

Amplifying the Voice of the Veterinary Community

2020





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Background

The veterinary community faces many pressures: student debt, the burdens of running a small business, and the daily emotional tolls of the profession to name a few. In order to continue providing veterinarians with best-in-class support and services, the NAVC conducted this primary research to:

- Better understand how their veterinary constituency feels about their job and the industry they work in
- Understand the internal and external pressures that vets and pet owners face on a day-to-day basis
- Understanding emerging trends in the veterinarian/animal care space that NAVC can utilize to develop future programs



Methodology

DATA COLLECTION



Online survey on computer, tablet, or smartphone

Veterinarians n=293

Vet Techs/Nurses n=277

Practice Managers n=38

Pet Owners n=501



Data Collected:
October
2019



15
minutes
in length



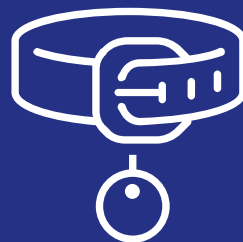
US Only

SAMPLING/QUALIFICATIONS



n=608 Vet Professionals

- Current veterinarians, veterinary nurses, veterinary techs, veterinary assistants and practice managers



n=501 Pet Owners

- Age 18+
- Pet owner (dogs, cats, fish, birds, reptiles, small pets, large animals)
- Must have visited a veterinarian in the past 12 months

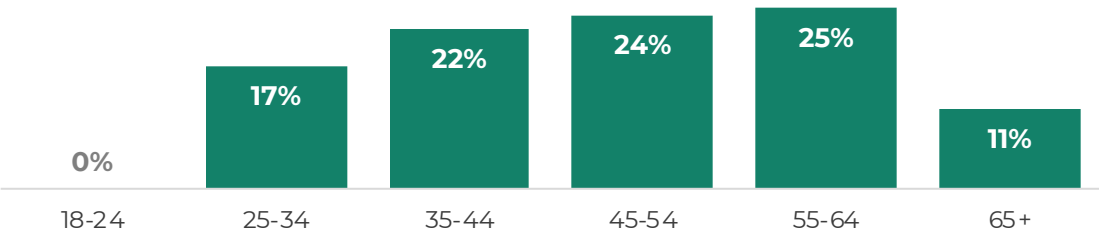
Who We Spoke To From the Veterinary Community

Veterinarians

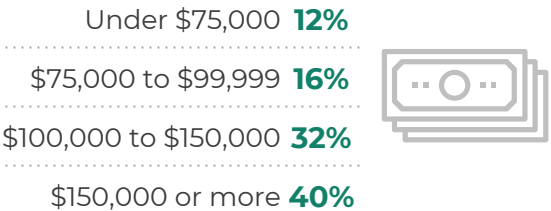
Gender



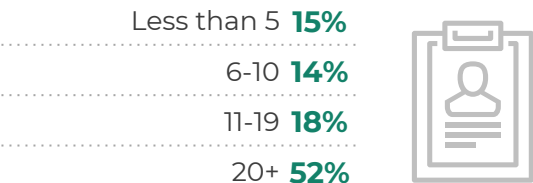
Age Range



Income



Years of Experience

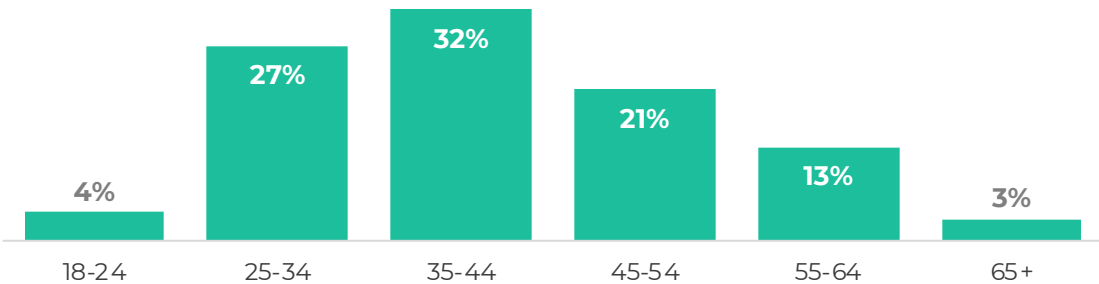


Techs/Nurses

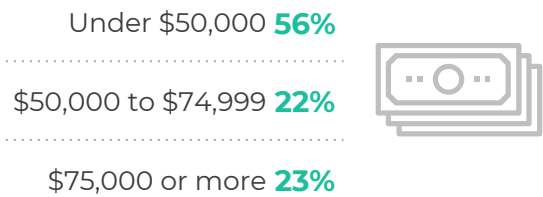
Gender



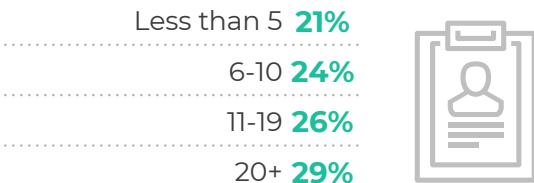
Age Range



Income



Years of Experience



S5: Select your gender.
E1: In what year were you born?
E4: Which range includes your total annual household income, before taxes?
S3: For how many years have you been in the veterinary practice since the completion of your formal training?



Relationship with Pets



Pet owners identify strongly with their pets, and their pets are a core part of their overall happiness and well-being.

Pet Owners Identification with their Pets

Among Total Pet Owners (n=501)

High Identification with Pets



IIM: Move the circle to show your relationship with each of the following.
A3: How much do you agree or disagree with the following statement: My pet is a core part of my overall happiness and well-being.

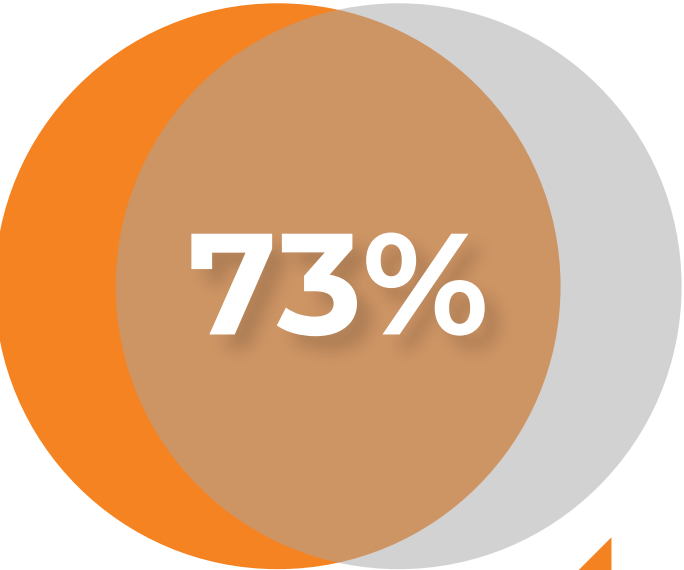


Caring for pets is a driving motivation in the work vet professionals do and a large part of their identity.

Vet Professionals Identification with Pets

Among Total Vet Professionals (n=608)

High Identification with Pets



Previous research has shown that consumers hover around an IIM score of 70-75% for things like their hometown, favorite brand, and even their family members, showing the high identification that vet professionals have with the animals they take care of.

Favorite Parts About The Job



IIM: Move the circle to show your relationship with each of the following.
A11: What do you see as the top benefits of your job? Please select a maximum of 5 responses.

Veterinarians and Techs/Nurses find similar qualities to be important in making an excellent veterinary team, with Vets focusing more on communicating with clients.

Most Important Qualities of an Excellent Veterinary Team - Ranking

Ranked Among Veterinarians		Ranked Among Tech/Nurses
1	Having a well-staffed office/veterinarian team	1
2	Communicating effectively with clients	7
3	Having an upbeat/ positive attitude	4
4	Being calm during difficult/stressful situations	2
5	Properly utilizing veterinary team members	3
6	Having a passion towards helping animals	5
7	Managing patient expectations/emotions	12
8	Effectively managing time from patient to patient	9
9	Staying on top of the latest techniques/developments in diagnosis and treatments	6
10	Spending sufficient time with patients	8
11	Quality of education	10
12	Understanding what pet parents are going through	11
13	Delegating tasks to other colleagues	13
14	Experience across a variety of specializations	15
15	Encouraging the bond between my clients and their pets	14

A14: In your opinion, which of the below qualities plays a strong role in making an excellent veterinary team? Please select up to 5 responses.

Only a third of vet professionals are discussing the HAB with their clients on a regular basis, with three-in-four pet owners aware of the human animal bond.

Human Animal Bond

Among Total Vet Professionals (n=608) & Pet Owners (n=501)



Vet Professionals

36%

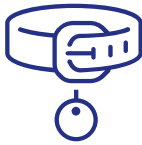
Discuss it very or extremely often with clients



Pet Owners

72%

Aware of HAB
(Know a little or lot about it)





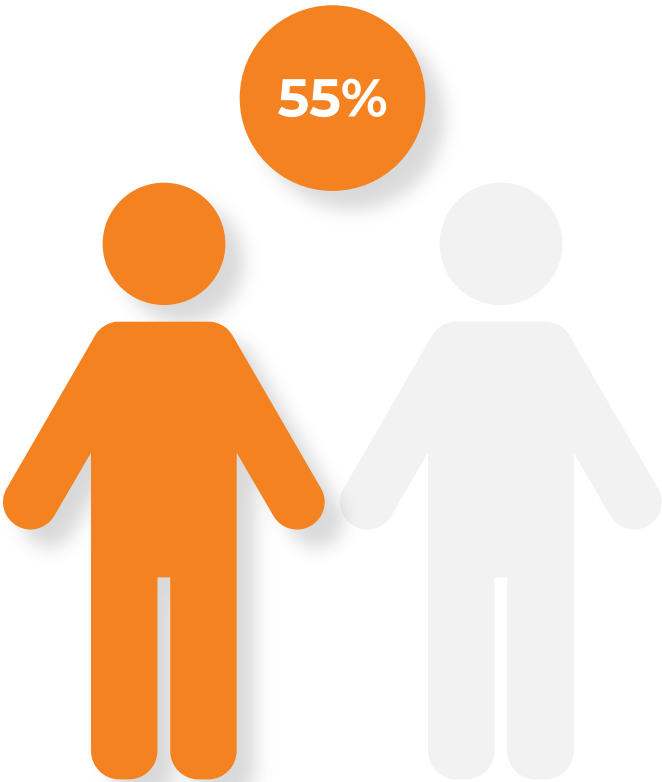
Job Satisfaction

Only half of vet professionals are satisfied with their job, but find helping animals and producing meaningful work to be their favorite parts.

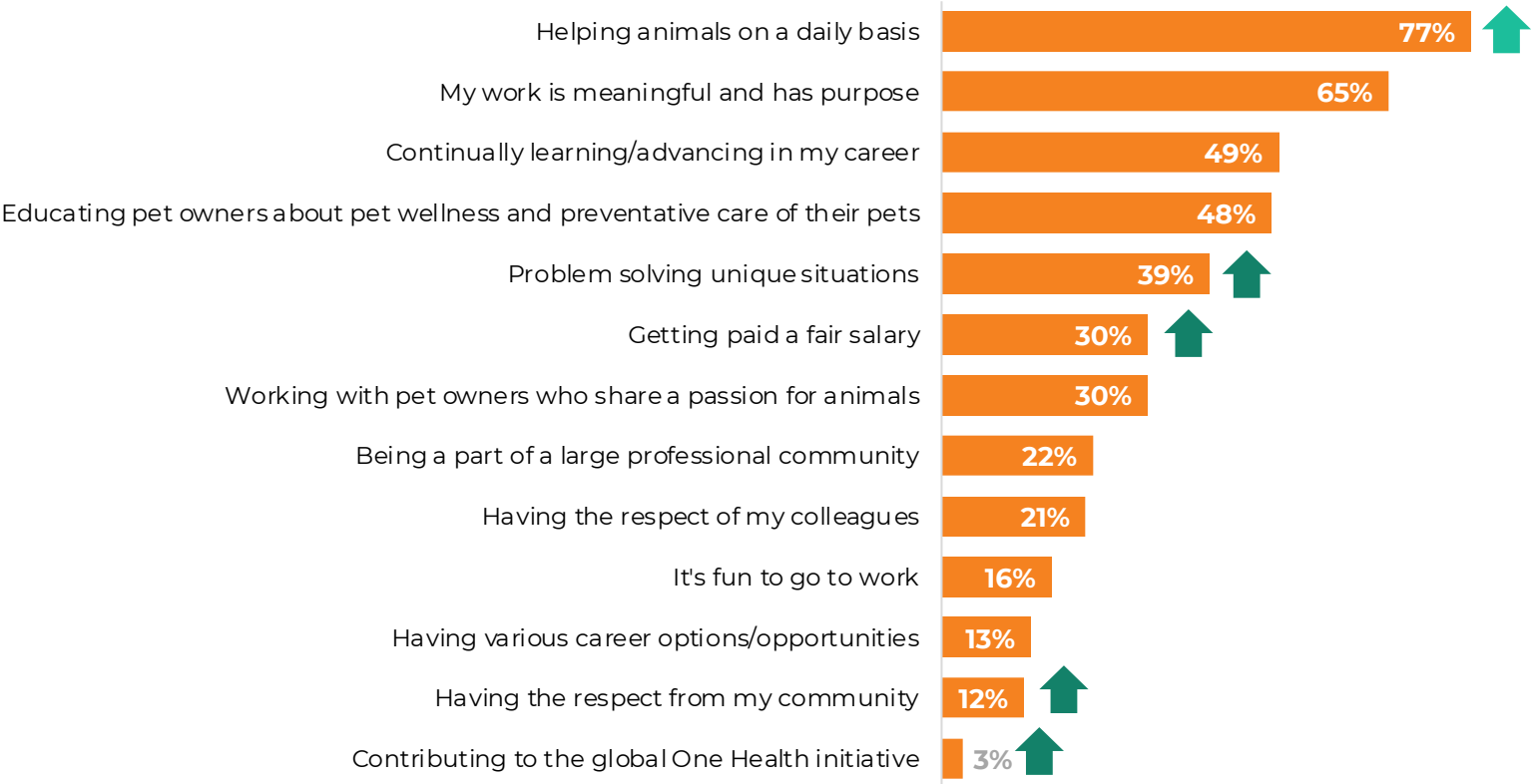
Satisfaction in the Veterinary Field

Among Total Vet Professionals (n=608)

Satisfied With Job



Favorite Parts of the job



A10: How satisfied are you currently with your job?
A11 :What do you see as the top benefits of your job? Please select a maximum of 5 responses.
Note: ↑ represent statistical significance at the 95% confidence interval.
Note: Satisfaction defined as being 'very satisfied' or 'extremely satisfied'.

