Taking charge of our future:
A vision for the veterinary profession for 2030
We launched the Vet Futures project in November 2014 under a quote from business guru Professor Peter Drucker: “The best way to predict the future is to create it.”

It was with this sense that the veterinary profession needed to take charge of its own future that we embarked upon what has been a very busy year of activity. Through research, a roadshow and other meetings, and via social media, members of the veterinary profession – alongside veterinary nurses, practice managers and users of veterinary services – came together to express their views on where they saw themselves and the profession by 2030.

This report sets out six ambitions. These coalesced out of the huge amount of information we gathered and we believe they are key to the future sustainability of the profession. In the pages that follow we try to explain why, but we are also conscious that, as with any future-scoping exercise, we won’t have got this entirely right. There will be things we have missed, things that perhaps seem critical today that may not seem so in a decade, but we hope this provides a starting point for action.

We tested these ambitions with the profession and stakeholders, and a substantial list of potential actions under each ambition has been suggested. We have distilled these into 34 broad recommendations.

This is only the beginning of the journey. Achieving the ambitions set out here will rely on many individuals and organisations coming together to deliver change. Our plan over the coming months is to engage veterinary leaders to help us turn these recommendations into a detailed action plan, and, the hard bit, to deliver it.

We are determined that this report will not sit on a shelf gathering dust, but will provide a blueprint from which we can create a future of which we can all continue to be proud.

A word of thanks
Our gratitude goes to all those who have given up their time to meet with us, share ideas, provide constructive challenge, and assist in shaping this report.

We are particularly grateful to the 12 contributors to the blogs featured on the Vet Futures website. These individuals have provoked debate and bravely lifted the lid on some tricky issues. The website has had around 45,000 visits since its launch in November 2014.

We would like to thank staff at RCVS Knowledge for providing assistance with the literature searches, and Hannah Jordan BSc(Hons) BVetMed(Hons) MRCVS for her assistance in conducting a review of the literature.

Finally, we would like to thank the team at inQuisit – led by Sally Williams, who has served as Vet Futures Project Manager – for conducting the qualitative and quantitative research, preparing the literature review, facilitating discussions and assisting us in developing this report.

Bradley Viner
RCVS President

Sean Wensley
BVA President
Summary of ambitions and recommendations

A profession in charge of its future

A leading force for animal health and welfare

Valued for our wider roles in society

Confident, resilient, healthy and well-supported

A broad range of diverse and rewarding career paths

Thriving, innovative, user-focused businesses

Exceptional leadership

www.vetfutures.org.uk
1. Develop and promote an animal welfare strategy for the veterinary profession
2. Enhance moral reasoning and ethical decision-making in education, policy-making, practice-based research and everyday veterinary work
3. Explore options to develop an online animal welfare hub to better disseminate animal welfare research, evidence and tools, including the critical appraisal of common practices in the light of emerging evidence
4. Clarify and promote regulatory requirements and professional responsibilities relating to animal welfare
5. Develop joined up national campaigns on preventive health and the five welfare needs
6. Increase collaboration between veterinary and human health professionals and environmental organisations, in line with the One Health concept
7. Promote and celebrate the wider roles of veterinary surgeons and veterinary nurses outside clinical practice within the veterinary profession and to the general public, starting with school-age children, both to help recruit future veterinary surgeons and nurses, and to develop a better informed public
8. Make a broader range of extramural studies (EMS) opportunities available to veterinary students including (non-veterinary) business, public policy and international fields
9. Work alongside ‘traditional’ funders of research and other stakeholders to adopt a more strategic, long-term outlook
10. Deliver a coordinated, well-funded and evidence-based approach to mental health and wellbeing for the veterinary team
11. Review the approach to recruiting and selecting veterinary and veterinary nursing students to ensure adequate support, improve wellbeing and manage expectations
12. Deliver peer support and/or mentoring in all UK vet schools and improve support for vets post-graduation
13. Develop support for overseas-graduated veterinary surgeons working in the UK, who may not have benefited from the same undergraduate support as UK students
14. Develop tools and services to help veterinary employers make working environments more supportive for everyone
15. Help veterinary professionals to work with uncertainties, and develop reflective practice, starting with undergraduates
16. Explore and consult on a sustainable structure for the veterinary degree, including the viability of limited licensure, allowing veterinary students to focus their studies and specialise during the veterinary degree
17. Ensure that veterinary undergraduates are provided with career ‘roadmaps’ and encouraged to undertake relevant work experience as part of EMS
18. Undertake a veterinary workforce study to assess the rewards, recognition and working conditions of vets and veterinary nurses, and the drivers of low and unequal pay
19. Create a one-stop-shop for careers advice and support to promote diverse career opportunities
20. Explore how we can encourage a more diverse profession (in relation to ethnicity, socio-economic background, gender etc) including reviewing the application and selection process for UK vet schools
21. Improve outreach to, and careers advice for, schoolchildren to better communicate the realities and opportunities of a veterinary career
22. Develop a public-facing awareness campaign to raise the profile of wider veterinary roles (including public health, research, government, industry, and academia)
23. Review the regulatory framework for veterinary businesses to ensure a level playing field, enable a range of business models to coexist, ensure professionalism in commercial settings, and explore the implications for regulation of new technologies (eg telemedicine)
24. Establish a business and innovation hub to showcase new technologies, services and business models, celebrate the innovators and ensure appropriate regulatory underpinnings are in place
25. Enhance business and finance skills amongst veterinary professionals through education, EMS and continuing professional development (CPD)
26. Explore whether practice standards inspection should be compulsory
27. Develop communications tools to improve consumer understanding of veterinary costs and fees, and promote the value of veterinary care
28. Consider whether and how allied professionals might be regulated as part of the vet-led team
29. Encourage veterinary nurse leaders to develop a report and recommendations which are directly relevant to veterinary nurses and their future, and complementary to the Vet Futures report
30. Explore options for bringing greater coherence to the support and representation of the veterinary profession
31. Explore ways to develop the next generation of veterinary leaders including by identifying and nurturing talent, and providing them with the skills and opportunities to succeed
32. Develop and communicate clear routes to a wide range of leadership roles
33. Look to develop a proactive veterinary-led EU/global agenda where the UK can lead in public health, education, regulation and improving standards
34. Develop lifelong learning in leadership, including mentoring and targeted leadership programmes, in particular for groups underrepresented in leadership (eg women and people from minority ethnic groups)
Contents

1. Introduction ................................................................. 8
  1.1 Key issues ............................................................... 8
  1.2 Scope ................................................................. 8
  1.3 Veterinary nurses .................................................. 9
  1.4 Approach .............................................................. 9
  1.5 Engagement .......................................................... 10
  1.6 Research reports .................................................... 12

2. Our vision ................................................................. 14

3. Summary of our ambitions ........................................... 16
  3.1 Education .............................................................. 17
  3.2 Regulation and standards ........................................... 17

4. Ambition one: animal health and welfare ....................... 18
  4.1 What this ambition means ......................................... 19
  4.2 Why it’s important .................................................. 20
  4.3 Welfare and industry: the challenge ........................... 20
  4.4 Integrity in treatment decisions ................................. 21
  4.5 Recommendations .................................................. 21

5. Ambition two: veterinary professionals’ wider roles in society 22
  5.1 What this ambition means ......................................... 23
  5.2 Why it’s important .................................................. 23
  5.3 Greater involvement ............................................... 24
  5.4 Policy makers ......................................................... 25
  5.5 Recommendations .................................................. 25

6. Ambition three: the health and wellbeing of veterinary professionals 26
  6.1 What this ambition means ......................................... 27
  6.2 Why it’s important .................................................. 27
  6.3 Targeted action ....................................................... 30
  6.4 Head start already made ........................................... 30
  6.5 Recommendations .................................................. 30

7. Ambition four: diverse and rewarding veterinary careers 32
  7.1 What this ambition means ......................................... 33
  7.2 Why it’s important .................................................. 33
  7.3 Change in direction ................................................. 34
  7.4 More satisfied outside clinical practice ....................... 35
  7.5 Diverse careers for diverse professions ....................... 36
  7.6 Widening access ..................................................... 38
  7.7 Veterinary nurse careers .......................................... 38
  7.8 Recommendations .................................................. 39

8. Ambition five: sustainable businesses and user-focused services 40
  8.1 What this ambition means ......................................... 41
  8.2 Why it’s important .................................................. 41
  8.3 Changing market .................................................... 41
  8.4 Skills, capacity and resilience .................................... 43
  8.5 Better meeting client needs ....................................... 45
  8.6 Paradigm shift ........................................................ 46
  8.7 Recommendations .................................................. 46

9. Ambition six: leadership ............................................... 48
  9.1 What this ambition means ......................................... 49
  9.2 Why it’s important .................................................. 49
  9.3 Veterinary value ..................................................... 50
  9.4 ‘One voice’ ........................................................... 50
  9.5 Exceptional leadership .............................................. 50
  9.6 Recommendations .................................................. 51

10. Next steps ............................................................ 52
    10.1 Vet Futures Action Group ....................................... 52
    10.2 Vet Futures Summit .............................................. 52

Appendices
  Appendix A: Vet Futures Project Board ........................... 54
  Appendix B: Contributors ............................................. 55
  Appendix C: References ................................................. 57
Predicting the future can be fraught with difficulty. Just think of the stock market crash that few anticipated, or the failure of opinion polls to predict the result of the last General Election.

‘Future-gazing’ is also, arguably, more complex today than ever. Never has change occurred as quickly as it does in this digital age. Just a decade ago, how many would have foreseen the dependency many of us have now on our smart-phones and other digital technology. Fast-forward another decade and the evolution of digital technology – and its impact on society and our daily lives – is hard to predict with any certainty.

But it’s not just the rapid changes in technology that will shape our future. We see drivers for change everywhere, from population growth and climate change, to the increased global movement of people and animals and changing social behaviours of successive generations.

While we may not be able to predict the future with certainty, we can make plans based on what we know now, the trends we observe, and what we believe is possible. By engaging with the vets and veterinary nurses whose futures are at stake, and the users of veterinary services whose needs and wants are evolving, we can pool opinion and extrapolate from today’s issues.

We do not need to be passive recipients of change – we can, and should, be instrumental in shaping the future. That future is ours for the taking. We can put plans in place, we can take active steps to rectify problems, and we can change direction.

It was with this in mind – alongside a growing need for joined-up strategic thinking, and to demonstrate leadership across the profession – that the Vet Futures project originated.

The veterinary profession has experienced rapid change in the environment within which it operates. Some changes have arisen from within the profession; others have been driven by external factors.

A recurring message throughout our work has been that, for many veterinary professionals, tackling current challenges leaves little time or energy to devote to future prospects. As with any changing landscape, there are those who are quick to gain and those who risk being left behind.

To support vets, and those they work alongside, into the future, the British Veterinary Association (BVA) and Royal College of Veterinary Surgeons (RCVS) joined forces through Vet Futures to create a framework within which the profession could prepare for, and shape, its own future.

Through a programme of research, engagement, and consideration of strategic issues already having an impact, the overriding aim of Vet Futures has been to develop a vision and ambitions for 2030 – and a way forward to achieving them.

The ambitions outlined in this report contain the necessary seeds for change that could lead to a dramatically improved and more coherent future for veterinary professionals, to the benefit of animals, their owners and society at large. We hope you find it equally inspiring.

