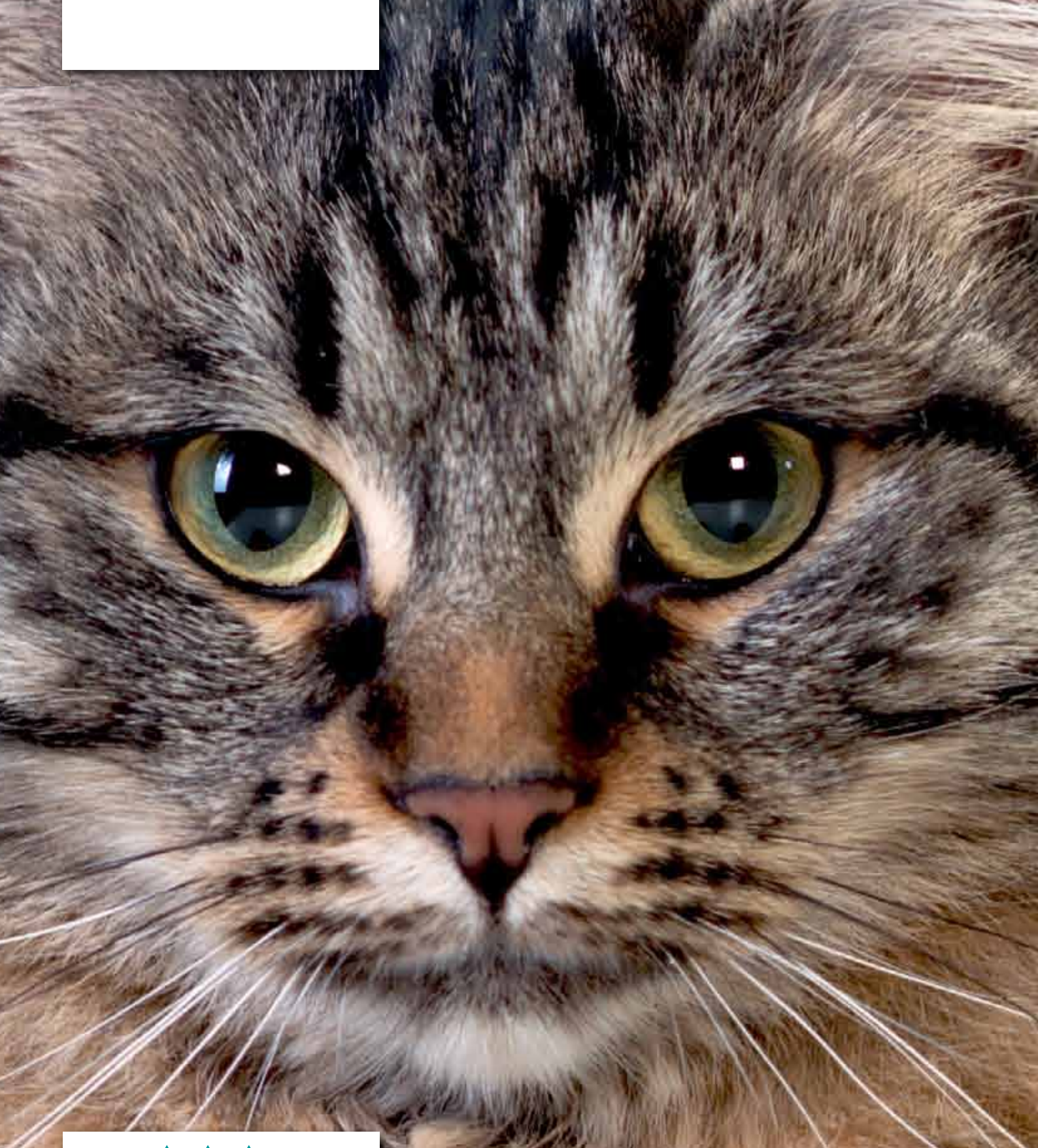




# FVE Survey of the Veterinary Profession in Europe





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# Introduction and Analysis by FVE Task Force Report

## Introduction by Rafael Laguens, FVE Vice-President

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

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

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

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

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

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

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



Rafael Laguens

## Analysis by FVE Task Force Report

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

### Significant findings

#### Demographics and job market

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

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

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

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

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

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

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

#### Financial

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

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

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

#### Other

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

## Points for further consideration

### Demographics & job market

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

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

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

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

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

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

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

### Financial

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

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

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

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

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

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

### Suggestions for future surveys

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

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

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

### Task Force members:

Jason Aldiss (UK), Pierre-Yves Anglaret (France), Bob Carrière (Netherlands) Christine Fossing (Denmark), Heiko Färber (Germany), Rafael Laguens (Spain), Nick Stace (UK), Marjan Tracer (Slovenia) and Nancy De Briyne (FVE).

# Executive Summary

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

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

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

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

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

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

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

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



# Survey Methodology

This research is based on a survey conducted amongst veterinarians across Europe. Whilst several FVE member organisations collect statistical data about veterinarians in their country, many more do not. And when the existing data is collated across Europe there are many inconsistencies in the data collected and even more gaps in the data. In order to gain a full and consistent picture of the profession across Europe we sought to collect the same data using the same questionnaire and at the same time amongst veterinarians in all European countries.

To do this, we required the active help and support of FVE member organisations. Twenty four member organisations participated and we are immensely grateful for their support. Two more member organisations participated partially by providing data from their recent surveys. The questionnaire was available in 13 different languages and was available for completion between 1 May to 30 September 2014. In total, 13 000 vets took part in this survey - a fantastic response. The table below shows the response from each participating country, and the statistical confidence for each. Those countries with a relatively low statistical confidence level are marked in tables with an asterisk indicating their data must be viewed with caution. Generally we avoid commenting on findings from these countries in the text. The overall statistical confidence is +/-0.8 per cent at the 95% confidence level which means we can be 95 per

cent certain that the Europe total results are accurate to within +/-0.8 percentage points.

Please note, it is possible that in some countries the survey questionnaire was distributed unevenly so there may be an element of bias within the response - e.g. under-representation of veterinarians in official positions, or veterinarians on long-term sick leave.

“EUROPE-38”\*: all countries in Europe represented by FVE members  
 “EUROPE-24”\*: all countries responding to the survey

Chart A-1  
 Countries participating in the survey



Table A-1  
 Summary of response to survey

	number of active* vets	number of respondents	respondents as per cent of all vets in country	statistical confidence +/-
Austria	3 100	220	7	6.4
Belgium	6 400	170	3	7.4
Bulgaria	3 400	93	3	10.0
Czech Republic	3 600	348	10	5.0
Denmark	2 250	80	4	10.8
Estonia	800	144	18	7.4
Finland	1 700	406	24	4.2
France	17 000	1 945	11	2.1
FYROM	250	87	36	8.5
Germany	26 800	2 183	8	2.0
Hungary	2 850	7	<1	37.0
Iceland	100	16	14	22.8
Italy	30 100	1 301	4	2.7
Latvia	700	31	4	17.2
Luxemburg	250	23	10	19.4
Netherlands	3 800	653	17	3.5
Norway	2 250	640	28	3.3
Poland	9 500	127	1	8.6
Portugal	5 000	173	3	7.3
Romania	7 400	439	6	4.5
Serbia	2 750	536	20	3.8
Slovakia	2 150	214	10	6.4
Spain	22 400	2 281	10	1.9
Sweden	1 900	290	15	5.3
Switzerland	2 100	594	28	3.4
Ireland	2 000	724	36	3.1
United Kingdom	20 800	6988	27	1.0
<b>EUROPE-24</b>	<b>158 550</b>	<b>13 001</b>	<b>8</b>	<b>0.8</b>

\* Number of Active Vets source: FVE. Figures refer to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE., except Belgium and United Kingdom.

# 1

## Demography of the Profession



## KEY FINDINGS - CHAPTER 1: Demography of the Profession

- Estimated number of veterinarians in Europe: 243 000
- This equates to 0.38 veterinarians per 1000 population
- 44 per cent of veterinarians aged under 40
- 53 per cent of veterinarians are female
- 78 per cent work full-time
- Reported unemployment is 3 per cent
- Private practice dominates, employing 60 per cent of veterinarians
- 19 per cent work in public service
- 21 per cent have a second job, most second employment is also in the Veterinary profession
- 48 per cent specialise in companion animals

## 1.1 Number of Veterinarians in Europe

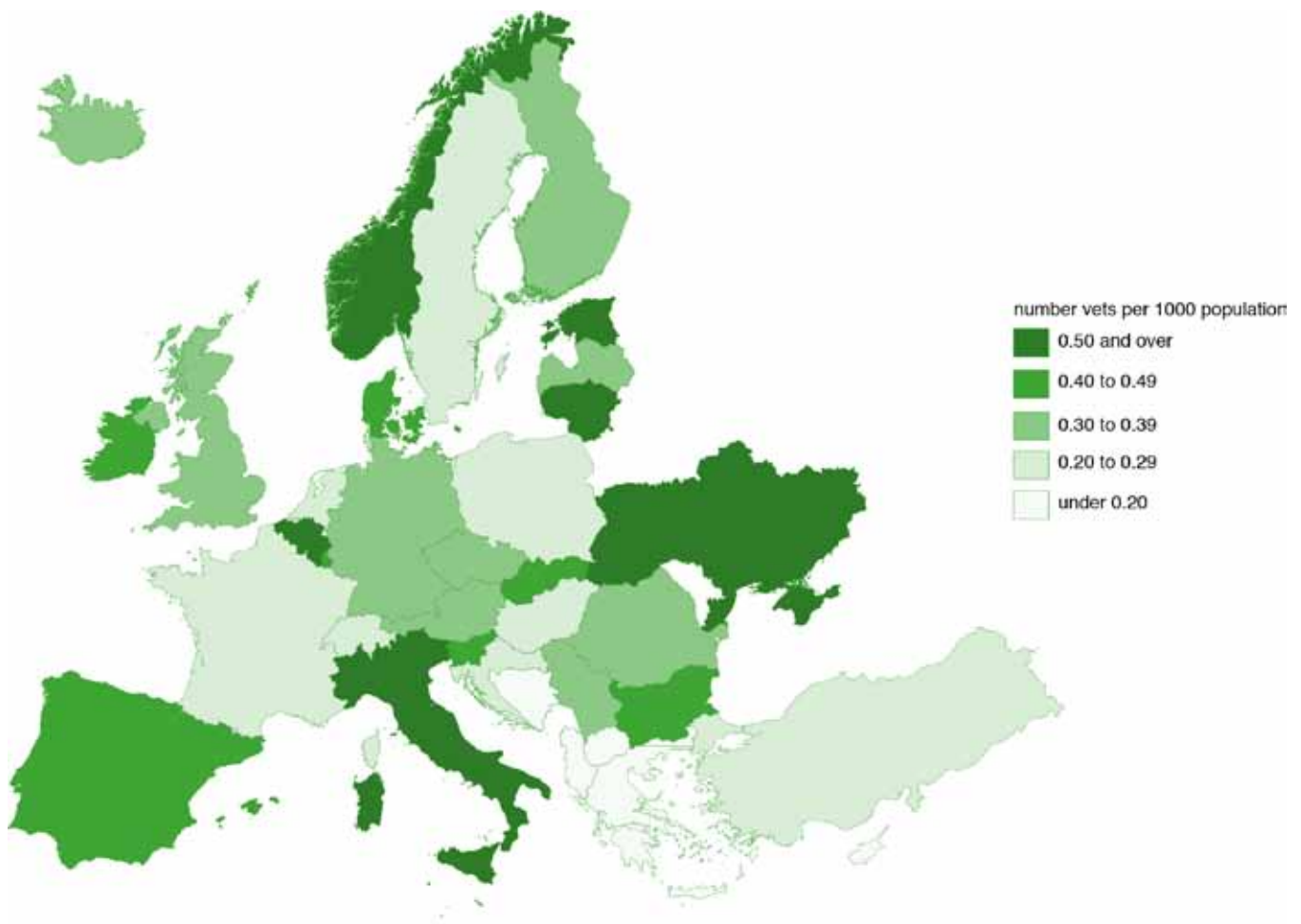
There are an estimated 243 000 veterinarians in Europe. Half of Europe’s veterinarians come from just four countries – Ukraine, Italy, Germany and Spain. Other countries with high numbers of veterinarians include France, the United Kingdom and Turkey.

as many in Ukraine and Lithuania and around 0.5 veterinarians per 1000 people in Italy, Spain, Portugal and Estonia. Fewer than 0.2 veterinarians per 1000 people are recorded in Greece, Bosnia/Herzegovina, Cyprus, FYROM and Albania.

On average across Europe there are 0.38 veterinarians per 1000 population; but there are at least twice

The number of veterinarians per head of population is shown in the chart below.