↑ Higher for Veterinarians ↑ Higher for Techs/Nurses

One third of techs/nurses are not likely to stay in the industry in the next 5 years, significantly higher than veterinarians.

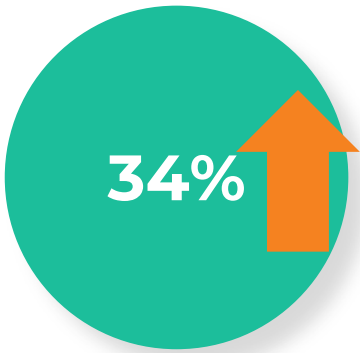
Likelihood to Stay in Veterinary Field

Among Total Vet Professionals (n=608)

Likely to Leave Industry in Next 5 years:



Veterinarians



Techs/Nurses

In 2016, turnover of RNs was reported to be 14.6% while turnover of Vet Techs sat at 22%.



"The work is stressful and demanding. The monetary reward is little in comparison to the same position in the human field."
- Veterinarian



"We are doing multiple jobs every single day in multiple categories. I feel we should be paid the same as an RN. This field needs to start paying more. You can work at Target and McDonald's with no education and make dollars more per hour!" – Tech/Nurse

A18: How likely are you to stay in the vet industry in the next 5 years?
A12: What parts of your job do you struggle with the most?
Sources: AAHA Compensation and Benefits Book 8th Edition, National Health Care Retention & RN Staffing Report
Note: † represent statistical significance at the 95% confidence interval.



Job Struggles

Vet professionals experience frequent stress across a wide variety of concerns in their profession particularly with student debt and adherence to time restrictions.

Top Stressors of the Job

Among Total Vet Professionals (n=608)

↑ Higher for Veterinarians ↑ Higher for Techs/Nurses

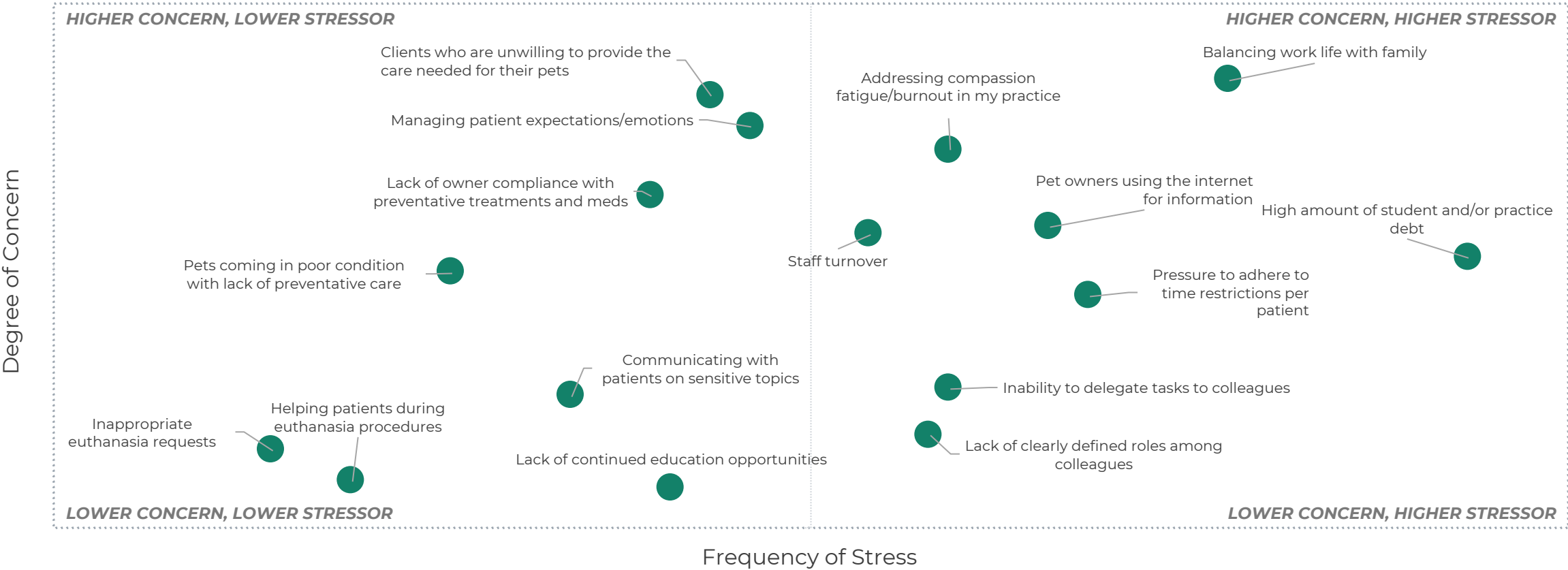


B1: Below is a list of situations that commonly occur in a veterinary clinic. For each item, please indicate how often in your present job you have found the situation to be stressful.
Note: ↑ represent statistical significance at the 95% confidence interval.

Vets show the highest amount of concern and stress in balancing work life with family, addressing burnout and in their amount of student and/or practice debt.

Top Concerns of the Job & Frequency of Stress

Among Veterinarians (n=293)

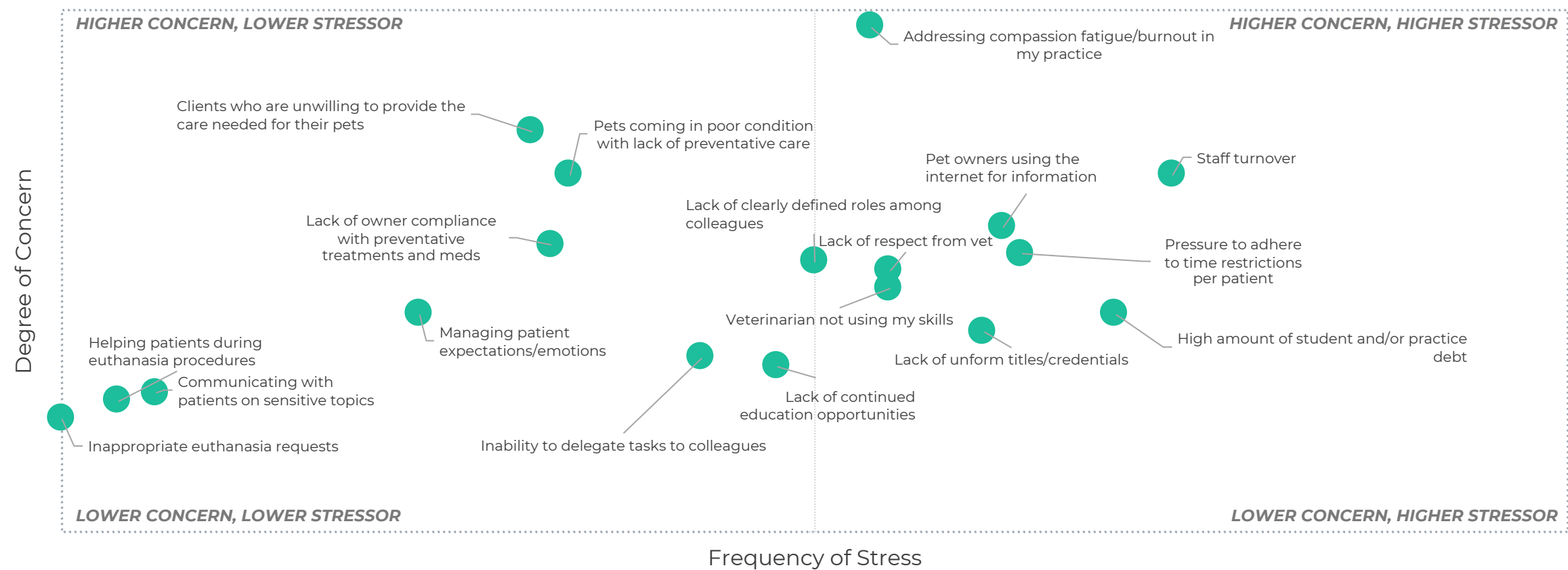


A13: From the list below, please rank the top 5 concerns that are most important to you with "1" being your most important concern.
B1: Below is a list of situations that commonly occur in a veterinary clinic. For each item, please indicate how often in your present job you have found the situation to be stressful.

Techs/Nurses show a high amount of stress with staff turnover, addressing compassion fatigue/burnout, and pet owners using the internet for information.

Top Concerns of the Job & Frequency of Stress

Among Techs/Nurses (n=277)



A13: From the list below, please rank the top 5 concerns that are most important to you with "1" being your most important concern.
B1: Below is a list of situations that commonly occur in a veterinary clinic. For each item, please indicate how often in your present job you have found the situation to be stressful.

Student debt is a top stressor in the lives of vet professionals, particularly among those who are less tenured.

Student Debt

Among Total Vet Professionals (n=608)

#1 Stressor Among Vet Professionals
Student Debt



Veterinarians



Techs/Nurses

Avg. Amount of Student Debt

\$174,122

Veterinarians

\$27,610

Techs/Nurses

Significantly more student debt is among
Vets with 10 or less years of experience
(62% vs 20% with 11+ years)



Debt was frequently mentioned as the aspect of the job vet professionals struggle with the most when asked unprompted.



“There is an extremely poor debt to income ratio”
-Veterinarian



“Every merit raise I earned, was eaten up by a raise in the minimum wage.”
-Tech/Nurse

C1: Do you currently have student debt? C2: How much student debt do you currently owe? Your best guess is fine.
A13: From the list below, please rank the top 5 concerns that are most important to you with "1" being your most important concern.
A12: What parts of your job do you struggle with the most?
Note: Debt/Income Ratio Among Those With <10 years of experience: Veterinarians: 2.0; Techs/Nurses: 0.73.

Low pay was something that frequently came up as a concern among vet professionals, primarily among Techs/Nurses.

Low Compensation

Among Total Vet Professionals (n=608)



Low compensation was mentioned frequently as a major struggle among both Veterinarians & Techs/Nurses.

**Higher incidence of “debt”
and “student loans”**

Veterinarians

**Higher incidence of low
pay with long hours**

Techs/Nurses

Linguistic Coding

- **Techs/Nurses used the word “Love” 7X more often than Veterinarians**
- Because being a tech is a low pay, high stress position, techs are expected to be compelled by a love for their profession rather than other compensation.



“I feel like I earn too little compared to how much of my life is spent at work, no matter how much I love my job.” – Tech/Nurse



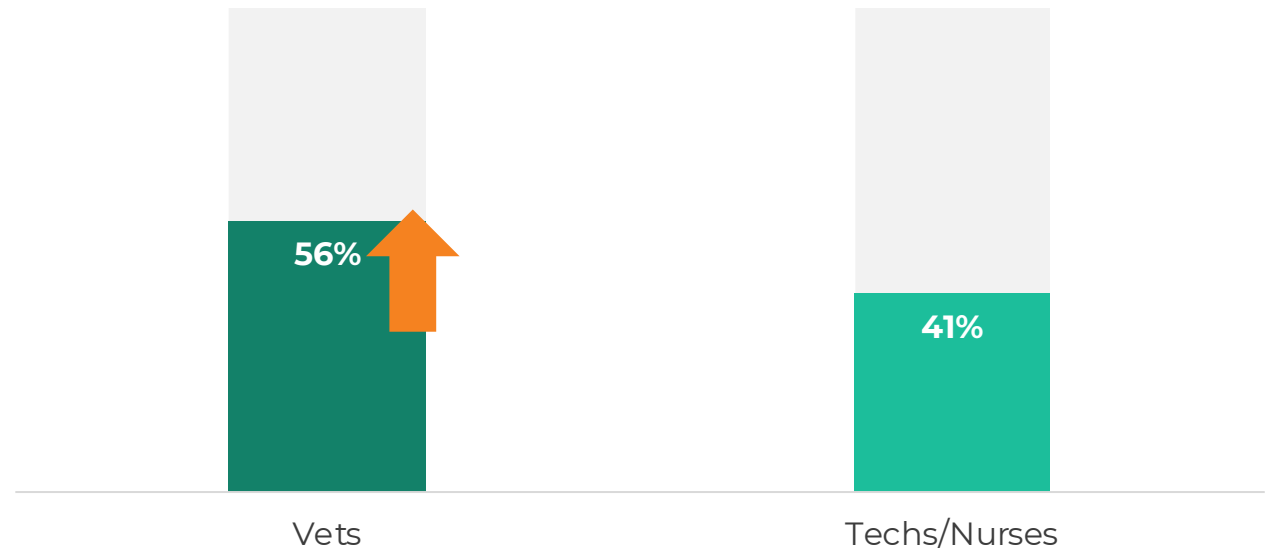
**“I love being an RVT but the pay is just not substantial enough for the cost of living.”
- Tech/Nurse**

Vet professionals express pet owners not providing the necessary care for their animals as a primary concern in their job.