1.1 Key issues

We recognise that there is little value in setting our sights on the horizon without addressing the challenges of today and tomorrow, so one of the project aims has been to develop a shared understanding of the key strategic issues currently facing the veterinary profession.

The main objectives for Vet Futures are summed up as follows:

1. To draw together strategic trends that veterinary professionals are already aware of; to both validate and challenge assumptions around these trends;

2. To scan the horizon for challenges and opportunities the profession will need to face – and rise to – if it is to shape a coherent future. What will help, what will hinder?

3. To consider how these issues might be addressed and how the profession can prepare (including what support might be needed);

4. To agree a plan for action, with broad buy-in from stakeholders, to enable the profession to prepare for challenges and exploit future opportunities.

1.2 Scope

When others have looked into the future, the focal point has ranged from a decade ahead to 50 years. The further
As the Vet Futures Project Board (see Appendix A), we found it helpful to think of the future in terms of ‘cohorts’ of veterinary surgeons. Most veterinary degrees take five years to complete, so a timeframe of fifteen years was agreed upon as representing three complete cycles of veterinary students becoming veterinary graduates. Our vision and ambitions therefore look ahead to the profession in 2030.

Wherever they work, veterinary surgeons operate in a multidisciplinary team alongside veterinary nurses, practice managers and non-veterinary owners, animal care assistants, receptionists, technical and animal health officers, meat inspectors, researchers, lab workers and other scientists, and a whole host of professionals delivering animal healthcare services, including artificial insemination, farriery, physiotherapy, dentistry, imaging and others. This list is not exhaustive but seeks to demonstrate that a successful future for the veterinary profession depends on the success of a wide range of allied professionals.

1.3 Veterinary nursing
Vet Futures has therefore sought to be inclusive of the wider veterinary team. Throughout the project we have, in particular, thought about the future for veterinary nurses alongside that for veterinary surgeons. We have engaged with the British Veterinary Nursing Association (BVNA), the RCVS Veterinary Nurses Council (VNC) and individual veterinary nurses, and found that many of the challenges and opportunities resonate with both professions.

Despite this we do recognise that the focus of this project has been on veterinary surgeons. Where it is clear that specific Vet Futures ambitions and recommendations are relevant to both professions we have set this out in the report. However, there will be differences, and our recommendation is therefore that the veterinary nursing profession builds upon the Vet Futures work to consider whether and how these issues apply to veterinary nurses, and to develop its own clear vision and ambitions.

1.4 Approach
Vet Futures has sought to initiate momentum across the profession to debate the key strategic issues, and how these may play out in 15 years’ time. BVA and RCVS have together stimulated and facilitated discussions nationally and regionally. The emerging messages – the ambitions – come from the profession, and its partners.

Vet Futures adopted an approach that has allowed fluidity between evidence gathering, engagement, analysis and action in order to facilitate the following objectives:

• To place a strong emphasis on engagement of the profession – rather than limiting it to a specific phase, engagement activity has run throughout the course of the project;
• To maintain momentum and interest in the project – by releasing outputs at several points along the project pathway;
• To ensure relevance, and a robust evidence base for the key strategic issues – by analysing findings as they unfold, testing assumptions and honing the key strategic issues, with challenge provided by the Vet Futures Project Board and also the Vet Futures Group (an advisory group of key stakeholders, see Appendix B).
A dedicated Vet Futures website was set up – www.vetfutures.org.uk – to provide an interactive focal point for the project. The website contains the Vet Futures research reports (detailed below), as well as other relevant sources. It has also provided a platform for members of the veterinary team and other interested parties to air their opinions, through blogs and polls.

The research, combined with an emphasis on engagement, has generated a wealth of rich intelligence. There has been a genuine convergence of views about the issues facing the profession, and a vast array of responses have been offered and absorbed.

Our task, then, has been to refine, test and hone these into a coherent vision for the future, and a way for turning this into our reality.

1.5 Engagement
Engagement with the profession and other stakeholders has been an important feature. This has taken place through a range of activities, outlined opposite.
Lively and stimulating discussions with around 450 vets, veterinary nurses and other interested parties at a roadshow of six dedicated meetings, alongside sessions at other meetings and congresses;

Three meetings of the Vet Futures Group, which comprised representatives of key stakeholder organisations (see Appendix B);

Two focus groups with BVA Council members;

One focus group with members of RCVS Council and another with the RCVS Veterinary Nurses Council (VNC);

Meetings with major employers and the Veterinary Schools Council;

A seminar with VNC and British Veterinary Nursing Association (BVNA);

Two focus groups with pet owners;

Telephone interviews with 46 vets and veterinary nurses, and representatives of stakeholder organisations;

Survey responses from more than 600 members of the BVA ‘Voice of the Veterinary Profession’ survey panel, almost 2,000 recent graduates (up to eight years qualified) and nearly 900 student vets;

A public omnibus survey of 2,000 members of the public from across Great Britain.
1.6 Research reports
An overview of the four research reports is given below. The full reports – containing the methods and findings – are available via the Vet Futures website: www.vetfutures.org.uk/resources

Getting the conversation started
This research report was the first stage of the programme of work. Designed to ‘get the conversation started’, interviews and focus groups with a wide range of stakeholders took place in November and December 2014.

A qualitative approach was taken to gain depth of feedback and to frame quantitative survey work later on. A mix of methodologies was used, depending on the target sample: two focus groups with pet owners; two with BVA Council members; two with members of RCVS Council and Veterinary Nurses Council. In addition, 46 telephone interviews were conducted with: veterinary surgeons and veterinary nurses; veterinary/non-veterinary members of BVA and RCVS Councils; and 20 stakeholder organisations.

Veterinary futures: the drivers of changes
This literature review1 provided a snapshot of the issues facing the veterinary profession in the UK in 2015, and what was known about their likely future impact. Where relevant, it provided insights from the veterinary professions overseas and from other relevant sectors, such as community pharmacy, dentistry and optometry.

The focus of this paper was to identify possible drivers of change from the literature. The review also generated thoughts about the capability of the veterinary professions to respond to these drivers – and areas where that might prove challenging.

Survey of the BVA Voice of the Veterinary Profession panel
The BVA ‘Voice of the Veterinary Profession’ survey panel was set up to give BVA members an opportunity to share their views of life in the UK as a vet or veterinary student. The panel is broadly representative of the BVA membership and comprised 1,238 members in March 2015.

This report presented the findings from an online survey, carried out in February and March 2015. It provided feedback from members of the BVA survey panel on the relevance and importance of the issues that had surfaced through interviews, focus groups, workshops and the literature review.

A total of 623 responses was received – giving a strong response rate of 50%. The survey was conducted by market research company Alpha Research.

Public trust in the veterinary profession
This report presented the findings from an online public omnibus survey, designed to explore levels of trust in veterinary surgeons. A total of 2,002 adults from across Great Britain participated in the survey, which was conducted by market research agency ICM Unlimited between 18 and 20 March 2015. The sample was weighted to be representative of the population of Great Britain.

Voices from the future of the profession
This report presented the findings from an online survey of current veterinary students, and vets who had graduated within the previous eight years – in other words, those who represent the future of the profession.

The survey was conducted in May and June 2015. Students were approached via the Association of Veterinary Students (AVS). Graduates were drawn from the RCVS Register.

A total of 2,865 responses were received – 1,973 from graduates (29% response rate) and 892 students (20% response rate). The survey was hosted by market research company Critical Research.

For the full results of all of these surveys, please visit www.vetfutures.org.uk/resources

---

1 To frame the work of the Vet Futures project, a review of national and international literature (in particular, the United States and Europe) was undertaken, covering the period 2011-2014. The search strategy was to identify a mix of research studies published in peer review journals and grey literature on the future of the veterinary profession, innovations in veterinary practice, and changes with the potential to impact on the veterinary team. A handful of seminal reports from outside the search period were also considered.
2. Our vision

A profession in charge of its future

- A leading force for animal health and welfare
- Valued for our wider roles in society
- Exceptional leadership
- Thriving, innovative, user-focused businesses
- Confident, resilient, healthy and well-supported
- A broad range of diverse and rewarding career paths
3. Summary of our ambitions

Our vision is encapsulated in six key ambitions for 2030, as set out in the table below.

<table>
<thead>
<tr>
<th>AREA OF FOCUS</th>
<th>AMBITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Animal health and welfare</td>
<td>That veterinary professionals are seen as a leading force for animal health and welfare science and practice throughout society, and our unrivalled expertise and evidence base is valued by government, the public and other stakeholders</td>
</tr>
<tr>
<td>2. Veterinary professionals’ wider roles in society</td>
<td>That the veterinary professions are clear and assertive about their wider roles in society, including in public health and environmental sustainability, and the critical importance of our scientific expertise is recognised and valued both within our professions and by the public</td>
</tr>
<tr>
<td>3. The health and wellbeing of veterinary professionals</td>
<td>That all members of the veterinary team are confident, resilient, happy, healthy and well-supported</td>
</tr>
<tr>
<td>4. Diverse and rewarding veterinary careers</td>
<td>That our diverse veterinary professionals enjoy a broad range of exciting career paths, each one offering stimulating and well-rewarded work</td>
</tr>
<tr>
<td>5. Sustainable businesses and user-focused services</td>
<td>That a range of business models exists in a diverse and thriving marketplace, in an environment that nurtures innovation and choice. That high quality services are fairly priced and responsive to client needs while always promoting the best interests of animals</td>
</tr>
<tr>
<td>6. Leadership</td>
<td>That the whole veterinary community benefits from exceptional leadership, that we develop the next generation of leaders, and that we strive to speak with one voice</td>
</tr>
</tbody>
</table>

We have also identified two cross-cutting issues which need to play a key role in delivering our six ambitions: education and regulation.
3.1 Education
Education has got to be key in enabling the profession to shape its future. The future direction for veterinary medical education has already received considerable targeted attention – including the ‘Foresight report’ (Willis et al, 2007). Now, Vet Futures has highlighted a need to build on this existing work and to challenge some of the fundamental principles of veterinary education – including whether the construct of ‘omnipotential’ (ie the aptitude to treat any and all species), remains relevant and achievable.

We cannot expect undergraduate education to provide all the knowledge and skills we require as qualified practitioners. Our recommendations therefore also give attention to postgraduate education and lifelong learning, in everything from environmental studies, business and finance, to leadership.

Ours is a scientific profession and yet we sometimes hide our light under a bushel when it comes to our scientific expertise. A theme running through our ambitions is a desire for the veterinary professions to better articulate our value, and for the public, partners and others to understand the expertise that vets and veterinary nurses can bring to bear. This includes being bolder about our scientific knowledge-base and the innovative contributions we can make through thought-leadership and scientific endeavour.

3.2 Regulation and standards
Any changes to educational requirements would demand review of the accreditation standards set and administered by the profession through the RCVS. Regulation will also have a key part to play in ensuring that future developments (including the advance of technology) are embraced in a way that does not conflict with, or undermine, the standards of professional veterinary practice. Embracing new technology may require changes to the regulatory framework or updating professional standards to keep pace with public expectation – or even to be ahead of the curve and anticipate advances coming down the track towards us. Ensuring that professionalism keeps pace with the future expectations of the public will also be important.

