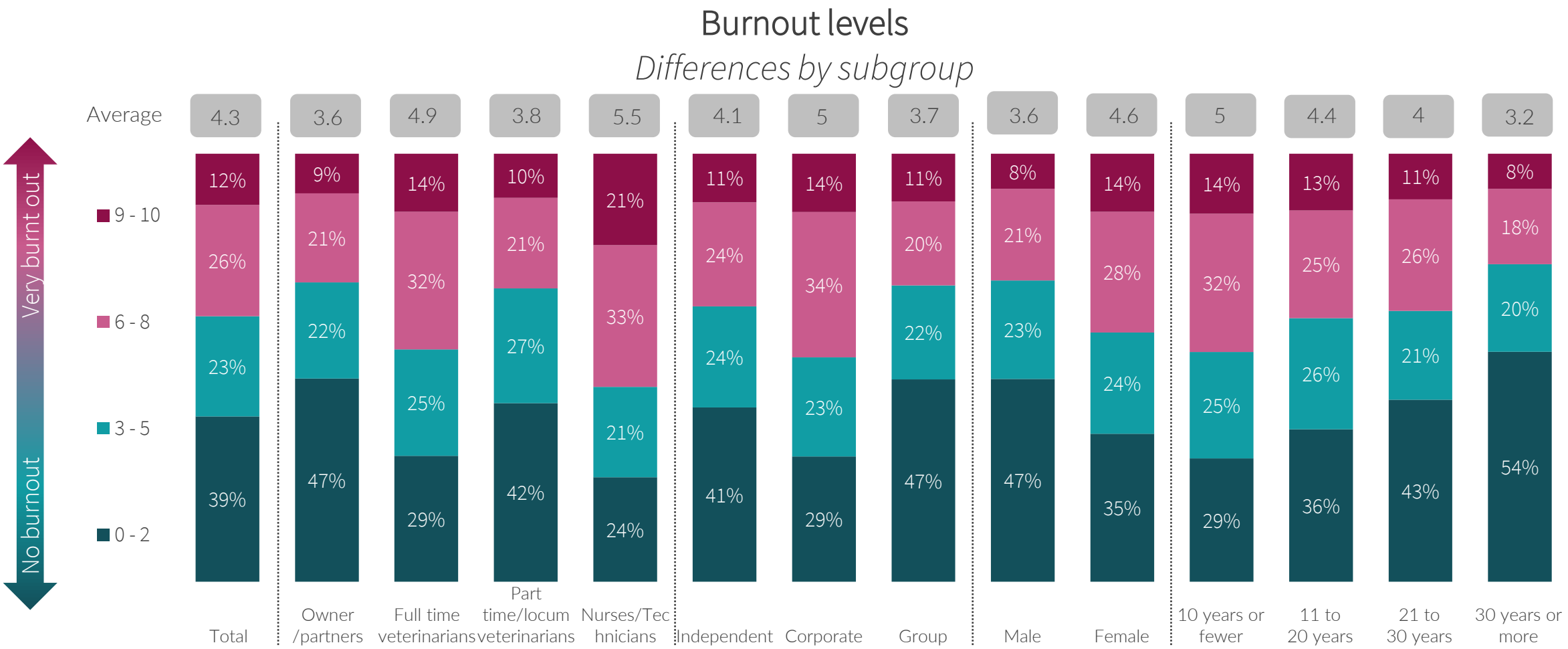
4.3
Global average

0 - NO BURNOUT

10 -VERY BURNT OUT

BURNOUT LEVELS BY SUBGROUP

Burnout is most widely reported among female, younger staff – with nurses/techs being a particularly vulnerable group



To what extent would you say you are currently experiencing

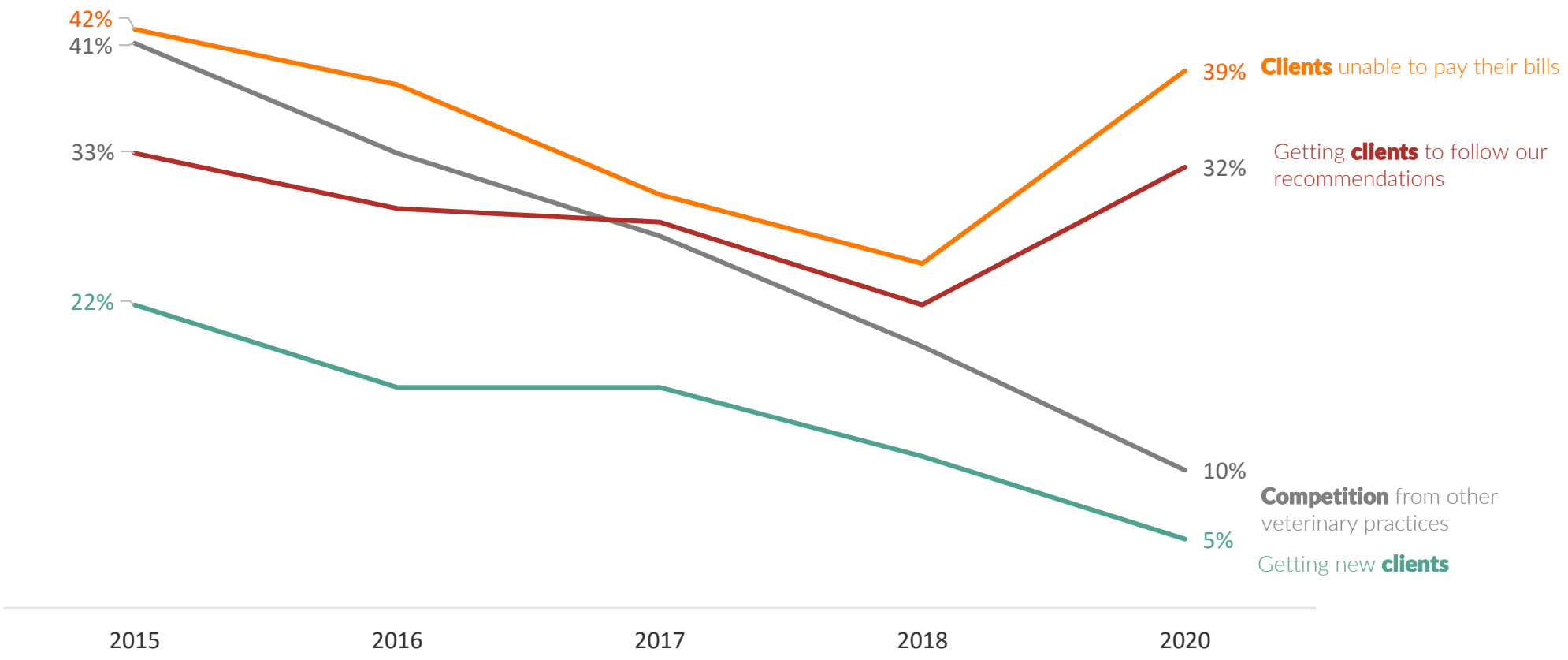
CHAPTER 03

THE FUTURE: WHERE WE ARE GOING

HAS THE PANDEMIC CHANGED THE FUTURE COURSE?

