



# FVE Survey of the Veterinary Profession in Europe





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## Contents

### SECTION ONE - MAIN REPORT

Introduction	2
Analysis by FVE Task Force Report	3
Executive Summary	6
Survey Methodology	7
1. Demography of the Profession	
1.1 Number of Veterinarians in Europe	10
1.2 Age	12
1.3 Gender	14
1.4 Years Working as a Veterinarian	16
1.5 Employment Status	17
1.6 Unemployment	19
1.7 Under-employment	20
1.8 Field of Employment	21
1.9 Second Field of Employment	23
1.10 Main Area of Focus	24
1.11 Reputation	26
2. The Demand for Veterinary services	
2.1 Number of Animals	30
2.2 Animal Care products and Medicines	34
2.3 Aggregate Value of Veterinary Practice	35
2.4 Revenue by Type of Service	37
2.5 Revenue by Type of Species	38
2.6 Trends in Practice Revenue	39
2.7 Future Workloads	41
3. Veterinary Practices	
3.1 Practice Size	45
3.2 Future Staffing	47
3.3 Practice Revenue	48
3.4 Legal Formation	49
3.5 International and Branches	50
3.6 On-line Presence	51
4. Working as a Veterinarian	
4.1 Average Earnings	55
4.2 Education and CPD	63
4.3 Retirement and Pension	66
4.4 Working in Another Country	68
4.5 Satisfaction	70
4.6 Working Hours	71
4.7 Holidays and Sick Leave	73
4.8 Professional Indemnity Insurance	74
5. The Future	
5.1 Future Challenges	77
5.2 How Vets think the Market will Change	79
5.3 What is Needed to Meet the Challenges	80
SECTION TWO - COUNTRY PAGES	81

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# Introduction and Analysis by FVE Task Force Report

## Introduction by Rafael Laguens, FVE Vice-President

It goes without saying that the Federation of Veterinarians of Europe (FVE) and its member organisations have a strong interest in the ongoing developments in the European labour market for veterinarians. Job opportunities and challenges for veterinarians are being discussed almost continuously. However, so far these discussions were seriously hampered by the lack of reliable data.

For this reason FVE commissioned a survey to assess bench-marking statistics for the profession pertaining to demographic, work market and financial indicators.

With over 13,000 veterinarians from 24 FVE member countries completing a questionnaire, prepared by an independent, professional agency, an extensive amount of data was collected. For two more countries, data from similar surveys were added. Additional data was collected from approved sources providing a solid base from which interpretations/observations can be made with sufficient confidence, both in investigation within the profession and in comparison to other professions.

Regardless the high number of responses, it is important to recognize that results reflect the personal replies of the respondents and thus on their own understanding, perspective and knowledge of their profession. It might occur that these are not in line with official national statistics. It is also important to note that in some countries no formal national statistics on these issues exist. In these countries the findings represent the first attempt at collecting comparable data.

This report therefore allows for the first time, to compare Veterinary demographic, labour market and financial indicators between European Countries. As this is the first survey of its kind progressive trends cannot be determined at this stage.

This report is generated by Mirza & Nacey Research Ltd. In addition, an FVE task force appointed by the FVE assembly further analysed the results and drew general themes and most significant findings.

This report would not have been possible without the support of many. The FVE board is grateful to all the national Veterinary organisations – members of FVE – who translated, promoted and distributed the survey; to the FVE task force who analysed rapidly and skilfully all results, to our sponsors and to “Mirza & Nacey Research Ltd” who supported us throughout the whole process with their competence and professionalism. FVE is especially grateful to all veterinarians who completed the survey.



Rafael Laguens

## Analysis by FVE Task Force Report

An FVE task force appointed by the FVE General Assembly further analysed the results and drew general themes and most significant findings.

### Significant findings

#### Demographics and job market

- The survey indicates quite clearly that the vast majority (60%) of veterinarians work in clinical practice and predominantly small animal clinical practice. The second most popular sector is public service (19%), education and research (6%) and industry and private research (4%). Another 10 per cent of the profession work in other areas as a veterinarian. It is interesting to note that salaries adjusted by the Purchasing Power Parity for veterinarians is significantly higher (almost 25%) in all countries compared to the average PPP adjusted salaries for all employees. The highest earning Veterinary trained professionals are, in order, those working in industry, those in non-veterinarian related work and thirdly those owning Veterinary clinics but overall there are not substantial differences in the rates of remuneration across all sectors.