A number of our recommendations therefore relate to maintaining standards and ensuring that the regulatory framework is fit for 2030.
4. Ambition one: animal health and welfare

Our ambition: that veterinary professionals are seen as a leading force for animal health and welfare science, policy and practice throughout society, and our unrivalled expertise and evidence base is valued by government, the public and other stakeholders.
Areas where vets feel they make a contribution/significant contribution

4.1 What this ambition means

- We always seek to promote the best welfare outcomes for animals, working in partnership with our clients and other service-users, whenever possible. In keeping with our declaration on admission to the profession, animal health and welfare is our overriding motivator
- We are clear about our duty to champion animal welfare more broadly across society – beyond the bounds of animals under our direct care – and to challenge activities that compromise animal welfare
- We take advantage of progress in scientific knowledge, innovation and technology to advance animal health and welfare, and challenge the status quo to drive continuous improvement. At the same time, we are alert to the impact of new technologies on animal health and welfare – and insist on robust ethical appraisal before new technologies are introduced
- We draw on our unrivalled evidence-base and skills to educate and inform others about animal welfare – embracing and creating opportunities to advise policy-makers, and support animal-keepers and owners
- We step up and fill available roles at the forefront of discussions around ethics and welfare in all aspects of sustainable animal agriculture – from farm to fork
- All veterinary surgeons have a good knowledge of animal welfare issues – including how these should be assessed and ethically appraised (see box, page 20) – and feel equipped to articulate the profession’s unique role here
- Ethical decision-making, in both veterinary and animal ethics, is mainstreamed and all vets are skilled in moral decision-making
- A broader cohort of veterinary professionals is equipped with the skills and capabilities required to fulfil an expert role in this area at national and international level

Source: Vet Futures (2015b)
4.2 Why it’s important
Animal health and welfare has, of course, always been central to the veterinary professions. Enhancing, protecting and securing the health and welfare of animals is our mission; it’s our fundamental purpose. Upon registration with the RCVS, vets and veterinary nurses declare: ‘...ABOVE ALL, my constant endeavour will be to ensure the health and welfare of animals committed to my care.’

Our survey work shows that vets believe their greatest contribution is to animal health and welfare – 89% of BVA members surveyed said this is an area where they contribute or make a significant contribution. Veterinary leadership on animal welfare was the most important goal cited for 2030.

Yet there is a worry that the profession is not seen to be leading this agenda, and a concern that, unless concerted action is taken, the profession’s role in animal welfare could be diminished.

4.3 Welfare and industry: the challenge
A key challenge is around remaining engaged – and continuing to work in partnership – with animal-using industries, while at the same time serving as advocates for animal health and welfare.

At our regional roadshow meetings, vets articulated the challenges that can arise from conflicting loyalties to animals, clients and employers. For example, we heard how vets in production animal work, employed by large agri-businesses, have, on occasion, found themselves accused of putting company profit before animal welfare. Others felt that failing to question practices that compromise animal welfare may be taken as tacit veterinary acceptance. Vets working in small animal and equine practice were also included in this, for example, vets faced critical challenge over welfare issues associated with selective dog breeding.

The profession needs to reach agreement on which stakeholders should be routinely considered when debating ethical dilemmas affecting animals (for example, animal-owners, breeders and farmers or those representing animals or the natural environment), and how veterinary professionals ought to apportion relative weightings to the interests of each when these conflict. While veterinary professionals should prioritise the interests of animals above all other considerations, this should be done professionally and respectfully so as not to alienate other legitimate stakeholders from within and outside the profession. Helping vets to navigate these dilemmas is crucial to achieving our ambition here.

Changes in animal production and farming practices, and the growing need to provide affordable food to expanding populations between now and 2030, are likely to exacerbate tensions in terms of maintaining the highest standards of welfare for production animals. Pressures to
increase efficiency and intensification of animal agriculture are growing at a time when animal welfare science is concurrently improving our understanding of animals' needs and preferences, and the extent to which their wellbeing could be compromised by management and husbandry practices. The veterinary professions should ensure that animal health and welfare are recognised as key sustainability objectives alongside more commonly cited issues such as carbon emission reductions, halting biodiversity loss and addressing water scarcity.

4.4 Integrity in treatment decisions
As advancements in treatments grow, the integrity of treatment decisions becomes a pressing question. ‘Treat as far as we should, not as far as we can’ was one of the most important goals vets participating in the BVA survey identified for 2030. Some within the profession have told us they would like to see tighter controls on what colleagues do in clinical practice.

Generally, there is a sense that more could be done for animal welfare. Vets told us that, while puppy farming, for instance, is a ‘big issue’ in some parts of the UK, poor practice largely goes unchallenged by vets on the ground. A myriad of complex reasons can underpin this, including issues over where responsibility for animal welfare lies, and the mechanisms by which vets can speak out or challenge practice in a public way. In the public sector, vets have a clear and crucial role in setting and monitoring standards in animal welfare, as well as in public and animal health, but do all vets have a mandate to speak out on animal health and welfare issues? And, if they don’t, shouldn’t they have? These are important questions. Our ambition seeks to link these issues together by strengthening the role of all vets, and also veterinary nurses, in animal health and welfare. We need to achieve far greater clarity than currently exists about our duties – not only to the animals under our care, but more broadly, across society. We need to clarify the expectations we have of ourselves – and the public has of us – in terms of challenging any practice that undermines animal health and welfare.

Vets and veterinary nurses need to feel confident that they have the authority and expertise to speak out, and will be supported by their peers when they do so.

4.5 Recommendations

1. Develop and promote an animal welfare strategy for the veterinary profession

2. Enhance moral reasoning and ethical decision-making in education, policy-making, practice-based research and everyday veterinary work

3. Explore options to develop an online animal welfare hub to better disseminate animal welfare research, evidence and tools, including the critical appraisal of common practices in the light of emerging evidence

4. Clarify and promote regulatory requirements and professional responsibilities relating to animal welfare

5. Develop joined up national campaigns on preventive health and the five welfare needs
5. Ambition two: veterinary professionals’ wider roles in society

Our ambition: that the veterinary professions are clear and assertive about their wider roles in society, including in public health and environmental sustainability, and the critical importance of our scientific expertise is recognised and valued both within our professions and by the public
5.1 What this ambition means

- We increase our prominence and influence across a wide range of global health and environmental sustainability issues— including protecting animal health and welfare, the natural environment, biodiversity, managing invasive species, climate change, food security, research and development, and antimicrobial resistance.
- Our wider roles in society are given greater value and respect, both within the profession and by society at large.
- Government understands the importance of involving us in decision-making and policy formation in all matters relating to animal science, public health and environmental sustainability. It is unthinkable for government to leave vets out of these discussions.
- We work in partnership with medical professionals to address the public health agenda, and the interfaces between the environment, and human and animal health.
- We are valued in our communities, for example, for our role in nurturing the human-animal bond, supporting farming clients through loss of livelihoods, and our work in tackling animal and domestic abuse.
- We form strong, effective partnerships with farmers and others who play a central part in achieving food security through sustainable animal agriculture.
- We promote our role as professionals equipped to tackle a range of scientific challenges, so that the wider public appreciates all we bring to debates about these issues.
- All veterinary surgeons have a good level of knowledge in these areas and can articulate the contributions that the profession can make.
- Some veterinary surgeons have the skills and capabilities required to fulfil an expert role in these areas on national and international platforms.
- We play a central role in delivering a vision for veterinary research that takes a long-term strategic view—one that stretches decades ahead, and supports veterinary surgeons’ long-term involvement in global issues.

5.2 Why it’s important

By 2050, the world’s population is expected to grow to 9.6 billion (United Nations, 2013), and, based on current consumption patterns, food production would have to increase by 70% in order to feed the extra mouths (Food and Agriculture Organization of the United Nations, 2009), and demand for meat protein is projected to double. These predictions point to the need for vets to play a greater role in helping to tackle global challenges, through improving animal health and in helping society understand the broader challenges of sustainable animal agriculture. This includes the need for environmental protection, good animal welfare and public health education on healthy levels of dietary meat intake.

The interconnections between population health, food...
consumption, agriculture, poverty and the climate are more pronounced than ever. There are concerns about food-chain security, the ability of food systems to deliver the increases needed to support demand for protein, and about sustainable intensification.

Add to this worries about bioterrorism, antimicrobial resistance, climate change, transboundary disease, ecosystem health and sustainability, and zoonotic disease control. These are big, global challenges. They are often housed under the umbrella of the ‘One Health’ concept (Gibbs, 2014; One Health Initiative, undated; Burns, 2012), which brings together human health with animal health and other considerations (see box).

Closer to home is a range of issues about surveillance of disease, facilitating the international trade of animals, and the need for the profession to maintain its capability to protect animal health and welfare. Specific concerns include bovine tuberculosis (bTB), antimicrobial resistance, and the proposed European Animal Health Regulation (Gibbens, 2013).

Worries extend to finding vets for sparsely populated areas and changes in agriculture (Lowe, 2009). Changes in the farming sector – and in the veterinary practices that serve farm animals – are, together, identified as posing challenges for the future sustainability of farm animal veterinary practice (Henry et al, undated). Ensuring animal welfare is recognised as an explicit goal of sustainable development is another live and important issue.

In addition to this vital public health role, veterinary surgeons also play a key role in advancing fundamental scientific knowledge in human health, for example, working within the biomedical arena.

5.3 Greater involvement
What these issues share in common is that they all require the greater involvement of the veterinary professions. Much of the literature implores the profession to assume a bigger profile here, to become more engaged and to evolve as fundamental partners in addressing issues that strike to the heart of global human and animal interests – poverty, hunger and wellbeing.

In discussions, vets raised concerns about a failure of the UK profession to engage sufficiently in public health and food hygiene, in particular. Our survey of BVA members uncovered the importance for vets of having a respected and valued role in society, and a perception that the public attaches little value to areas such as food production, safety and security, and public health. Many comments from vets reflected a desire to increase awareness of the breadth of contributions vets make beyond companion animal health, and raising the profile of veterinary contributions to public health was identified as a key aim for the future.

Efforts have been made to increase awareness amongst

---

One Health

The One Health Initiative is about forging collaborations between doctors, vets, dentists, nurses and other disciplines related to science, health and the environment.

The One Health concept is described as ‘a worldwide strategy for expanding interdisciplinary collaborations and communications in all aspects of health care for humans, animals and the environment’ (www.onehealthinitiative.com).

The aim is to advance health care for the future by accelerating biomedical research discoveries, enhancing public health efficacy, expanding the scientific knowledge base, and improving medical education and clinical care.

The concept is not new, and yet we found that ‘One Health’ is not a term that resonates with some within the profession. This in itself tells us something about how the veterinary profession engages with One Health and how the veterinary and medical professions engage with each other on this agenda.

www.vetfutures.org.uk
vets of their potential here. For example, ensuring that the undergraduate veterinary medicine curriculum gives proper attention to the role vets can play in such issues as food security, efficient and sustainable production, control of animal disease and zoonoses (Maud et al., 2012). There has also been debate about how vets might respond to the challenge set out by Philip Lowe in his report on veterinary expertise in food animal production (Lowe, 2009): that the profession should be clearer and more assertive about its offering with regard to public health and food assurance (Clarke and Jones, 2011).

