REPORT OF THE SURVEY OF THE BVA ‘VOICE OF THE PROFESSION’ PANEL

June 2015

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ABOUT THE PROJECT

The British Veterinary Association (BVA) and the Royal College of Veterinary Surgeons (RCVS) have joined forces to consider the big issues facing the veterinary profession today, and into the future.

Through a programme of research, engagement with the profession and the public, and a consideration of strategic issues already having an impact on the profession, the aim is to develop a plan for action that will help deliver the best – for animal health and welfare, the public and everyone with a role within the veterinary profession.

This report presents the findings from an online survey, which was carried out in February and March 2015. It represents the final stage of phase 1: Identifying key strategic issues.

The survey provides feedback from members of the BVA survey panel on the relevance and importance of the issues identified so far through interviews, focus groups, workshops, and a literature review.

Ideally, it should be read in conjunction with our public omnibus findings – report entitled Public Trust in the Veterinary Profession.

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KEY FINDINGS
– PREVAILING MINDSET

🌟 For most vets (59%), their working life to date has matched or exceeded their expectations. But that leaves 41% feeling some disappointment
  • Those who are disappointed are more likely to be younger (significantly, the vets of tomorrow)
  • ‘Opportunities for career progression’ is the main reason given where working life has met or exceeded expectations

🌟 Levels of optimism for the future outweigh feelings of pessimism – although almost a quarter of vets are unsure how they feel about the future

🌟 Vets perceive the profession to be ‘cautious of change’. Those most likely to feel this are mid-career: the generation who’ll be leading the profession towards 2030

🌟 Vets perceive the public fails to recognise their contribution in key areas such as food supply and security, and public health
  • Many comments reflect a desire to increase awareness of the breadth of contributions vets make beyond ‘companion animal health’

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KEY FINDINGS
– OPPORTUNITIES AND THREATS

Here are key areas that vets see as offering potential opportunities for the future:

- Vets feel growing pressure to deliver higher levels of customer service and better meet client needs. Are there ways to creatively address this, they wonder?
- Undergraduate training – can it be developed further, to reflect the diversity of possible veterinary careers and, potentially, encourage more early specialisation?
- Public health – is it possible to raise the profile of veterinary contributions here, in response to, for instance, perceived growing public concern over animal-related disease?

Vets perceive the greatest threats the profession faces arise from changes in the marketplace. Key factors are perceived as:

- The growing corporatisation of vet-practice ownership
- Potential oversupply of vets – is there a danger of more vets ending up being trained than there will be work for?
- Competition from the internet
- Perceived public concern around the costs vets charge – although our public omnibus findings might go some way to reassuring them. We found 70% of people rate their vet positively for value for money

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KEY FINDINGS – AMBITIONS FOR 2030

🌟 Four of the top five goals vets prioritise for 2030 relate to them having **recognition, valued roles and a higher profile**. According to our public omnibus, vets *are* well thought of. Still, it’s clear vets worry about this: having a ‘respected and valued role in society’ was a top priority (especially for business owners/partners)

🌟 The **integrity of treatment decisions** is a priority for many – treating as far as one should, rather than as far as one can. A few vets also made comments about providing treatment where animal owners cannot afford to pay

🌟 **Reducing stress** is the single highest priority for many. Vets in small animal practice, younger vets and women were more likely to prioritise this

🌟 Veterinary **leadership on animal welfare** is cited as another key goal

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KEY FINDINGS
– PROFILE OF RESPONDENTS

🌟 The profile of the vets responding to this survey reflects the characteristics of the BVA membership in terms of gender and geographical spread. The BVA panel is, however, biased towards older vets – 58% of survey respondents are over 45 years old as compared with 32% of the BVA membership, and student vets are under represented

🌟 Most (56%) working vets are in small animal/exotic practice. Of these, 54% are employed, 37% are self-employed and 9% are business owners or partners

🌟 Self-employed vets tend to be the lowest earners, with more than half of them earning <£35,000. This reflects that self-employed vets are also most likely to work part-time

🌟 Female vets are more likely to be younger than their male counterparts. Students and vets who are currently not working are also more likely to be women

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Strategies for 2030 will need to include **uniting the profession behind common objectives**. There are clear divisions in career satisfaction and aspirations for the future between vets working in small animal practice (nearly half of respondents) and vets working outside of clinical practice:

- Vets in small animal practice are the public face of the profession – yet they are **most likely to find their work stressful** and be concerned about levels of pay
- Vets **outside of clinical practice** tend to be **more satisfied** in their careers and **more optimistic** about the future – even though vets think these roles lack profile and perceived value by the broader public

An overriding theme that reverberates across the sector is the **pursuit of recognition** for the roles vets play across the board. They want their work to be understood, valued and respected. This matters a lot to vets...