- Across almost all countries, the male/female ratio is approximately 50:50. However the proportion of female veterinarians is much higher amongst veterinarians under 40, indicating that there will be a change in the gender distribution within the profession in the future. There is no indication that this will change as higher numbers of females continue to enter undergraduate training.

- Veterinary unemployment and under-employment is a significant problem in some countries. These countries tend to have larger numbers of Veterinary schools producing relatively higher numbers of Veterinary students, thus contributing to, or causing the employment deficit. However, this is very country specific and relates to the relative size of the total population i.e. not all countries with high numbers of Veterinary schools have high Veterinary un/under employment.

- Across all countries, participating veterinarians reply that they feel there are too many veterinarians graduating. They also expect more veterinarians will be needed in more 'new fields' of employment such as monitoring animal welfare.

- Across all countries, veterinarians indicated that 'Day-one competencies' and Continuous Professional Development (CPD) will become more important, as the profession in the future will be expected to become more specialised.

- A high percentage of professionals are, or have, considered emigrating to work in another country. This reality is clearly more prevalent in those countries with higher levels of unemployment. The biggest single concern about working in another European country relates to practical, relocation or personal issues. Whilst this phenomenon is recorded it requires further analysis and detailed questioning in order to identify root cause, proposed alternative roles, length of stay away from home country, and key destinations.

- An interesting point to note is the size of Veterinary practice appears to be in a process of change. Currently most veterinarian practices are small with fewer than 5 staff. However, there would appear to be a trend towards increasing corporatisation and the creation of larger practice groups. These larger organisations will have an impact on the style and type of Veterinary employment impacting upon earnings, work patterns, employment opportunities, etc.

#### Financial

- A significant remunerative differential can be observed between the replies of the male and female veterinarians - with females being paid on average 28% less than their male colleagues.

- Practice revenue mostly comes from treatment in clinical practice, followed by surgery, sales of food stuff, sales of medicines and official tasks. Variation can be seen depending on the species treated. By far the greater proportion of practice revenue is derived from professional non-commercial activities indicating what would appear to be a significant shift away from practice earnings based on drug sales.

- Veterinarians seem unsatisfactory prepared for retirement. Across all countries a high proportion of veterinarians noted that they had either failed to make provisions for their retirement in the form of a pension or had made inadequate provision. It is unclear whether this is because of a lack of funds available, a lack of knowledge, caused by high unemployment/under employment in certain countries or because the profession is relatively young in total age profile.

#### Other

- A potentially disturbing finding related to a rather low reputational value ascribed to the profession in a number of predominantly Central and Southern European countries. As this is the view of the profession's perception of what the public felt this finding could be unnecessarily pessimistic but it potentially indicates a low level of self-worth in certain countries.

## Points for further consideration

### Demographics & job market

1. This entrance into a wider range of career options starts during undergraduate training – the Veterinary degree opens many doors as it provides an individual with the ability to analyse problems, and find solutions in many and varied situations outside of what is currently known as the core traditional roles. It needs Veterinary leaders to provide undergraduates and recent graduates with the desire to explore new possibilities and the ability to identify new areas of work in which they can use their newly acquired skills and capabilities. It is clear that veterinarians are highly valued as professionals in industry and are well rewarded accordingly. The Veterinary profession remains the only profession within Europe with an undergraduate education accreditation scheme ensuring high standards of training.

2. Currently the majority of veterinarians work in clinical practice. The numbers of veterinarians are increasing due to the increasing number of veterinarian schools. This, combined with the constant threat from highly qualified non-Veterinary individuals who are able to carry out tasks and functions previously the sole domain of the veterinarian, will ensure that, proportionate to the populations of respective countries, employment opportunities for veterinarians decrease. With this in mind it is essential that the profession expands its employment horizons and seeks to enter non-traditional roles expanding employment options and opportunities.

3. There is a recognised need to advance undergraduate training. Whilst much has been done over recent years to widen and increase the range of skills and training offered to undergraduates there is a still need to further widen the training base so that other fields including aquaculture and bee health, for example, become core parts of the curriculum. Furthermore, the survey notes concerns raised by Veterinary colleagues that the skills of the recent graduate are in need of improvement. This could be either a function of the increasing specialism and complexity of Veterinary practice and a more demanding public thus leading to greater consumer expectations or a real failure on behalf of academic institutions to produce a core 'product' fit-for-purpose on Day 1. There is a need for further examination of this matter so that an in-depth understanding of the cause of this perception is identified to permit corrective actions to be put into place.