5.4 Policy makers
It seems that vets feel frustrated – unable to get a foot in the door – regarding policy formulation. This reflects changes in their roles and responsibilities when it comes to governing animal health and food animal production (Enticott et al, 2011). There is a need to ensure that the valuable contribution that veterinary surgeons can make to policy-making in this area is recognised and that veterinary input is sought, listened to and acted upon.

The veterinary profession has an important and influential role to play within governments and international bodies to ensure that policies and standards are informed and underpinned by the best possible evidence and veterinary analysis and advice. However, policies and standards reflect a balance of factors and societal norms that will, and should, change over time. The profession therefore has a responsibility to provide cogent arguments for change, and leadership to promote change, where that will best serve animal health and welfare and the needs of society as a whole.

Another imperative is to reinforce the professional standing of vets in society (Liddon et al, 2011). We have heard many concerns about a perceived decline in the status of vets, amidst worries that veterinary services could in future be regarded as a luxury service rather than fundamental to the public good.

This is an area where we need to capitalise on our scientific credentials. The UK has a highly efficient research base in the veterinary sciences, and veterinary research has the potential to play a major role in addressing challenges such as inefficiencies in the food-chain, national food security, mitigating the impact of animal disease, improving food animal welfare and tackling climate change (Royal College of Veterinary Surgeons, 2013). Fulfilling this role means that we must work alongside ‘traditional’ funders of research and other stakeholders to adopt a more strategic, long-term outlook.

The profession needs to demonstrate knowledge and dynamism if it wants the public, government and others to recognise the importance of its contributions to society beyond clinical practice. This recognition is important to the status of the profession but, more importantly, society stands to gain from the greater involvement of the veterinary professions in these mission-critical questions.

5.5 Recommendations

6. Increase collaboration between veterinary and human health professionals and environmental organisations, in line with the One Health concept

7. Promote and celebrate the wider roles of veterinary surgeons and veterinary nurses outside clinical practice within the veterinary profession and to the general public, starting with school-age children, both to help recruit future veterinary surgeons and nurses, and to develop a better informed public

8. Make a broader range of extramural studies (EMS) opportunities available to veterinary students including (non-veterinary) business, public policy and international fields

9. Work alongside ‘traditional’ funders of research and other stakeholders to adopt a more strategic, long-term outlook
6. Ambition three: the health and wellbeing of veterinary professionals

Our ambition: that all members of the veterinary team are confident, resilient, happy, healthy and well-supported
6.1 What this ambition means

- Veterinary and veterinary nursing professions offer a good quality of life so people aspire to join them and stay in them.
- Our focus is on safety, health and wellbeing and achieving a good work-life balance, including being flexible enough to let those who wish to work part-time or develop so-called ‘portfolio’ careers.
- Vets and veterinary nurses work in supportive environments as a matter of course – they are regularly appraised and have learning and development opportunities, which enable them to reflect as they go, adapt and weigh up future options.
- Support starts early – with any vulnerable students identified at the start, and supported throughout their careers – and continues with appropriate help for those who need it, throughout their lifetime.
- The veterinary profession is no longer a high suicide-risk profession.
- Occupational and mental health support is available to anyone working anywhere in the veterinary professions, and there are no barriers to access.

6.2 Why it’s important

Levels of stress in vets and a reported higher propensity towards suicide have received considerable attention in the veterinary literature and in discussions held for this project. There can be no doubt that the stresses of veterinary work come high on the agenda for vets, veterinary nurses, and others in the veterinary team. Our survey of BVA members found that reducing stress was the single highest priority for many – vets in small animal practice, younger vets (less than 35 years of age) and women were more likely to prioritise this.

The RCVS 2014 Survey of the Veterinary Nursing Profession found dissatisfaction with stress levels in the job (Robinson et al, 2014). Compared with the 2010 survey, veterinary nurses reported feeling more useful, thinking more clearly and dealing with problems better, but at the same time they felt less relaxed and ‘less loved’ (Ibid, 2014).

Better veterinary wellbeing was the top goal for 2030 in our survey of veterinary students and recent graduates. Furthermore, the most popular suggestion for improving veterinary education was to have ‘compulsory modules on managing stress, personal development and work-life balance’. This points to a need to review the extent to which veterinary education currently prepares tomorrow’s vets for the stresses and strains of the workplace.

Yet there is also a danger of the profession allowing itself to become over-identified with the single issue of stress. Moreover, stress is not always a problem in itself; it’s only where stress impacts negatively on individuals that we need to tackle it.

We know that vets and veterinary nurses are not alone in feeling workplace pressure. A number of studies published in 2015 shine a light on how a range of other professionals feel about their respective workplaces. One study reported that 46% of nursing staff said they had work-related stress.
“We also need to understand better how to build resilience, so that we are sufficiently agile to adapt to all manner of challenges.”

(Royal College of Nursing, 2015). More than half of teachers in England plan to quit their jobs within the next two years (National Union of Teachers, 2015). More than 80% of hospital doctors may retire early because of work-related stress (Hospital Consultants and Specialists Association, 2015). Dentists are also reported to be at high risk of work-related stress (British Dental Association, 2015).

Further, our survey work suggests that it is ‘opportunities for career progression’ – not levels of stress – that are the biggest determinant of whether the career expectations vets had when entering the profession are met or not. This is one reason why ambition four is focused on veterinary careers.

This is not to say that tackling stress should not be a priority. It certainly needs to be – and that’s reflected in our findings. We do, however, counsel caution around allowing the profession to become defined solely in terms of the stress that vets and nurses in clinical practice in particular, report experiencing.

It was also felt important to consider not so much ‘work-life balance’ as ‘life balance’. So rather than the difficulties of work needing to be balanced by the positivity of ‘other life’, work can and should be an enjoyable and rewarding part of living, particularly for those, like vets, who are following a vocation.

We therefore believe it is important to affirm the fundamental positive qualities that should be associated with being a vet or veterinary nurse. These roles should be compatible with healthy, happy, fulfilled lives, and we believe

How stressed are we?

Nearly 90% of vets surveyed in 2014 for the RCVS considered veterinary work to be stressful, although it was also the case that a similar proportion said it provides variety and over 80% reported job satisfaction (Buzzeo et al, 2014).

Many vets in practice, and veterinary nurses, emphasised stress in the telephone interviews and focus groups we conducted. Some of the causal factors they cited were:

- Long working hours
- Out-of-hours work
- Increasing public expectations
- Professional isolation
- Insufficient earnings
- A lack of preparedness for the emotional side of interacting with animal owners

New graduates were thought to need most help. This is backed up by our survey of students and recent graduates, which suggested that the point of transition from undergraduate to graduate needs particular attention. Concerns were also raised at our roadshows about a high ‘drop out’ rate at later stages of the career pathway due to stress.

How stressed are we?

Nearly 90% of vets surveyed in 2014 for the RCVS considered veterinary work to be stressful, although it was also the case that a similar proportion said it provides variety and over 80% reported job satisfaction (Buzzeo et al, 2014).

Many vets in practice, and veterinary nurses, emphasised stress in the telephone interviews and focus groups we conducted. Some of the causal factors they cited were:

- Long working hours
- Out-of-hours work
- Increasing public expectations
- Professional isolation
- Insufficient earnings
- A lack of preparedness for the emotional side of interacting with animal owners

New graduates were thought to need most help. This is backed up by our survey of students and recent graduates, which suggested that the point of transition from undergraduate to graduate needs particular attention. Concerns were also raised at our roadshows about a high ‘drop out’ rate at later stages of the career pathway due to stress.

How stressed are we?

Nearly 90% of vets surveyed in 2014 for the RCVS considered veterinary work to be stressful, although it was also the case that a similar proportion said it provides variety and over 80% reported job satisfaction (Buzzeo et al, 2014).

Many vets in practice, and veterinary nurses, emphasised stress in the telephone interviews and focus groups we conducted. Some of the causal factors they cited were:

- Long working hours
- Out-of-hours work
- Increasing public expectations
- Professional isolation
- Insufficient earnings
- A lack of preparedness for the emotional side of interacting with animal owners

New graduates were thought to need most help. This is backed up by our survey of students and recent graduates, which suggested that the point of transition from undergraduate to graduate needs particular attention. Concerns were also raised at our roadshows about a high ‘drop out’ rate at later stages of the career pathway due to stress.

How stressed are we?

Nearly 90% of vets surveyed in 2014 for the RCVS considered veterinary work to be stressful, although it was also the case that a similar proportion said it provides variety and over 80% reported job satisfaction (Buzzeo et al, 2014).

Many vets in practice, and veterinary nurses, emphasised stress in the telephone interviews and focus groups we conducted. Some of the causal factors they cited were:

- Long working hours
- Out-of-hours work
- Increasing public expectations
- Professional isolation
- Insufficient earnings
- A lack of preparedness for the emotional side of interacting with animal owners

New graduates were thought to need most help. This is backed up by our survey of students and recent graduates, which suggested that the point of transition from undergraduate to graduate needs particular attention. Concerns were also raised at our roadshows about a high ‘drop out’ rate at later stages of the career pathway due to stress.
The Mind Matters Initiative was launched to help address mental health and wellbeing issues across the veterinary team. It sets out to encourage a culture where people are able to talk about, and deal with, stress and related mental-health issues.

It is supported by a group comprising Vetlife, the British Veterinary Association, the British Veterinary Nursing Association, the Veterinary Practice Management Association, the Veterinary Schools Council, the Veterinary Defence Society, the Society of Practising Veterinary Surgeons and the Association of Veterinary Students.

It has five streams of activity:

1. **Learning and understanding best practice** – research within the veterinary profession, for example, into occupational stress factors, and among other related professions and private and public sector organisations that have successfully tackled similar issues

2. **Changing the culture** – a programme of communications activities to help generate a positive environment for discussion, to reduce stigma, and to increase awareness and the ability to identify risks, and encourage help-seeking behaviour

3. **Intervention: personal level** – financial and other support for existing services, such as Vetlife Helpline and Vetlife Health Support, together with an investigation into what more may be required to support those in need

4. **Intervention: supporting the supporters** – training and guidance for those who may be working or living with someone who needs assistance, in order to help supporters spot and understand signs of stress and mental illness, and help the person seek expert help

5. **Making changes** – working closely with Vet Futures to identify aspects of how the profession is structured and run (from student to retirement) that exacerbate stress and mental health problems – and consider how they may be addressed

vetmindmatters.org
the profession should actively promote these qualities. We also need to understand better how to build resilience within veterinary professionals, so that we are sufficiently agile to adapt to all manner of challenges.

6.3 Targeted action
Proactive approaches to managing workplace stress in veterinary practice suggested by the literature include regular appraisals for all members of the veterinary team, as well as the importance of personal and development plans (Field, 2011).

Many of the actions needed to tackle stress fall to employers to deliver. Any investment employers make here should reap rewards in the long term – students and vets qualified up to eight years selected ‘an organisation that is good at supporting vets’ as one of the top three factors having greatest influence on their choice of career option. Ultimately, providing for supportive and happy professional lives is something that the profession as a whole needs to grasp. We each need to play a part in delivering this, whether that be stepping forward to mentor graduates, establishing networks for peer support, or simply adopting a more compassionate approach around the stresses inherent in the job. And we must equip vets and veterinary nurses with the tools to deal with uncertainty, and the skills to undertake reflective practice.