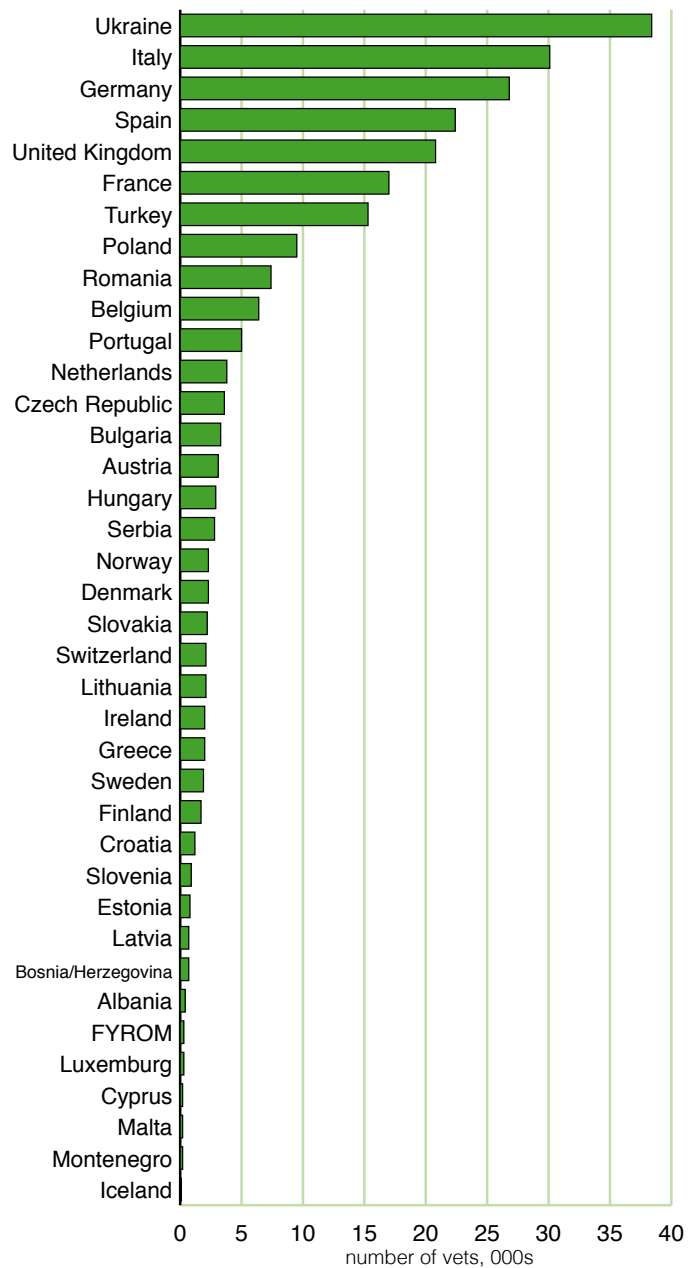
Chart 1-1  
Number of veterinarians per 1000 population mapped by country



**Table 1-1**  
Estimated number of veterinarians in each European country

	number of vets	population	vets per 1000 population
Albania	400	2 895 947	0.14
Austria	3 100	8 507 786	0.36
Belgium	6 400	11 203 992	0.57
Bosnia and Herzegovina	700	3 830 911	0.18
Bulgaria	3 400	7 245 677	0.47
Croatia	1 150	4 246 700	0.27
Cyprus	150	858 000	0.18
Czech Republic	3 600	10 512 419	0.34
Denmark	2 250	5 627 235	0.40
Estonia	800	1 315 819	0.61
Finland	1 700	5 451 270	0.31
France	17 000	65 856 609	0.26
FYROM	250	2 065 769	0.12
Germany	26 800	80 780 000	0.33
Greece	1 950	10 992 589	0.18
Hungary	2 850	9 879 000	0.29
Iceland	100	325 671	0.36
Ireland	2 000	4 604 029	0.43
Italy	30 100	60 782 668	0.50
Latvia	700	2 001 468	0.36
Lithuania	2 100	2 943 472	0.72
Luxemburg	250	549 680	0.43
Malta	150	425 384	0.36
Montenegro	150	624 335	0.22
Netherlands	3 800	16 829 289	0.23
Norway	2 250	5 109 056	0.44
Poland	9 500	38 495 659	0.25
Portugal	5 000	10 427 301	0.48
Romania	7 400	19 942 642	0.37
Serbia	2 750	7 146 759	0.38
Slovakia	2 150	5 415 949	0.40
Slovenia	900	2 061 085	0.44
Spain	22 400	46 507 760	0.48
Sweden	1 900	9 644 864	0.20
Switzerland	2 100	8 136 689	0.26
Turkey	15 300	64 308 261	0.24
Ukraine	38 400	45 245 894	0.85
United Kingdom	20 800	64 308 261	0.32
<b>EUROPE-38</b>	<b>242 700</b>	<b>647 105 899</b>	<b>0.38</b>

**Chart 1-2**  
Estimated number of veterinarians in each European country



Population source: Eurostat population as at 1 January 2014 copyright (c) Eurostat

Number of Vets source: FVE. Figures refer to the number of active vets ie **excluding** retired, unemployed, not working.

## 1.2 Age

The age profile of the profession is skewed towards the younger age groups, with a peak at age 30 to 34. Overall, 44 per cent of the profession is aged under 40; 24 per cent are in their forties and 30 per cent are aged between 50 and 64. Two per cent are aged 65 or over.

The youngest veterinarian population appears to be in Portugal, the Czech republic, FYROM and Romania; while more than a quarter are aged 55 and over in the Netherlands and Poland. Indeed Poland is unusual in that it has a high proportion of younger and older veterinarians – with few aged between 40 and 55.

Chart 1-3  
Veterinarians aged under 40 mapped by country

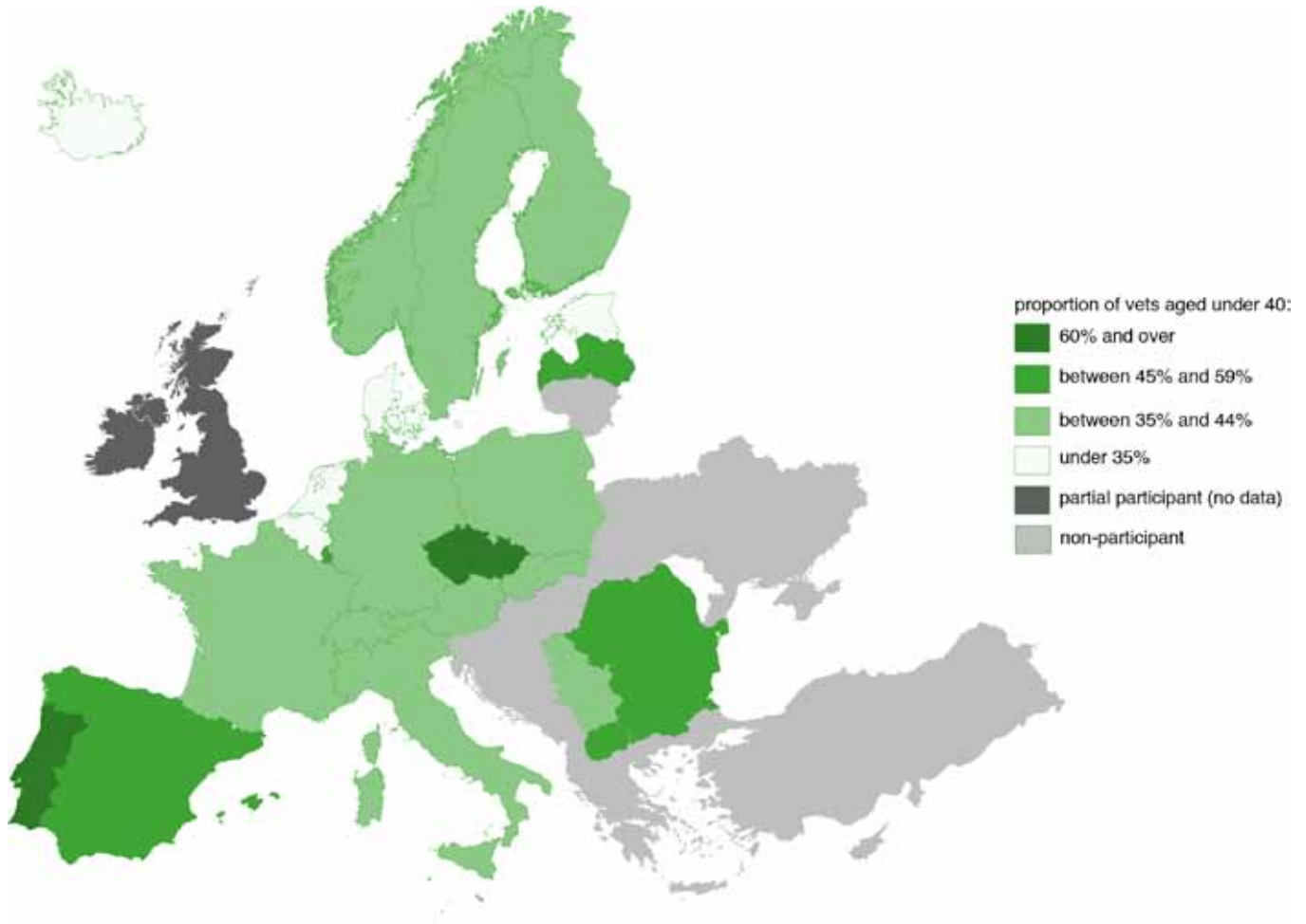


Chart 1-4  
Veterinarians by age - Europe

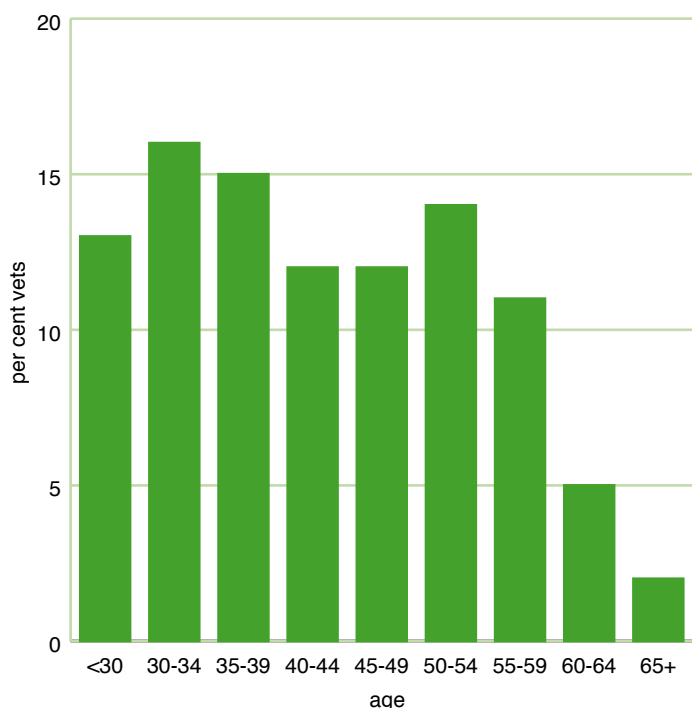


Table 1-2  
Age of Veterinarians analysed by country

per cent	<30	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
Austria	6	16	14	14	17	13	11	8	1
Belgium	6	12	12	11	14	21	11	9	4
Bulgaria*	8	18	19	6	13	13	14	7	2
Czech Republic	27	22	16	5	8	8	8	4	3
Denmark*	6	9	15	18	9	19	13	9	4
Estonia	9	14	9	15	18	15	10	6	4
Finland	10	13	16	17	13	10	11	6	3
France	11	14	14	12	13	17	12	6	2
FYROM	11	21	21	20	23	2	0	1	0
Germany	11	17	15	12	14	13	9	5	4
Iceland*	0	25	6	25	19	0	6	13	6
Italy	9	13	15	10	11	17	16	7	1
Latvia*	10	23	16	19	10	13	6	3	0
Luxemburg*	4	26	22	9	4	26	9	0	0
Netherlands	9	13	10	12	12	17	13	7	7
Norway	8	15	17	13	11	13	12	7	4
Poland	17	18	9	7	9	9	21	6	4
Portugal	33	28	15	12	3	6	1	2	0
Romania	15	19	18	14	15	8	6	3	3
Serbia	5	15	15	15	22	17	7	3	1
Slovakia	12	20	11	10	8	17	12	6	5
Spain	18	19	15	12	14	13	6	2	1
Sweden	10	11	14	17	11	12	14	10	0
Switzerland	12	14	13	11	13	15	14	6	2
Ireland	13	< 30 >		< 24 >		< 17 >		< 15 >	
United Kingdom	17	16	13	11	9	9	7	6	12
EUROPE-24	13	16	15	12	12	14	11	5	2

\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

### 1.3 Gender

The gender split across Europe is almost equal; 53 per cent of veterinarians are female, 47 per cent male. Countries with the highest proportion of male veterinarians are FYROM (81 per cent male), Slovakia and Serbia (both 72 per cent); while Finland and Sweden have the highest proportion of female veterinarians (87 and 80 per cent respectively).