Interacting with Clients

Among Total Vet Professionals (n=608)

#3 Concern Among Vet Professionals
Clients unwilling to provide the care needed for their pets



“[I struggle with] owners who are not receptive to treatment recommendations because of out of pocket cost.” - Veterinarian

“Impossible expectations by clients has become much worse in the last 5-10 years, with the advent of online pharmacies and social media. They expect quick diagnoses, but won't pay for the extra testing it would take to get the answer.” - Veterinarian

A12: What parts of your job do you struggle with the most?
A13: From the list below, please rank the top 5 concerns that are most important to you with "1" being your most important concern.
Note: † represent statistical significance at the 95% confidence interval.

Less than half of vet professionals feel that they work well with others on their team, with Techs/Nurses finding the Veterinarian not utilizing their skills to be a top stressor.

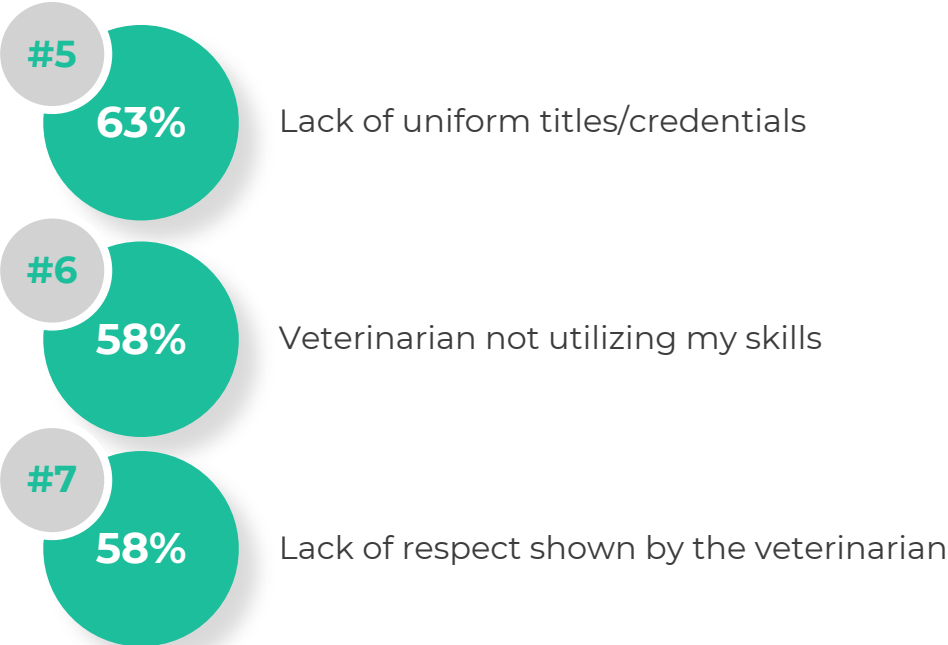
Relationship Between Veterinarians & Techs/Nurses

Among Total Vet Professionals (n=608)

#4 Stressor Among Vet Professionals
Staff Turnover



Most Frequent Stressors (Among Techs/Nurses)



“Because our state does not require certification, I feel the veterinarians do not allow us to perform skills we have learned and mastered during our externships.”
– Tech/Nurse

“There is still a lot of disrespect towards VTs/VAs in the field and my practice. The DVM and managers don't want to use us to the fullest. It is very frustrating.”
– Tech/Nurse

A13: From the list below, please rank the top 5 concerns that are most important to you with "1" being your most important concern.
B1: Below is a list of situations that commonly occur in a veterinary clinic. For each item, please indicate how often in your present job you have found the situation to be stressful.
A15: Thinking about your colleagues whom you work with on a regular basis, how would you rate everyone's ability to work together as a team? A12: What parts of your job do you struggle with the most?

Vet professionals struggle with their mental health, with two-in-five showing a high likelihood of having depression.

Mental Wellness

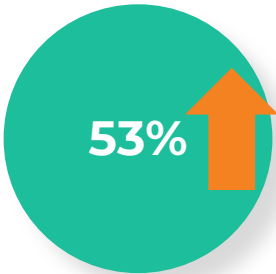
Among Total Vet Professionals (n=608)

Low Mental Wellbeing

% of those who rated their mental health a 1, 2 or 3 out of 5



Veterinarians
N=293



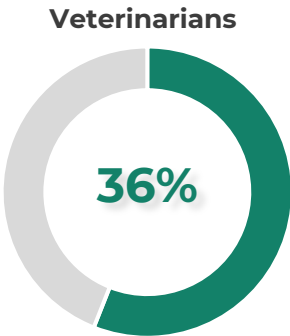
Techs/Nurses
N=277

Depression Scale

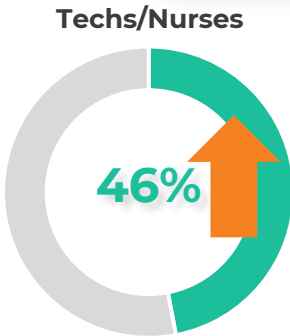
- ✓ My sleep was restless
- ✓ I could not “get going”/get out of bed
- ✓ I had trouble keeping my mind on what I was doing
- ✓ I felt that everything I did took too much effort
- ✓ I felt depressed
- ✓ I felt lonely
- ✓ I was bothered by things that usually don't bother me
- ✓ I felt fearful

Depression Index

High likelihood of being depressed



Veterinarians



Techs/Nurses

This increase is driven by millennial Techs/Nurses with a HH income <\$50K



“[I struggle with] having enough time to take care of everything and turning my brain off at night so I can sleep. It’s hard letting go at the end of the day – I’m always second guessing myself as a nurse.” – Vet Nurse

Vet professionals are much more likely than the general US population to be depressed.

The higher incidence in techs could be due to gender or other demands of the job.

Euthanasia

Although it did not come up as a frequent stressor among vet professionals, euthanasia came up frequently when asked about what they struggle with the most at their job.

Euthanasia and death weighs more heavily on Veterinarians than Techs/Nurses, mentioning it 3X more often when asked about the struggles at their job.



“I have been at my practice long enough to meet the new pet at their first vet visit and then euthanize at their last visit. I feel the strain of that more than anything recently.” - Veterinarian



“Being one of the two people responsible for euthanasia's within the entire shelter [is a huge struggle at my job].“ - Veterinarian



“The psychological burden that we must bear working in this field [is a huge struggle]. The emotional and mental drain of [when we have to put a pet down] is the most challenging aspect of this job.” – Tech/Nurse





Relationship with Pet Owners

Pet owners find that having a passion for animals, communicating effectively and staying up to date on the latest techniques are the most important qualities in a vet.

Most Important Qualities of an Excellent Veterinarian Team

Ranked Among Total Vet Professionals

Ranked among
Pet Owners

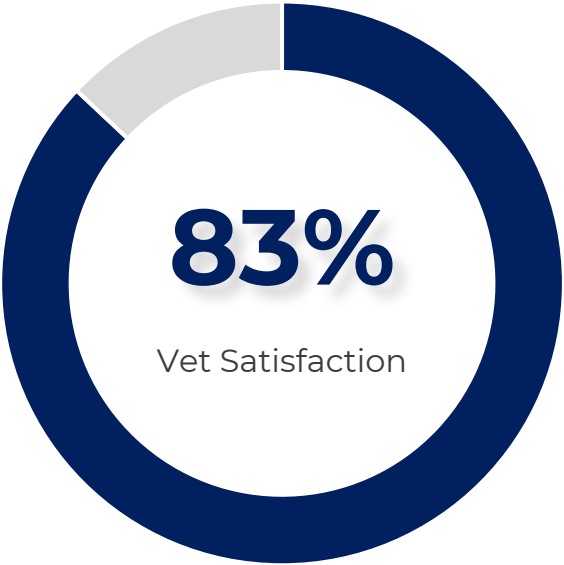
1	Having a well-staffed office/veterinarian team	5
2	Communicating effectively with clients	2
3	Having an upbeat/ positive attitude	8
4	Being calm during difficult/stressful situations	6
5	Properly utilizing veterinary team members	14
6	Having a passion towards helping animals	1
7	Managing patient expectations/emotions	13
8	Effectively managing time from patient to patient	11
9	Staying on top of the latest techniques/developments in diagnosis and treatments	3
10	Spending sufficient time with patients	4
11	Quality of education	7
12	Understanding what pet parents are going through	9
13	Delegating tasks to other colleagues	15
14	Experience across a variety of specializations	10
15	Encouraging the bond between my clients and their pets	12

A14: In your opinion, which of the below qualities plays a strong role in making an excellent veterinary team? Please select up to 5 responses.
A8: In your opinion, which of the below qualities play the strongest role in making an excellent veterinarian?

The majority of pet owners are satisfied with their vet and rate them highly in a variety of ways.

Pet Owners Satisfaction with their Vet

Among Total Pet Owners (n=501)



Vet Rating (Strongly Agree)



A6: How satisfied were you with your most recent visit to the veterinarian?
A7: Thinking of your overall experience at the veterinary hospital, please rate your vet/clinic in the following areas.

The top barriers to visiting the vet are largely focused on not seeing a need for it and being unable to pay for veterinary care.

Barriers to Not Visiting the Vet in the Past Year

Among Pet Owners Who Did Not Visit Vet In P12M (n=179)

¹In 2016, 78.8% percent of dog owners and 47.2% of cat owners said they visit the vet at least once a year.

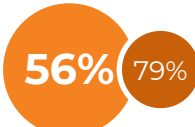


Those who did not go to the vet in the P12M have a much lower HH income (58% with a HH income under \$50K vs 38% who have gone to the vet).



Of those who did take their pet to the vet in the past year, the average person spent \$522 on veterinary visits in that time.

Those who did not go to the vet in the P12M are less dog and cat owners, a potential reason why they do not feel the need to visit as often.²



Dog Owner



Cat Owner

■ Did NOT Visit the Vet in P12M ■ Visited the Vet in P12M

75% of pet owners do not have pet insurance or wellness plans for their animals.

S9: From the list below, please select the reason(s) why you have not taken your pet(s) to the veterinarian in the past 12 months.

¹Source: American Veterinary Medical Association

²Note: Other pets owned included: Fish, Birds (not poultry), Reptiles/Amphibians, Small pets such as guinea pigs, rabbits, mice, etc., Large animals (e.g., equine).

What is the NAVC doing to address the challenges reported in these findings?

PROVIDING COMMUNITY SUPPORT

The NAVC is committed to strengthening the community and supporting wellbeing among our veterinary teams, encouraging balance, raising awareness of signs associated with burnout, compassion fatigue and mental illness; and increasing acceptance of wellbeing assistance.

OFFERING MORE TRAINING & TOOLS

NAVC will provide new tools and training to improve management and communication skills for veterinary professionals. The NAVC will continue to advocate for improved utilization of trained veterinary paraprofessionals to better distribute the workloads, which will, in turn, improve job satisfaction and retention among the entire veterinary team.

EXPANDING FREE & LOW-COST RESOURCES

NAVC will continue to increase the types of educational resources available to veterinary team members while striving to provide free and low-cost options whenever possible.

ADVOCATING FOR THE VETERINARY COMMUNITY

NAVC will continue to empower veterinary teams, advocate for the importance of veterinary care and showcase the expertise and experience of veterinary professionals to pet owners while increasing the recognition of the importance of the Human-Animal Bond.