6.4 Head start already made
Crucially, we do not start from a blank sheet. While the qualitative research found that some believe the profession has been slow to acknowledge and respond to the pressures on vets, Vetlife (formerly the Veterinary Benevolent Fund) has been working hard in this area for many years, and, with the launch of the Mind Matters Initiative by the RCVS in December 2014 (see box), activity in this area has stepped up yet further.

6.5 Recommendations

10. Deliver a coordinated, well-funded and evidence-based approach to mental health and wellbeing for the veterinary team

11. Review the approach to recruiting and selecting veterinary and veterinary nursing students to ensure adequate support, improve wellbeing and manage expectations

12. Deliver peer support and/or mentoring in all UK vet schools and improve support for vets post-graduation

13. Develop support for overseas-graduated veterinary surgeons working in the UK, who may not have benefited from the same undergraduate support as UK students

14. Develop tools and services to help veterinary employers make working environments more supportive for everyone

15. Help veterinary professionals to work with uncertainties, and develop reflective practice, starting with undergraduates
7. Ambition four: diverse and rewarding veterinary careers

Our ambition:
that our diverse veterinary professionals enjoy a broad range of exciting career paths, each one offering stimulating and well-rewarded work
7.1 What this ambition means

- Young people from diverse backgrounds aspire to join the veterinary professions because of the range of exciting career opportunities available to them. Schoolchildren have access to up to date information about the breadth of veterinary careers available.
- Veterinary schools select students appropriate for careers across the profession, not just for clinical practice. ‘Day-one competences’ reflect the diversity of career opportunities.
- Undergraduate training reflects the diversity of careers, promotes leadership skills and is fit for the future.
- Veterinary graduates emerge equipped with a breadth of skills that enable them to pursue any number of exciting career paths and are supported in taking these from ‘Day-one’ to ‘Year-one’ competences.
- Veterinary professionals can be confident that they will be fairly rewarded for the work they do. This means squaring the circle between client concerns about the cost of services, and professional concerns about salaries, and being clear about the value of veterinary services.
- Opportunities for career development for vets and veterinary nurses are clearly identified across a diverse range of areas.
- Business models for veterinary services reflect the importance of structured career pathways and career progression, to ensure careers in practice remain rewarding and diverse.
- Opportunities for secondment across business and veterinary areas are commonplace.
- Veterinary businesses demonstrate the value placed on veterinary nurses through investment in training, career development and enhancement.

7.2 Why it’s important

The landscape for veterinary careers has been subject to greater change than any other issue covered by the Vet Futures agenda. Young vets have new and changing expectations for their careers. Things are not the same as when many of today’s leaders qualified.

Tomorrow’s vets show signs of having different aspirations regarding their working hours – which will have implications for ways of working across the profession. This can already be seen in changes to the arrangements for out-of-hours, for instance. Slightly fewer vets overall were found to be personally engaged in out-of-hours work in 2014 than in 2010; fewer reported that their practice covers its own out-of-hours work; and more expected to use dedicated out-of-hours service providers in the future (Buzzeo et al, 2014).

Our survey of students and recent graduates (up to eight years post-qualifying) found that, while at vet school, most students (60%) aspire to be employed in a medium-sized practice, and 45% want to become a practice owner or partner. Once vets start work, however, their career ambitions appear to shift away from clinical practice – and

---

3 Defined as four to 10 full-time-equivalent vets.
Wake up call

Half of vets who graduated within the last eight years reported that their careers had not matched their expectations, according to our survey.

Although 37% of graduates reported that their working lives had met their expectations, and a further 13% said it had exceeded them, this left 50% partly or wholly unsatisfied.

Further, 10% said they wished to leave the profession entirely.

Vets who had qualified for five years or more were least optimistic about the future, rating their opportunities for career progression less positively than more recent graduates. They were also least likely to feel that their degree had prepared them for their current work.

Only 17% of vets five or more years after graduating thought that their degree had prepared them ‘very well’ for the work they were doing.

Four in ten BVA members surveyed during 2014 said they would not, or were not sure if they would, choose to be a vet again.

the aspiration to become a practice owner or partner drops to 25%.

This survey also found that the reality for graduates often fails to match their expectations, and vets who have been qualified for five or more years are the least optimistic about the future. We dubbed the findings a ‘wake-up call’ for the profession – see box.

Putting our findings into context, in terms of understanding how they compare with other professions, is not straightforward; studies often measure career intentions differently. However, we know that thousands of newly qualified British doctors seek jobs abroad each year (Doward, 2015); and around 10% of UK human healthcare nurses report an intention to leave nursing (Health Education England, 2014). Further, the evidence for human nursing shows that a reported intention to depart is a strong predictor of actual behaviour, meanwhile, that newly qualified nurses and nurses reaching retirement are most likely to leave (Ibid, 2014).

If we wish to influence the expectations of those who pursue veterinary careers, we need to focus upstream on future generations, encouraging young people to change the way they think of vets and veterinary nurses – to see that they don’t only look after cats and dogs, but can also be involved in sustainable development issues, say, or food production or disease control.

7.3 Change in direction

The number of vets seeking a change in direction – and even considering leaving the profession entirely – just five to eight years after qualifying, is a serious concern. It points to a need to review the extent to which veterinary education currently prepares students for the workplace, and also what the workplace provides – see ‘Educating for modern careers’, page 36.
Vets who have been qualified for five or more years are the least optimistic about the future. These vets also rate opportunities for career progression less positively than more recent graduates. And they are least likely to feel that their veterinary degree has prepared them for their current work. There is also a noticeable shift away from the main types of clinical practice among graduates of five or more years' standing.

These vets are less likely to be working in small animal/exotic practice (59%), or mixed practice (11%) than vets 1-4 years after graduation (64% and 19%, respectively).

Four in 10 BVA members surveyed during 2014 said they would not, or were not sure if they would, choose to be a vet again, reflecting dissatisfaction with the rates of pay, long hours and stress (Alpha Research, 2014).

Our survey of BVA members found that while, for most vets (59%), their working life to date had matched or exceeded their expectations, a large percentage (41%) reported disappointment. Insufficient opportunities for career progression was the main reason vets gave where their expectations had not been met. This points to the flat career structure that many vets experience once in clinical practice.

We found that the proportion of recent graduates wanting to work outside clinical practice (18%) is double the proportion of veterinary students who say they hope to do this (9%). These findings confirm an issue that surfaced from the qualitative research, and was echoed at many of the regional events. This is a perceived over-emphasis on clinical practice at the expense of other areas, most notably industry, research, academia and food safety and security.

The number of vets employed in mixed animal practice and equine practice has declined, while the number working in small animal/exotic practice has increased and is expected to continue to grow (Buzzeo et al, 2014). A decline in the number of vets working in some UK government departments or agencies is reported, and this population is expected to remain static or decline further. Another concern is the reduction in grade profile and remuneration for government-employed vets. A consistent trend is for an increasing amount of veterinary time to be spent treating small animals, and less time treating farm animals (Buzzeo et al, 2014). This contraction in the farm sector is multifactorial, including, a shift towards preventative medicine and a reduction in animal numbers in some sectors.

7.4 More satisfied outside clinical practice

The irony is that our research suggests that vets outside clinical practice tend to be more satisfied in their careers and more optimistic about the future. Our survey of BVA members found vets in small animal practice were most likely to find their work stressful and be concerned about levels of pay. Similarly, we found that vets within the first eight years post-graduation who reported that their working life was slightly better than expected, were more likely to be working outside clinical practice. There is a noticeable shift away from the main types of clinical practice among graduates of five or more years' standing. These more experienced vets are increasingly likely to be working for a referral practice or consultancy, in academia, research or industry, or for a charity. They are also more likely to rate their opportunities for career progression more positively than do their colleagues in private first-opinion practice.

There is a strong case for the profession to diversify: not every new graduate should become a clinician. A more diverse market for veterinary careers is needed to take us to 2030 – not least to support our ambitions around animal health and welfare, and to underpin vets' wider role in society. To achieve this, though, we need to tackle some of the barriers that currently stand in the way, such as the low status and priority afforded to veterinary public health, working conditions, remuneration packages, and the range of career opportunities available. We also need to increase the standing, and understanding, of careers outside clinical practice.

The career prospects of veterinary nurses must be an integral part of these discussions – see, ‘Veterinary nurse careers’, page 38.
Educating for modern careers

A recurring theme in discussions about the future has been whether the construct of ‘omnipotential’ – the aptitude to treat all species – remains relevant to modern career pathways. This topic has attracted polarised views. When we asked students and recent graduates what they thought of the idea of specialisation during a degree course, most opposed it or were not sure (56% of recent graduates and 64% of students). However, recent graduates were more positive, with 44% supporting the idea compared with 35% of students (numbers subject to rounding). Discussion amongst experienced vets has often stumbled over the practicalities of how to ensure that students do not specialise in areas where the employment prospects are limited, or about mechanisms to re-enter and retrain in a different area if necessary.

It is beyond the scope of this report to resolve these questions, and we have captured this as an issue that needs to be fully explored in the next phase of the project.

Depending on the outcome of discussions in this area, it may be appropriate to explore the feasibility of limited licensure, and the implications for the 24/7 obligation, for instance. Again, this project cannot provide the answers, but these are conversations worth having and the options examined properly.

What does seem evident is that veterinary education needs to be better mapped to the diverse range of careers that vets can pursue. There is broad agreement that we cannot simply add additional components to an already bulging curriculum. Further, some argue that the profession should be seeking to reduce the length of veterinary training; we cannot consider issues of student debt without talking about the time span over which veterinary education is delivered.

7.5 Diverse careers for diverse professions
The profile of the veterinary profession in 2030 will be quite different from how it looks today. A growing proportion of veterinary surgeons in the UK is female. Of vets who are practising in the UK, 57% are women and 43% are men (Vet Futures, 2014). This gender imbalance is set to deepen; just 24% of veterinary students starting their degree in 2012 were male (Royal College of Veterinary Surgeons, 2014), raising questions about the
Vets working in farm production or outside clinical practice rate their opportunities for career progression more positively than their colleagues in practice:

48% of those in areas outside clinical practice (research/academia/government work), and 41% of those in farm production, regarded their prospects as excellent or good – this compares with 36% of those in small animal/exotic/mixed/equine practice.

Vets working in equine practice were most likely to rate their career opportunities as uncertain or poor (27% said this).

Source: Voices From The Future Of The Profession - the report of a survey of vet students and graduates (July 2015)

...
small animal, equine or mixed practice, whereas men lean towards farm and equine (Kinnison et al, 2013).

### 7.6 Widening access

Those people entering the profession are more likely to come from certain socio-economic groups – for example, almost a quarter of vets (24%) responding to the RCVS 2014 survey had been privately educated, and 30% had attended school outside the UK (Buzzeo et al, 2014). By comparison, just 6.5% of school children in the UK are educated in the independent (private) sector (Independent Schools Council, 2015).

Efforts by universities to widen access to students from disadvantaged backgrounds (Andrews, 2012; Veterinary Record, 2013) may change the socio-economic profile of students in the future. However, some argue that educational debt and low earning potential make a veterinary education a poor financial investment for most students (Downing, 2014). There would appear to be gender issues here too – women in the US tend to report a higher average debt after vet school and to earn less than their male counterparts (Ibid, 2014).