... But, do they need to worry? Certainly the results of our omnibus suggest vets **are** valued by the public. Is there, then, another underlying issue here – perhaps around communication or confidence?

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REPORT STRUCTURE

1. Research approach
2. The prevailing mindset
3. Opportunities and threats
4. Ambitions for 2030
5. Profile of respondents
1. RESEARCH APPROACH

The BVA ‘Voice of the 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.

An online questionnaire was informed by issues that had surfaced through interviews and focus groups with the profession and stakeholders, a literature review, and a workshop of the Vet Futures Group conducted in January 2015.

The survey was sent to all members of the BVA survey panel on 16 February 2015 and closed on 8 March 2015. A total of 623 responses were returned – giving a strong response rate of 50%.

The survey was conducted by market research company Alpha Research. Analysis was undertaken by Bernice Hardie and Sally Williams.

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2. THE PREVAILING MINDSET
59% OF VETS FEEL THEIR CAREER HAS MET, OR EXCEEDED, EXPECTATIONS

Base: 535

To what extent has your working life matched the expectations you had when you first entered the profession?

- **Much better than expected** – 7%
- **Slightly better than expected** – 14%
  - **More likely to be**: retired/not practising, earning >£55k, >55yrs, not in small/mixed practice, men
- **As expected** – 38%
  - **More likely to be**: business owner/partner, in mixed practice
- **Only met some expectations** – 38%
  - **More likely to be**: qualified <15yrs, <35yrs, women, intending to leave the profession
- **Not met any expectations** – 3%

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To what extent has your working life matched the expectations you had when you first entered the profession?

Reasons working life has not met expectations

- Few opportunities for progression – 38%
- Pay – 31%
- Working hours (including out of hours) – 25%

Reasons working life has met or exceeded expectation

- Good opportunities for progression – 65%
- Area of work – 28%
- Practice management – 26%

Opportunities for career progression are the biggest determinant of whether career expectations are met or exceeded.
WORKING LIFE HAS NOT MET OR ONLY PARTIALLY MET EXPECTATIONS

Recurring grounds for dissatisfaction were levels of pay, stress and interactions with clients

‘There is a huge amount of stress and pressure put on vets by the public. As a younger vet, I don’t feel the veterinary profession creates a safe learning environment’

‘The lack of a progressive modern career structure is also a problem’

‘Poor work life balance with increased competition for jobs reducing wages and increasing working hours as a result. Poor opportunities to buy in or set up a practice’

‘Disappointment with how veterinary practice is going towards business and away from caring. Practices are aiming for shorter consultations, with little chance to bond with clients and ensure compliance, little time to write up notes, feeling not able to cover yourself legally as you need to these days’

‘Didn’t realise or understand the importance of finances in practice. Was never taught at college that compromises may be needed in veterinary care. Didn’t realise how onerous out of hours work could be’

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Vets who reported that their working life had met or exceeded their expectations were typically working outside general clinical practice.

‘I am very excited by the opportunities I have to influence central Government policy’

‘Because I am now a Specialist which has given me massively increased job satisfaction, and because of the practice I work in which is a fantastic working environment. Previously I was in general practice for 9 years and I was deeply unsatisfied’

‘Once you get into the real world rather than the artificial environment of vet practice you realise how valuable the veterinary education really is’

‘I always intended to go into practice but spent >20 yrs in the pharmaceutical industry before eventually ending up in practice. I have had 3 careers in the veterinary profession and have enjoyed all 3 immensely; and I still love my work’

‘I have progressed up the career ladder in the disease surveillance service. I have management responsibility and can coach the next generation’
VETS ARE GENERALLY OPTIMISTIC ABOUT THE FUTURE

How optimistic are you overall about the future of the UK veterinary profession?

- 59% see the glass half full – i.e. 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

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A MAJORITY OF VETS THINK THE PROFESSION IS CAUTIOUS OF CHANGE

Which best describes your view of the veterinary profession’s current attitude to change?

Resistant to change – 9%
Scared of change – 7%
Cautious of change – 53%
Open to change – 30%
Eager to change – 1%

Vets aged 35-45 years are the least positive about the profession’s attitude to change – these are the vets who will be leading the profession towards 2030.

Almost 1 in 10 vets perceive the profession to be resistant to change.

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VETS PERCEIVE THE PUBLIC TO PLACE LITTLE VALUE ON KEY AREAS

Base: 607; 593

Vets believe their greatest contribution is to animal health and welfare – and perceive the public to place most value here too.

The public is perceived as attaching little value to other areas in which vets feel they make an important contribution.