THE INCREASE IN CLIENTS IS DOUBLE EDGED

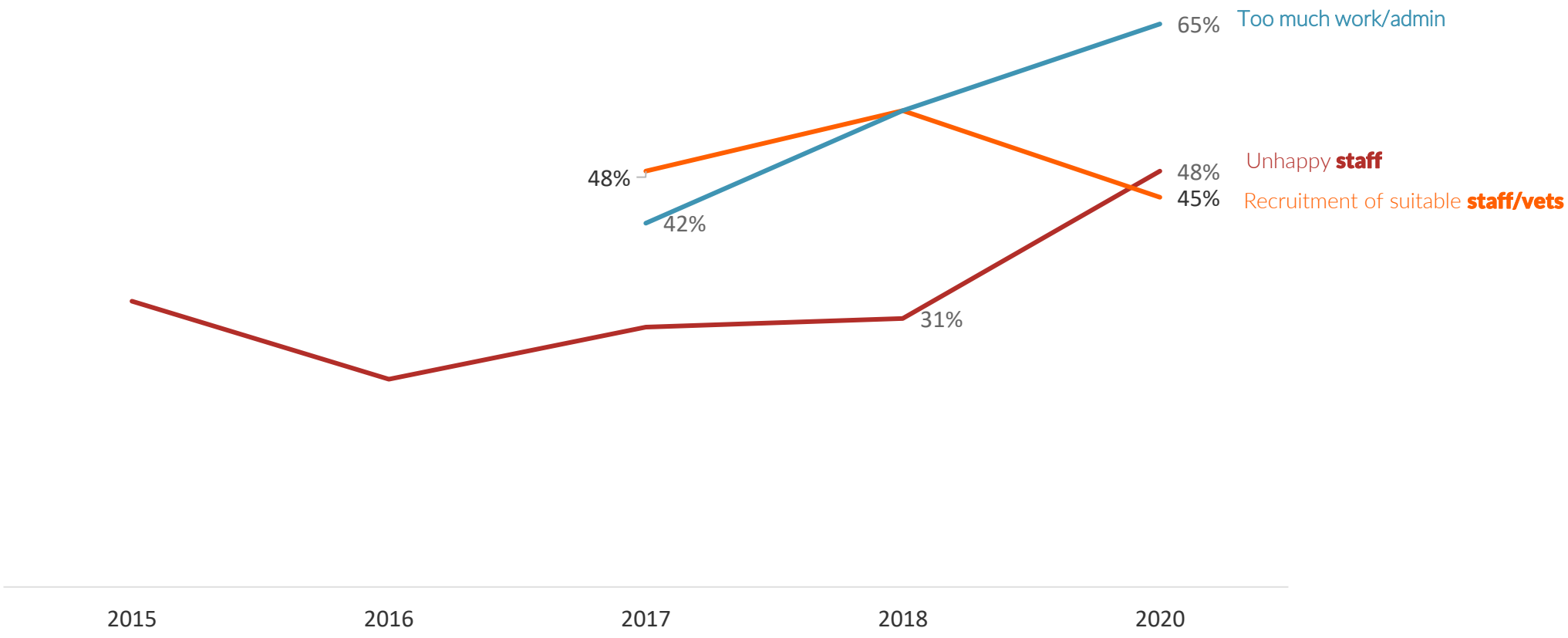
The pandemic has reversed the downwards trend in client challenges. Clients being unable to pay and client compliance have increased since 2018. On the other hand, competition and getting new clients continue to trend downwards.



VetSurvey 2020 - Q27: What would you say are the biggest challenges facing your vet practice at this moment? *Multi-choice closed options*

WORKLOAD AND STAFF MORALE AREN'T LIKELY TO IMPROVE SOON

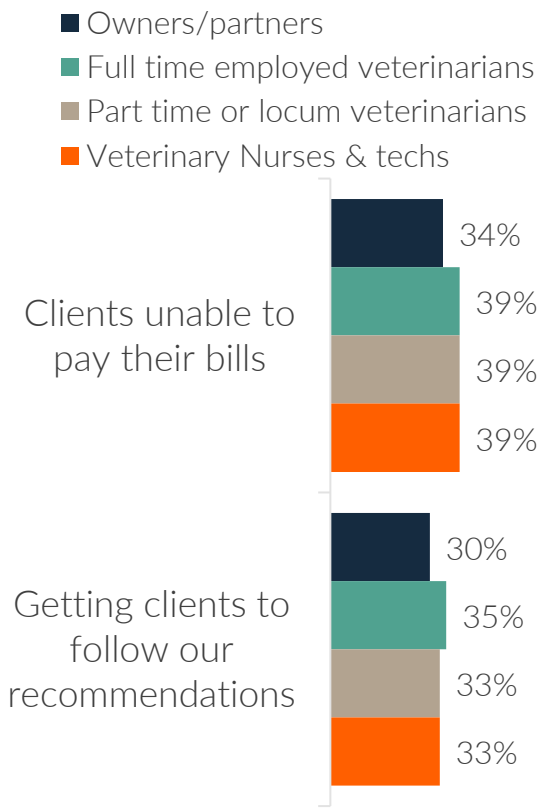
Whilst the pressures on recruitment have stabilised, we see huge increases in workload and unhappy staff being reported as the biggest challenges



VetSurvey 2020 - Q27: What would you say are the biggest challenges facing your vet practice at this moment? *Multi-choice closed options*

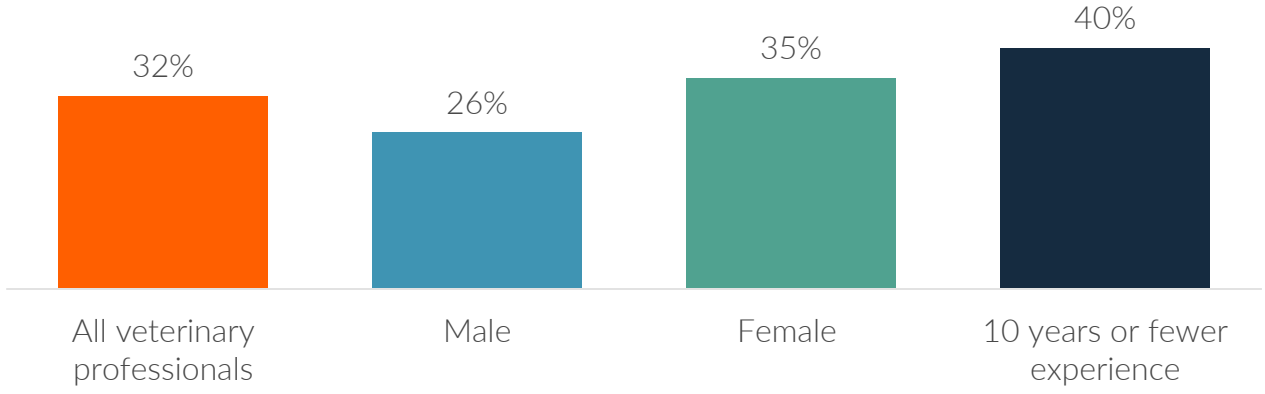
HOW THE TOP CHALLENGES AFFECT DIFFERENT GROUPS

Client compliance and paying bills presents the same level of challenge regardless of role



But younger and female veterinary professionals find compliance more challenging

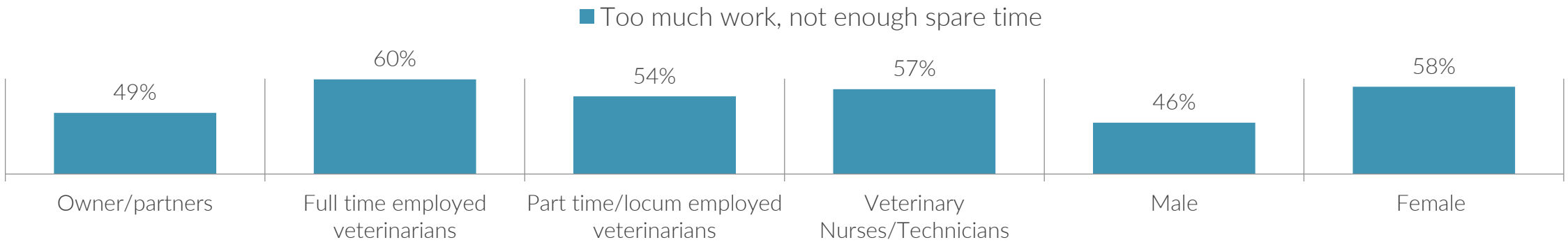
% agreeing that "getting clients to follow our recommendations" is a challenge