Table 1-3  
Gender of Veterinarians analysed by country

per cent	male	female
Austria	47	53
Belgium	60	40
Bulgaria*	51	49
Czech Republic	42	58
Denmark*	38	63
Estonia	47	53
Finland	13	87
France	51	49
FYROM	81	19
Germany	32	68
Iceland*	44	56
Italy	51	49
Latvia*	26	74
Luxemburg*	39	61
Netherlands	51	49
Norway	33	67
Poland	62	38
Portugal	38	62
Romania	69	31
Serbia	72	28
Slovakia	72	28
Spain	48	52
Sweden	20	80
Switzerland	48	52
Ireland	59	41
United Kingdom	46	54
EUROPE-24	47	53

Chart 1-5  
Gender break-down of the profession - Europe

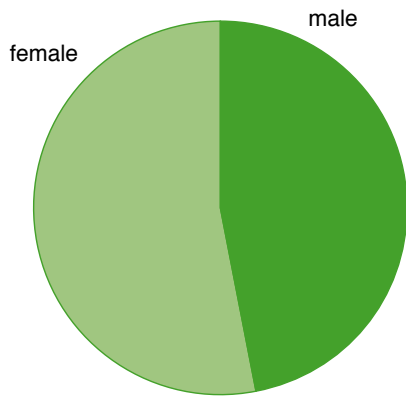
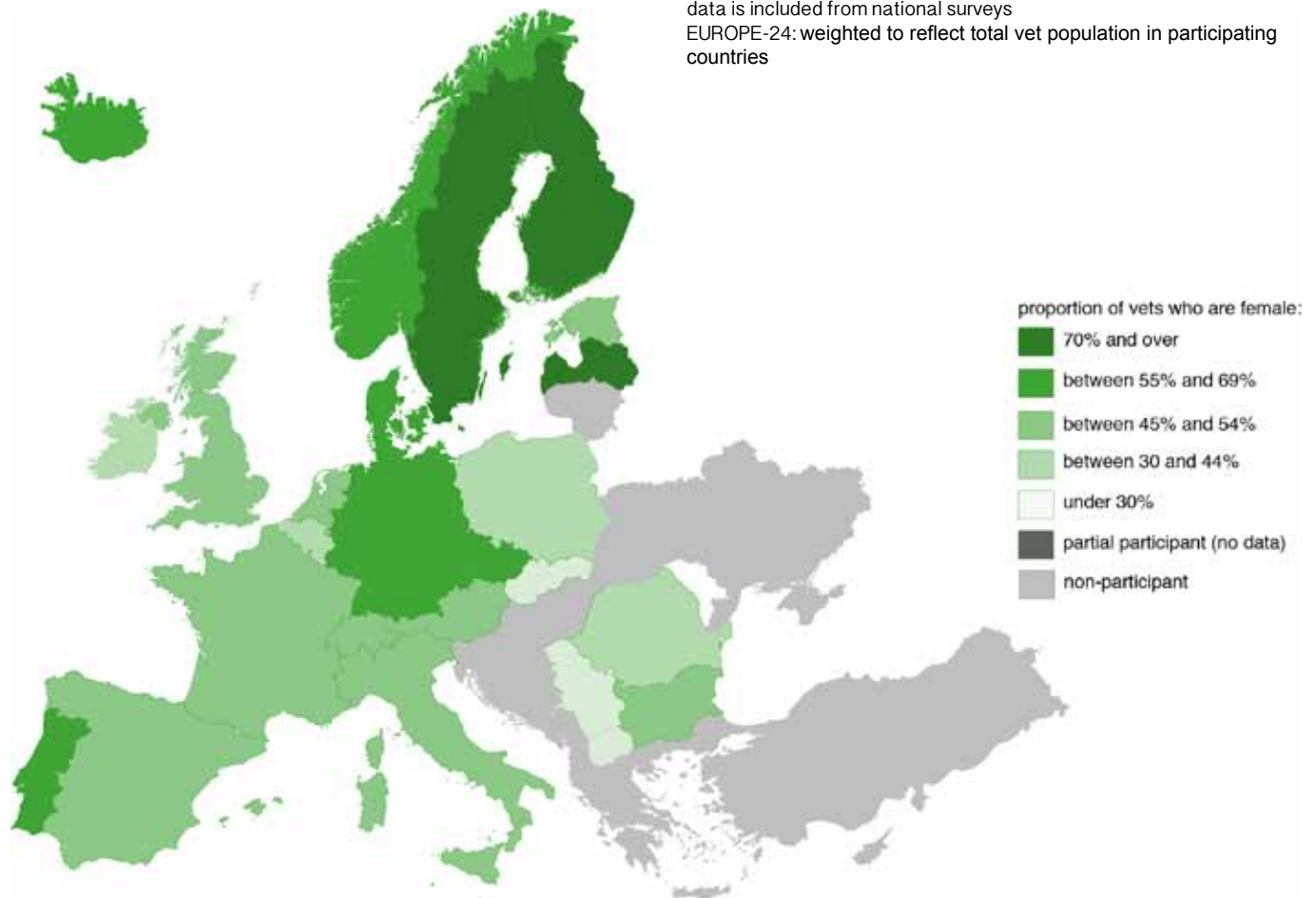


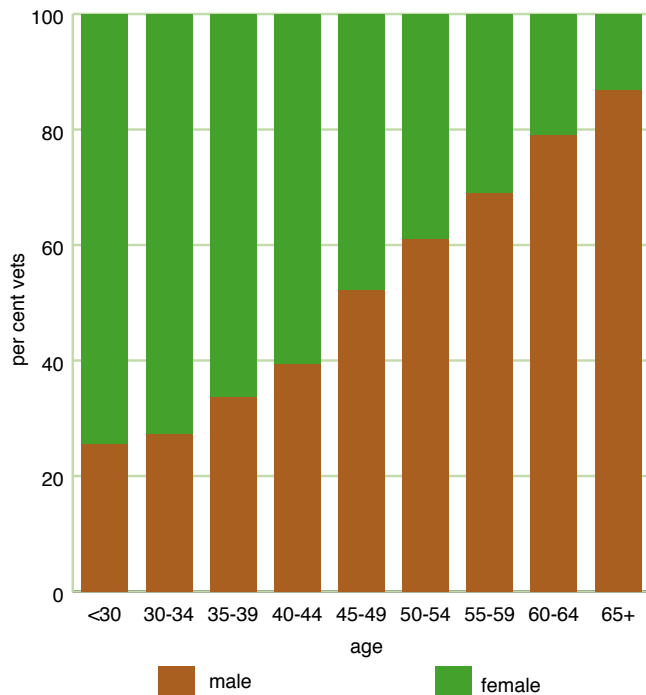
Chart 1-6  
Proportion of Vets who are female mapped by country



\* caution: small sample  
Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: weighted to reflect total vet population in participating countries



Chart 1-7  
Veterinarians' age analysed by gender - Europe



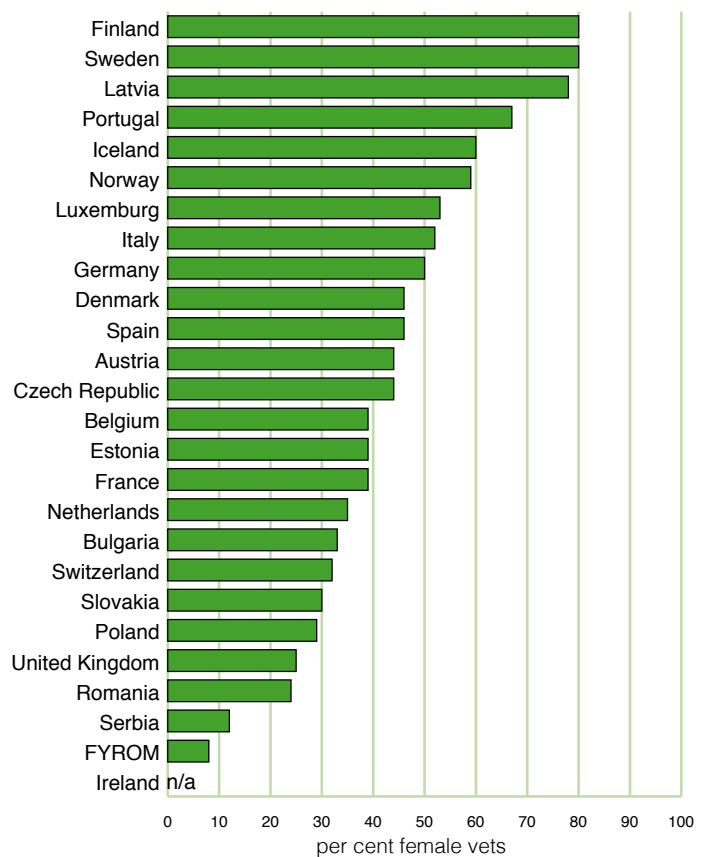
When analysed by age, the split between male and females is dramatic. The chart on the left shows that women account for over 70 per cent of the profession at age 30 but this falls to about 20 per cent at age 60. The pattern for males is almost the exact opposite; rising from about 25 per cent at age 30 to 80 per cent at age 60. There are equal numbers of males and female veterinarians around age 45.

Overall, 53 per cent of veterinarians are female. But the majority, 55 per cent, of veterinarian practice owners are male (table 1-4).

Table 1-4  
Gender of Veterinarian practice owners analysed by country

per cent	male	female
Austria	56	44
Belgium	61	39
Bulgaria*	67	33
Czech Republic	56	44
Denmark*	54	46
Estonia	61	39
Finland	20	80
France	61	39
FYROM	92	8
Germany	50	50
Iceland*	40	60
Italy	48	52
Latvia*	22	78
Luxemburg*	47	53
Netherlands	65	35
Norway	41	59
Poland	71	29
Portugal	33	67
Romania	76	24
Serbia	88	12
Slovakia	70	30
Spain	54	46
Sweden	20	80
Switzerland	68	32
Ireland	n/a	n/a
United Kingdom	75	25
EUROPE-24	55	45

Chart 1-8  
Proportion of female Veterinarian practice owners ranked by country



\* caution: small sample  
Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys. The UK figure is derived from data in more than one table within the UK study.  
EUROPE-24: weighted to reflect total vet population in participating countries

## 1.4 Years Working as a veterinarian

About half of the profession has been working as a veterinarian for more than 15 years. Nearly one third, 31 per cent, have between 6 and 15 years' experience; 20 per cent five years or less. 'Experience' means working as a veterinarian. The proportion of veterinarians with the most experience is highest in Belgium, Denmark, France, the Netherlands and Estonia. The highest proportion of veterinarians with no more than two years' experience is in Czech Republic (17 per cent) and Portugal (16 per cent).

Table 1-5  
Number of years working as a Veterinarian analysed by country

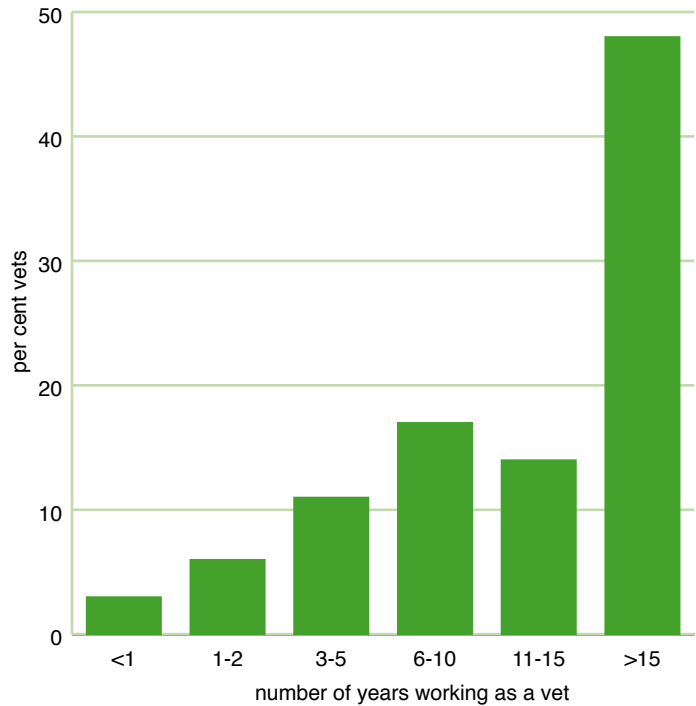
per cent	<1	1-2	3-5	6-10	11-15	>15
Austria	<1	4	8	19	19	50
Belgium	1	<1	9	12	11	67
Bulgaria*	2	1	9	15	21	52
Czech Republic	9	8	24	18	10	32
Denmark*	3	3	9	14	13	60
Estonia	3	4	8	20	6	58
Finland	1	6	11	14	18	50
France	1	4	8	16	13	58
FYROM	3	7	21	20	22	27
Germany	4	7	12	17	15	45
Iceland*	0	0	13	25	13	50
Italy	3	5	10	16	14	52
Latvia*	6	3	10	16	19	45
Luxemburg*	0	0	4	30	26	39
Netherlands	2	5	9	14	12	58
Norway	4	5	9	15	15	51
Poland	3	9	9	15	10	54
Portugal	5	11	27	24	13	20
Romania	2	11	13	19	15	40
Serbia	1	5	14	17	13	50
Slovakia	2	5	13	18	11	50
Spain	5	7	12	19	14	42
Sweden	4	5	13	13	15	51
Switzerland	3	4	12	14	15	52
Ireland	< 12	>	14	14	12	48
United Kingdom	<	>	43	>		57
EUROPE-24	3	6	11	17	14	48

\* caution: small sample

Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys

EUROPE-24: weighted to reflect total vet population in participating countries

Chart 1-8  
Number of years working as a veterinarian - Europe



## 1.5 Employment Status

Seventy eight per cent of veterinarians – the vast majority - work full-time. Ninety per cent or more of veterinarians work full-time in Bulgaria, Belgium, Poland, Portugal and Serbia. Seventeen per cent of veterinarians work part-time. The greatest level of part-time working occurs in the Netherlands (31 per cent), Germany and Italy (both 23 per cent) and Switzerland (22 per cent). Across Europe, three per cent of veterinarians are unemployed, while a further 2 per cent are not working for other reasons. The highest rates of reported unemployment are recorded in Spain (8 per cent), Serbia (6 per cent), Italy, Portugal and FYROM (5 per cent in each). Several countries report near zero unemployment.