4. Linked to the above point is the identified continued need for improved support to new and recent graduates. This requirement is not only

to support improved clinical competence, and thus preserve and protect Veterinary professional reputation and animal welfare, but also to improve job satisfaction thus potentially leading to improved well-being and increased retention rates. This need for post-graduate support is well recognised and should take the form of both professional mentoring and pastoral care which can and should be provided both by Veterinary colleagues, and the profession's representative bodies coordinated by the academic institutions.

5. The findings point quite clearly to a detrimental impact of too high numbers of Veterinary graduates in an individual member country. At present Veterinary employment and unemployment is country specific which appears to be partly linked to numbers of graduates which is a function of the number of schools operating within a given country. Furthermore, there also appears to be a directly proportionate impact on the perceived reputation of the Veterinary profession and Veterinary well-being and feelings of self-worth with Veterinary over-supply and a concomitant increase in Veterinary unemployment. Every member state and their Veterinary authorities must make every endeavour to manage Veterinary levels to maximise job opportunities, preserve Veterinary reputations through the maintenance of the highest possible professional standards and ensure that over-supply is avoided.

6. With the apparent change in Veterinary ownership and structure occurring in many countries with the development of a more corporate clinical network this will necessarily change the way veterinarians work and thus what training and support they receive. Whilst larger practices can often provide greater pastoral care and technical support they can also place additional commercial and financial burdens on employees which place different pressures particularly on the younger graduate. With this in mind the profession must ensure that undergraduate training is tailored to produce a Veterinary graduate that is designed for all type of Veterinary endeavour.

### Financial

7. The observed difference in remuneration between genders and the increase of female veterinarians, needs further consideration. Whether the difference may be due to the fact that females take a break whilst producing a family, work on a more part-time basis (26% of females work part-time versus only 12% of male colleagues) or possibly might predominate in certain fields of specialisation within the profession, which traditionally have attracted lower rates of remuneration, it is clear that the 'family gap' increases the age of the female population before they achieve



the equivalent seniority of their male counter-parts. This finding raises a number of questions with regards the reported feminisation process within the profession – how will the increasing number of female graduates alter work-place dynamics, pay rates and practice ownership rates, for example. It is recommended that the leaders of the profession should further investigate this remuneration differential and try to find ways to promote female leadership within the profession.

8. The survey highlights a number of areas which indicate either a lack of awareness or a lack of understanding of the importance of core business, legal and financial matters and skills. The results would seem to demonstrate that a worryingly high number of colleagues have made inadequate pension provisions, are unaware of their requirement to have appropriate indemnity insurance cover, feel exposed from an employment rights perspective, and are unprepared for retirement. These apparent deficiencies would indicate that there is either a need for support or for training for the profession generally. These issues are important and it is vital that individual members of the profession take adequate care of their personal circumstances in order to ensure that job satisfaction, personal integrity, and professionalism is assured. The leaders of the profession must recognise this area of need and implement programmes in order to improve access to the appropriate services, offer necessary training under and post graduate or at least raise awareness of these issues.

9. What does become readily apparent from the survey findings is the need for the profession to improve its use and uptake of modern IT based marketing and merchandising techniques. The on-line presence and participation in the virtual market seems to be under-utilised by the profession. Given the importance of on-line sales of goods and services this would seem to be an area which could be readily exploited. It is unclear if the uptake of IT methods is low as a result of unfamiliarity, a lack of training/awareness or simply as a result of a perceived lack of demand. A recommendation would seem appropriate which encouraged further investigation into the value and the best method of entrance into this market area.

10. It is positive that by far the greater proportion of practice revenue is derived from professional non-commercial activities indicating what would appear to be a significant shift away from practice earnings based on drug sales in many countries,

nevertheless there remains room for improvement in some countries. The profession must move away from a reliance on merchandising to become mainly dependent upon the sale of professional advice. The survey shows clearly that in some countries there has been a most successful move away from drug sales towards an expertise driven revenue stream which provides a more resilient, and reliable financial foundation.