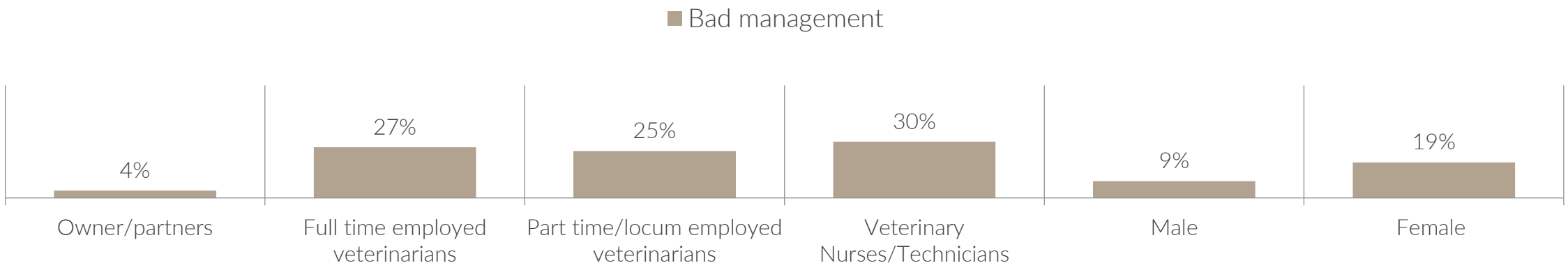


VetSurvey 2020 - Q27: What would you say are the biggest challenges facing your vet practice at this moment? *Multi-choice closed options*

HOW THE TOP CHALLENGES AFFECT DIFFERENT GROUPS

Too much work, unhappy staff and bad management are three challenges that disproportionately affect employees vs owners and women vs men

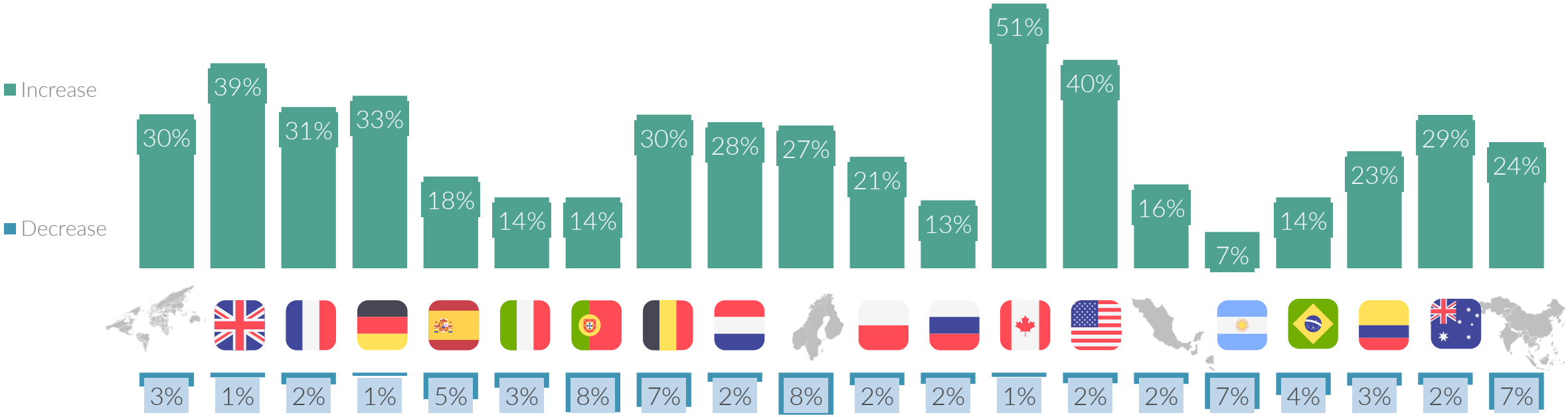




VetSurvey 2020 - Q27: What would you say are the biggest challenges facing your vet practice at this moment? *Multi-choice closed options*

ACROSS THE GLOBE, VETERINARY PROFESSIONALS ARE ONLY EXPECTING WORKLOAD TO GO UP

% expecting an increase in workload vs. a decrease in the next 10 years



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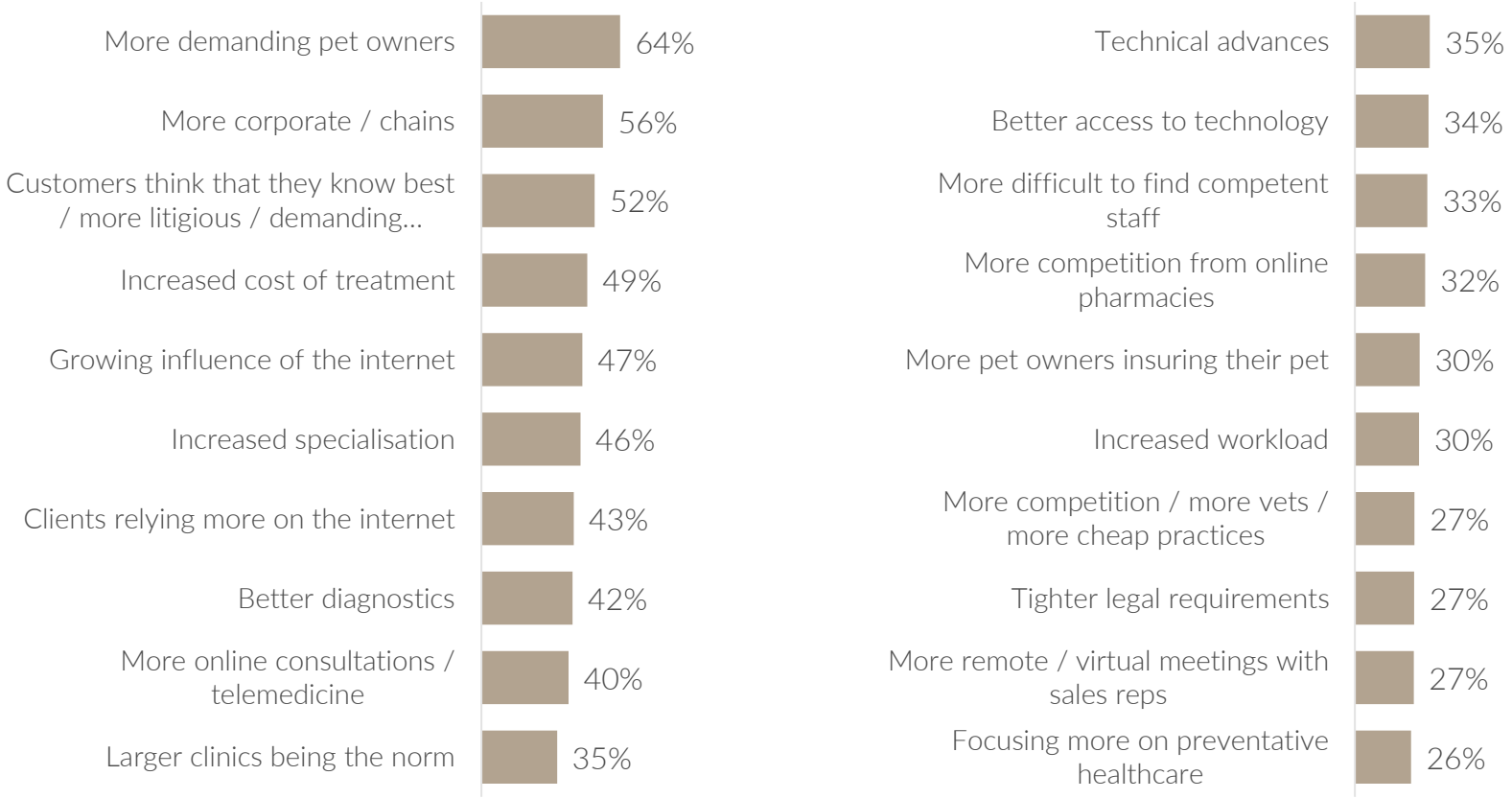
WHAT CHANGES ARE VETERINARIANS EXPECTING?