Chart 1-9  
Employment status - Europe

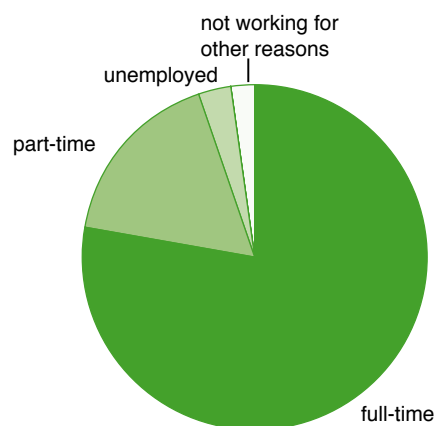


Table 1-6  
Employment Status of Veterinarians analysed by country

per cent	full-time	part-time	unemployed	retired	not working for other reasons
Austria	80	19	0	0	<1
Belgium	91	9	1	0	0
Bulgaria*	99	1	0	0	0
Czech Republic	75	18	2	1	5
Denmark*	81	13	4	0	3
Estonia	85	12	0	1	2
Finland	79	16	1	<1	3
France	85	14	1	<1	0
FYROM	89	4	5	0	2
Germany	71	23	2	1	3
Iceland*	94	6	0	0	0
Italy	69	23	5	1	2
Latvia*	55	45	0	0	0
Luxemburg*	87	13	0	0	0
Netherlands	65	31	1	2	1
Norway	86	12	1	0	1
Poland	90	10	1	0	<1
Portugal	90	4	5	0	1
Romania	85	10	<1	0	4
Serbia	90	3	6	0	1
Slovakia	86	13	0	0	1
Spain	78	13	8	<1	1
Sweden	78	20	<1	<1	1
Switzerland	75	22	2	<1	1
Ireland	< 95 >		1	3	2
United Kingdom	65	19	2	10	4
EUROPE-24	78	17	3	<1	2

\* caution: small sample      Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

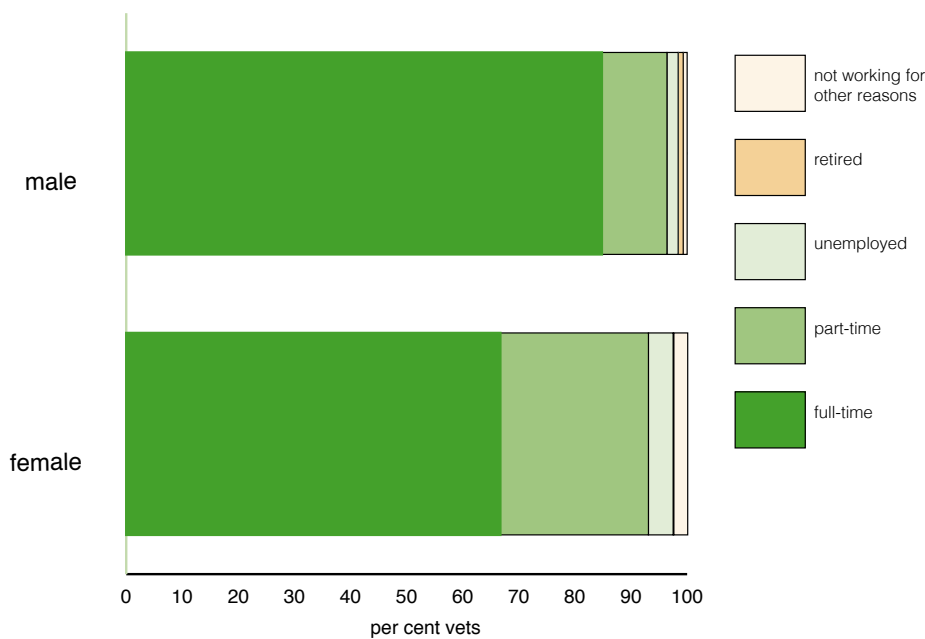
**Table 1-7**  
**Employment Status of Veterinarians analysed by gender**

per cent	full-time	part-time	unemployed	retired	not working for other reasons
Male EUROPE-24	85	12	2	1	1
Female EUROPE-24	67	26	4	<1	2
ALL - EUROPE-24	78	17	3	<1	2

EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

Analysed by gender, 67 per cent of female veterinarians work full-time, compared with 85 per cent of male veterinarians. More than twice as many female veterinarians work part-time (26 per cent) than male veterinarians (12 per cent); while also twice as high is the reported unemployment rate amongst female veterinarians (4 per cent) compared with 2 per cent amongst male veterinarians).

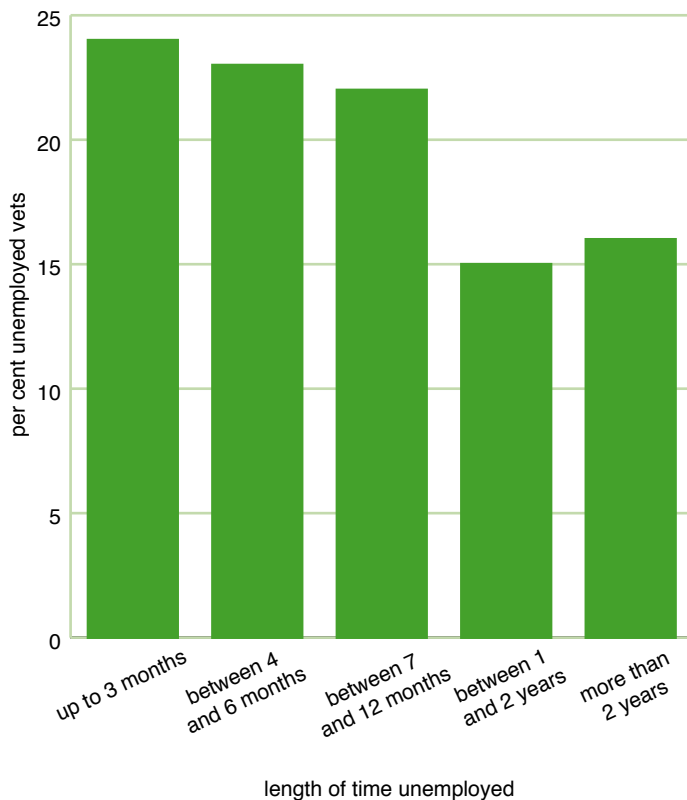
**Chart 1-10**  
**Employment status - Europe, analysed by gender**



## 1.6 Unemployment

Chart 1-11

How long veterinarians have been unemployed



Unemployed veterinarians were asked how long they had been unemployed for. One quarter, 24 per cent, had been unemployed for less than three months. About the same proportion, 23 per cent, had been unemployed for between 4 and 6 months and again a similar proportion (22 per cent) for between 7 and 12 months. Another 15 per cent had been unemployed for between 1 and 2 years, while 16 per cent had been unemployed for more than 2 years. Expressed another way, 31 per cent of unemployed veterinarians had been unemployed for at least a year.

About half of all unemployed veterinarians were currently seeking work *only* within the veterinarian profession. Thirty seven per cent were looking for work both inside and outside the profession; just 4 per cent were only looking outside the veterinarian profession.

Table 1-8

How long veterinarians have been unemployed

time period	per cent
up to 3 months	24
between 4 and 6 months	23
between 7 and 12 months	22
between 1 and 2 years	15
more than 2 years	16
EUROPE-24 unemployed vets	100

\* caution: small sample

Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys

EUROPE-24: weighted to reflect total vet population in participating countries

Table 1-9

Sectors in which looking for work

time period	per cent
only within the vet profession	51
only outside the vet profession	4
both in and outside the vet profession	37
not currently searching for work	9
EUROPE-24 unemployed vets	100

Table 1-10

How long veterinarians have been unemployed analysed for countries with high levels of unemployment (5 per cent or higher)

per cent	up to 3 months	between 4 and 6 months	between 7 and 12 months	between 1 and 2 years	more than 2 years
FYROM	25	25	0	25	25
Italy	18	10	21	18	33
Portugal	0	38	13	25	25
Serbia	0	29	10	23	39
Spain	21	18	16	25	19
EUROPE-24	24	23	22	15	16

## 1.7 Under-employment

'Underemployment' means that veterinarians do not have enough work to adequately fill their standard working hours. It may also mean that veterinarians are paid under the minimum wage, or that they are hired as an Intern / Stagiaire while doing the work of a professional. The figures are self-reported. The average figure for under-employment amongst veterinarians across Europe is 23 per cent - this is the proportion of vets who responded saying they have been "regularly" under-employed in the past 12 months. The highest levels of under-employment are recorded by veterinarians in Bulgaria (small sample) and FYROM, where the proportions are over 90 per cent. Sixty eight per cent of vets in Slovakia say they have been under-employed in the past 12 months, while fewer than 10 per cent of vets in the Netherlands and Serbia report being under-employed.

To give this figure some context, we can compare it with levels of under-employment we have recorded over time for the architectural profession in the UK. Under-employment amongst architects in the UK varies in line with the economic cycle - the 2014 figure is 11 per cent, the highest in the last ten years was 19 per cent, recorded in 2012. The under-employment figure for veterinarians, at 23 per cent, is considerably higher.

Table 1-11  
Proportion of vets regularly under-employed

per cent	'regularly' under-employed last 12 months
Austria	13
Belgium	32
Bulgaria*	99
Czech Republic	18
Denmark*	12
Estonia	21
Finland	10
France	11
FYROM	91
Germany	14
Iceland*	17
Italy	29
Latvia*	54
Luxemburg*	28
Netherlands	9
Norway	16
Poland	26
Portugal	34
Romania	47
Serbia	5
Slovakia	68
Spain	12
Sweden	15
Switzerland	10
Ireland	n/a
United Kingdom	n/a
EUROPE-24	23

Table 1-12  
Relationship between the number of vets per 1000 population, unemployment and under-employment

	vets per 1000 population (number)	reported unemployment rate (per cent)	reported under-employment rate (per cent)
Spain	0.48	8.2	12
Serbia	0.38	6.1	5
Italy	0.50	5.4	29
Portugal	0.45	5.3	34
FYROM	0.12	4.8	91
Denmark*	0.40	3.8	12
Czech Republic	0.34	2.1	18
Germany	0.33	1.8	14
Switzerland	0.26	1.6	10
Finland	0.31	1.0	10
France	0.26	0.9	11
Norway	0.50	0.9	16
Poland	0.25	0.8	26
Belgium	0.27	0.6	32
Netherlands	0.23	0.6	9
Romania	0.37	0.3	47
Sweden	0.20	0.3	15
Austria	0.36	0.0	13
Bulgaria*	0.70	0.0	99
Estonia	0.61	0.0	21
Iceland*	0.36	0.0	17
Latvia*	0.63	0.0	54
Luxemburg*	0.43	0.0	28
Slovakia	0.40	0.0	68
Ireland	0.43	1.3	n/a
United Kingdom	0.23	2.0	n/a
EUROPE-24	0.36	3.2	23

\* caution: small sample      Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

## 1.8 Field of Employment

A majority of the profession, 60 per cent, work in private practice. This is the single most popular employment sector. The second most popular sector is public service, which provides employment for 19 per cent of veterinarians. Six per cent of veterinarians work in education and research, 4 per cent in industry and private research. Another 10 per cent of the profession work in other areas as a veterinarian, while just 1 per cent work elsewhere but not as a veterinarian.

At least 80 per cent of veterinarians in the United Kingdom, Czech Republic, Belgium, Austria and France work in private practice; while the highest level of public service employment are in Bulgaria, Finland, Iceland (small sample) and Portugal. Bulgaria (small sample) stands out as having an exceptionally significant public sector, accounting for the employment of 76 per cent of veterinarians.