Our qualitative research also identified some concerns about the impact of inadequate earnings for vets on the long-term sustainability of the profession. Some felt that current levels of vet student debt, coupled with the prospect of inadequate subsequent earnings, could be a disincentive to training. Earnings for vets were felt to be too low in comparison to that of other professions, and to be falling.

Our survey of BVA members found that 72% of working vets earn gross income of less than £55,000. The average annual gross income for vets five to eight years after graduation is £34,000, according to our survey of recent graduates. Amongst the recent graduates we found that significantly more men earn over £41,000 per year than women. The 2014 Society of Practising Veterinary Surgeons (SPVS) Salaries Survey found the salary package for all vets varied from £31,150 for newly qualified vets to £69,021 for vets qualified more than 20 years (SPVS, 2014).

By comparison, hospital consultants earn a basic salary of £75,249 to £101,451 per year, depending on the length of service (Health Education England, 2015).

### 7.7 Veterinary nurse careers

Veterinary nursing has its own issues of gender imbalance, with the overwhelming majority of veterinary nurses being women (Williams and Robinson, 2014). Minority ethnic representation among veterinary nurses is very low, at just 2% (Ibid, 2014). The proportion of veterinary nurses working full-time (67%) decreased markedly between 2010 and 2014 and around a fifth of veterinary nurses have a second job (Ibid, 2014). Age has most influence on work status, with an increase in the proportion of veterinary nurses aged under 20. Full-time working is most common among nurses in their twenties and declines with age.

There is a number of indicators that suggest veterinary nurses are feeling more positive about their professional work, although, at 31, the average age of a veterinary nurse remains low compared with veterinary surgeons (44), which could indicate a higher drop-out rate for a range of reasons, including family. A survey carried out

---

#### Numbers of students obtaining a veterinary degree

<table>
<thead>
<tr>
<th>Year</th>
<th>Women</th>
<th>Men</th>
</tr>
</thead>
<tbody>
<tr>
<td>1994</td>
<td>189</td>
<td>144</td>
</tr>
<tr>
<td>2004</td>
<td>412</td>
<td>176</td>
</tr>
<tr>
<td>2014</td>
<td>666</td>
<td>188</td>
</tr>
</tbody>
</table>

for the RCVS in 2014 found that the numbers of veterinary nurses planning to stay in the profession was up compared to the findings of an earlier survey in 2010. The survey also revealed that veterinary nurses had generally become more positive about most aspects of working life (Williams and Robinson, 2014). The main areas for improvement they cited were around pay and getting respect and recognition from the public.

These findings were echoed in the Vet Futures qualitative research, which found that veterinary nurse leaders want to see their position within the veterinary team strengthened and, in many ways, validated. The new RCVS Royal Charter now recognises registered veterinary nurses as members of a regulated profession, who are answerable for their professional conduct. The ongoing campaign legally to protect the title ‘veterinary nurse’ looks to strengthen this position even further.

While there are some commonalities between vets and veterinary nurses, there are also differences. The growing positivity in veterinary nurses about most aspects of working life is something that veterinary nurse leaders will wish to build upon for the future.

7.8 Recommendations

Explore and consult on a sustainable structure for the veterinary degree, including the viability of limited licensure, allowing veterinary students to focus their studies and specialise during the veterinary degree

Ensure that veterinary undergraduates are provided with career ‘roadmaps’ and encouraged to undertake relevant work experience as part of EMS

Undertake a veterinary workforce study to assess the rewards, recognition and working conditions of vets and veterinary nurses, and the drivers of low and unequal pay

Create a one-stop-shop for careers advice and support to promote diverse career opportunities

Explore how we can encourage a more diverse profession (in relation to ethnicity, socio-economic background, gender etc) including reviewing the application and selection process for UK vet schools

Improve outreach to, and careers advice for, schoolchildren to better communicate the realities and opportunities of a veterinary career

Develop a public-facing awareness campaign to raise the profile of wider veterinary roles (including public health, research, government, industry, and academia)
8. Ambition five: sustainable businesses and user-focused services

Our ambition: that a range of business models exists in a diverse and thriving marketplace, in an environment that nurtures innovation and choice. That high quality services are fairly priced and responsive to client needs while always promoting the best interests of animals.
8.1 What this ambition means

- A range of sustainable business models co-exist in a diverse and thriving marketplace, offering clients real choice. We propagate a culture where we share good practice and disseminate innovative models.
- We strive to ensure that primary veterinary care is available, and affordable, to clients at all levels of means, and that vets are valued in their communities for the steps they take to ensure this.
- We embrace new technologies and digital media for their potential to add value to the services we can offer, while being clear about maintaining our professional standards.
- We ensure that expectations of professionalism and conduct keep pace with the services vets provide, and the environments in which they operate.
- Potential new markets are stimulated through client-led approaches, based on a solid understanding of clients' needs and how these vary.
- We empower our clients through a new partnership between clients and the veterinary team, where vets serve as advocates and advisers, and help clients make fruitful use of all the information available.
- Vets lead multidisciplinary teams of nurses, practice staff and allied practitioners – and develop close ties with other related professions (e.g., those carrying out physiotherapy, scanning, imaging or dentistry, or advising on nutrition or behaviour).
- Our clinical decisions are underpinned by evidence-based veterinary medicine, which supports us to provide services based on clinical need.
- We help animal owners understand the shift away from just managing sickness towards enhancing wellbeing, and embracing preventive medicine.
- The way we charge for the expertise of the whole veterinary team, our services and products is transparent, fair and sustainable.
- We assist those who seek to grow their own veterinary businesses to develop the skills, capability and resilience to do so.
- We are able to articulate expectations of employers and business-owners in terms of quality standards, animal health and welfare, and employee wellbeing.
- Our values as veterinary professionals, and our focus on animal health and welfare, sit at the heart of all veterinary business models. We demonstrate professional integrity in the working environment and speak out at any activity that conflicts with our professional values.

8.2 Why it’s important

The economics of veterinary practice are under pressure in several ways that threaten the sustainability of traditional veterinary business. BVA members responding to our survey perceived the greatest threat to the future of the profession to lie in changes to the marketplace.

Vets in clinical practice provide a range of services in a number of settings. However, the most significant segment of the market, in terms of revenue, is the provision of services to pets and farm animals. Most important of these is the provision of vet services for pets, which accounted for 45% of industry revenue in 2014-15 (IBISWorld, 2014).

8.3 Changing market

A number of factors have already changed this market and are expected to continue to shape the landscape for the foreseeable future. Some of the key drivers of change include the following:

- **Market consolidation** – there has been a gradual but clear decline in the number of practices set up from scratch by independents (Wright 2011). Any new practices that do spring up, generally, are part of chains. According to the 20:20 vision report published in 2014, corporates and charities already accounted for about 25% of practices, with some predictions that corporates would plateau at approximately 50% of market share (Veterinary Record, 2014a). This could have a knock-on effect for the expansion of referral-only practices, as larger general practices become able to offer referral services within their group. Projections for the year 2023 include general practice diverging into training hospitals and well-equipped practices, alongside more basic primary clinics offering a handful of services, such as vaccination and neutering (Veterinary Record, 2014b).

- Some parts of the UK (notably Northern Ireland) report mergers of practices in rural areas and a growth of small animal practices in urban centres. Farm animal vets report pressures due to changes in their roles for, among other things, bTB testing and wider veterinary surveillance.
Petcare market

This is a market we should not take for granted.

The potential demand for companion animal veterinary services in the UK would appear to be strong. Yet pet ownership in itself is not an indicator of demand for vet care – the US has seen a decline in visits to the vet by owners of companion animals (Brakke Consulting, 2011). The 2014 PDSA Animal Wellbeing Report indicates that approximately 2.5 million pets (cats, dogs and rabbits) are not registered with a vet (PDSA, 2014).

Factors include the cost of care and pet owners substituting internet research for visits to the vet. Pet owners in the US are perceived as spending a great deal on their pets, but very little on veterinary care, reflecting a lack of understanding of what vets can offer compared with others in the lucrative pet market. Meanwhile the UK petcare market was valued at approximately £6.7 billion in 2013 (Hucker, 2014).

Only around 15% of cat and dog owners in the UK have pet insurance (Association of British Insurers, 2014). Conditions for the pet insurance market are increasingly challenging. The uptake of pet insurance is reported to be declining, whilst the number and size of claims has been increasing (King, 2011). Average pay-outs have risen faster than average premiums.

Early indicators of excess capacity of veterinary services? Recruitment and retention of the right people for your needs is critical to keeping any veterinary business vibrant and successful (Veterinary Record, 2014a). Recent veterinary graduates report increasing difficulty in finding work of the type they seek – although almost all of those surveyed had found a job within three months (Robinson and Buzzeo, 2013). In the US, market indicators of excess capacity of veterinary services at national level include falling incomes for vets; falling rates of productivity; and increased difficulty for new graduates in finding employment (AVMA, 2013). However, at the same time recent surveys by BVA and SPVS have pointed to difficulties in recruiting experienced veterinary surgeons with the required skills (BVA, 2015 and SPVS, 2015).

Changing attitudes to practice ownership – there is a perceived decline in appetite for practice ownership, which threatens the traditional partnership model. Our survey
of students and graduates revealed that the aspiration that 45% of students hold to become a practice owner or partner drops to 25% once vets start work (see ambition four). There may be a number of factors contributing to this change, including finances, lifestyle and opportunity.

The cost of veterinary services – there are issues about how services are priced. Subsidisation of the cost of services – through the sale of pet health products and animal health medicines – is a specific concern, not least because of the threats to these markets and the potential impact of ‘decoupling’ (a regulatory change that would separate the prescribing and selling of veterinary medicines and restrict vets’ ability to sell medicines). If decoupling were to occur it would remove any margin from medicines and therefore any cross-subsidy of service. There is a recognition that the pricing of veterinary services has to change, and especially that practices need to be more transparent on pricing, and charge more appropriately for time and professional services rather than relying on product sales (Veterinary Record, 2014b).

In focus groups, pet owners told us that vet services were thought to be expensive and they would welcome greater transparency about costs – including displaying prices for a wider range of products and services in waiting rooms, standardised pricing and the option of payment plans.

Pressures on the pet insurance market – the conditions for this market are increasingly challenging (see box), and there are concerns for its long-term viability. This could have a knock-on effect on referral practices in particular, and investment made into innovative and new techniques. One pet insurance company has already made moves to restrict the choice of referral practices as a means of controlling the cost of premiums.

New channels of supply – internet pharmacies have been keen to capitalise on the lucrative UK market for animal medicines by selling products more cheaply and providing the convenience of door-step delivery to the consumer. Liberalisation of the online and mail-order pharmacy market for human medicines has varied across Europe, with the UK being one of the countries leading the way for new licences (AT Kearney, 2012). Further expansion of the animal medicines market online seems inevitable – although proposed European veterinary medicine regulations may dampen the growth of this market. Vets need to realign the costs of services and not subsidise the practice through product sales (Veterinary Record, 2014a).

Encroachment from other sectors – community pharmacy is also set to get progressively more involved in the market for animal medicines and products. Community pharmacists have found that selling pet health products can make a significant boost to sales and profitability – and there are moves to extend their reach (Chemist and Druggist, 2014). Pharmacists are being encouraged to consider dispensing veterinary prescription medicines, and to place the emphasis on competitive prices, convenience and the offer of a one-stop-shop for the whole family (The Pharmaceutical Journal, 2013).