WHAT DO VETERINARIANS EXPECT TO HAPPEN IN THE FUTURE?

Changes expected in next 10 years

Top 20, all regions and countries



THEY EXPECT CLIENTS TO GET MORE DIFFICULT

Especially in…..

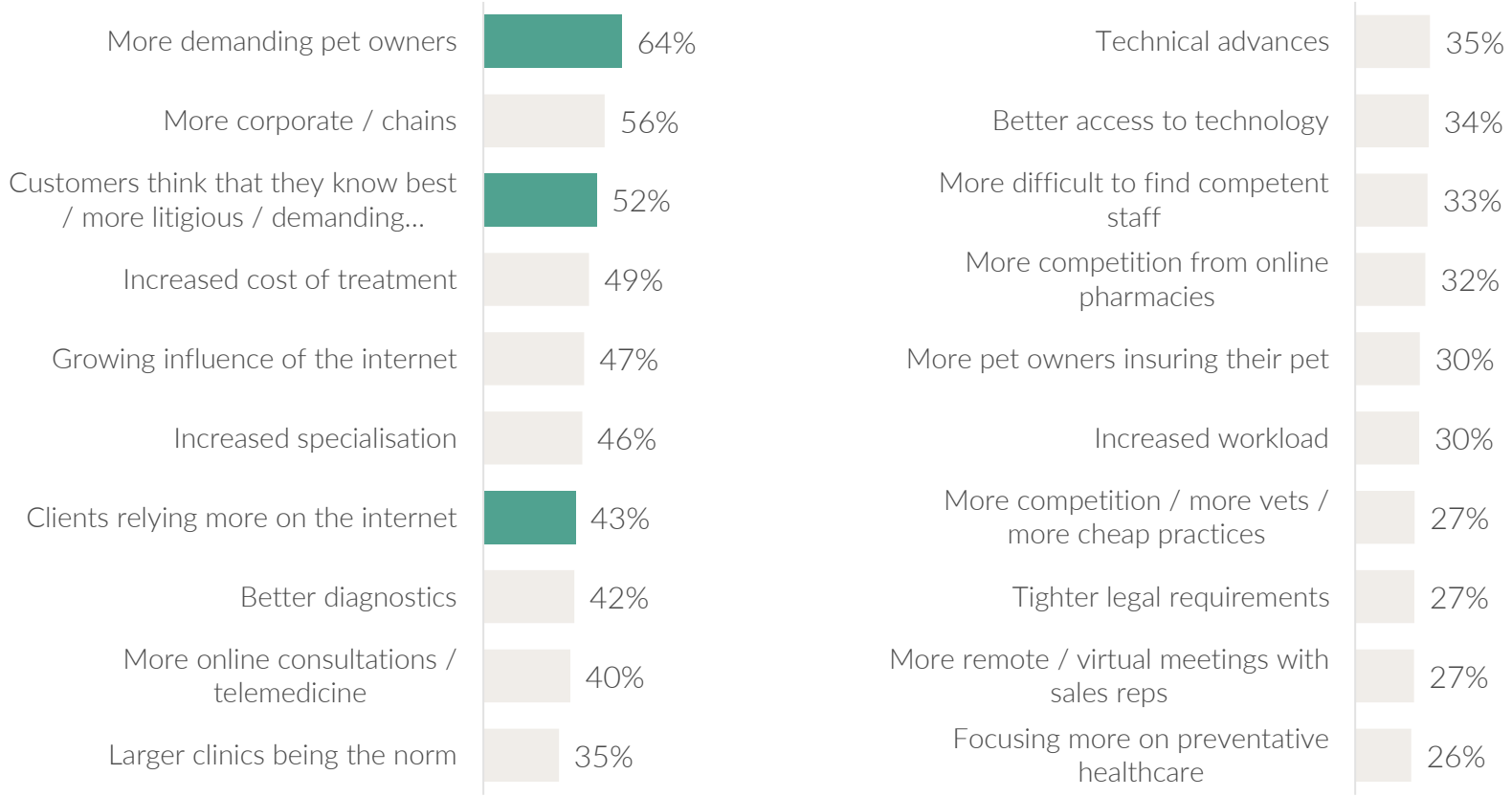
United Kingdom

Portugal

Brazil

Changes expected in next 10 years

Top 20, all regions and countries



MORE CORPORATE GROWTH

Especially in…..

United Kingdom

France

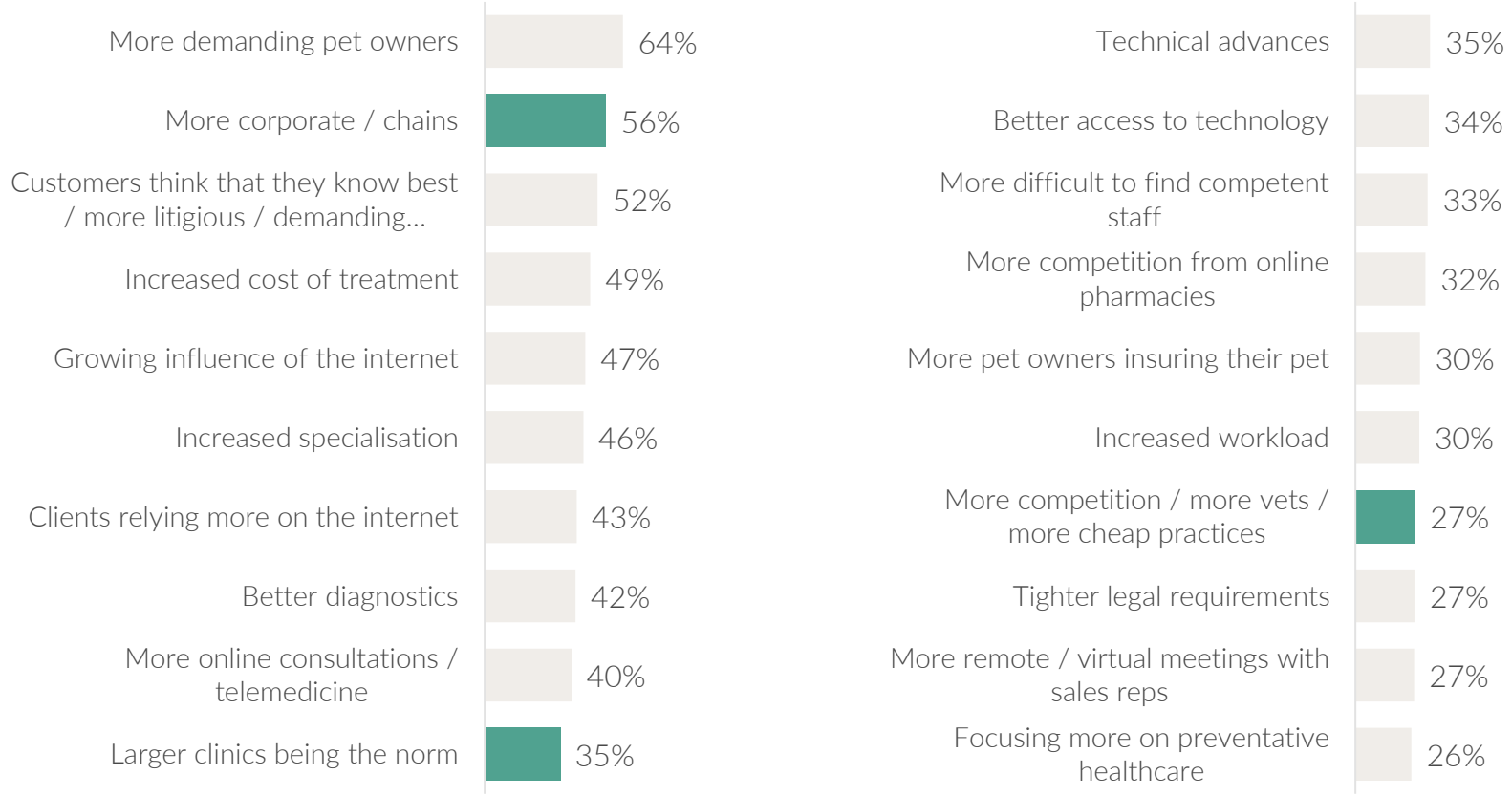
Germany

United States

Australia

Changes expected in next 10 years

Top 20, all regions and countries



TECHNOLOGICAL CHANGES

Especially in…..