Chart 1-12  
Field of employment - Europe

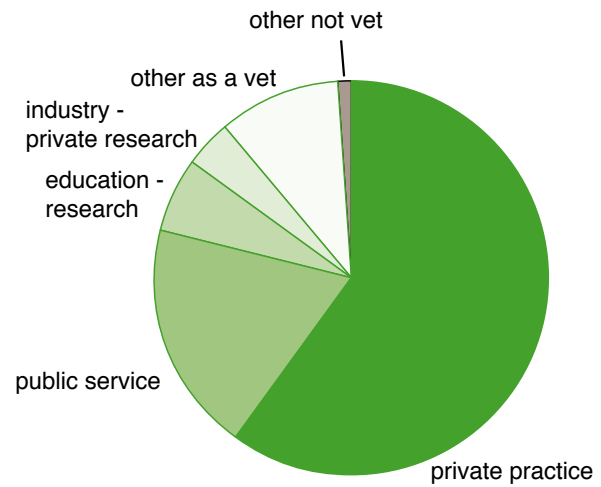


Chart 1-13  
Levels of employment in private practice mapped by country

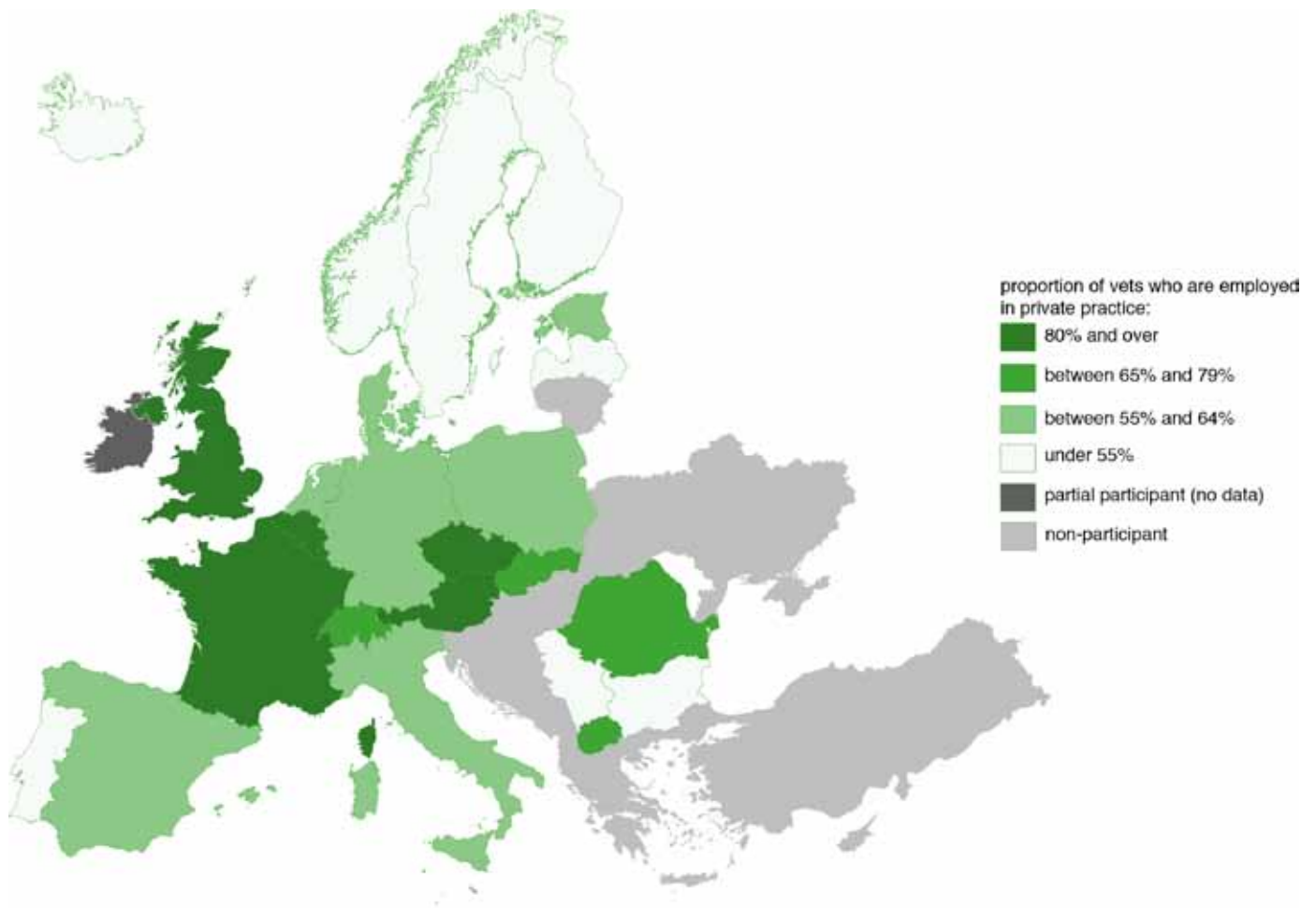


Table 1-13  
Veterinarians' Field of Employment analysed by country

per cent	private practice			public service	education - research	industry - private research	other as a vet	other not vet
	vet owners	vets not owners	ALL					
Austria	65	18	82	6	6	1	3	<1
Belgium	80	9	88	3	4	2	2	0
Bulgaria*	7	5	12	76	6	0	5	1
Czech Republic	49	32	81	2	3	1	12	1
Denmark*	37	24	60	16	7	11	4	1
Estonia	38	21	59	18	7	0	14	2
Finland	13	25	38	39	14	4	4	1
France	60	20	80	13	3	3	1	0
FYROM	33	40	73	3	0	0	24	0
Germany	35	31	65	15	7	6	4	1
Iceland*	33	0	33	47	0	7	13	0
Italy	26	35	61	27	4	3	4	2
Latvia*	29	23	52	6	6	0	32	3
Luxembourg*	65	26	91	4	4	0	0	0
Netherlands	33	29	62	12	11	8	5	2
Norway	25	24	49	29	8	5	5	3
Poland	47	14	61	27	5	1	6	0
Portugal	7	42	49	31	4	3	12	0
Romania	52	19	71	14	3	2	9	2
Serbia	31	18	49	14	9	3	23	2
Slovakia	31	39	70	6	2	0	19	3
Spain	25	34	59	18	5	5	11	1
Sweden	16	37	54	19	7	5	15	1
Switzerland	39	27	66	12	12	6	4	1
Ireland	n/a	n/a	71	20	3	4	2	1
United Kingdom	48	37	85	10	10	10	10	5
EUROPE-24	35	25	60	19	6	4	10	1

\* caution: small sample      Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

Please note, it is possible that in some countries the survey questionnaire was distributed unevenly so there may be under-reporting of certain employment fields eg public service or industry



## 1.9 Second field of Employment

A substantial minority of veterinarians, 21 per cent, have a second occupation. Having a second occupation does not necessarily mean that veterinarians were under-employed in their main field of employment. One quarter of these veterinarians have a second occupation in a private practice. Another quarter have a second occupation as an 'other' job as a veterinarian. Almost as many, 21 per cent, have a second occupation outside the profession. The highest proportion of veterinarians with a second occupation occurs in Poland (39 per cent), Romania (34 per cent), Slovakia and Belgium (both 32 per cent). Latvia has a high proportion but this is based on a small sample.

Chart 1-14  
Whether veterinarians have a second occupation

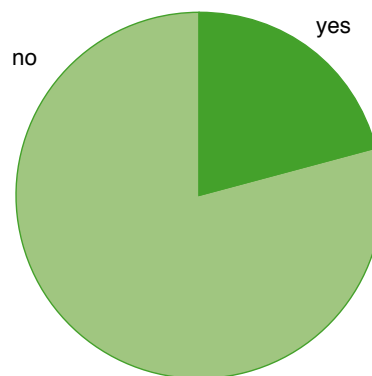


Table 1-14  
Veterinarians' Field of Employment analysed by country

per cent	have a second occupation	second employment field of those who have a second occupation					
		private practice	public service	education - research	industry - private research	other as a vet	other not as a vet
Austria	28	25	8	7	2	31	27
Belgium	32	22	18	18	2	16	25
Bulgaria*	18	7	33	0	0	33	27
Czech Republic	20	43	8	15	2	15	18
Denmark*	26	47	11	5	5	21	11
Estonia	30	18	23	13	8	21	18
Finland	18	34	22	13	4	18	9
France	14	18	17	11	4	28	24
FYROM	21	38	13	0	13	25	13
Germany	18	19	13	12	2	27	27
Iceland*	33	40	20	20	0	0	20
Italy	16	35	15	11	7	18	14
Latvia*	74	30	9	13	9	9	30
Luxemburg*	9	100	0	0	0	0	0
Netherlands	16	10	7	23	5	39	16
Norway	23	39	15	6	2	19	18
Poland	39	19	53	0	2	17	9
Portugal	16	36	16	8	0	16	24
Romania	34	25	9	10	3	34	19
Serbia	19	26	9	14	0	30	21
Slovakia	32	31	6	0	2	37	24
Spain	18	23	9	17	2	24	24
Sweden	21	40	3	14	0	28	16
Switzerland	18	29	17	15	2	18	19
Ireland	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	21	25	16	11	3	24	21

\* caution: small sample      Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

Please note, it is possible that in some countries the survey questionnaire was distributed unevenly so there may be under-reporting of certain employment fields eg public service or industry

## 1.10 Main area of focus

Almost half (48 per cent) of veterinarians focus on companion animals. This is by far the largest area of focus. Fewer than 20 per cent focus on any other area – 18 per cent on food producing animals, 16 per cent on Veterinary public health. The highest proportion of veterinarians focusing on companion animals are in the Czech Republic, Slovakia and France – where at least 60 per cent of veterinarians focus on companion animals. The highest levels of focus on food producing animals occur in Denmark, Estonia, Belgium and Austria – where at least 35 per cent of veterinarians focus on this field. The highest proportion of veterinarians focusing on equine care occur in Sweden, Germany and Austria; while Norway is the only country to have a significant number of veterinarians focusing on aquaculture (10 per cent). More than 30 per cent of veterinarians in Bulgaria (small sample) and Portugal focus on Veterinary public health.

Chart 1-15  
Area of focus - Europe

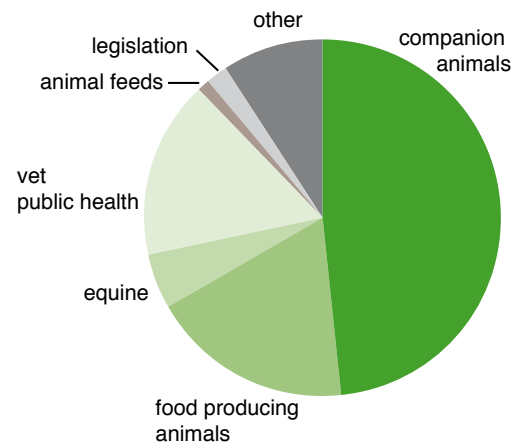
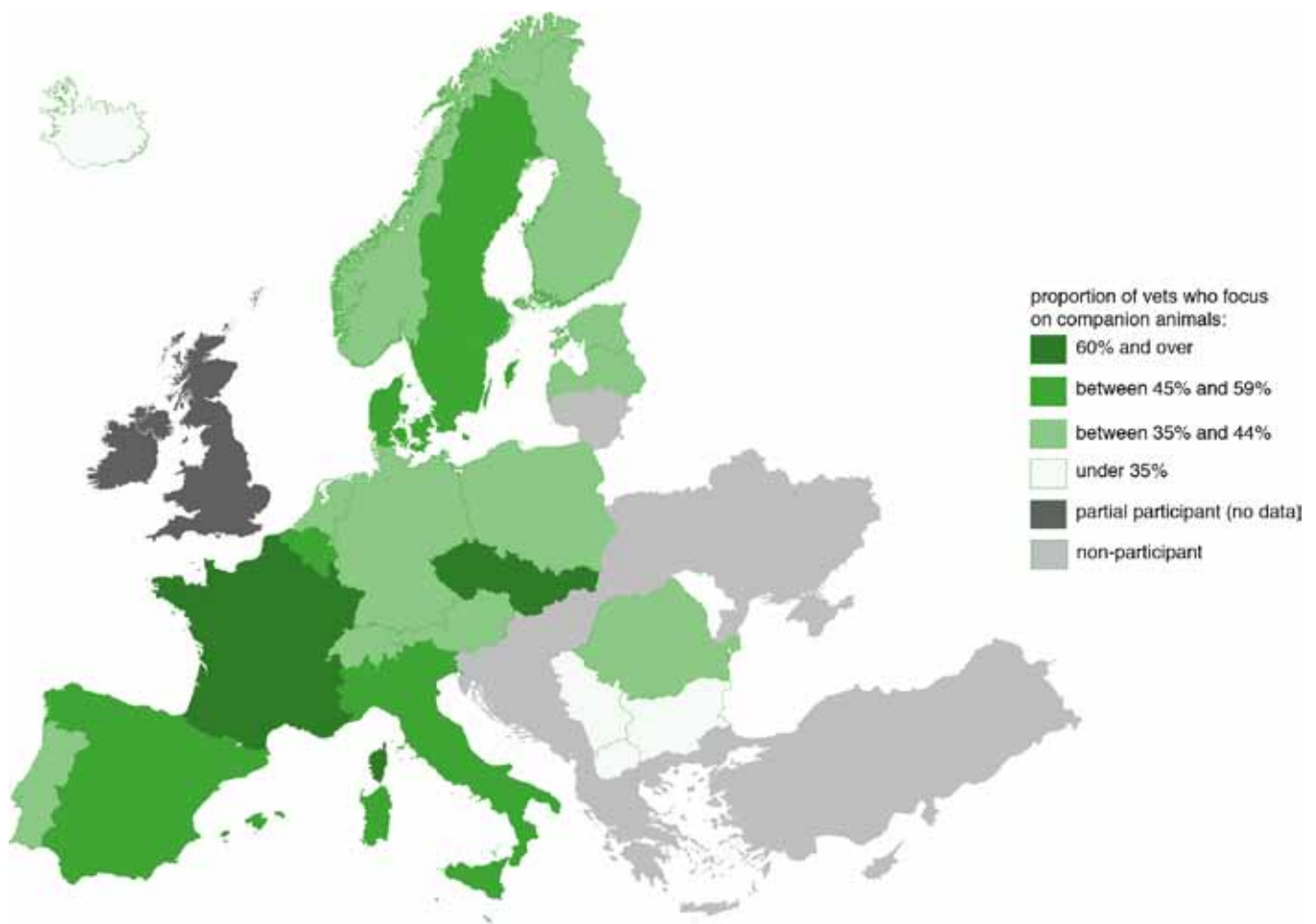


Chart 1-16  
Levels of focus on companion animals mapped by country



**Table 1-15**  
Veterinarians' area of focus analysed by country

per cent	companion animals	food producing animals	equine	vet public health	aquaculture	animal feeds	legislation	other
Austria	40	35	12	5	1	0	0	6
Belgium	53	36	3	3	1	0	1	3
Bulgaria*	19	0	1	40	0	1	12	27
Czech Republic	71	17	5	2	0	0	0	5
Denmark*	45	36	5	5	0	0	4	4
Estonia	42	35	4	11	0	0	1	7
Finland	41	19	7	18	1	0	4	10
France	60	19	3	10	0	0	1	5
FYROM	30	38	0	4	0	0	2	26
Germany	39	17	13	13	0	0	1	15
Iceland*	21	29	14	29	0	0	0	7
Italy	55	13	3	21	1	2	1	5
Latvia*	43	23	7	7	0	3	0	17
Luxemburg*	82	5	9	0	0	5	0	0
Netherlands	41	30	8	11	0	1	2	8
Norway	35	22	4	16	10	0	4	9
Poland	40	21	3	19	0	3	5	9
Portugal	44	12	2	33	0	0	4	5
Romania	44	31	1	14	0	1	1	8
Serbia	24	33	2	15	1	3	2	21
Slovakia	77	19	3	0	1	1	0	1
Spain	55	15	2	18	1	1	2	7
Sweden	45	17	15	10	0	0	5	8
Switzerland	41	27	7	9	1	0	1	13
Ireland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	48	18	5	16	<1	1	2	9

\* caution: small sample      Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

## 1.11 Reputation

Veterinarians are quite modest as to how well they think they are regarded by their customers and by the public. This question asks veterinarians to say how well they themselves think they are regarded – so is not necessarily the same as a direct question to customers and the public. Only 7 per cent believe they are “very highly” regarded by their customers. Another 40 per cent think they are regarded “quite highly”, which is the largest single rating selected by veterinarians. About half as many, 19 per cent, think they are regarded “quite poorly”, while 6 per cent say “very poorly”. The remainder (28 per cent) believe they are regarded “neutrally” by their customers. When asked how they think they are perceived by the general public, veterinarians give themselves even lower ratings. The most common rating used for customers, “quite highly”, slips from 40 to 29 per cent. Almost as many veterinarians, 26 per cent, believe the public rates them “quite poorly”. Add together the “quite” and “very” scores and more veterinarians think they are “poorly” regarded by the general public (36 per cent) than “highly” regarded (33 per cent). Amongst customers, veterinarians score themselves 25 per cent “poorly” against 47 per cent “highly”.