### Suggestions for future surveys

The results of the survey allows for the first time, to compare Veterinary demographic, work market and financial indicators between European Countries and has given value new information relating to the Veterinary profession in Europe. Unavoidably, the survey has also generated further questions and a number of points that require more investigation. It must also be appreciated that some critical data are missing from these results which impacts on the ability to interpret these findings e.g. total numbers of veterinarians per country etc. These deficiencies should be rectified in any future survey.

Whilst a number of the conclusions can be made and extrapolated across all countries, there are some findings/issues which are country or region specific. Furthermore, it has become clear that some of the questions require refinement in order to reduce the degree of ambiguity in some of the results and to improve the overall consistency and accuracy of the findings. Linked to this point is the need for alignment of definitions for such concepts as Continued Professional Development (CPD), drug sales, etc. Each country appears to have a different understanding of what can be considered CPD or at what point a drug sale is registered as a direct sale as opposed to a therapeutic sale – this will naturally have an impact on the manner in which respondents answered and therefore have an impact on what direct conclusions can be taken from the results.

Finally, a second survey will help illustrate development over time in observations made in this survey.

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# Executive Summary

This first ever survey of veterinarians across Europe follows the same approach we have used for similar surveys of other professionals in Europe. The approach relies on assistance from member organisations and in this respect the assistance has been eager and enthusiastic. Twenty four member organisations took part, and we are very grateful for the assistance they provided. What particularly surprised us was the size of the response from veterinarians themselves. A total of 13 000 veterinarians from across Europe took the time to complete the survey questionnaire; this represents 8 per cent of **all** the veterinarians in the 24 participating countries. This extraordinary response means that the survey results have a high level of credibility, with good or acceptable statistical confidence levels in most participating countries. Two more member organisations partially participated, by providing a large quantity of data from very similar surveys they had recently run domestically. In total, therefore, 26 out of the FVE membership of 36 countries are represented in this first survey.

The results themselves establish demographic, market and financial benchmarks for the profession. Europe's **243 000 veterinarians** care for **157 million** companion animals and **342 million** cattle, sheep, pigs and goats. The survey demonstrates that the Veterinary profession is **a young profession**, with 44 per cent of veterinarians aged under 40. This suggests it is a growing profession, with many more veterinarians entering the profession than retiring. It is **an equal profession**, with a near balance of male and female veterinarians. Veterinary medicine is a **flexible** profession: 17 per cent are working part-time, while 21 per cent have at least two different jobs (usually both within the Veterinary profession). Reported unemployment is 3 per cent, but it is much higher in a small number of countries where unemployment is a serious issue. Overall, 31 per cent of unemployed veterinarians have been unemployed for more than one year. Under-employment is significant, at 23 per cent.

Half of responding veterinarians think they are well regarded by their clients, but only a third think they are well regarded by the public. Despite this, Veterinarians are **satisfied with their choice of career**; but are only

just satisfied with their earnings. Average earnings for full-time veterinarians are €38 500, this rises by age and, for owners, by size of practice. Despite near parity in the number of male and female veterinarians, average earnings remain unequal - the differential in favour of male veterinarians is 28 per cent.

Veterinary practice is the most important area of employment, and is where 60 per cent of veterinarians work. One of the key figures in this research is to establish the aggregate value of veterinarian practice – we estimate that Veterinary private practice is worth **€11 100 million** across the 24 surveyed countries. This translates as being **worth €111 000 per vet in private practice** across Europe. Half of practice revenue comes from treatment, and another 20 per cent from surgery. Sales of medicines account for 13 per cent of revenue, and food sales 6 per cent.

**Most practices are small:** a quarter are one person practices, a fifth are 2 person practices. Just 4 per cent employ more than 30 people. The average revenue for a practice with between 3 and 5 staff is €312 000, and for one with between 6 and 10 staff is just under €800 000. About half of the vets who are outside veterinarian practice work in public service.

Looking to the future, **veterinarians feel confident about their prospects**. Nearly three quarters say they expect practice revenues to increase or stay the same in the **next** three years - compared with 61 per cent who say their revenues have stayed the same or improved in the **last** three years. And as many as 79 per cent think their workloads will increase, or stay the same, over the coming 12 months.

Respondents believe that **more veterinarians will be needed** in the future in the areas of animal welfare, disease control, the environment, and to meet growing demand from owners of companion animals and exotic animals. There is a concern that new graduates are not being equipped with sufficient skills, and indeed that too many new veterinarians are emerging from Veterinary schools. To meet future challenges, veterinarians think they need to **specialise more**, and agree they need **more business training**.