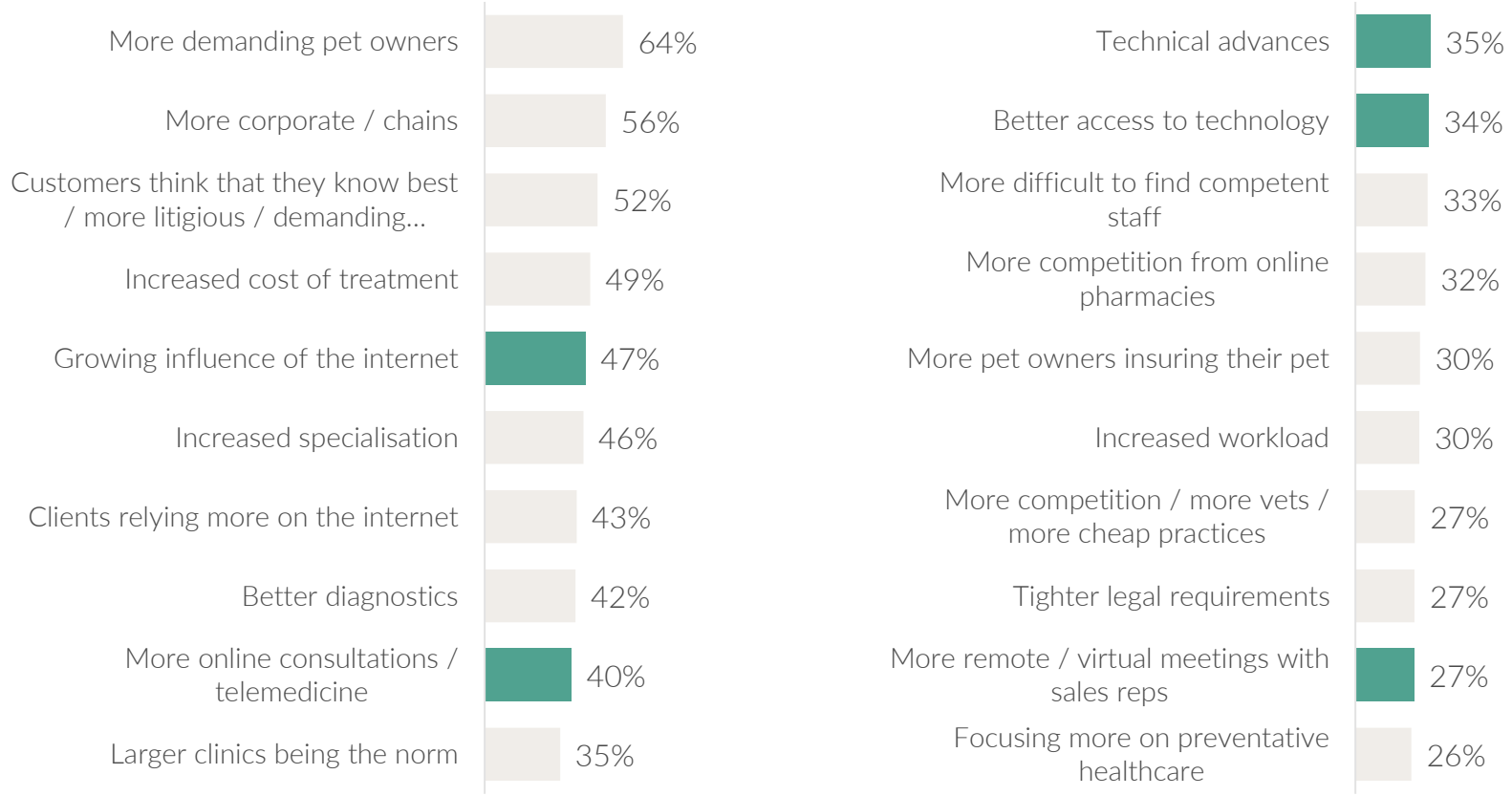
Nordics

Australia

Asia

Changes expected in next 10 years

Top 20, all regions and countries



CLINICAL CHANGES

Especially in…..