Chart 1-17  
How well veterinarians think they are regarded by their customers and by the general public - Europe

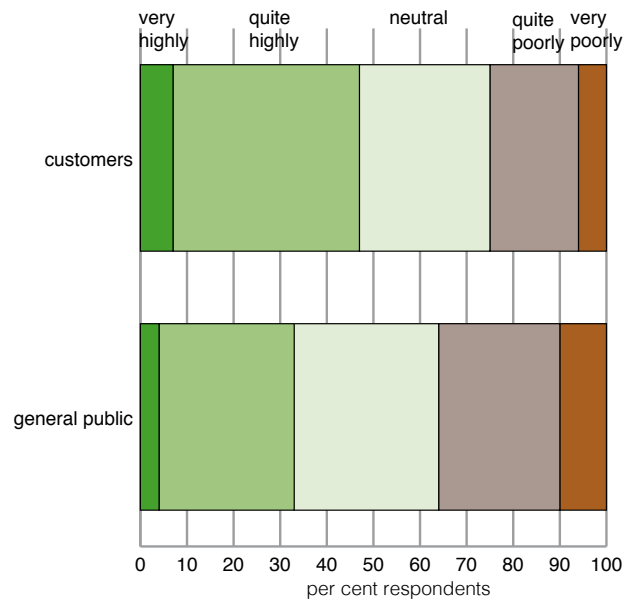


Chart 1-18  
How well veterinarians think they are regarded by the public mapped by country

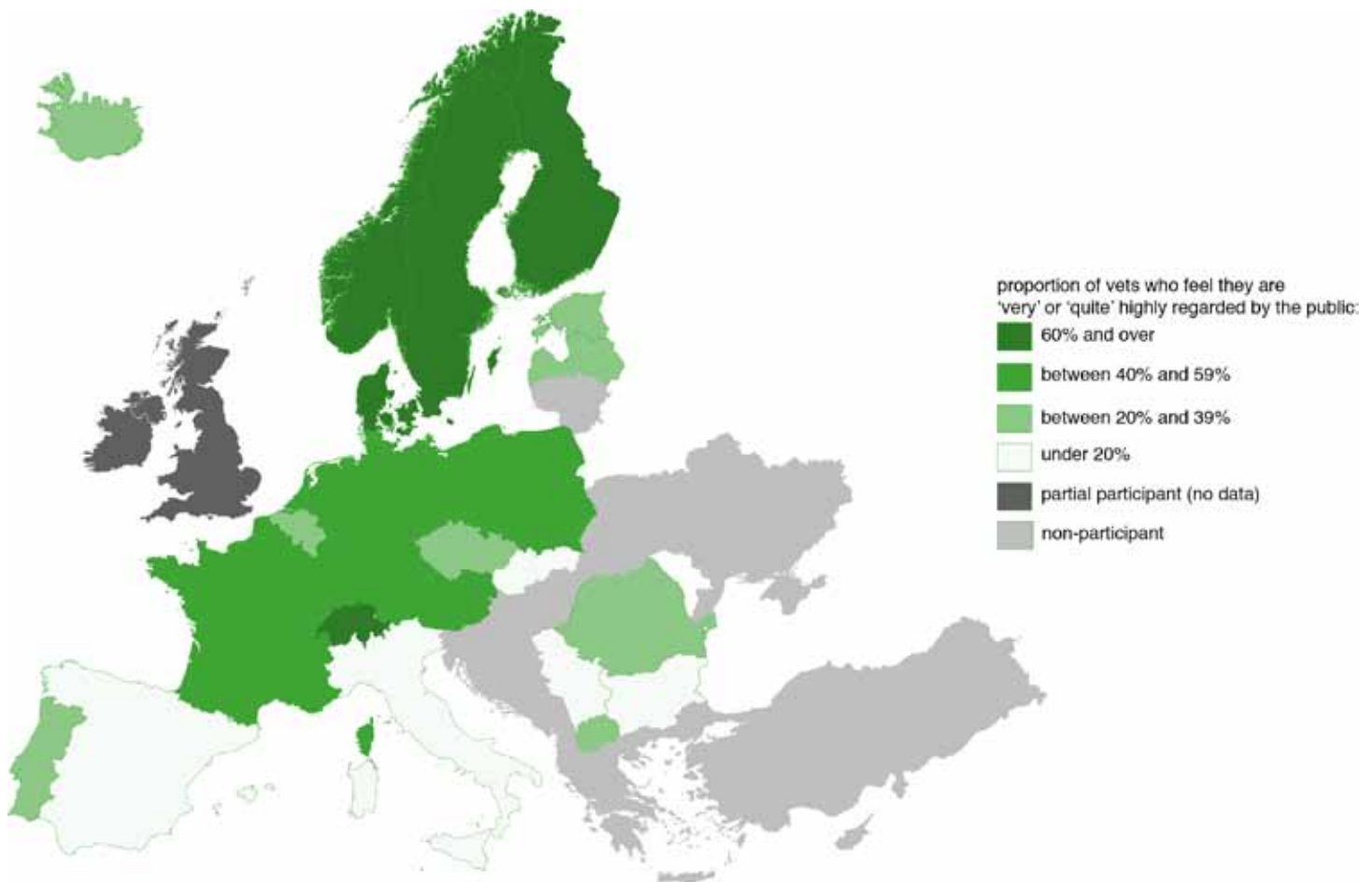


Chart 1-19

How well veterinarians think they are regarded by the general public ranked by country - highest first

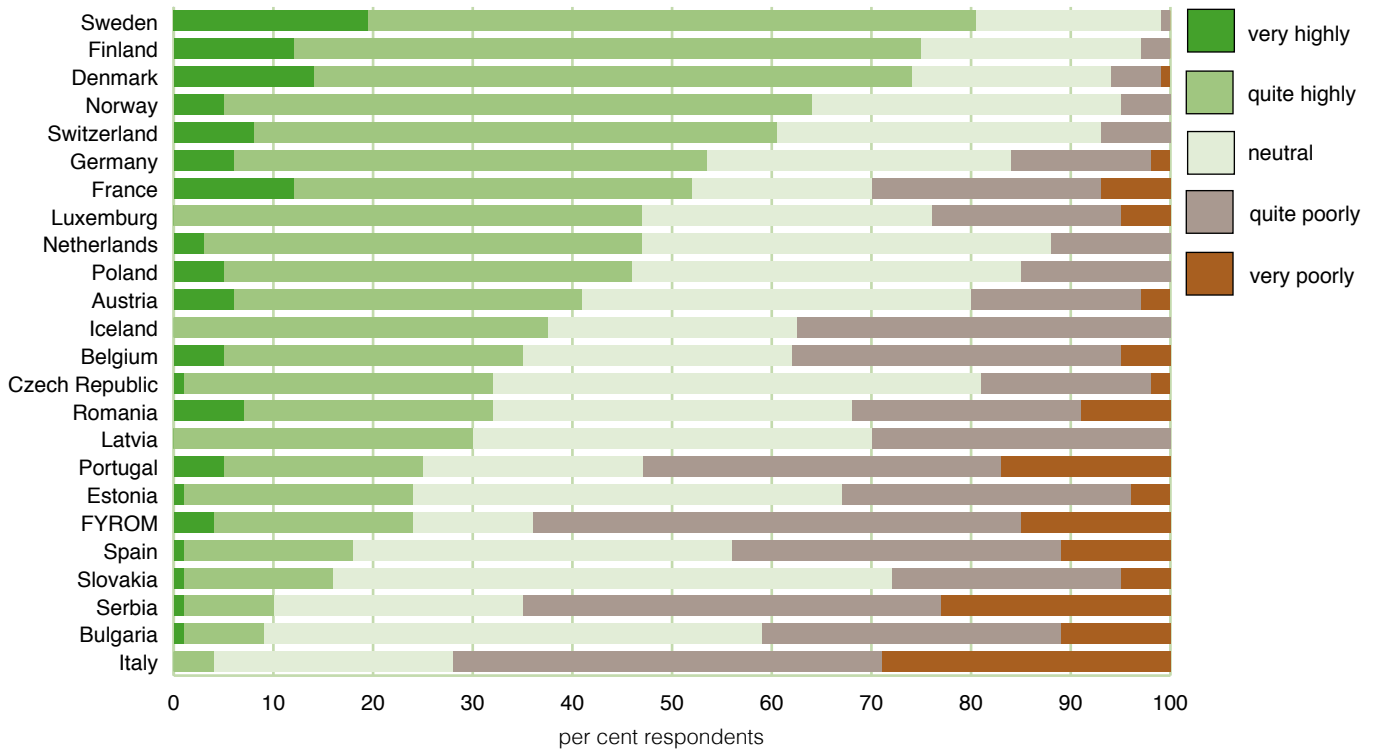
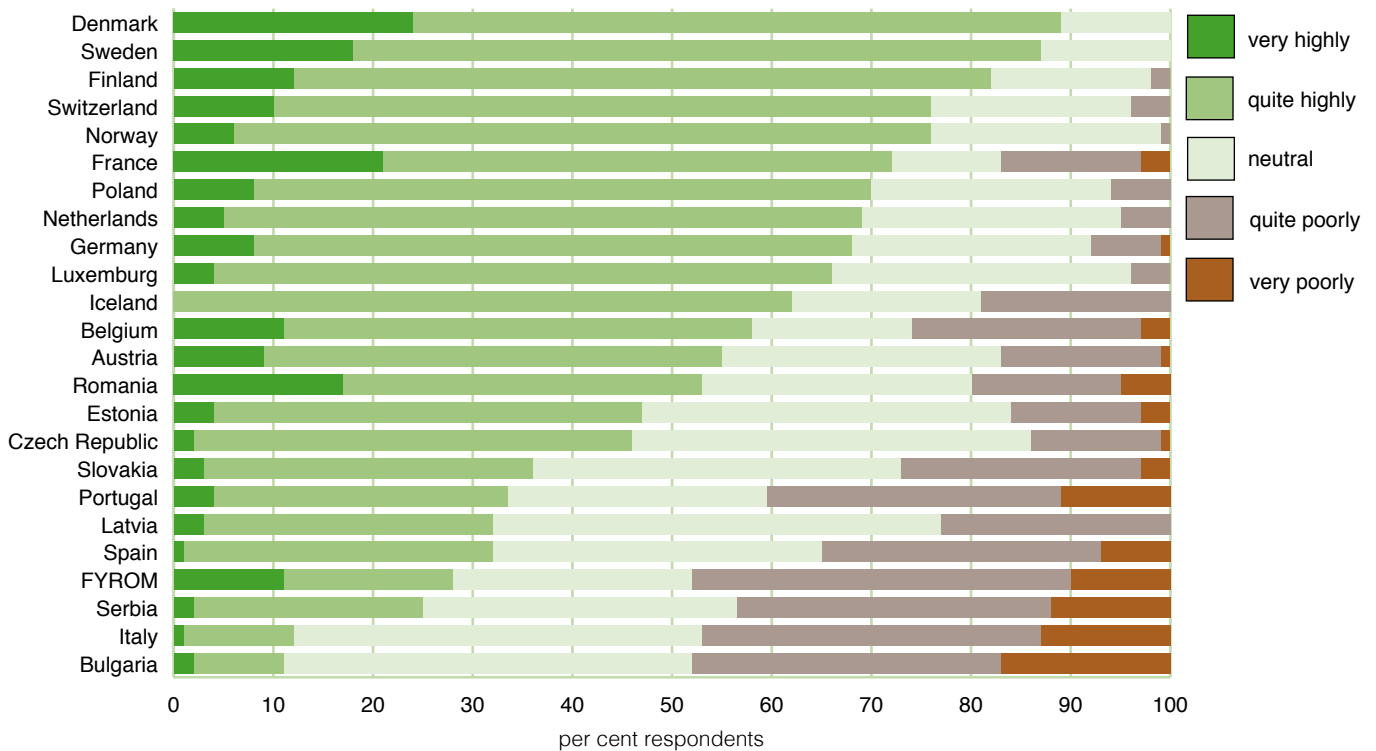