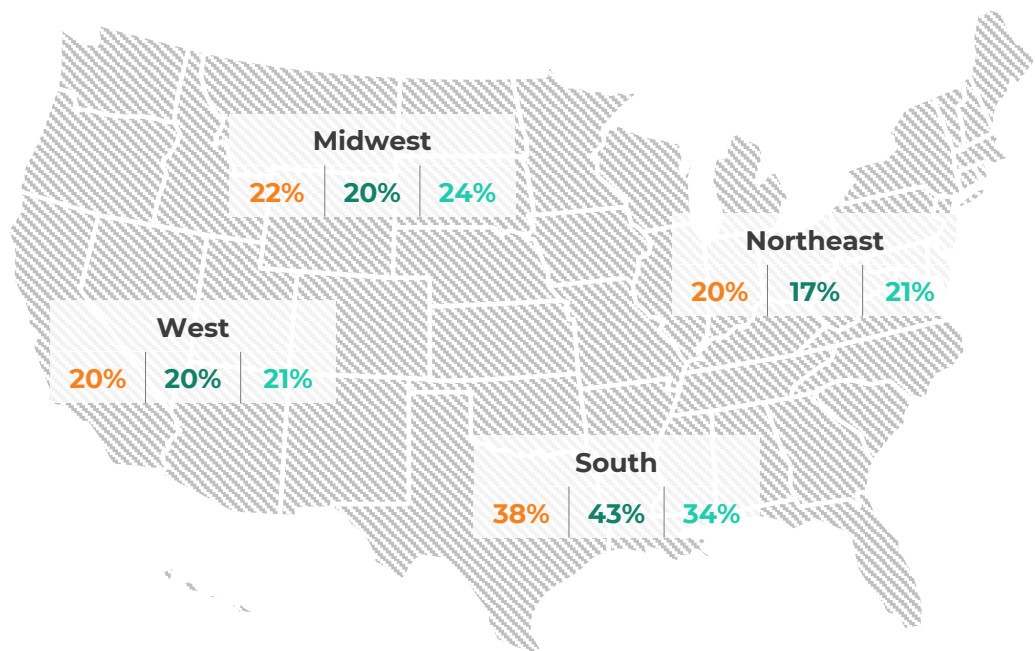
Appendix: Vet Professionals

Clinic Information

Among Total Vet Professionals (n=608)

■ Total ■ Vets ■ Techs/Nurses

Region



Type of Practice

General	74%
Specialty	8%
Teaching Hospital	5%
Emergency	3%
Other	10%

Specialization

Small	88%
Exotic	14%
Mixed	10%
Large	6%
Other	3%

Size of Clinic

Sole Proprietors	5%
2-5	8%
6-10	19%
11-20	33%
21-30	14%
31-50	7%
50-99	5%
More than 100	9%

Clinic Certification

AAHA	31%
“Fear Free”	16%
HAB	2%
None	61%

S4: What is the 5-digit zip code where your clinic/practice is located?
A2: What type of practice is the veterinary clinic at which you work?
A1: How many people work in your clinic including yourself and full/part time employees?
A3: What does your practice specialize in?
A5: From the list below, please select if the primary clinic you work at has any of the following certifications.

Profiling Vet Professionals

Among Total Vet Professionals (n=608)

Number of Clinics Currently Work

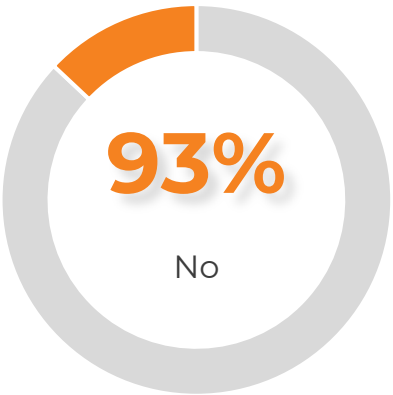
	Vet	Techs/Nurses
1	78%	88%
2	16%	10%
3	3%	0%
4	0%	0%
5+	3%	1%

Ethnicity

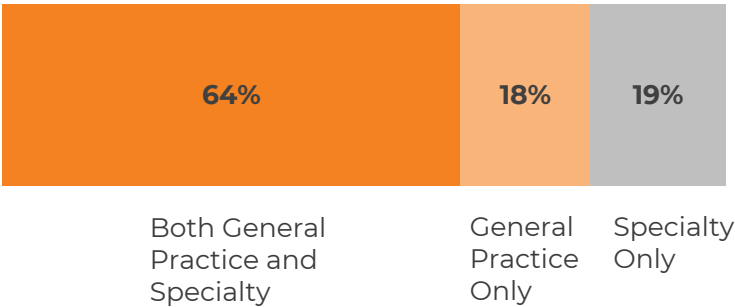
	Vet	Techs/Nurses
Caucasian or White	78%	85%
Hispanic	6%	8%
African-American or Black	1%	1%
Asian or Pacific Islander	5%	1%
Other	9%	5%

A4: At how many clinics do you currently work?
E3: Which categories describe your race?
A7: Do you have a board certified specialization?
A9: From the list below, what do you cover or oversee in your practice?

Board Certified



Daily Medical Activity Category



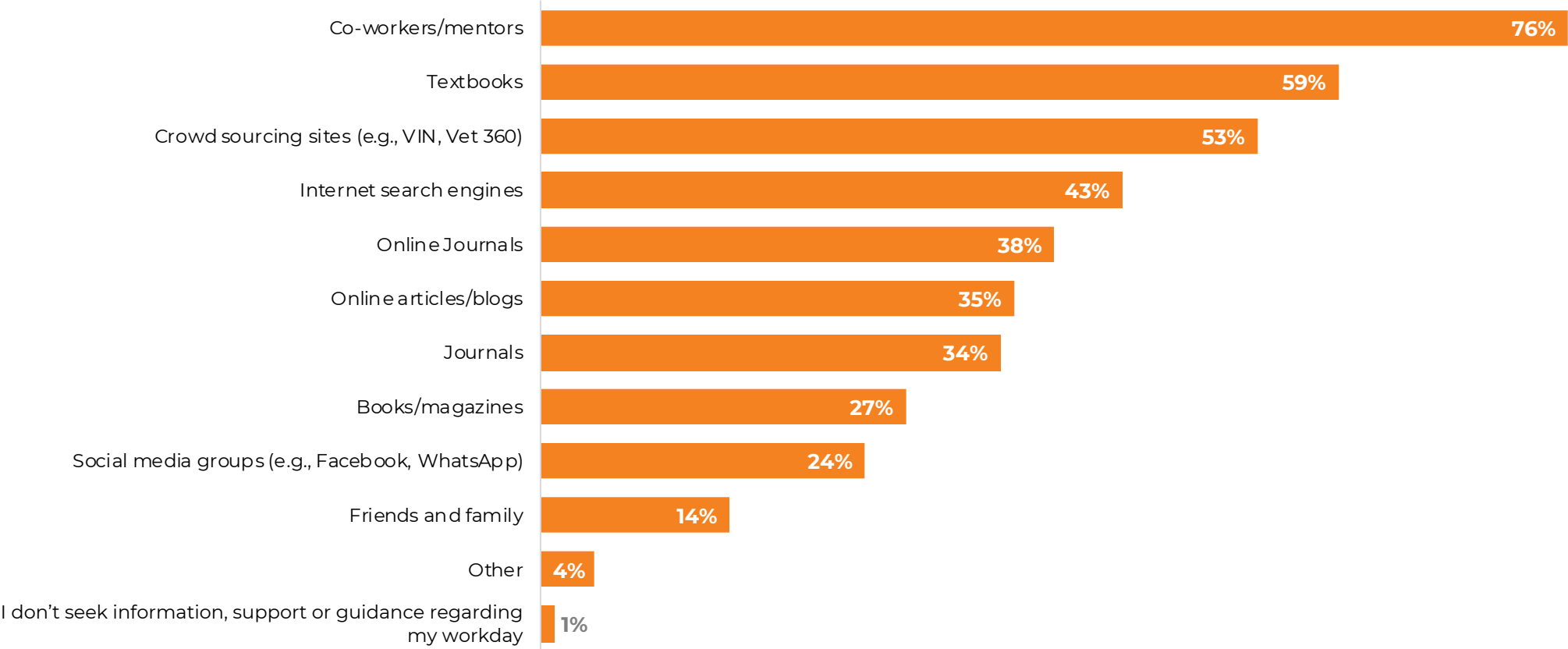
Daily Medical Activity

General Practice	80%
Anesthesia and Analgesia	64%
Surgery	55%
Dentistry	54%
Dermatology	38%
Behavior	38%
Emergency and Critical care	36%
Nutrition	36%
Ophthalmology	29%
Cardiology	28%
Preventive Medicine	26%
Radiology	25%
Oncology	19%
Animal Welfare	18%
Neurology	18%
Pharmacology	15%
Pathology	12%
Toxicology	10%
Sports Medicine and Rehabilitation	9%
Microbiology	7%
Therigenology	7%
Zoological Medicine	6%
Equine	5%
Laboratory Animal Medicine	5%
Poultry Medicine	3%
Other	8%

What sources of information do vet professionals use?

Information Sources

Among Total Vet Professionals (n=608)

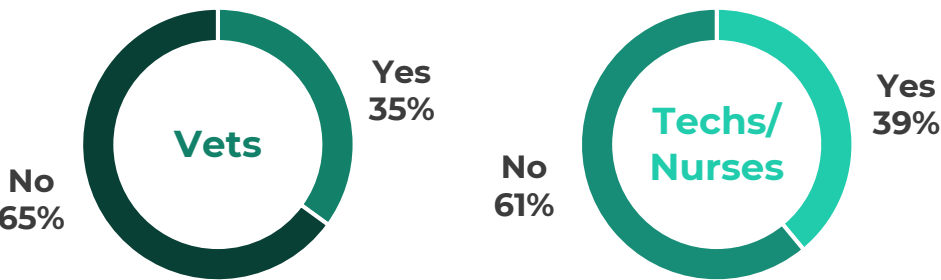


D5: Where do you go for information, support or guidance when you have questions in your workday?

Impact of Debt on the Veterinary Community

■ Total ■ Vets ■ Techs/Nurses

Student Debt



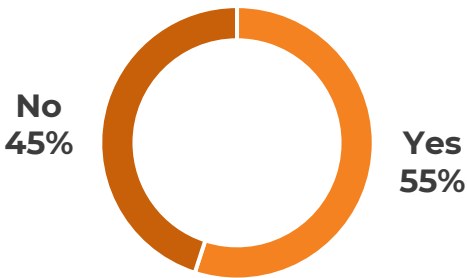
Student Debt Nets – Among Those With Student Debt (n=218)

	Vet	Techs/Nurses
Less than \$50,000	18%	83%
\$50,000 to \$99,999	18%	13%
\$100,000 to \$199,999	19%	4%
\$200,000 to \$299,999	24%	0%
\$300,000 or more	19%	0%
Mean	\$174,122	\$27,610

Life Events Delayed By Student Debt – Among Those With Student Debt (n=218)

	Total	Vet	Techs/Nurses
Travel	64%	63%	65%
Buying a house	42%	34%	51%
Buying a car	32%	35%	29%
Planning a family	27%	24%	30%
Marriage	18%	17%	19%
Other	14%	17%	11%
My student debt does not prevent me from putting off any decision	17%	17%	19%

Practice Debt – Among Those Who Own Their Practice (n=110)



Practice Debt Nets – Among Those With Practice Debt (n=60)

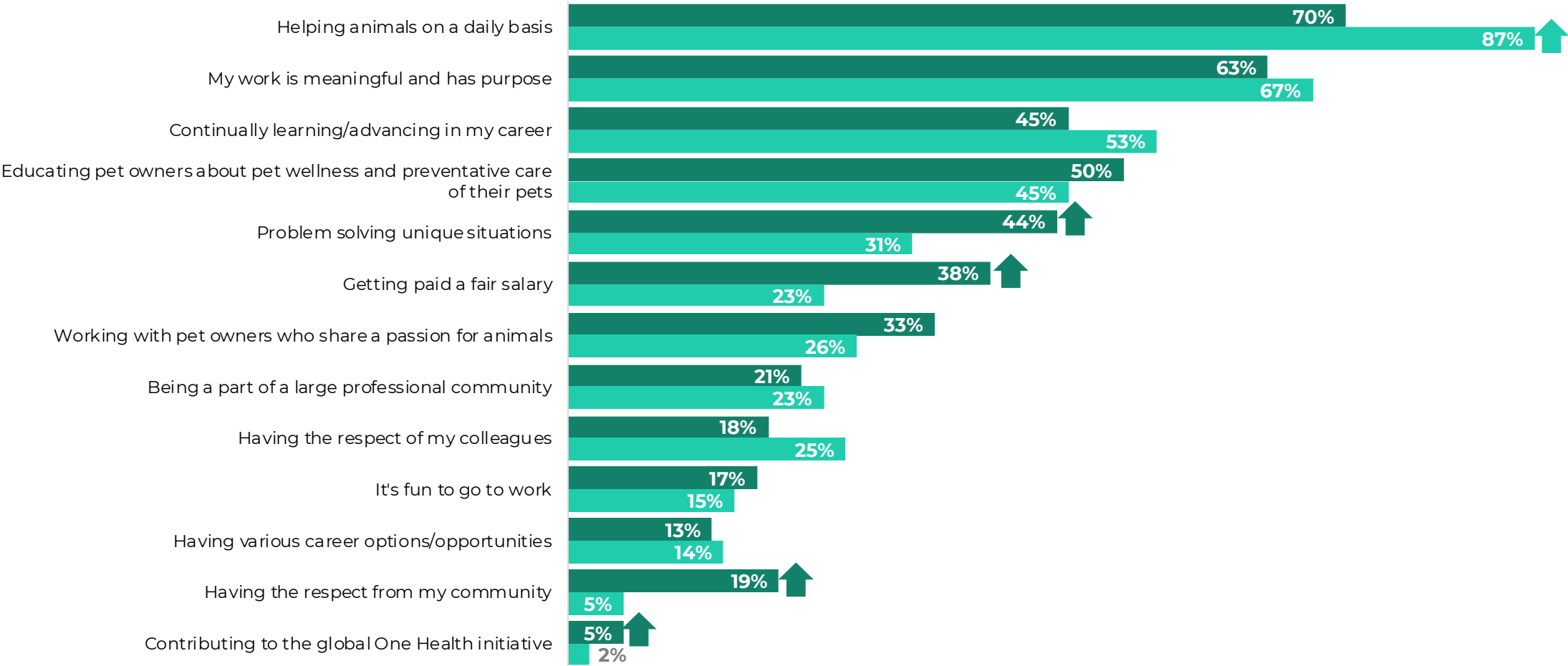
	Total
Less than \$50,000	27%
\$50,000 to \$99,999	15%
\$100,000 or more	58%
Mean	\$329,993

C1: Do you currently have student debt? C2: How much student debt do you currently owe? Your best guess is fine.
C4: What life events/decisions, if any, are you putting off because of your student loan debt?
C5: Do you currently have debt stemming from owning your own practice?
C6: How much professional or practice related debt do you currently owe? Your best guess is fine.