Vets' perceptions of areas the public value

- Animal health and welfare: 81%
- Research: 74%
- Food supply and security: 71%
- Public health: 54%
- Environmental issues: 16%
- Other areas: 25%

Areas vets feel they make a contribution/significant contribution

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3. OPPORTUNITIES AND THREATS

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## Areas of Greatest Opportunity

**Which one issue offers the greatest opportunity for the veterinary profession?**

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increasing expectations around customer service</td>
<td>16%</td>
</tr>
<tr>
<td>Structure and content of undergraduate courses</td>
<td>13%</td>
</tr>
<tr>
<td>Public health concerns relating to animal disease</td>
<td>13%</td>
</tr>
<tr>
<td>Increase in out-of-hours providers</td>
<td>10%</td>
</tr>
<tr>
<td>Relationship with government</td>
<td>9%</td>
</tr>
<tr>
<td>Increasing part-time work</td>
<td>9%</td>
</tr>
<tr>
<td>Global food security</td>
<td>9%</td>
</tr>
</tbody>
</table>

**Base: 567**

Vets believe that greatest opportunity lies in increasing client expectations around customer service.

Education and public health are also regarded as offering great opportunity for the future of the profession.
OPPORTUNITY NO.1: CUSTOMER EXPECTATIONS

According to our omnibus, 95% of people trust vets. Still, delivering higher levels of customer service and better meeting clients’ needs is seen by vets as the greatest area of opportunity.

‘Help clients appreciate what vets and only vets can do. Do this work well and provide best service allowing proper fee structure for time taken etc’

‘Vets need to respond to what clients want, not wait for fire brigade services to be requested. In the farming area it is consultancy, preventative work, courses’

‘Veterinary practice has always responded to its market and client expectations have burgeoned, but a concern is the gradual exclusion of the less well-off from seeking help in private practice. We need to address this trend as it could impact on the regard in which the profession is held’

‘High levels of service mean a more satisfied customer, as long as they also appreciate it comes at a cost. It can set independents apart from high throughput low cost practices – both have a place’

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OPPORTUNITY NO.2: VET EDUCATION

Vets would like to see veterinary training developed further. They want it to reflect the real breadth of career choices graduates do and will face – and allow students to specialise earlier

- ‘More emphasis on sustainability, food security, public health, international animal health/globalisation and the roles of vets in other sectors of society’
- ‘The profession needs to diversify. Not every new graduate should become a clinician. Not everyone is suited to a very demanding clientele. The face of the profession is changing to a far more business-orientated approach’
- ‘More emphasis on other areas vets are needed in – conservation, environment, food security, global aid, research etc. Less overemphasis on high-end, companion animal surgery/medicine until after qualifying’
- ‘Maybe the time for prequalification specialisation will come. Also there is the opportunity to teach empathy, counselling and people management – there is not enough of this in most courses at the moment’
OPPORTUNITY NO.3: PUBLIC HEALTH

Vets are eager to increase awareness and understanding of the contributions they can and do make to issues of public health.

‘Closer collaboration with medical service e.g. in One Health programmes and use of medicines. Return to veterinary presence in markets and animal gatherings for information exchange and gathering.’

‘Through positive media interaction vets can highlight the roles they have in control of animal disease and hence public health and enhance public view of importance of vets outside of the companion animal role.’

‘We are poorly represented in research/drug development/government policy groups, possibly due to lack of awareness amongst our profession of the opportunities available, but possibly also because the profession as a whole seems incapable of publicising how much we actually know!’

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Which one issue do you consider to be the greatest threat to the future of the veterinary profession?

% selecting as greatest threat

- Growing corporatisation: 20%
- Increasing numbers of places for vet students: 16%
- Internet based animal health advice/products: 13%
- Public concerns about the cost of services: 10%
- Vets decreasing profile in the media: 7%

Vets perceive the greatest threat to lie in changes to the marketplace – growing corporatisation, potential oversupply of vets, competition from the internet, and perceived concerns about pricing.
4. AMBITIONS FOR 2030
THE MOST IMPORTANT GOALS FOR 2030
CENTRE ON RECOGNITION FOR VETS