Chart 1-20

How well veterinarians think they are regarded by their customers ranked by country - highest first



# 2

## The Demand for Veterinary services



Photograph: Jan Joris Vandenberg

## KEY FINDINGS -

### CHAPTER 2: The Demand for Veterinary Services

#### Number of animals in Europe:

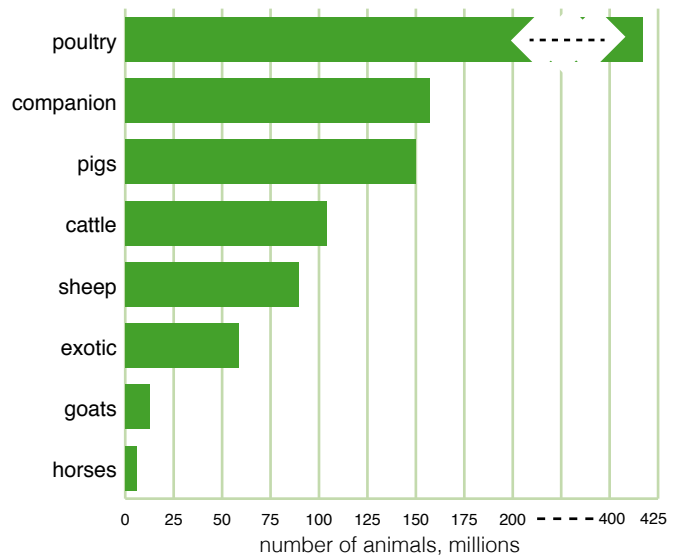
- 157 million companion animals
  - 104 million cattle
  - 90 million sheep
  - 150 million pigs
  - 13 million goats
  - 6 million horses
  - 59 million exotics
  - 417 million poultry
- 
- Long-term downward trend in number of pigs and sheep; cattle too although has been trending up for past two years
  - 242 companion animals and 265 livestock units (cattle, pigs, sheep, goats, horses, poultry) per 1000 population
  - Total companion, livestock, horses and exotics equates to almost 2000 animals per veterinarian (livestock and horses measured as livestock units)
  - Aggregate value of veterinarian practice : €11 102 million
  - Average value per veterinarian in private practice: €111 000
  - Largest aggregate values are in France and Germany
  - Share of revenue: treatment 52 per cent, surgery 20 per cent, medicine sales 13 per cent, food sales 6 per cent

## 2.1 Number of Animals

Europe's 243 000 veterinarians care for 157 million companion animals, 104 million cattle, 90 million sheep, 150 million pigs, 13 million goats, 417 million poultry, 6 million horses and 59 million exotics. Data in the bottom row of table 2-1 below shows how many of each type of animal each veterinarian, on average, potentially cares for each year.

Livestock numbers appear to have been trending down in recent years; particularly sheep, whose numbers have fallen by more than 10 per cent since 2005. There are 9 per cent fewer pigs and 5 per cent fewer goats since 2005; cattle numbers are also lower but by just 2 per cent the trend showing a double dip – but also a double rise – during the eight year period.

Chart 2-1  
Number of animals - Europe



Data source for all charts: Eurostat

Chart 2-2  
Trends in the number of cattle, Europe 2005-2013

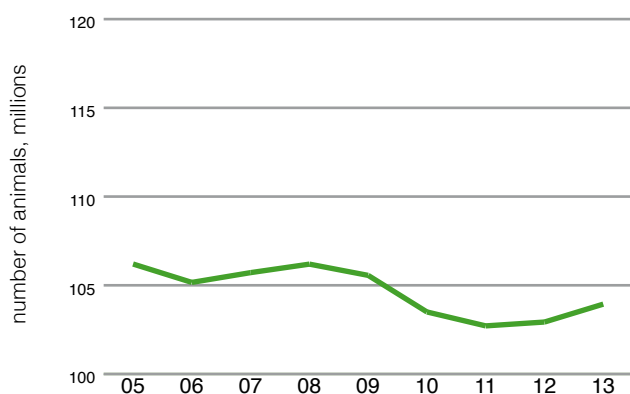


Chart 2-3  
Trends in the number of sheep, Europe 2005-2013

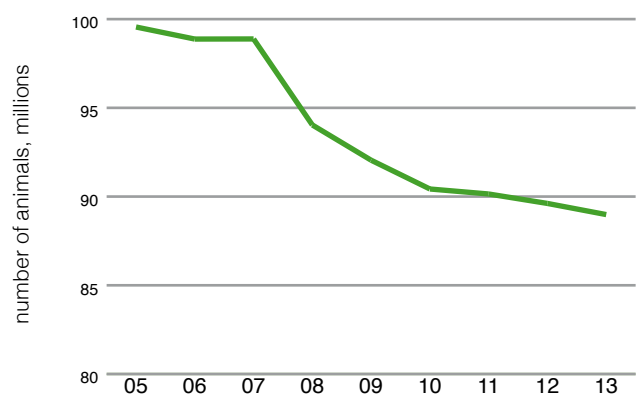


Chart 2-4  
Trends in the number of goats, Europe 2005-2013

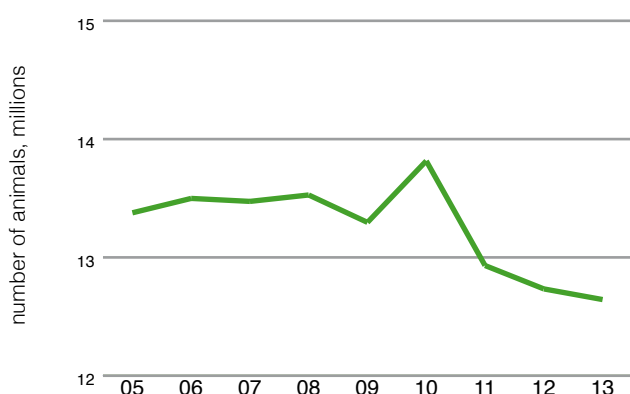
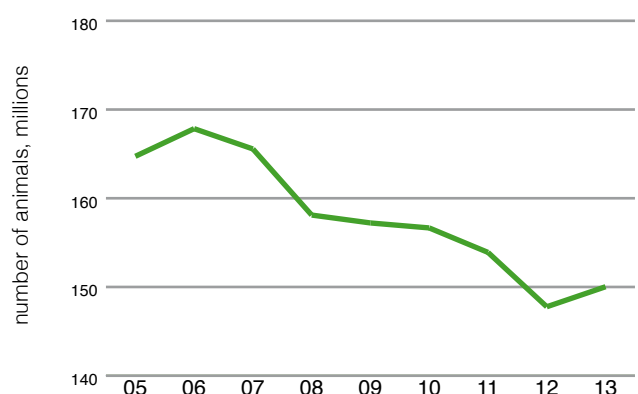


Chart 2-5  
Trends in the number of pigs, Europe 2005-2013



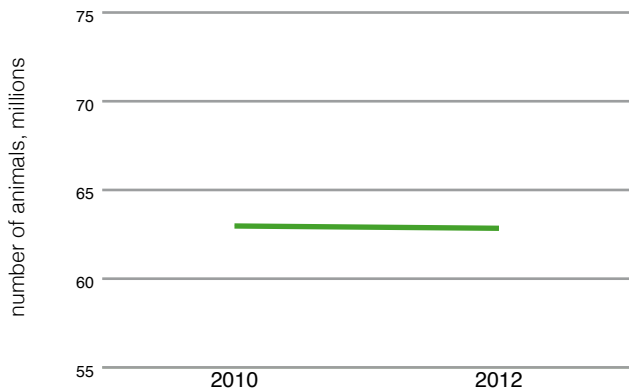


Trend data on companion animals is sourced from the FEDIAF. Data is more limited than the Eurostat statistics for livestock animals, and the charts below show the short-term trends in companion animal numbers as reported by FEDIAF in 2010 and 2012. Analysis of trend data is limited as we have only two years' worth of data to examine, however the figures suggest the number of dogs and ornamental birds

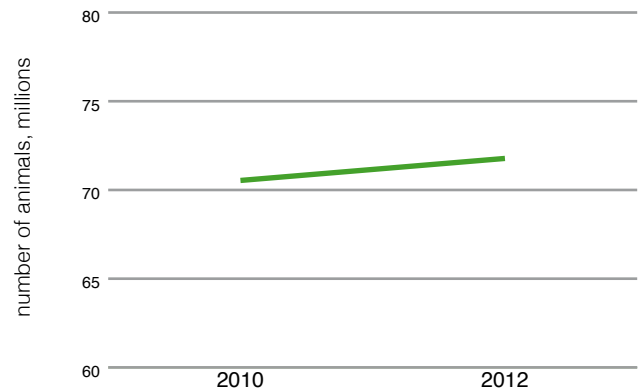
are stable, while the number of cats has increased by 2 per cent between 2010 and 2012, and the number of small mammals has declined, by 13 per cent.

Data on poultry numbers sourced from Eurostat shows a long-term decline, from a peak in 2004. The volume of aquaculture shows an upward trend, with rises recorded every year since 2008.

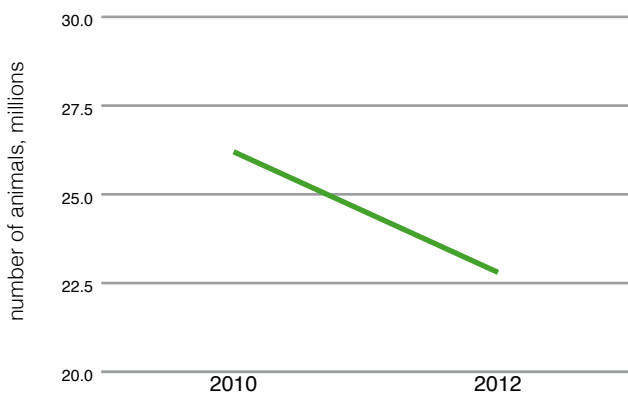
**Chart 2-6**  
Trends in the number of dogs, Europe 2010-2012  
(Source: FEDIAF)



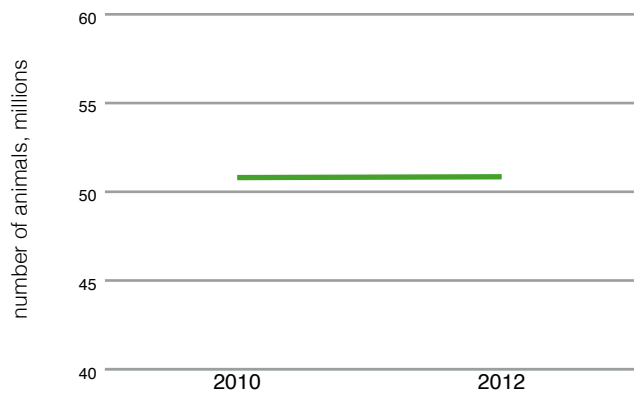
**Chart 2-7**  
Trends in the number of cats, Europe 2010-2012  
(Source: FEDIAF)



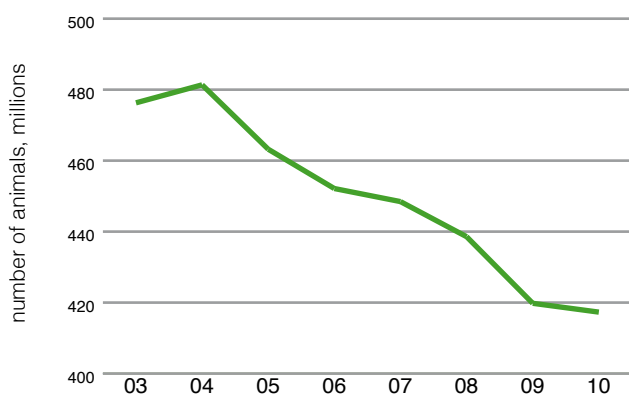
**Chart 2-8**  
Trends in the number of small mammals, Europe 2010-2012 (Source: FEDIAF)