Favorite Aspects of Job

Among Total Vet Professionals (n=608)

Vets Techs/Nurses



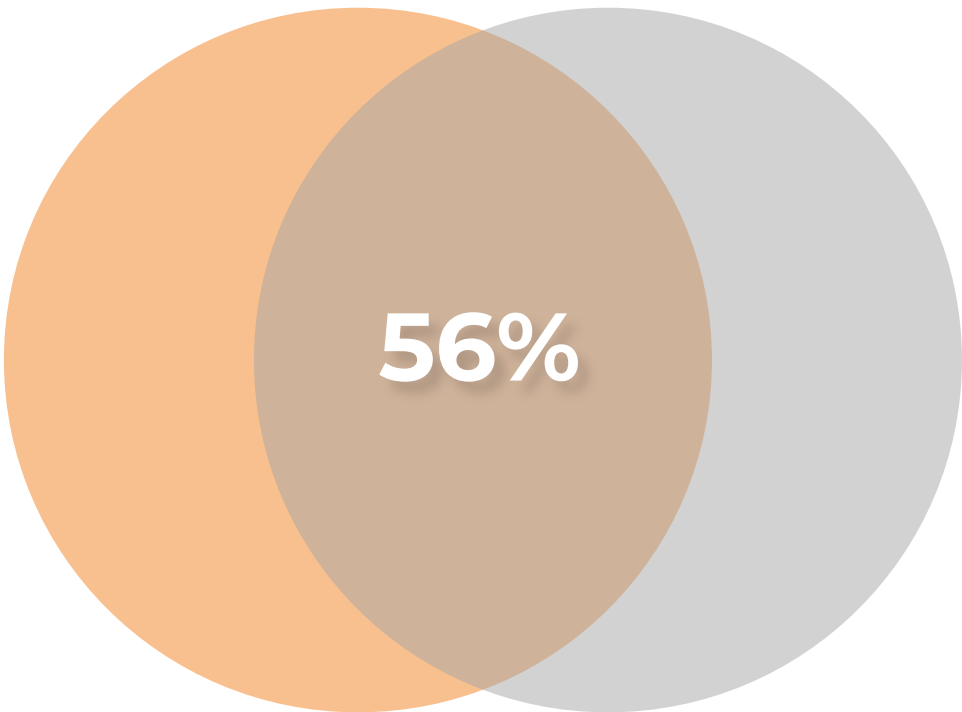
All: What do you see as the top benefits of your job? Please select a maximum of 5 responses.

Vet professionals and pet owners show to have a similar strength in their identification and relationship with one another.

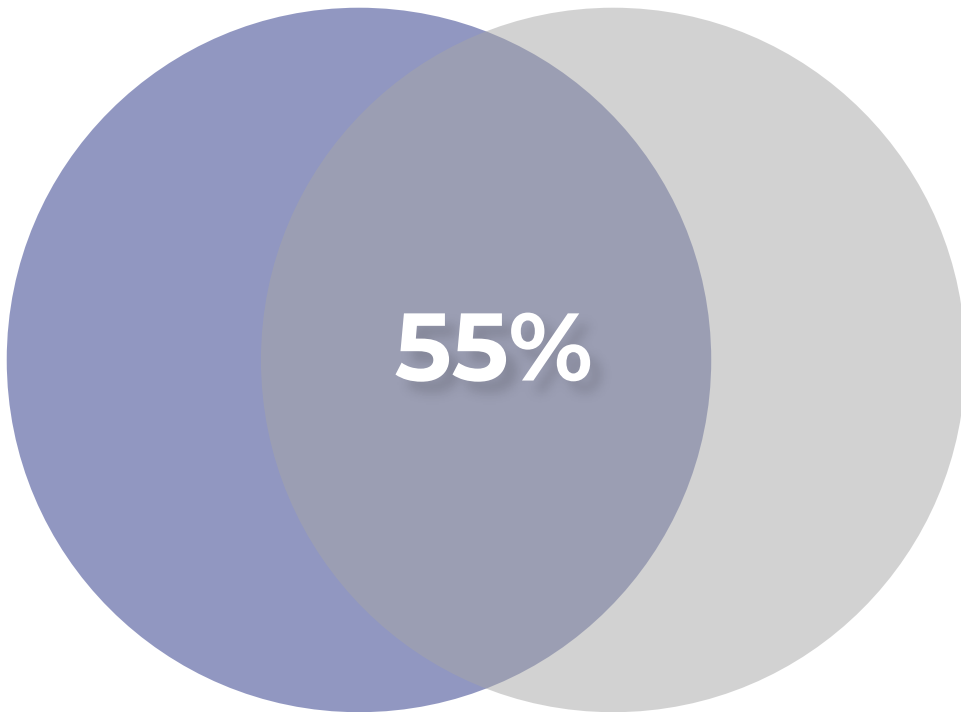
Pet Owners Identification with their Pets

Among Total Vet Professionals (n=608) & Pet Owners (n=501)

Vet Professionals



Pet Owners



LINGUISTIC CODING: What Is It?

Linguistic Coding taps into the non-conscious thought processes that take place when people are discussing a brand or product. Portions of respondent conversations are run through our Linguistic Coding software in order to conduct the analysis.

HOW IT WORKS

Linguistic Coding results indicate the degree to which people use different categories of words in their speech.

Results are coded in total for each space, allowing comparison among the spaces

The number of words used reflects engagement, while differences in linguistic coding results between subgroups illustrate variation in emotionality, thinking styles and other psychological properties.

TEXT ANALYZED: STRUGGLES AT JOB

Answers to the following line of questioning was analyzed:

What parts of your job do you struggle with the most? This can be anything from working with colleagues to interacting with clients to working long hours. Please provide as much detail as possible.

What are veterinarians talking about?

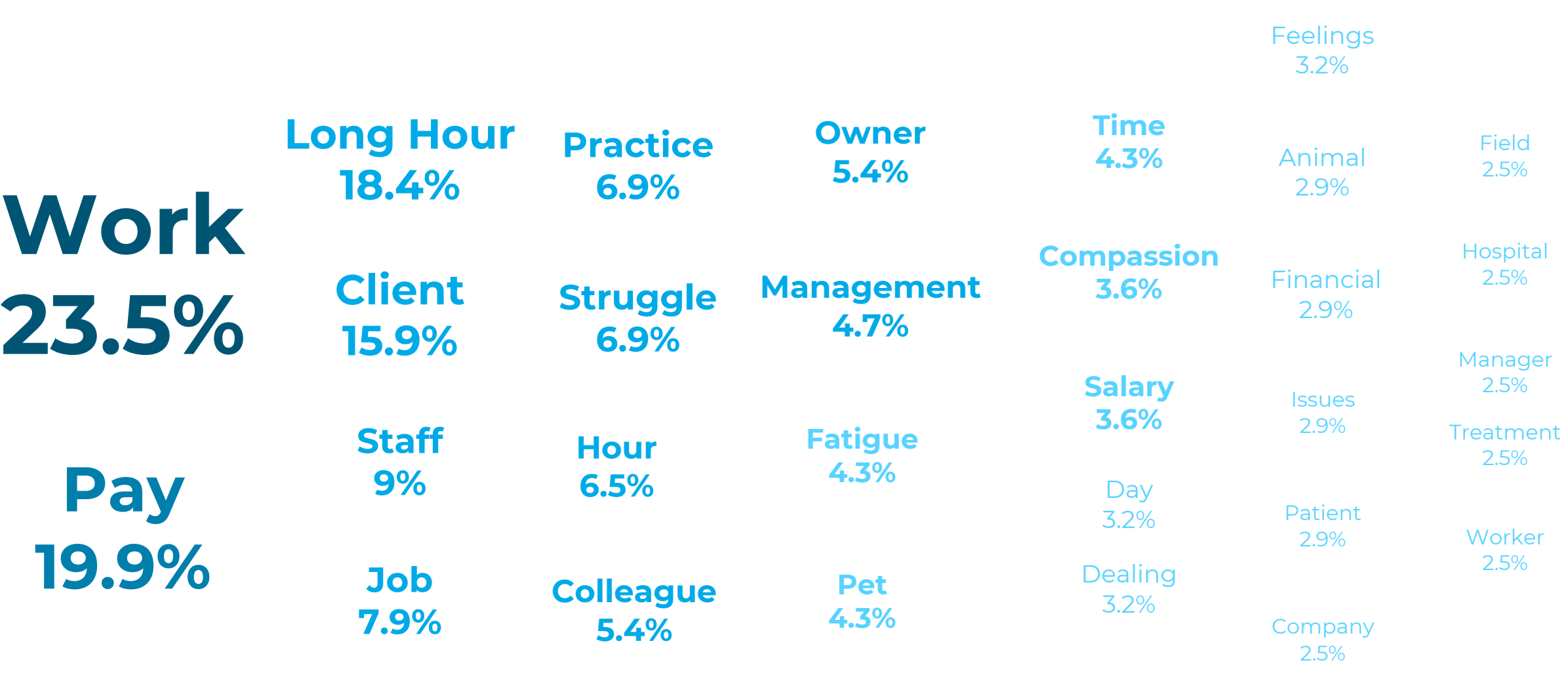
Client
13.4%

Work
12.2%



A12: What parts of your job do you struggle with the most?
Note: Derived from linguistic coding.

What are techs/nurses talking about?