New markets – the impact of new markets on the horizon – such as for genetics, cancer therapy and diagnostics – is as yet unknown. Some have expressed concern that the profession could miss out on developments in technology – such as genomic sequencing – if vets fail to be proactive in grasping the opportunities.

8.4 Skills, capacity and resilience

Responding to these pressures relies on veterinary professionals having the skills and expertise to capitalise on opportunities and manage threats. The indications are that vets need to develop their business skills.

Lowe (2009) highlighted a need for the veterinary curriculum to better equip the next generation of vets with, among other things, business skills. This will be important both for potential business owners and for employees to better understand the financial structure of the business. Bachynsky et al (2013) found that recent veterinary graduates and their employers rated graduates’ preparedness and competence in early career business skills as poor to average – yet these skills were regarded as having average to high importance. In 2015, half of more than 2,800 students and graduates we surveyed said they would like more teaching on business and financial skills. It would seem that we still have some way to go in terms of equipping veterinary professionals with the skills needed to navigate the marketplace and build their own resilience.

We have heard many suggestions for ways that...
Embracing technology – nurturing innovation

Our's is a scientific profession, and innovation should sit at the heart of it. We believe there is scope in being more strident about the value we attach to technology and innovation. Mechanisms to identify innovators within the veterinary professions, and to capture and disseminate learning, need bolstering.

Genomic sequencing, Big Data, pen-side testing and other diagnostic tools, drones, genetically modified organisms, and social media: there is no limit to the impact that technological advances may have on the veterinary profession. There is a risk that we see the future as just a slightly modified version of the present, but it's important to remember that 15 years ago there was no Twitter, no Facebook, and Google was just two years old. We simply don't know what will disrupt us, and the way we work, in the future.

Vets do see opportunities from embracing the digital revolution – to create new services, improve the efficiency of, and access to, existing services, deliver quality information to clients and the broader public, and to share learning.

We explored attitudes towards new technology in our survey of students and recent graduates. More than half of all students and graduates perceive the profession to be embracing digital technology well, although 42% were unsure or think it could do better here. The findings suggest that practices are using a range of digital technology – and particularly social media – for promoting, educating, building a client base and garnering feedback. Some are using webinars and selling over the internet.

Students and recent graduates perceive greatest potential for technology in the future to lie in animal risk assessment, observing real-time procedures via web-link, and using social media to send appointment reminders. But they expressed wariness about relying on technology for diagnosis and treatment purposes, or to replace consultations, for example via Skype. Meanwhile, many at our regional events saw the advent of Skype-type consultations could be beneficial to animal health and welfare by broadening access to veterinary care.

In an age of information being increasingly readily available to everyone, vets need to make the cultural shift from 'owning' knowledge to knowledge management. Vets in clinical practice need to help animal owners navigate and understand the wealth of information available. For example, it may be that in the future home-diagnostic kits put more knowledge in the hands of owners, but what happens to this information, and how it informs treatment options, will depend on veterinary surgeons staying ahead of the curve and continuing to demonstrate their unique value, knowledge and skills in research, diagnosis and client relationships. This change needs to start within the veterinary schools, but also in the wider veterinary community.

Some concerns have been voiced that vets could miss out on developments in technology, such as genomic sequencing, if they fail to be proactive about grasping the opportunities. This might mean exploring how business models can enable the sharing of high tech equipment. It almost certainly requires us to be more ambitious and to find ways to demonstrate that veterinary professionals not only welcome, but are driving, innovation in animal health.
independent practices should evolve. There is recognition of a need to differentiate their position from large corporate practices and to focus on building a loyal client base. There is a need to explore the potential to grow small businesses differently in response to a decline in the numbers of vets coming forward for traditional partnerships – to develop models that will take the profession to 2030, and beyond. Options include ‘John Lewis’ partnership-type models, social enterprise federated ways of working. Initiatives highlighted by vets include: more partnerships between practices; overseas sabbaticals; concerted efforts to meet competition from other sectors; and opportunities from embracing the digital revolution (see box).

One aspect of resilience we consider important is maintaining professionalism in an increasingly competitive marketplace where vets need to be more commercially astute. Some veterinary professionals are reported to equate being a commercial organisation with being unethical and to have a distorted view of business and their professional identity (Page-Jones and Abbey, 2015). Other professions, like dentistry, have identified tensions between ‘ethically correct decision-making relationships with patients’ and the drive to maintain a successful business (Ozar, 2012). Pressure to demonstrate an ethical approach in charging for professional services is likely to increase, and there are opportunities to strengthen standards guidance for the profession to this end.

8.5 Better meeting client needs

Vets have told us that they feel growing pressure to deliver higher levels of customer service. They also see better meeting clients’ needs as a key area of opportunity for the future – in our survey of BVA members it was cited as the one issue offering greatest opportunity for the profession, mainly in terms of enabling practices to maintain a competitive edge. We believe that it is in the interests of the profession as a whole to assist vets in practice to achieve this, for example, through exploring compulsory practice standards. It is not our intention to interfere with the market, but instead to support those veterinary professionals who seek extra help to compete in an increasingly diverse marketplace.

Many within the professions have highlighted the imperative to understand our clients, employers, customers, end users, and market segregation, much better than we currently do. There is a whole host of issues that needs addressing here, from better understanding the amount pet owners in particular feel able to pay for veterinary services – and gaining a better understanding of clients and their spending habits – to pinpointing new opportunities among existing and potential clients.

A recurring message is about the duty the profession has to communicate better the value of veterinary services – in terms of quality, as well as value for money. Value needs to be more clearly articulated to mitigate a risk that veterinary services become seen as a luxury. In terms of value for money, the survey we commissioned of the general public revealed that 70% of animal owners rated their vets positively for value for money. This is encouraging, but there is no room for complacency: it still leaves almost a third rating this poor or very poor.

The literature points to a mismatch between the value vets attach to some aspects of their service (wellness exams, for instance), and the value that clients attribute to that same offering. A lack of association between the value and price of services can also be an issue (Felstead, 2012). Vets themselves have been found to lack confidence in their ability to meet the expectations of pet owners (Roshier et al, 2012). One study identified a mismatch in expectations of what is important between vets and dairy farmers (Hall and Wapenaar, 2012). There is evidence that vets are even losing business through a failure to meet the needs of some farmers (Kaler and Green, 2013). Lowe (2009) challenged the profession to renew its relationship with farmers, amid revelations that farmers want vets to provide services that meet the broader needs of their business.

This leads us to conclude that the veterinary professions need better to understand – and respond to – the needs of clients. This includes ensuring that our offering is responsive to the different wants of clients, as well being clearly articulated (Gabay et al, 2014). Factors that are important to one client group – such as proximity or standard of care – can assume a different level of importance to another. For example, equine owners have been found to be prepared to travel further than pet owners for veteri-

Federations are groups of practices collaborating to provide a greater range of services, see RCGP, undated, for more information.
Review the regulatory framework for veterinary businesses to ensure a level playing field, enable a range of business models to coexist, ensure professionalism in commercial settings, and explore the implications for regulation of new technologies (eg telemedicine).

8.6 Paradigm shift
One of the fundamental drivers underpinning veterinary services may need to change – from a model driven by what vets are prepared to offer, to one that is driven by the needs and wants of existing and potential users of veterinary services. This means a move from service-led models to user-led approaches. It may also require changing the nature of the discourse between veterinary professionals and clients – from a hierarchical model with the vet as the expert imparting instruction, to one centred on partnership with empowered clients and other veterinary-related professionals.

This implies a paradigm shift from teaching knowledge to teaching knowledge management – and to demonstrating our expertise by knowing how to sort through the information available and help clients to make sense of it. Nearly all vets responding to one survey reported seeing clients whose behaviour had been influenced by what they had read on the internet – information which vets were likely to regard as unhelpful (Alpha Research, 2014).

This shift may, in turn, help to create new markets or enable us to reach untapped audiences. By working in partnership with clients, vets are better positioned to convince them of the value of preventive services, for example. The evidence suggests we also need to better tailor our offering to client behaviour. Increasingly digitally sophisticated, time-constrained consumers place value on convenience. Online sales more than tripled as a proportion of total retail spending between 2007 and 2014 (Wrigley and Lambiri, 2014). A growing ‘mindfulness’ and seriousness about ethical responsibilities, as well as towards increased personalisation, and products and services that are tailored to meet consumers’ demands and expectations (Barkworth, 2014), are all trends to which veterinary services need to adapt.

An enduring appetite for digital and technological advances and, in particular, portable devices like phones and tablets, means that it is easier than ever to find out what clients want and how they feel about services. The consumer market is more democratic than ever (Mak, 2015), which poses challenges as well as opportunities – consumer feedback can make or break a business, and all at the click of a button.

8.7 Recommendations

23. Review the regulatory framework for veterinary businesses to ensure a level playing field, enable a range of business models to coexist, ensure professionalism in commercial settings, and explore the implications for regulation of new technologies (eg telemedicine)

24. Establish a business and innovation hub to showcase new technologies, services and business models, celebrate the innovators and ensure appropriate regulatory underpinnings are in place

25. Enhance business and finance skills amongst veterinary professionals through education, EMS and continuing professional development (CPD)

26. Explore whether practice standards inspection should be compulsory

27. Develop communications tools to improve consumer understanding of veterinary costs and fees, and promote the value of veterinary care

28. Consider whether and how allied professionals might be regulated as part of the vet-led team
9. Ambition six: leadership

Our ambition: that the whole veterinary community benefits from exceptional leadership, that we develop the next generation of leaders, and that we strive to speak with one voice.
9.1 What this ambition means

• We all recognise the value of strong leadership across the sectors where there is any involvement from veterinary professionals. This includes government policy-making, industry, academia, research, public health, environment and clinical practice, as well as in organisations representing the profession.

• Leadership of the veterinary profession is less fragmented, with convergence towards fewer organisations cooperating more and competing less – support and representation for the profession is well coordinated and coherent.

• We have strong and influential leaders empowered to speak on behalf of vets and veterinary nurses on any issue that matters and who will advocate the importance of veterinary science as a knowledge-led discipline to society at large.

• A diverse range of leadership opportunities exists, from government, research, academia and politics, to business and industry.

• Management and leadership roles are clearly defined and the routes into these roles clearly understood by vets and veterinary nurses.

• Investment is made into leadership development and succession planning. We identify future leaders early on and provide them with the appropriate support to develop the skills and behaviours they need to step into leadership roles.

• We support vets and veterinary nurses from a diversity of backgrounds to step forward to occupy positions of leadership; those leading the professions are representative of those they lead, in terms of age and gender balance.

• We all recognise our duty to demonstrate leadership – affirming our credentials by doing the job well, and speaking out on issues that other stakeholders may not be aware of or have prioritised as important.

• The veterinary professions are highly regarded – looked up to across other sectors for our evidence-based and scientific approach to a range of issues. These attributes underpin all we do, and the influence and status of veterinary practice across our society.

9.2 Why it’s important

The leadership task ahead is a significant one. It includes needing better to articulate the value of vets and veterinary nurses – across a range of settings and sectors.

59% see the glass half full – ie feel optimistic – when it comes to thinking about the future.

Vets in rural practice and business owners/partners are the most optimistic about the future.