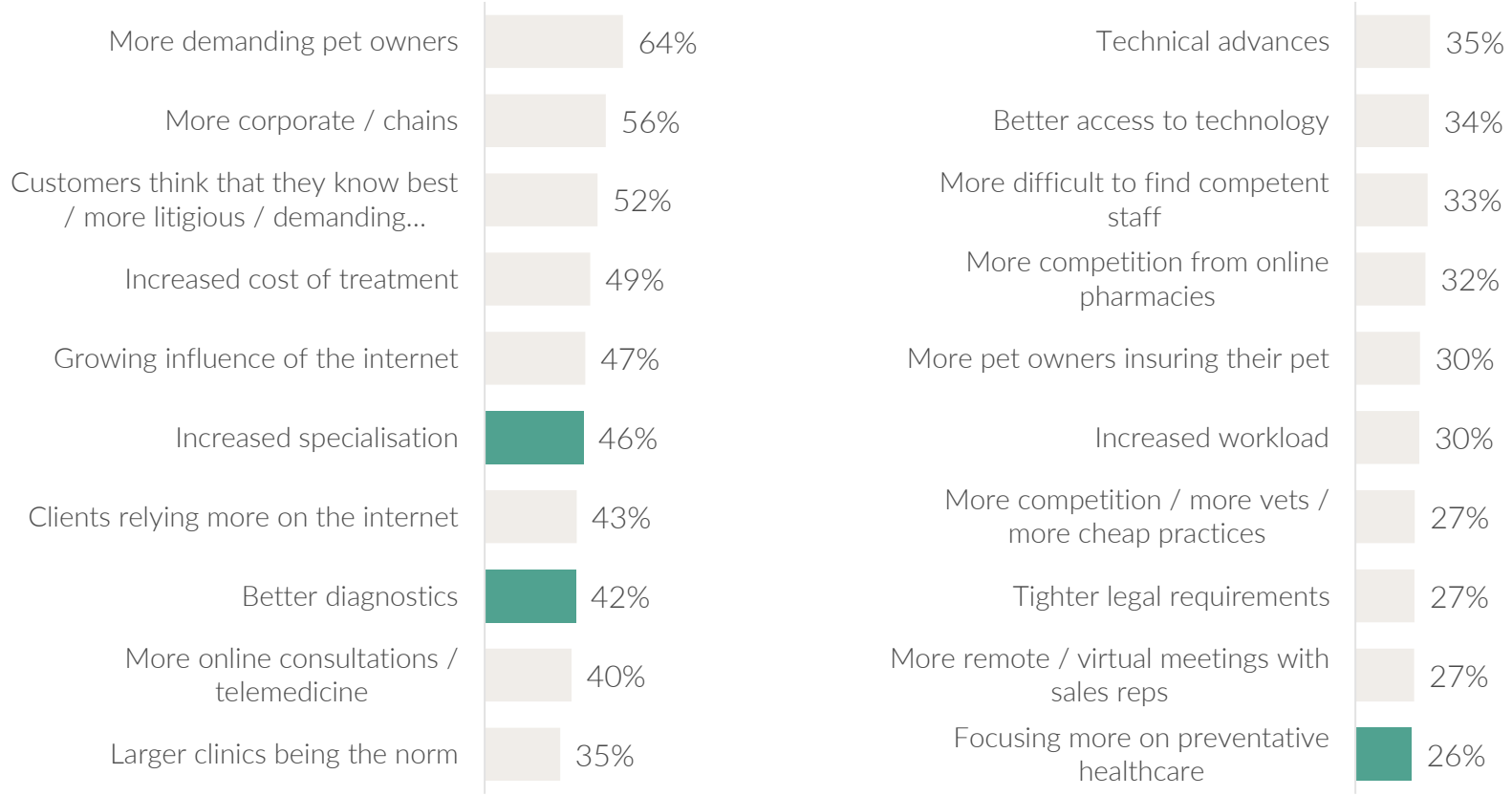
Nordics

Poland

Portugal

Changes expected in next 10 years

Top 20, all regions and countries

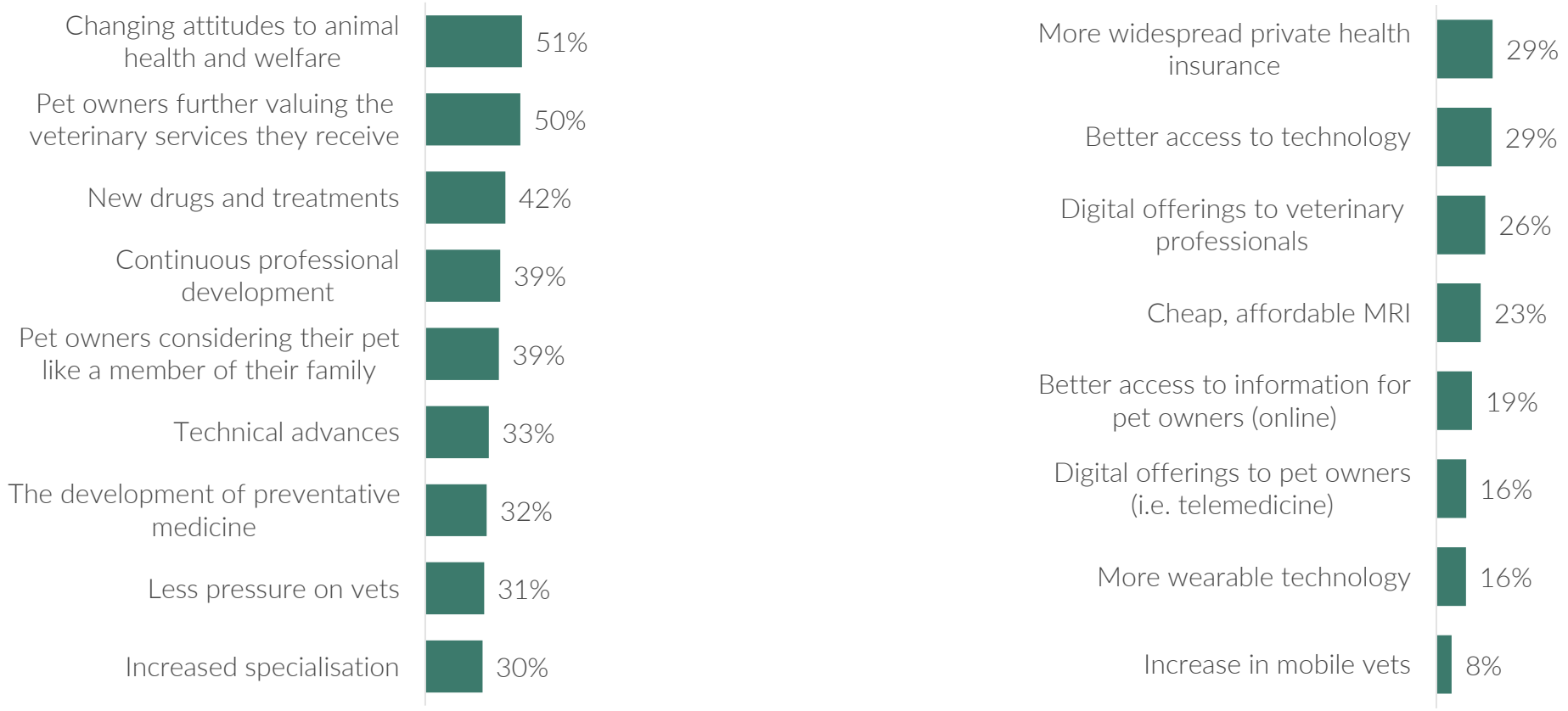


WHAT DO THEY NEED?

MORE THAN NEW DRUGS AND TREATMENTS, VETERINARY MEDICINE NEEDS AN ATTITUDE CHANGE FROM ITS CLIENTS

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

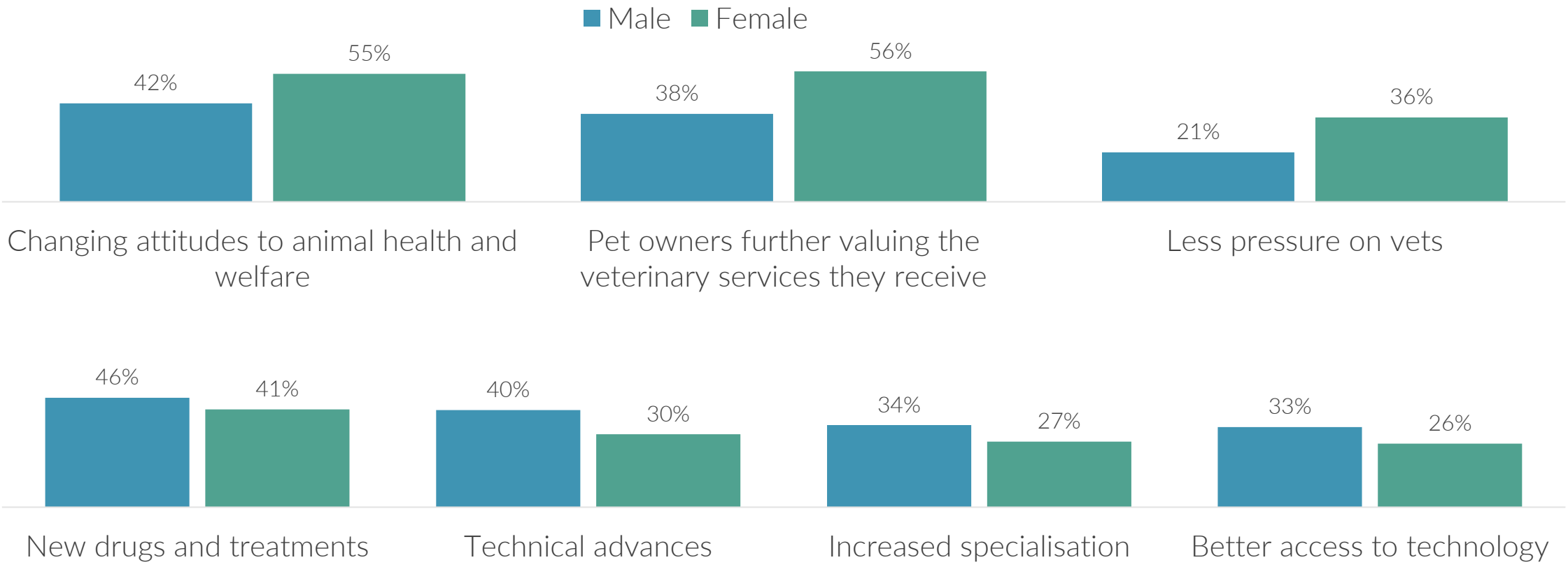
All regions and countries



VS1. What would you say are the biggest challenges facing your vet practice at this moment? All answering (3779)