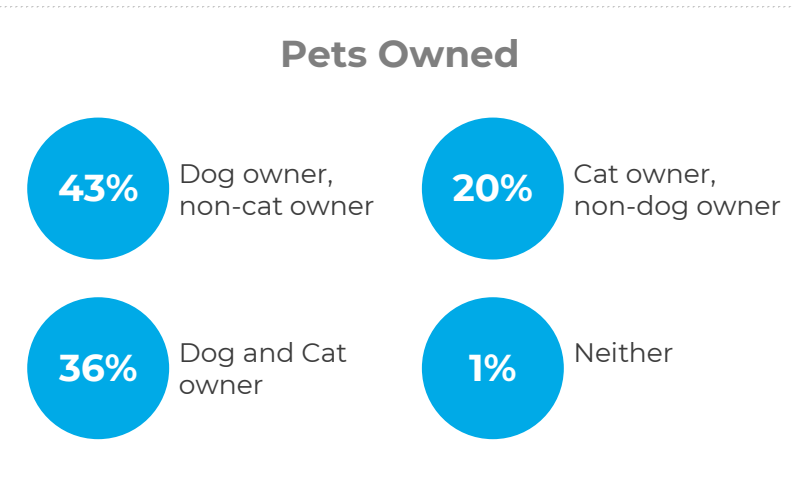
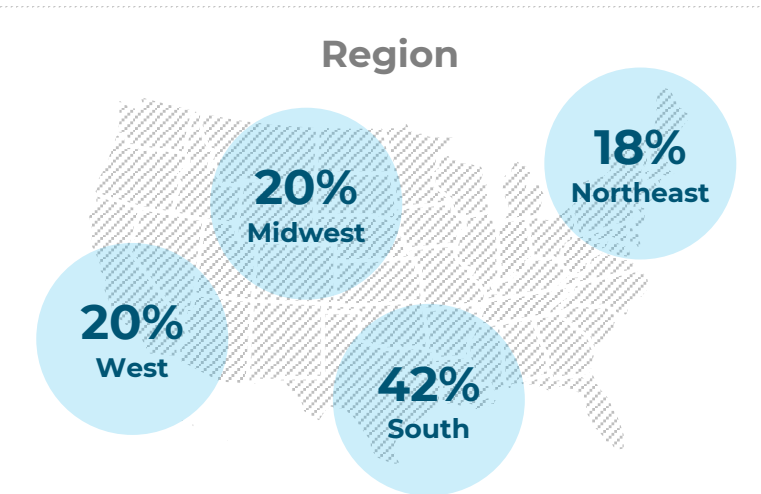
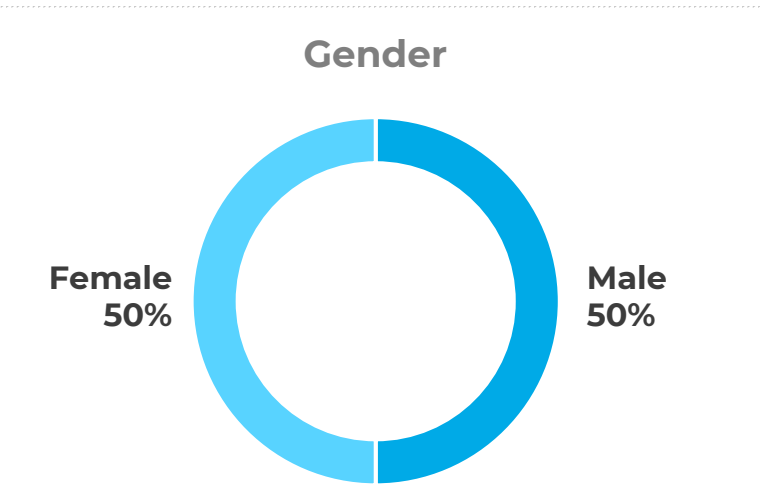
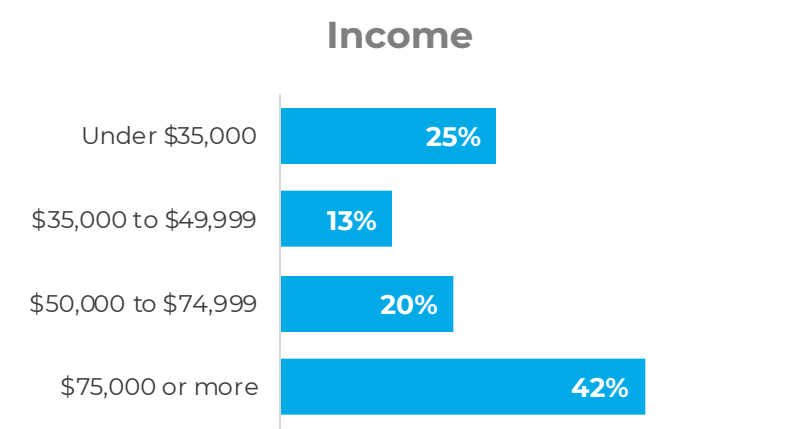
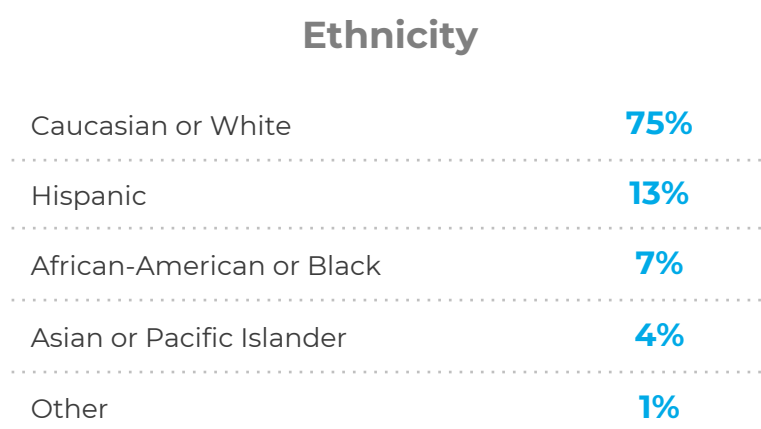
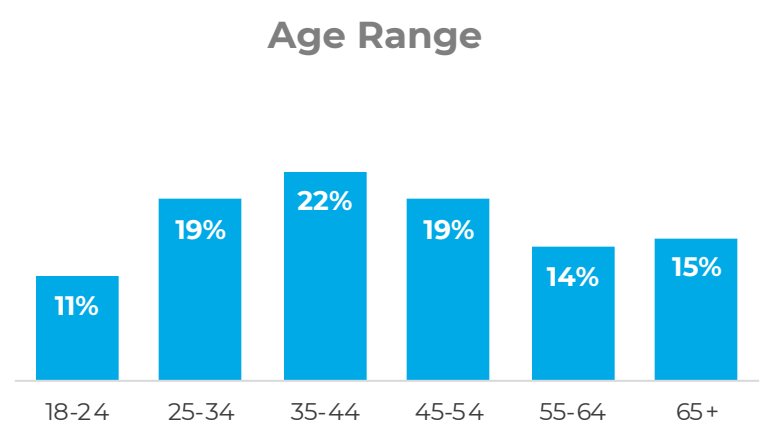
A12: What parts of your job do you struggle with the most?
Note: Derived from linguistic coding.



Appendix: Pet Owners

Pet Owner Demographics

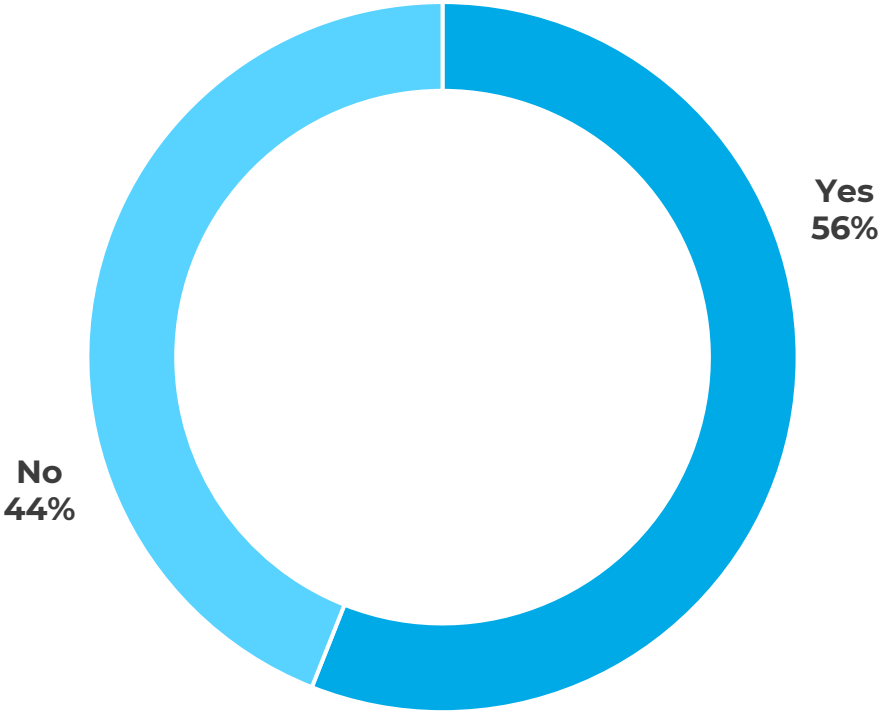
Among Total Pet Owners (n=501)



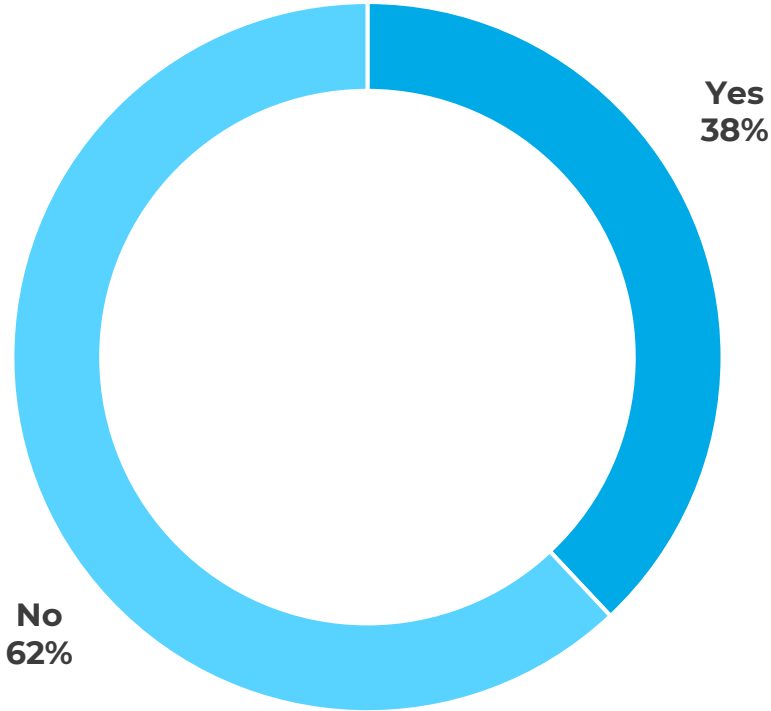
S1: In what year were you born? S2: Select your gender. S4: Which categories describe your race?
S5: What is your 5-digit zip code? S6: Which range includes your total annual household income, before taxes?
S7: Which of the following, if any, types of pets do you have in your home?

Telemedicine's Influence on Vet Visits

Telemedicine – Among Pet Owners Who Visited Vet In P12M (n=501)



Telemedicine - Among Pet Owners Who Did Not Visit Vet In P12M (n=178)

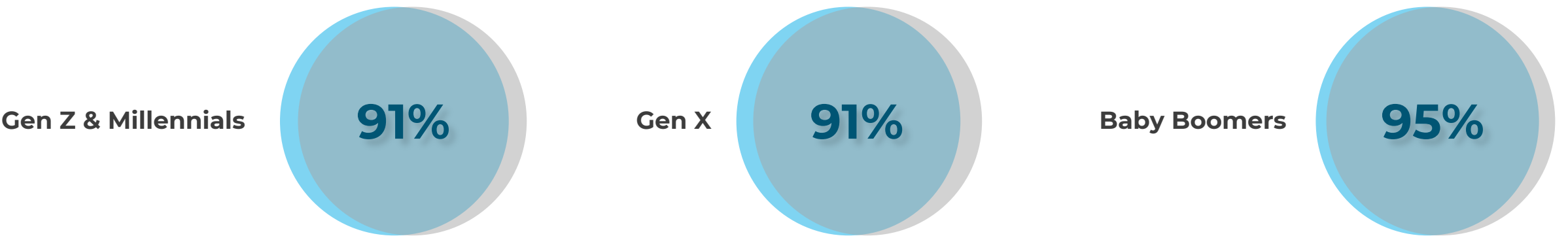


S10: If your veterinarian offered **telemedicine**, would that increase the number of visits you make to the vet (whether in-person or digitally)?
Telemedicine involves remotely diagnosing and treating patients through various digital platforms.

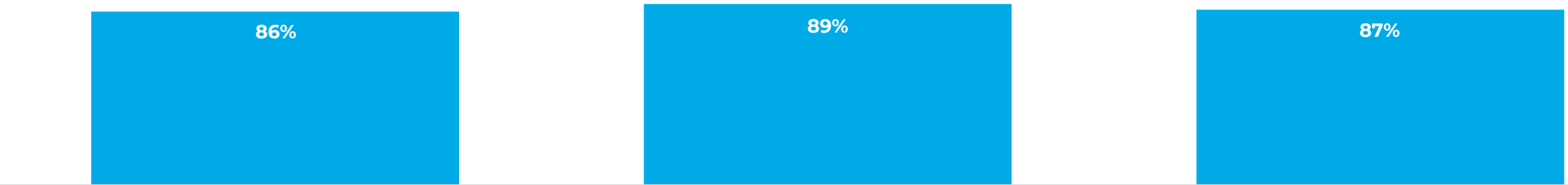
Identification and relationship with pets does not vary significantly by generation.

Among Total Pet Owners (n=501)

IIM Identification With Pets



Relationship With Pets



IIM: Move the circle to show your relationship with each of the following: My pet(s)
A3: How much do you agree or disagree with the following statement: **My pet is a core part of my overall happiness and well-being.**

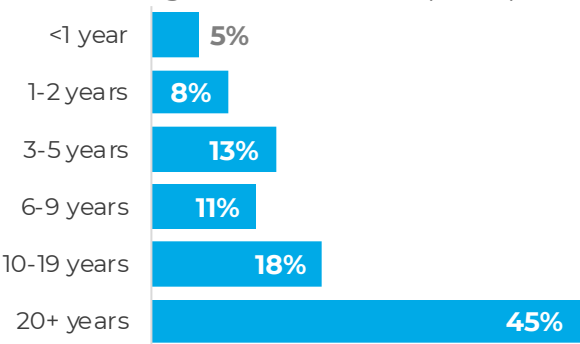
Vet Visit Information

Vet Visit Types

	Total	Dog Owner Only (A)	Cat Owner Only (B)	Dog and Cat Owner (C)
Base	501	216	100	179
Vaccinations	63%	72% BC	48%	62% B
Annual wellness exam	51%	58% BC	45%	47%
Physical exam (e.g., X-Ray, blood test, etc.)	35%	36%	33%	35%
Illness	20%	18%	25%	20%
Dental exam	18%	21%	14%	17%
6-month wellness exam (6 months of age)	12%	11%	14%	13%
12-month wellness exam (1 year of age)	10%	7%	10%	12%
Injury	10%	8%	10%	11%
Behavioral evaluation	6%	4%	5%	9%
Chronic disease (e.g., heart disease, diabetes)	6%	4%	9%	6%
End-of-life/euthanasia	4%	3%	5%	4%
Other	5%	6%	2%	6%

Pet Ownership Length

Among Total Pet Owners (n=501)



Vet Visit Frequency

Among Those Who Have Been Pet Owners For Over 5 Years

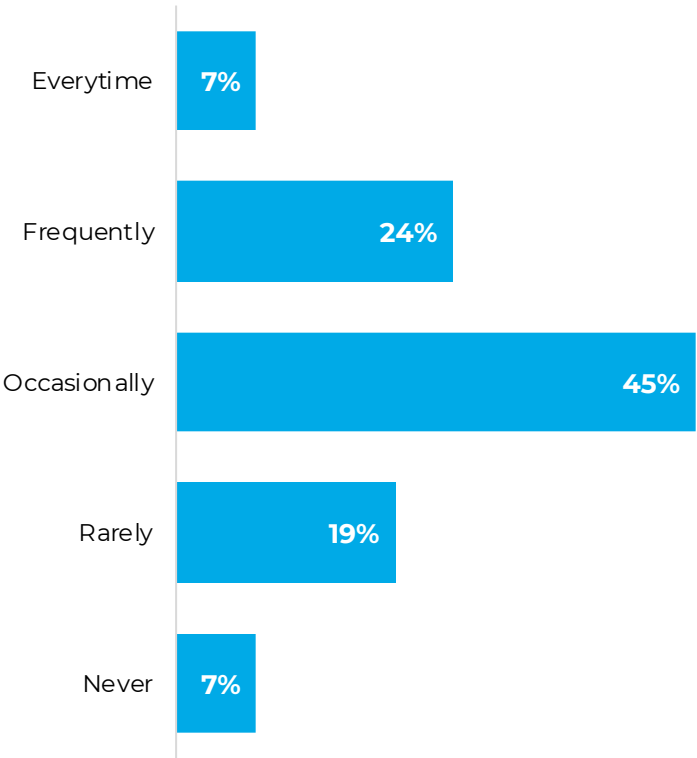
Base	372
I am taking my pet(s) to the vet less frequently now than I did 5 years ago	13%
I am taking my pet(s) to the vet the same now as I did 5 years ago	64%
I am taking my pet(s) to the vet more frequently now than I did 5 years ago	23%

Capital letters indicate statistical significance at the 95% confidence interval
A5: In the past 12 months, what are the reason(s) that you have taken your pet(s) to the veterinarian?
D2: How long have you been a pet owner?
D3: From the list below, please select how the number of visits to the vet has changed from 5 years ago to today.