Men are significantly more likely than women to be fairly pessimistic about the future.

Source: Vet Futures (2015b)
audiences – to create within the profession a shared sense of purpose, while also raising its profile more widely.

9.3 Veterinary value
An overriding message from vets is the pursuit of recognition – we want our work to be understood, valued and respected. For vets who responded to the Vet Futures survey of BVA members, four of the top five goals they prioritised for 2030 related to this.

According to the public omnibus survey, vets are well thought of (see box). This seeming mismatch between vets’ worries about how they are perceived, and the value the public actually attaches to them appears to come down to how their roles are perceived. Members of the public are most likely to come across vets in a clinical, therapeutic setting. The research we conducted reveals a desire among vets to be understood for our broader contribution to society (see ambition two).

There are also issues around self-confidence and resilience that leaders need to help the profession to confront. This points to a need to think about the culture of the profession and the values underpinning it. Leaders need to instil a sense of optimism for the future and to galvanise the profession into embracing change. Only 59% of BVA members we surveyed felt optimistic about the future; almost a quarter were unsure how they felt about it. Our survey also found that more than half of vets (53%) perceive the profession to be ‘cautious of change’. Those most likely to feel this were mid-career – the generation who will be leading the profession towards 2030.

9.4 ‘One voice’
Assisting farmers, pet owners, businesses, government and society at large fully to understand the contributions of vets and veterinary nurses demands a clear, coherent voice for the profession.

The qualitative research conducted for Vet Futures highlighted that many from within the veterinary profession were looking for stronger and more unified representation, support and leadership. This was regarded as key to whether the profession can adapt successfully to future challenges and grasp the opportunities that arise.

A current disconnect between different sections of the profession was a recurring theme in the interviews and focus groups with vets, nurses and other stakeholders. This was thought to result in a lack of joined-up thinking and, as a consequence, a perceived loss of influence at a high level (particularly with government).

9.5 Exceptional leadership
Veterinary leaders will also need to demonstrate exceptional leadership in order to drive delivery of this
vision for 2030. Concerns have been articulated about the number and profile of vets and veterinary nurses stepping forward for leadership roles. This inevitably leads to questions over whether the profession currently has sufficient leadership capacity, and is developing such capability for the future. Mechanisms to identify tomorrow’s leaders from within the profession appear to be lacking. The review of the UK literature uncovered relatively little with respect to veterinary leadership. This may suggest that, until now, the profession has given leadership insufficient focus. This ambition seeks to change that.

9.6 Recommendations

29. Encourage veterinary nurse leaders to develop a report and recommendations which are directly relevant to veterinary nurses and their future, and complementary to the Vet Futures report

30. Explore options for bringing greater coherence to the support and representation of the veterinary profession

31. Explore ways to develop the next generation of veterinary leaders including by identifying and nurturing talent, and providing them with the skills and opportunities to succeed

32. Develop and communicate clear routes to a wide range of leadership roles

33. Look to develop a proactive veterinary-led EU/global agenda where the UK can lead in public health, education, regulation and improving standards

34. Develop lifelong learning in leadership, including mentoring and targeted leadership programmes, in particular for groups underrepresented in leadership (eg women and people from minority ethnic groups)
10. Next steps

This is the beginning of a new chapter for the UK veterinary community – one that seeks to build on our unique strengths, extensive knowledge and learning, our broad skills and our professionalism. We want to harness the expertise and energy that vets and veterinary nurses have demonstrated throughout Vet Futures, and to maintain the momentum that has been generated. We want to tackle the long-standing issues that have emerged through this project, which are holding us back in key areas. More than that, though, we want to forge forward – and take the veterinary professions to the next stage of evolution.

We want to establish the services we offer as a public good, and we want vets and nurses to be well set up to enjoy successful, satisfying careers in the years leading up to 2030 and beyond.

10.1 Vet Futures Action Group
Arising from the six ambitions are 34 recommendations. It is vital that we turn these recommendations into a credible set of actions. We will be inviting members of the veterinary professions to step forward and join a new Vet Futures Action Group, to ensure that there is buy-in from across the profession and to drive forward workstreams of activity.

This Group will begin the process of identifying SMART\(^5\) actions, and a clear plan for their delivery. As part of this, it will develop a number of measures, or indicators, for success. These will be designed to challenge us all to deliver.

10.2 Vet Futures Summit
Delivering lasting change is a responsibility for the whole profession. Together we must share it. With this in mind, we will hold a Vet Futures Summit in the first half of 2016. We will invite a wide range of leaders from across different sectors of the veterinary professions, including those working in clinical practice, education, industry, government and research, to celebrate the profession and map out its future.

---

\(^5\) SMART: Specific, measurable, achievable, realistic and time-bound
Appendix A: Vet Futures Project Board

The Vet Futures Project Board has provided oversight of Vet Futures by fulfilling the following roles:

- Providing guidance and feedback to the Project Manager (for example, on draft discussion guides and survey questionnaires);
- Reviewing spending of the budget and managing risks;
- Holding the Project Manager to account for delivery of the project against key milestones.

A key role for the Project Board has been in assimilating all the information gathered and preparing this report.

Membership of the Project Board:

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>BVA</td>
<td>Sean Wensley</td>
<td>President (from September 2015)</td>
</tr>
<tr>
<td></td>
<td>John Blackwell</td>
<td>Senior Vice-President (from September 2015)</td>
</tr>
<tr>
<td></td>
<td>Gudrun Ravetz</td>
<td>Junior Vice-President (from September 2015)</td>
</tr>
<tr>
<td></td>
<td>Robin Hargreaves</td>
<td>Senior Vice-President (to September 2015)</td>
</tr>
<tr>
<td></td>
<td>David Calpin</td>
<td>Chief Executive</td>
</tr>
<tr>
<td></td>
<td>Sally Burnell</td>
<td>Director of Policy, Media &amp; Strategy</td>
</tr>
<tr>
<td>RCVS</td>
<td>Dr Bradley Viner</td>
<td>President (from July 2015)</td>
</tr>
<tr>
<td></td>
<td>Professor Stuart Reid</td>
<td>Senior Vice-President (from July 2015)</td>
</tr>
<tr>
<td></td>
<td>Nick Stace</td>
<td>Chief Executive and Secretary</td>
</tr>
<tr>
<td></td>
<td>Lizzie Lockett</td>
<td>Director of Communications</td>
</tr>
<tr>
<td></td>
<td>Anthony Roberts</td>
<td>Special Advisor to the CEO</td>
</tr>
<tr>
<td>inQuisit</td>
<td>Sally Williams</td>
<td>Project Manager</td>
</tr>
</tbody>
</table>

Meetings have been hosted by the RCVS and BVA in rotation, and chaired by the Chief Executive of the hosting organisation.
Appendix B: Contributors

A significant number of vets, veterinary nurses, practice managers, veterinary students, representatives of key stakeholder organisations, and others have contributed to Vet Futures. We are grateful to the members of RCVS Council, BVA Council and the Veterinary Nurses Council, and the pet owners who took part in our focus groups, as well as those who completed our surveys.

Vet Futures Group
We also thank the members of the Vet Futures Group, which comprised members of the veterinary professions and other key stakeholder groups, including government, academia, industry and the charitable sector, who provided ideas and challenge throughout the project, and our other ‘critical friends’ who provided valuable input on the draft report. Members of the Vet Futures Group and our critical friends are listed below.

The Vet Futures Group was established to:
• Provide subject expertise and assist in understanding the implications of research findings;
• Test emerging thinking and serve as a ‘critical friend’ by challenging assumptions;
• Assist in identifying key themes and recommendations arising from these;
• Provide a forum for engagement with, and securing buy-in, from key stakeholders.

The Group has met on three occasions during the course of the project: January 2015 (London), April 2015 (Cambridge) and July 2015 (London).

We are also grateful to the members of the RCVS Operational Board and BVA Board for their contribution.

<table>
<thead>
<tr>
<th>The Project Board would like to thank:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Martin Alder</td>
</tr>
<tr>
<td>Jason Aldiss</td>
</tr>
<tr>
<td>Clare Allen</td>
</tr>
<tr>
<td>Rosie Allister</td>
</tr>
<tr>
<td>Fiona Andrew</td>
</tr>
<tr>
<td>David Bartram</td>
</tr>
<tr>
<td>David Black</td>
</tr>
<tr>
<td>Amanda Boag</td>
</tr>
<tr>
<td>Paula Boyden</td>
</tr>
<tr>
<td>Penny Bramwell</td>
</tr>
<tr>
<td>Tricia Colville</td>
</tr>
<tr>
<td>Liz Cox</td>
</tr>
<tr>
<td>Helena Diffey</td>
</tr>
<tr>
<td>Simon Doherty</td>
</tr>
<tr>
<td>Javier Dominguez-Orive</td>
</tr>
<tr>
<td>Ian Futter</td>
</tr>
<tr>
<td>Nigel Gibbens</td>
</tr>
<tr>
<td>Davis Hadrill</td>
</tr>
<tr>
<td>Andrew Harrison</td>
</tr>
<tr>
<td>Gareth Hateley</td>
</tr>
<tr>
<td>Laura Higham</td>
</tr>
<tr>
<td>Myfanwy Hill</td>
</tr>
<tr>
<td>Erwin Hohn</td>
</tr>
</tbody>
</table>

www.vetfutures.org.uk
Vet Futures roadshow and regional events
Vet Futures held a series of regional events across the UK in which vets, veterinary nurses and other members of the veterinary team were encouraged to give their views about current issues and ideas for the future.

The roadshow events were delivered in a workshop style to provide opportunities to update on the project, test the emerging findings, and capture new ideas.

The roadshow events were held from April to June 2015 in:
• Belfast on 16 April
• Exeter on 20 April
• Cambridge on 21 April
• Manchester on 18 May
• Edinburgh on 5 June
• Swansea on 17 June

Members of the Vet Futures Project Board also held workshops and discussions at:
• BSAVA Congress in Birmingham on 9 April 2015
• RCVS Regional Question Times in Dundee (10 November 2014) and Carlisle (11 November 2014) and Guildford (19 March 2015)

Other meetings
Other meetings have been held with stakeholder groups such as the Veterinary Schools Council, the major employers group, the Pet Owners’ Association, the RCVS VNC and BVNA, and those involved with veterinary nurse training.
Appendix C: References


One Health Initiative (Undated). One Health Initiative will unite human and veterinary medicine. Available at: http://www.onehealthinitiative.com/


Society of Practising Veterinary Surgeons (2015). SPVS Recruitment Survey Results: Where have all the experienced vets gone?. Available at: http://www.spvs.org.uk/content/spvs-recruitment-survey-results (accessed on 1 November 2015).


Vet Futures (2013). ‘Progression agreement aims to help widen access to the profession’. Veterinary Record 2013;172:350.


inQuisit is an independent research consultancy that seeks to inspire change through open inquiry and robust research, and by involving those with an interest in the process.

- We have experience in leading a range of projects that deliver a better understanding of what it is to be a doctor in training, surgeon, chiropractor, or vet. We also conduct research to explore the views and experiences of members of the public.
- For each project, we draw together a bespoke team of individuals able to bring their unique expertise to the field of study.
- We use the insights we gather to inform the development of strategy, improve services, and assist organisations to develop in new and inspired directions.