Base: numbers answering for each statement varied – min 537, max 551

<table>
<thead>
<tr>
<th>Statement</th>
<th>% scoring 9 or 10</th>
<th>Mean score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veterinary leadership on animal welfare</td>
<td>54%</td>
<td>8.43</td>
</tr>
<tr>
<td>Respected and valued role in society</td>
<td>50%</td>
<td>8.30</td>
</tr>
<tr>
<td>Treating as far as we should, not as far as we can</td>
<td>48%</td>
<td>8.06</td>
</tr>
<tr>
<td>Valued role for vets in education on responsible animal ownership</td>
<td>48%</td>
<td>8.06</td>
</tr>
<tr>
<td>Higher profile on animal-related issues that affect public health *</td>
<td>39%</td>
<td>7.86</td>
</tr>
<tr>
<td>Less stress</td>
<td>45%</td>
<td>7.68</td>
</tr>
<tr>
<td>Pricing policy not dependent on medicine sales</td>
<td>31%</td>
<td>7.29</td>
</tr>
</tbody>
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*Mean score indicates that this goal generated more polarised views in terms of its importance

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REDUCING LEVELS OF STRESS IS THE TOP PRIORITY

Base: 556

Which goal would you give highest priority to?
% selecting as ‘top’ goal

- Less stress: 19%
- Veterinary leadership on animal welfare: 14%
- Respected and valued role in society: 14%
- Treating as far as should, not as far as we can: 12%
- Valued role in ed on responsible animal ownership: 9%
- Vets active in a wider range of activities: 5%
- Higher profile on animal-related public health: 4%
- Pricing policy not dependent on medicine sales: 5%
- Other goals: 16%

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SOME GOALS DIFFER BY TYPE OF VET

Base: 556

Less Stress
More likely to be:
• Vets in small animal and equine practice
• Younger vets <35 years
• Those thinking of exiting profession
• Women

Respected and valued role in society
More likely to be:
• Business owner/partner (20% chose this as highest priority)

Treating as far as should, not as can
More likely to be:
• Self-employed or retired vets

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INITIATIVES HIGHLIGHTED BY VETS

Base: 103

Expanding scope of work
46%
- Food nutrition
- Sustainable farming
- Prevention
- Responsible ownership
- Human medicine
- Technological developments (e.g. remote robotic surgery)

Responding to competition
13%
- More partnerships between practices
- Overseas sabbaticals
- Concerted efforts to meet competition from other sectors

Improving the workplace
30%
- More provision for part-time working
- More support for new graduates
- Flexible shift patterns
- Mental health support
- Allocated time for paperwork

Continuing professional development
10%
- Increasing online CPD resources
- CPD tools/resources for allied professional areas (e.g. dentistry, physiotherapy)

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A DIGITAL FUTURE?

Some vets see opportunities from embracing the digital revolution

Specifically:

• The opportunity to create completely new services – and ways to deliver quality information to clients and the broader public

• Opportunities to improve the efficiency of existing services

• Opportunities for shared learning and CPD for those in practice

• A platform for raising public awareness

‘The possibility of providing easy access to accurate information on animals is something the veterinary profession should be embracing!’

‘Skype based consultations/Q & A sessions. Web based interactive & interlinked herd health plans with traceable search facilities’

‘Online pharmacies and well informed online veterinary services, similar to Boots “online doctor”’

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5. PROFILE OF RESPONDENTS

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85% OF RESPONDENTS ARE CURRENTLY WORKING

Base: 611

Which of the following best describes your current working status in the veterinary profession?

- Business owner/Partner, 27%
- Employed, 49%
- Student, 9%
- Self-employed, 7%
- Retired, 3%
- Not currently working, 5%

- Those retired are virtually all male
- 4 out of 5 students are female, and 1 in 10 are aged over 35yrs
- Those not currently working are more likely to be female

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MOST (56%) WHO ARE WORKING ARE IN SMALL ANIMAL/EXOTIC PRACTICE

Base: 516

If you are currently employed, what area of veterinary work accounts for most of your time?

Small animal/exotic practice: 56%
- 54% employed
- 37% business owner or partner
- 9% self-employed

Other areas:
- Academia/education
- Commerce/industry
- Charities/trusts
- Government

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72% of working vets earn less than £55k

Base: 442

Please indicate on the scale below your approximate gross income (before tax) in 2014, including benefits

- 34% up to £35k
- 38% £35k-£55k
- 28% > £55k

- 46% of vets in employed roles are earning £35k-£55k – 39% earn less than £35k
- 59% of business owners/partners are earning more than £55k
- 57% of self-employed vets are earning less than £35k – only 12% earn >£55k

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26% OF WORKING RESPONDENTS ARE PART-TIME

Base: 464

Are you currently working full or part time?

- 65% of self-employed vets are working part-time
- 86% of business owners/partners are working full-time
- 74% of vets in employed roles are working full-time

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58% OF RESPONDENTS ARE WOMEN

Base: 612

- Men are more likely to be older (>55 years)
- Women are more likely to be younger (<37 years)
Which of the following best describes your current working status in the veterinary profession?

- Employed
- Business owner/partner
- Self-employed