Information Sources Used By Pet Owners

Among Total Pet Owners (n=501)

Use Internet For Pet Medical Info



Info Sources

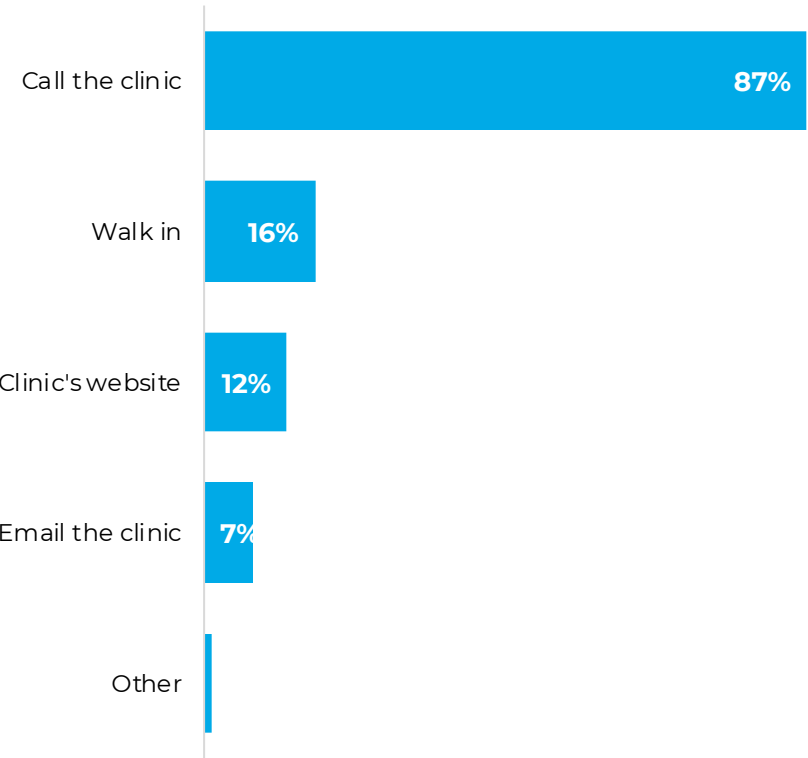
Advice from veterinary professionals	49%
Pet Websites	48%
Advice from friends or family	32%
YouTube	27%
Social media (e.g., Facebook, Instagram)	19%
My vet clinic's social media sites	17%
Magazines	10%
Mobile apps	8%
Pet insurance provider hotline service	5%
E-newsletters	5%
Other	2%
I do not use any sources to gather information about my pet(s)	5%

C1: How often do you search the internet for information on your pet's medical condition, symptoms, or behavior?
C2: What sources do you **currently** use to gather information or research about your pet(s)?

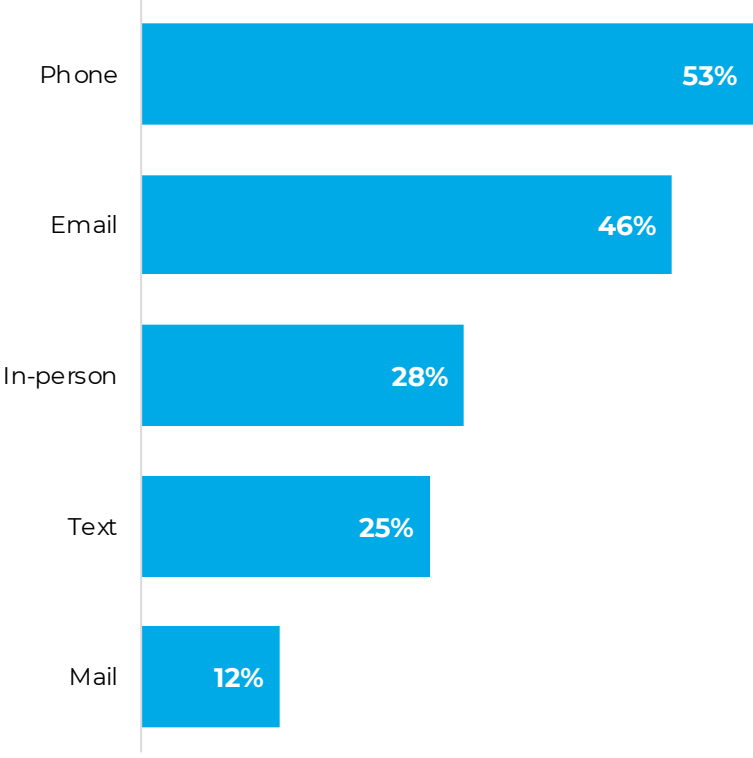
Preferred Methods of Communication

Among Total Pet Owners (n=501)

Scheduling Vet Appointments



Follow-up Preference



D4: How do you typically make your veterinary appointments?
D5: How do you prefer to receive follow-up visit information/inquiries after visiting the vet?

Pet-Care Spend Behaviors

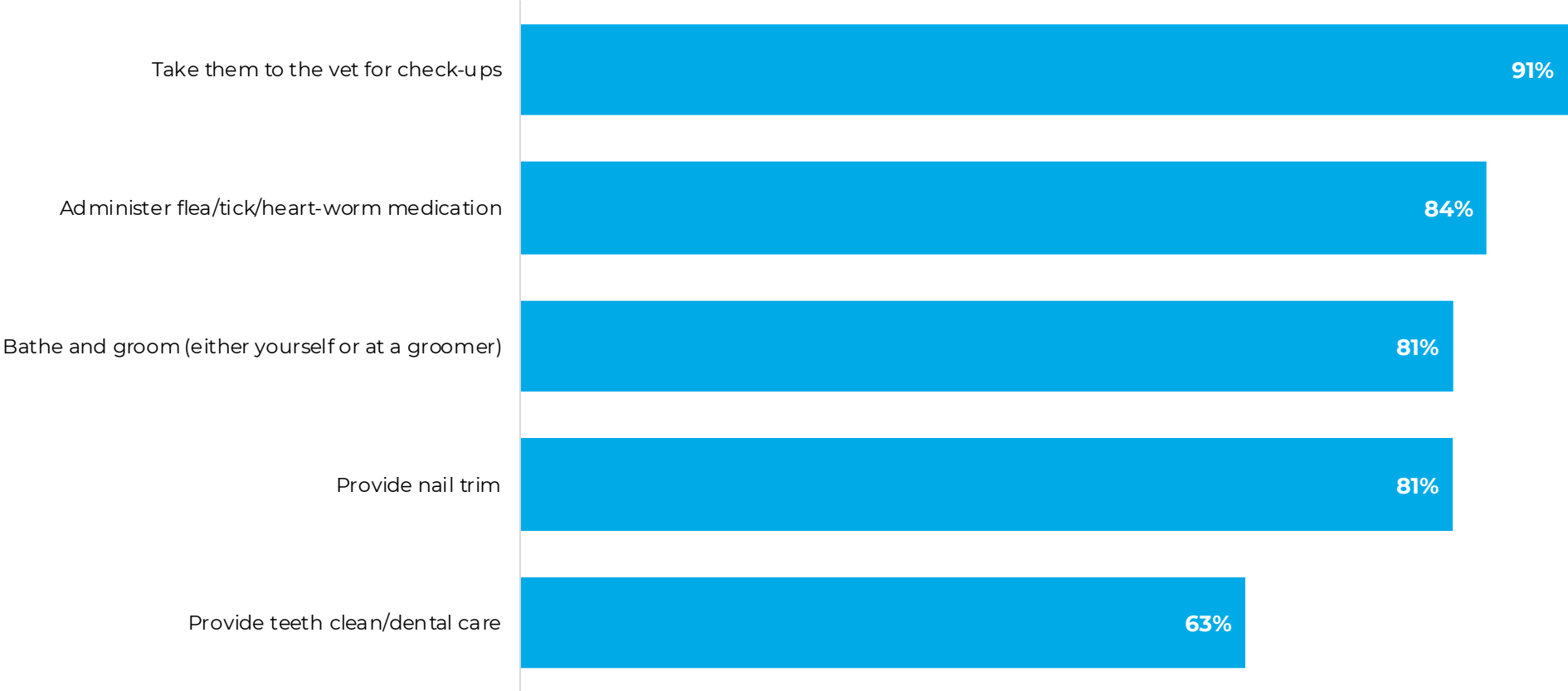
Among Total Pet Owners (n=501)

Pet Care Purchased	Purchased in P12M	Average Spend
Veterinary care	69%	\$522
Toys/bedding	64%	\$77
Preventative Health Care (e.g., flea/tick medication, heartworm preventive)	62%	\$163
Accessories (e.g., collars, leashes, grooming supplies)	55%	\$65
Generic food/treats	47%	\$220
Gourmet food/treats	41%	\$197
Nutraceuticals (e.g. vitamins and minerals)	20%	\$79
Pet clothing	20%	\$71
Day care/dog walking	14%	\$338
Training	9%	\$232
CBD products	7%	\$69
Pheromone products	4%	\$45
Other	4%	\$223

D6: Which of the following products and services have you bought for your pet(s) in the past 12 months?
D7: In the past 12 months, how much have you spent on the following for your pet(s)?

Preventative Care Measures Used

Among Total Pet Owners (n=501)

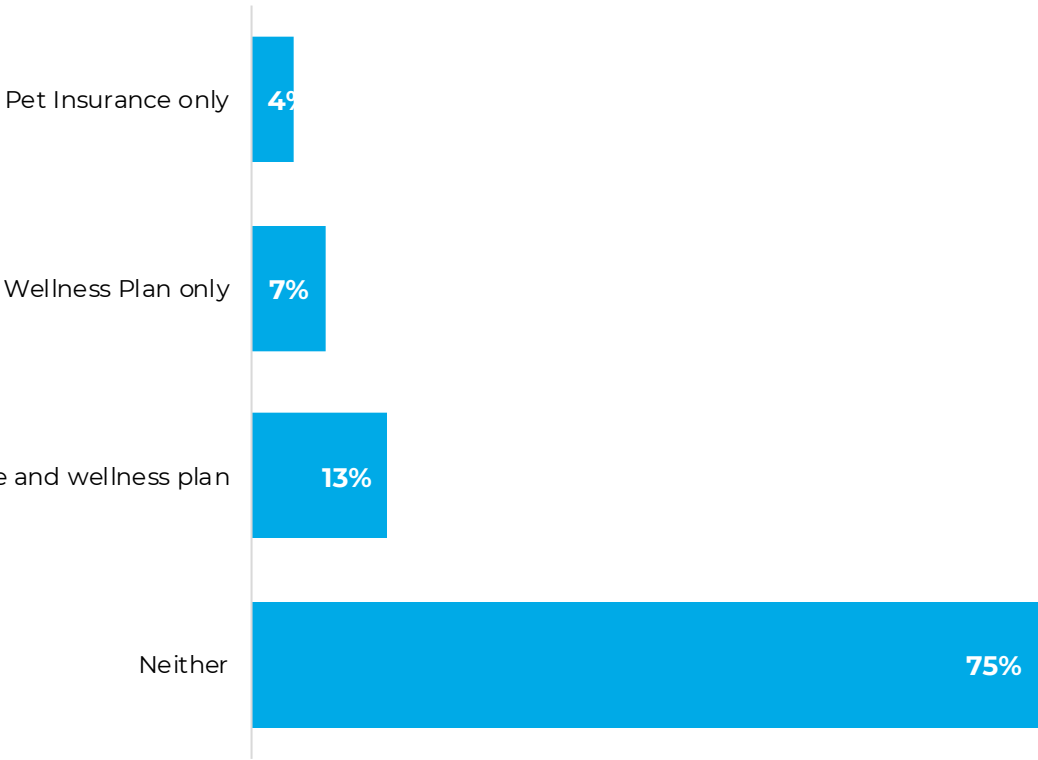


D8: When caring for your pet(s), how often do you...