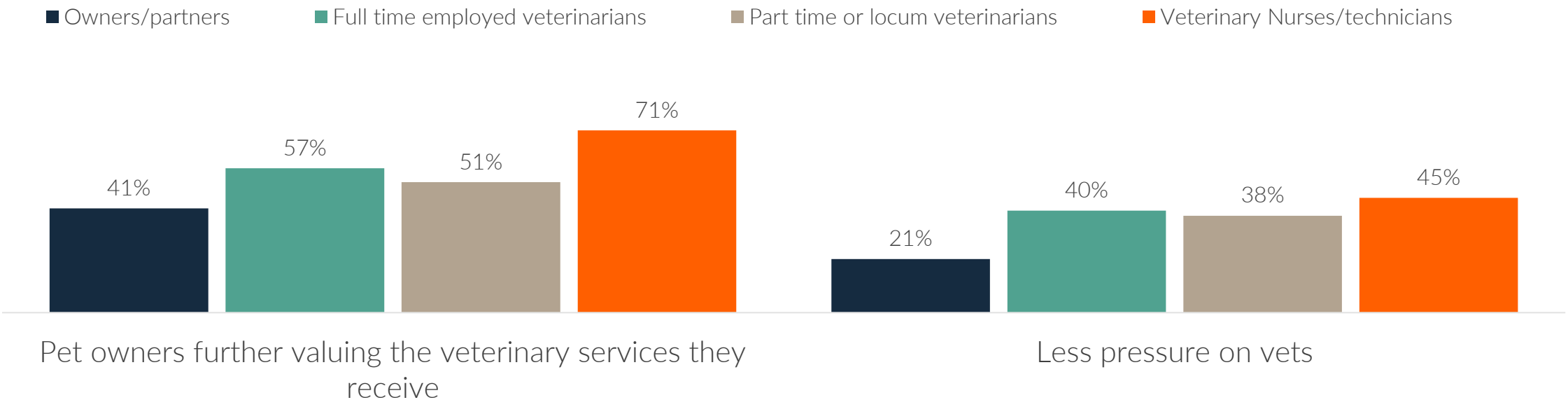
FEMALE AND MALE PROFESSIONALS SHOW SOME KEY DIFFERENCES IN THEIR EXPECTATIONS ON WHAT WOULD MAKE A POSITIVE DIFFERENCE

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



AND IT IS EMPLOYED VETS AND NURSES WHO WANT TO SEE THE PRESSURE TAKEN OFF

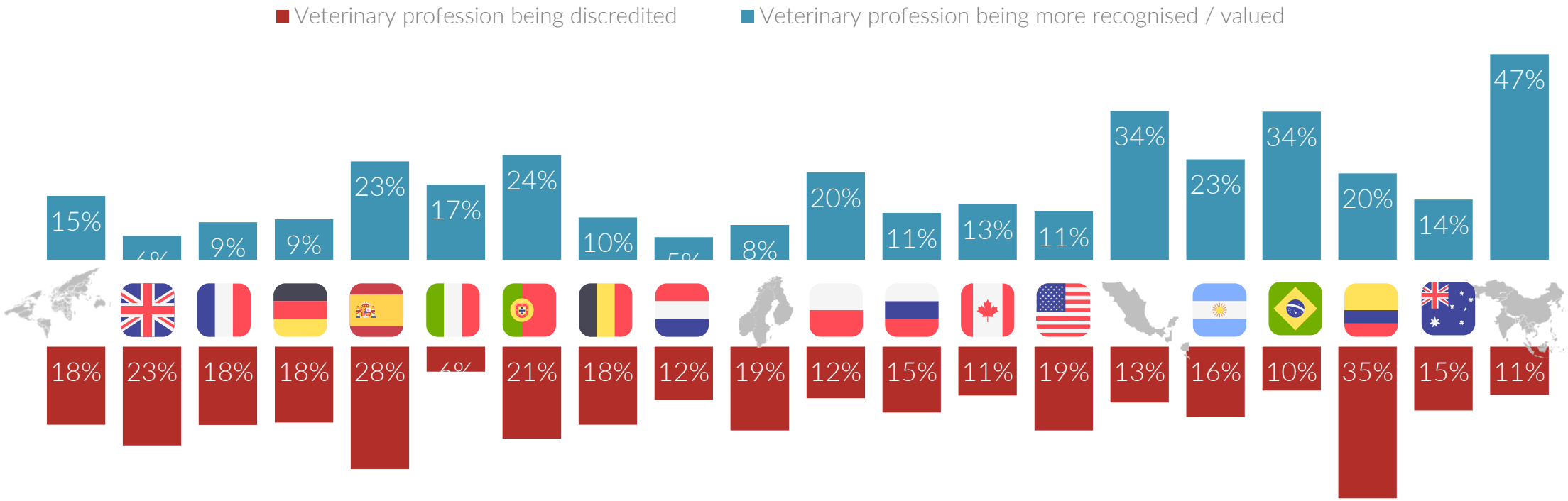
What would make the most positive difference to the future of veterinary medicine?
All regions and countries

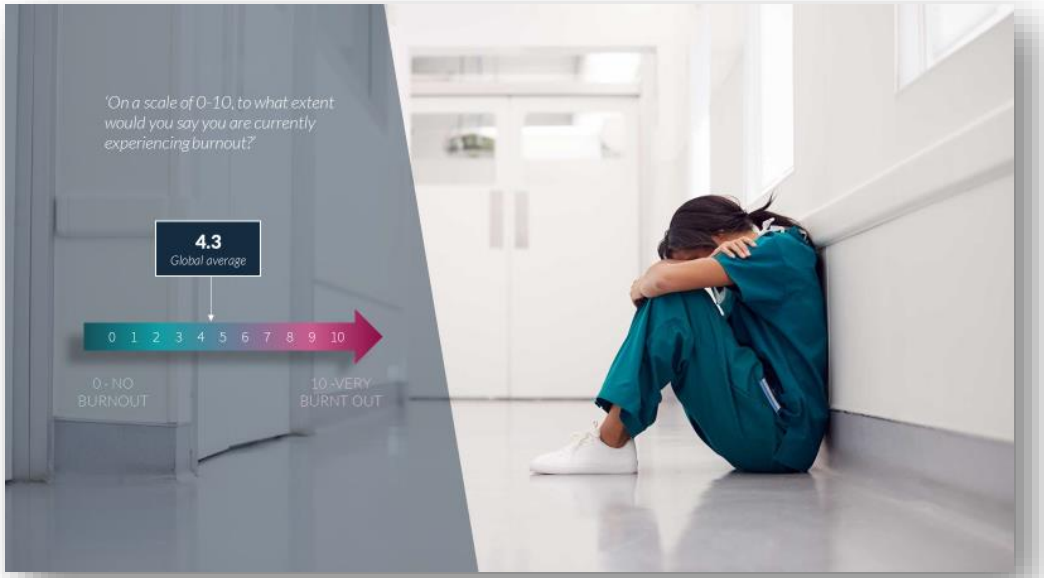


VS1. What would you say are the biggest challenges facing your vet practice at this moment? All answering (3779)

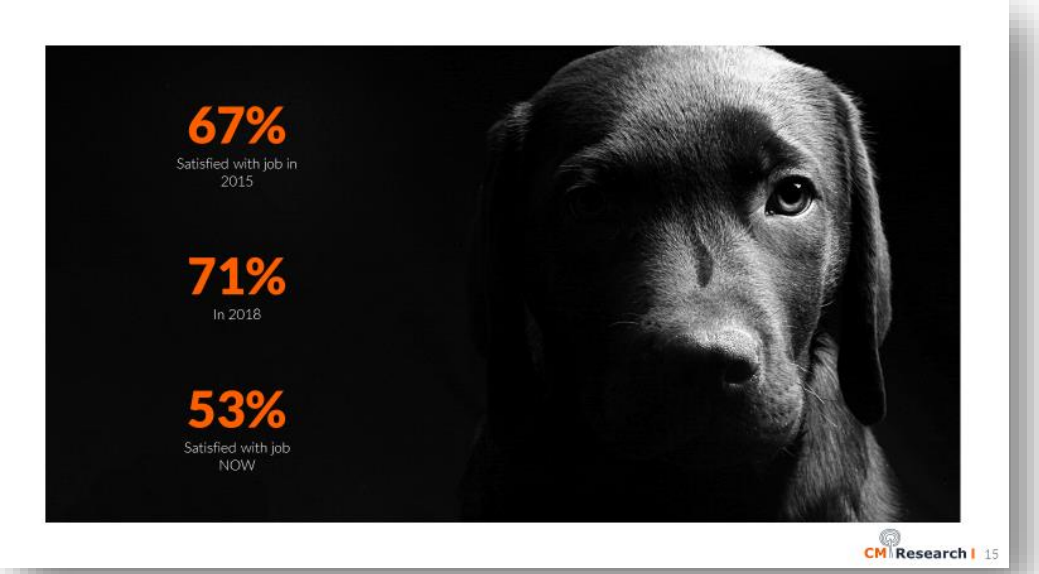
WHILST VALUE IS SOMETHING VETERINARIANS NEED, IT ISN'T EXPECTED

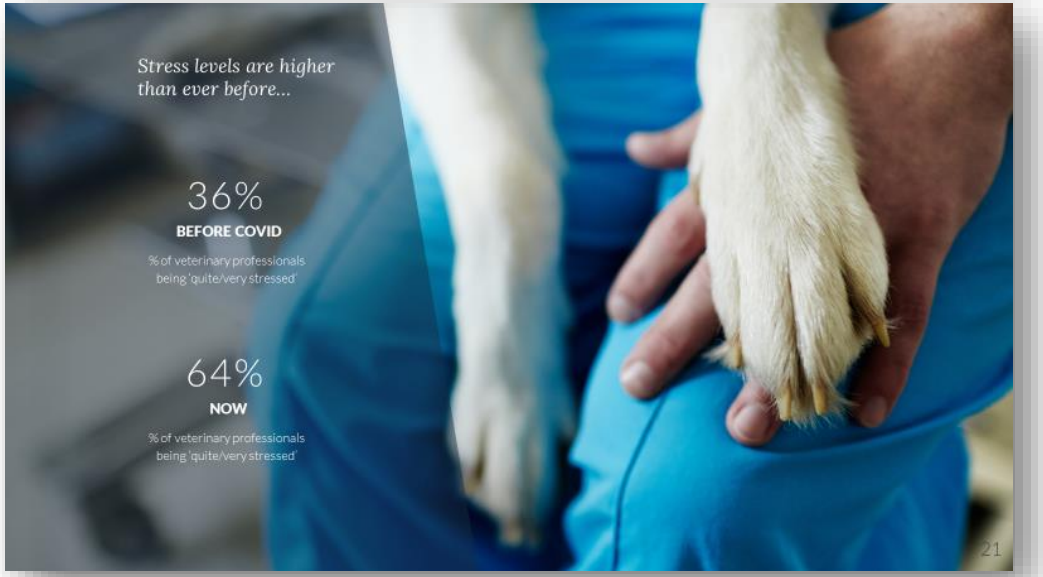
% expecting change in next 10 years




'On a scale of 0-10, to what extent would you say you are currently experiencing burnout?'
4.3
Global average
0 1 2 3 4 5 6 7 8 9 10
0 - NO BURNOUT
10 -VERY BURNT OUT

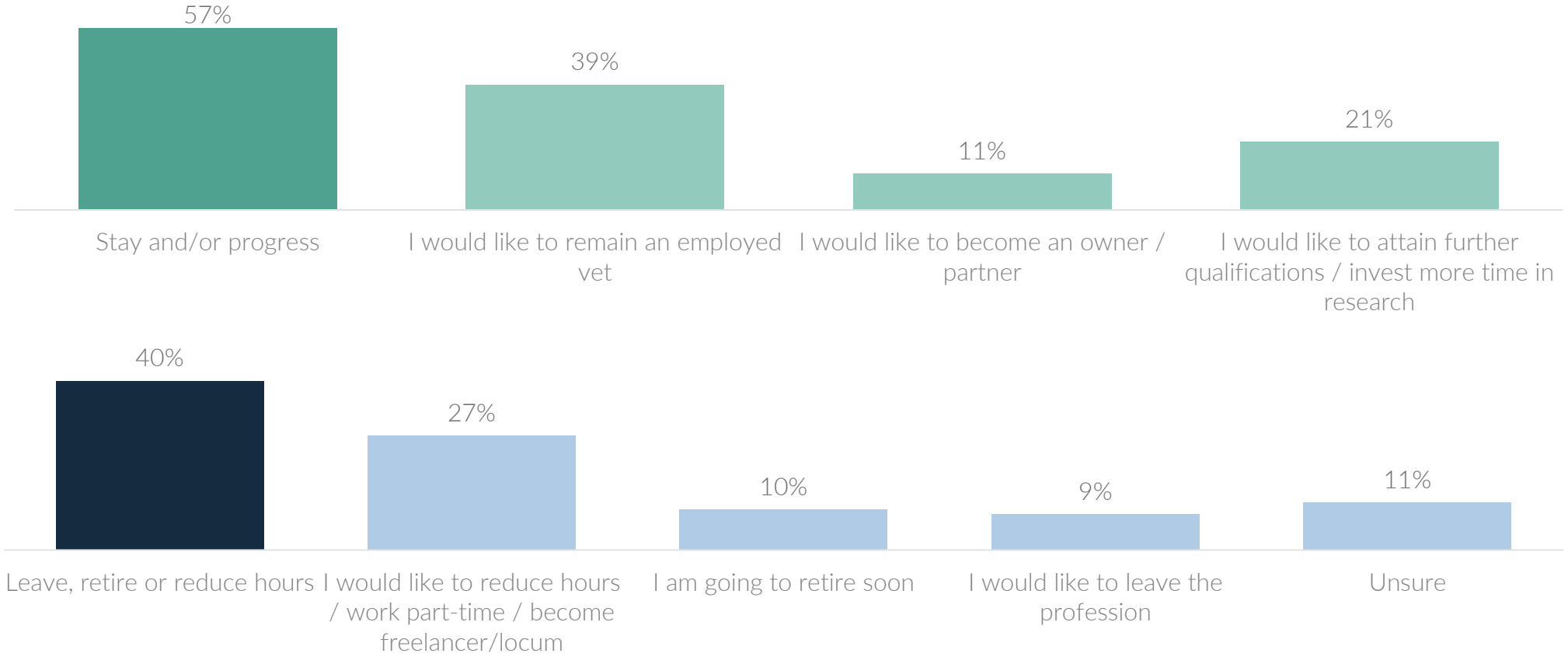
56%
Stressed in 2015
59%
Stressed in 2018
64%
Stressed NOW
CM Research I 14


67%
Satisfied with job in 2015
71%
In 2018
53%
Satisfied with job NOW
CM Research I 15


Stress levels are higher than ever before...
36%
BEFORE COVID
% of veterinary professionals being 'quite/very stressed'
64%
NOW
% of veterinary professionals being 'quite/very stressed'
21

SHOULD I STAY OR SHOULD I GO?

Considering the pandemic and its effects, what are your long term career aspirations?
All veterinarians surveyed



VS8 Considering the pandemic and its effect, what are your long-term career aspirations?

THE ANSWER TO WHAT VETERINARY PROFESSIONALS NEED IS SIMPLE

1. They need to be valued more, especially nurses, techs and women
2. They need the resources and time to tackle the growing mental health crisis
3. They need support in educating pet owners to improve outcomes for animals
4. They need support to stem the flow of those wanting to leave the industry
5. They need continued innovation to manage the changing landscape and growth of the pet population

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HOW WE HELP THEM GET THERE IS THE CHALLENGE

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