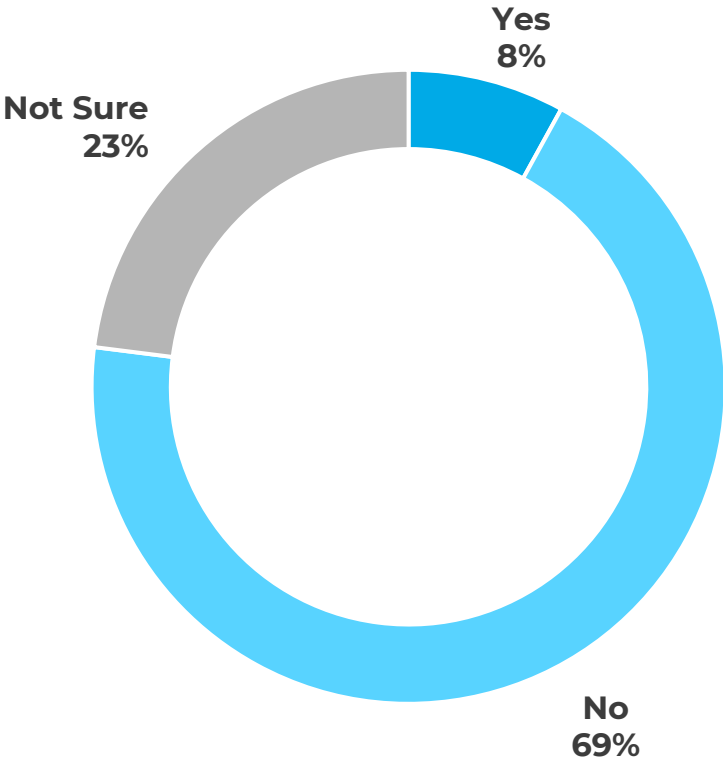
Healthcare Coverage and Frequency of Clinic Consolidation

Among Total Pet Owners (n=501)

Insurance and Wellness Plans

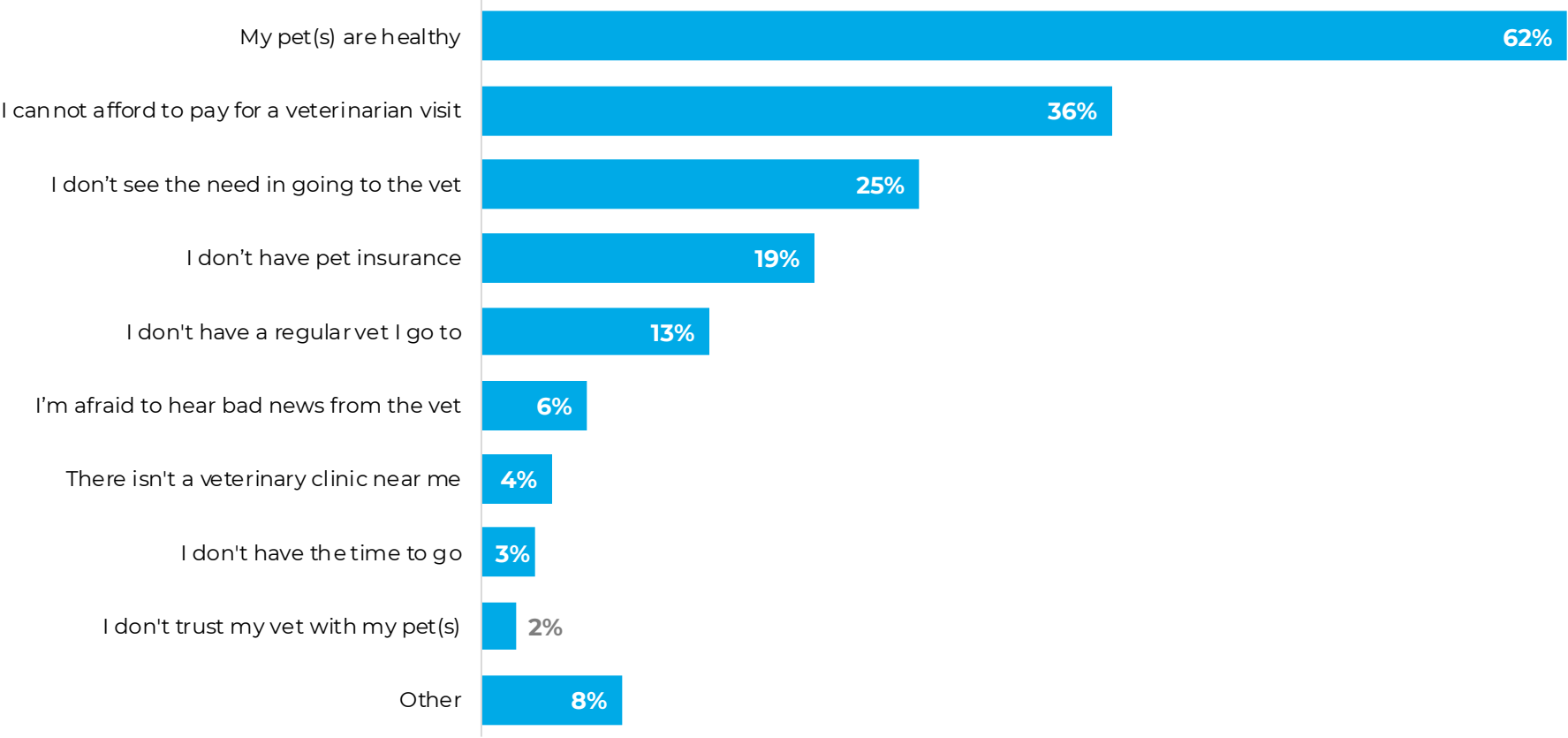


Clinic Consolidation



Barriers to Not Visiting the Vet in the Past Year

Among Pet Owners Who Did Not Visit Vet In P12M (n=179)



S9: From the list below, please select the reason(s) why you have not taken your pet(s) to the veterinarian in the past 12 months.
*Source: American Veterinary Medical Association



Appendix: Trends

Agreement with Trends

Among Total Vet Professionals (n=608)

	Total	Vets	Techs/Nurses
Preventative care is an important aspect of a pet's health and well-being	98%	98%	97%
Having a pet improves my clients' mental/physical health	92%	91%	93%
Hospice/palliative care can help the pet owner make difficult end-of-life decisions	89%	90%	88%
Alternative treatments such as acupuncture and laser therapy are beneficial as part of an overall treatment plan for many conditions such as osteoarthritis	83%	81%	86%
"Fear Free" for pets is an important part of the vet visit experience for patients	80%	76%	85% ↑
Vet techs and nurses should have standardized titles, credentials, and scope of practice.	79%	72%	86% ↑
Veterinarian professionals should be permitted to discuss CBD products/treatments	64%	66%	61%
Wellness plans can help a pet owner pay for veterinary services	62%	56%	69% ↑
In-home vet visits/euthanasia services should be part of the services offered by a veterinary clinic	61%	49%	74% ↑
There is an increased need for specialization in the veterinary field	54%	38%	71% ↑
Wearable technology will help monitor pets' health on a day to day basis	51%	49%	53%
Tele-doc/e-medicine is an exciting new trend for vets to take advantage of	37%	36%	39%
Healthcare mergers and acquisitions impact patient care access, care quality, and cost in a positive way	29%	25%	34% ↑

Top Concerns in Animal Health

Among Total Vet Professionals (n=608)

Base	Total 608	Veterinarians 293	Techs/Nurses 277
Miscommunication between vets and clients	49%	58% ↑	39%
High amount of turnover with vets, nurses, and techs	48%	39%	57% ↑
Clients have less trust in veterinarians today than they used to	47%	56% ↑	38%
Anti-vaccination movement	40%	44%	37%
Difficulty in referring clients to a specialist due to cost and a lack of specialized vets	36%	35%	37%
Pet parents are less focused on preventative care for their pets	34%	34%	32%
Antimicrobial resistance in medication	31%	37% ↑	26%
Lack of research/evidence of alternative medications (e.g., CBD)	30%	32%	27%
Lack of training on how best to incorporate vet nurses/techs as a part of daily work	26%	20%	33% ↑
Clients not understanding my role in the process	22%	15%	31% ↑
Zoonotic diseases (e.g., animal flu, bovine tuberculosis)	19%	17%	20%
Alternative treatment options (nutraceuticals, acupuncture)	18%	13%	23% ↑

D3: From the list below, please rank the top 4 concerns in animal health that are most important to you with "1" being your most important concern.

Changes That Will Have Biggest Impact in 5-10 Years

Among Total Vet Professionals (n=608)

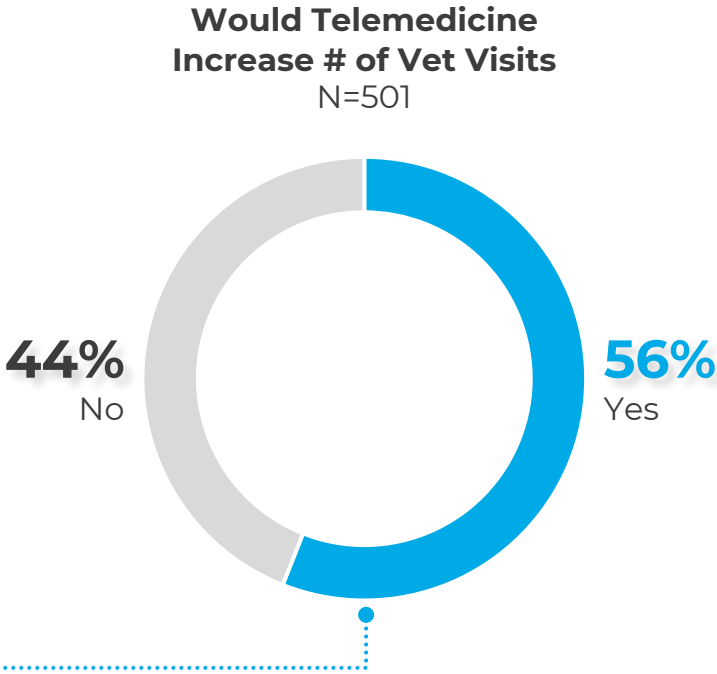
Base	Total 608	Veterinarians 293	Techs/Nurses 277
Corporate consolidations/mergers/takeovers of independent practices	69%	79% ↑	57%
Breakthroughs in medical treatments (e.g., cancer)	50%	46%	56% ↑
High degree of turnover in the industry	47%	40%	53% ↑
Non-VCPR tele-medicine	26%	41% ↑	10%
Increased preventative care measures by pet owners	24%	20%	27%
Incorporating wearable technology/artificial intelligence to diagnose conditions earlier	20%	16%	24% ↑
Increasing number of specialties offered	18%	14%	23% ↑
Clinics use of big data for early detection of diseases	11%	9%	14%
Rise of “One Health” best practices	10%	11%	10%
Other	3%	3%	3%

D4: From the list below, please select what factors you believe will have the biggest impact on the veterinary industry in the next 5-10 years.

Trends among Pet Owners

Among Total Pet Owners (n=501)

	Awareness	Importance (T2B)
Grooming and boarding services offered by veterinarian	96%	46%
Pet hotels/boarding/day care	95%	35%
Preventative care measures for my pet(s) (e.g., 12-month flea and tick medications)'	94%	82%
New options in food and nutrition (e.g., plant based proteins, clean labels, nutraceuticals)'	87%	57%
Wellness plans	86%	61%
Behavioral therapy/modification	80%	39%
Cat-Friendly Vet Clinics	75%	54%
Alternative treatment options (e.g., CBD, laser therapy, acupuncture)'	73%	47%
New treatments for cancer, heart disease, etc.'	71%	62%
In-Home Vet Visits/Euthanasia Services	66%	50%
Pet transportation	65%	40%
Hospice/Palliative Care	61%	49%
Telemedicine	58%	33%
Wearable technology to help monitor pet health on day to day basis	53%	41%
"Fear Free" veterinary clinics (reducing fear and anxiety from visits to the vet)	50%	64%
Hyperbaric Oxygen Therapy	42%	33%



B2: How important to you are each of the following services or trends?

Pet Health Importance

Among Total Pet Owners (n=501)

Base	501
Finding a veterinarian I can trust	65%
Maintaining my pets' wellness needs (e.g., nail trim, teeth clean, grooming)	43%
Finding a veterinarian I can afford	42%
Being aware of/treating serious medical conditions in my pet(s) (e.g., cancer, heart disease)	35%
Knowing the right nutritional options for my pet(s)	28%
Keeping up on breakthroughs in treatment so I can provide the best care for my pet(s)	23%
Finding a veterinarian that recognizes the relationship I have with my pet(s)	20%
My pet(s) getting enough exercise on a daily basis	20%
Having a veterinarian that supports a holistic approach to my pet's healthcare	16%
My pet(s) being socialized with other animals	8%

B3: From the list below, please rank the **top 3** things that matter to you most when it comes to providing the best health care for your pet(s).