**Chart 2-9**  
Trends in the number of ornamental birds, Europe 2010-2012 (Source: FEDIAF)



**Chart 2-10**  
Trends in the number of poultry (laying hens), Europe 2003-2010 (Source: Eurostat)



**Chart 2-11**  
Trends in the production of aquaculture (fishery products), Europe 2008-2012 (Source: Eurostat)

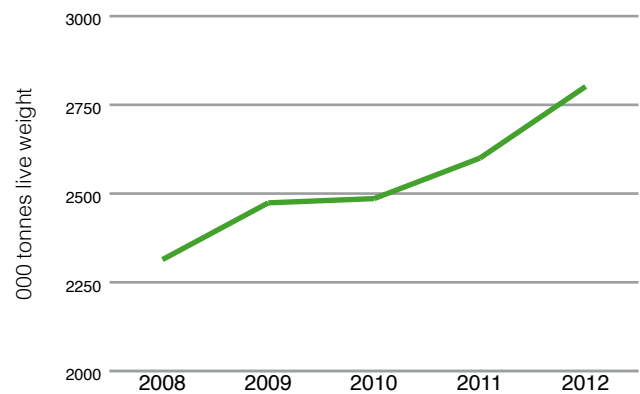


Table 2-1  
Number of animals in Europe

000s	cattle	sheep	pigs	goats	poultry (laying hens)	aquaculture (total fishery products, tonnes live weight)	horses	companion (dogs, cats, small mammals)	exotic (bird reptile)
Albania	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Austria	1 958	357	2 896	n/a	5 725	2 167	103	2 858	399
Belgium	2 441	146	6 351	289	6 484	576	536	4 580	3 064
Bosnia / Herzegovina	447	1 020	530	289	n/a	n/a	n/a	n/a	n/a
Bulgaria	586	1 370	586	22	6 217	6 940	98	1 577	53
Croatia	442	620	1 067	976	5 486	13 921	24	n/a	n/a
Cyprus	57	313	358	13	507	4 332	7	n/a	n/a
Czech Republic	1 332	197	1 548	n/a	10 661	20 763	33	3 464	75
Denmark	1 583	90	12 402	130	3 900	33 588	122	1 647	327
Estonia	261	62	359	8	674	420	8	580	21
Finland	903	94	1 258	6	3 180	11771	74	1 310	57
France	19 129	7 193	13 428	69	51 310	205 106	840	21 488	9 174
FYROM	251	732	152	225	n/a	n/a	n/a	n/a	n/a
Germany	12 686	1 574	28 046	2	34 036	40694	481	18 800	4 850
Greece	679	9 520	1 077	2 610	11 152	108 852	70	1 667	988
Hungary	772	1 238	2 935	n/a	12 544	14 558	77	4 745	505
Iceland	73	474	36	n/a	n/a	5306	n/a	n/a	n/a
Ireland	6 309	3 321	1 468	4 250	3 745	36 142	159	898	139
Italy	6 249	7 182	8 561	243	55 460	164127	469	16 269	14 296
Latvia	406	67	368	14	2 223	574	11	720	n/a
Lithuania	714	100	755	4	4 301	3428	27	1 410	n/a
Luxembourg	198	8	90	66	n/a	n/a	5	n/a	n/a
Malta	15	11	49	409	315	7 440	2	n/a	n/a
Montenegro	85	207	18	n/a	n/a	n/a	n/a	n/a	n/a
Netherlands	4 090	1 074	12 013	72	n/a	45 954	294	5 932	4 910
Norway	n/a	n/a	n/a	n/a	n/a	1 321 119	n/a	1 375	303
Poland	5 500	219	10 994	398	49 040	33 226	276	13 984	1 325
Portugal	1 471	2 074	2 014	1 313	8 452	10 317	179	2 978	666
Romania	2 022	9 136	5 180	30	35 603	10 005	729	8 307	294
Serbia	913	1 616	3 144	69	n/a	n/a	n/a	n/a	n/a
Slovakia	468	400	637	6	6 266	1 263	7	1 411	30
Slovenia	461	138	288	35	1 378	778	23	789	58
Spain	5 697	16 119	25 495	1 283	57 030	266 593	681	10 755	3 468
Sweden	1 444	585	1 478	96	5 065	13 757	229	2 520	373
Switzerland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	2 502	399
Turkey	14 533	n/a	n/a	n/a	n/a	212 410	n/a	4 935	11 120
Ukraine	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	9 682	22 624	4 383	1	36 560	205 595	796	19 900	1 900
<b>EUROPE-38</b>	<b>103 858</b>	<b>89 879</b>	<b>149 966</b>	<b>12 644</b>	<b>417 313</b>	<b>2 801 722</b>	<b>6 361</b>	<b>157 401</b>	<b>58 793</b>
EUROPE-38 LIVESTOCK UNITS (LSU)	103 858	7 190	29 993	2 023	19 156	n/a	5 089	n/a	n/a
Average LSU / number per vet*	521	39	163	11	113	n/a	28	794	301

## SOURCES:

Cattle sheep pigs: Eurostat data for most countries refers to 2013; poultry: Eurostat, data refers to 2010 (or 2009 for a small number of countries; Finland, Italy, Spain, Sweden, UK are 2004-2006 data); aquaculture: Eurostat, data refers to 2012 (or 2010-11 for a small number of countries)

Horses: World Horse Welfare and Eurogroup for ANIMALS (2015) – EU Equine Welfare Project

Companion animals and exotics: derived from FEDIAF 'Facts and Figures 2012'

\* Average number per vet excludes countries where number of animals is n/a. Average LSU (livestock units) for cattle, sheep, pigs, goats, horses, poultry calculated using the Eurostat weighting figures. Total number of companion animals and exotics per vet - unweighted.

Chart 2-12

Number of livestock units (LSU) per 1000 population mapped by country (cattle, sheep, pigs, goats, horses, poultry)

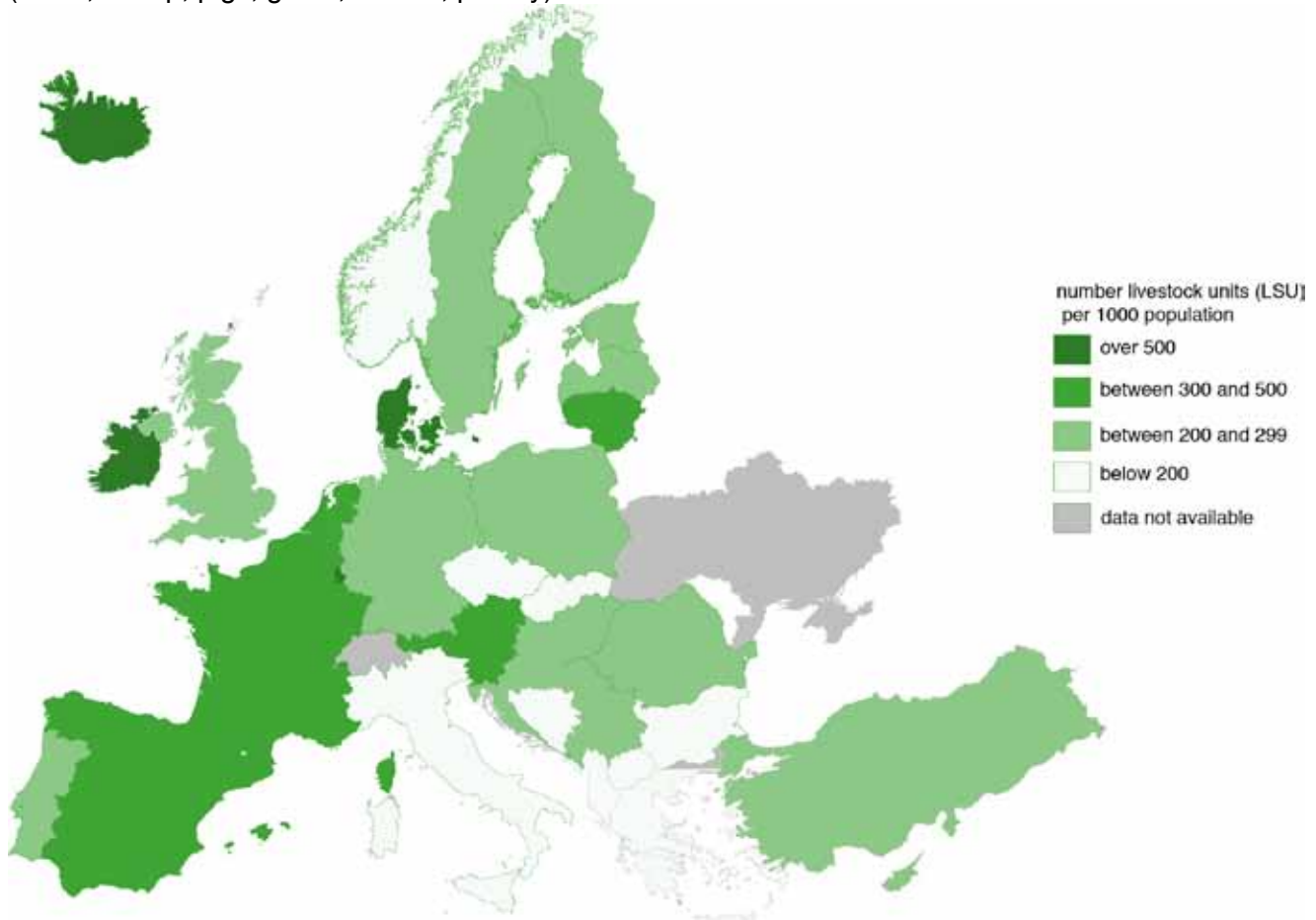
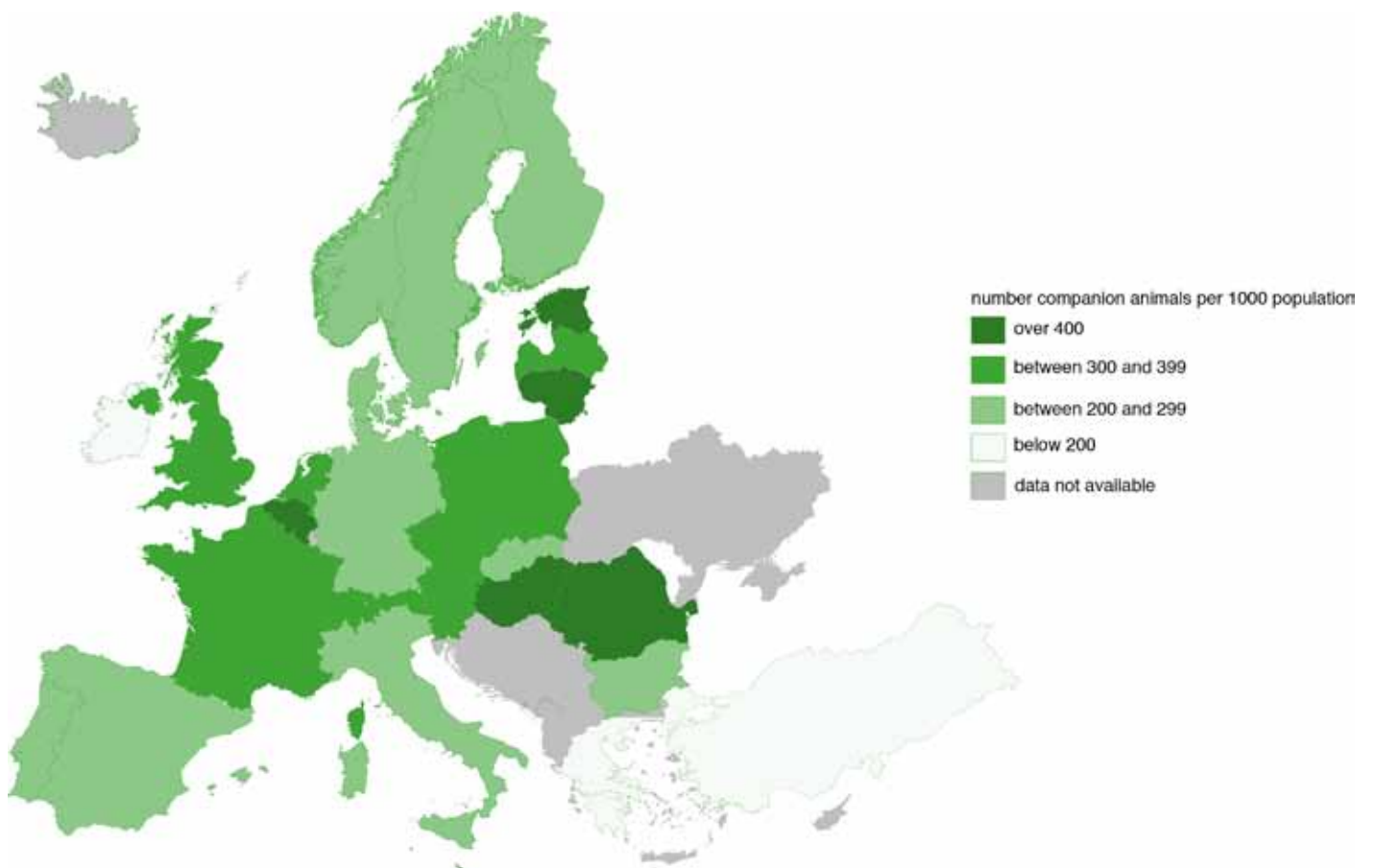


Chart 2-13

Number of companion animals per 1000 population mapped by country



## 2.2 Value of Animal Care Products and Animal Medicines

Data in this section is sourced from various official and NGO sources, and is NOT data from the survey.

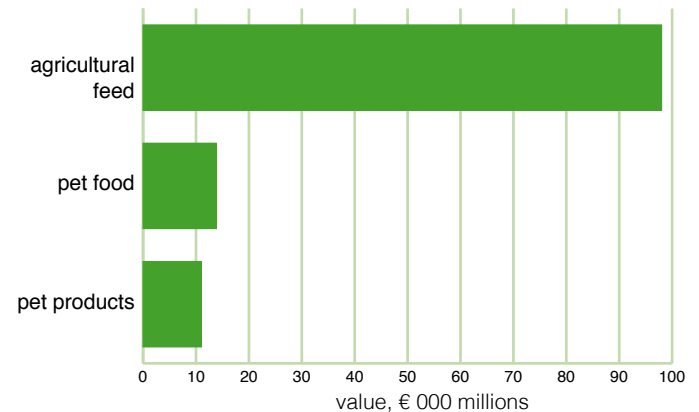
Substantially more is spent on agricultural food for livestock animals than is spent on pet food, according to data sourced from Eurostat and the FEDIAF. The total value of agricultural food in Europe is €98 billion (2013), a third of which is spent in just two countries – Germany and France. The value of expenditure on pet food is estimated to be €14 billion (2012) (country breakdown is not available).

Other key background market statistics reveal that €11 billion is spent on pet related products and services across Europe and another €5 billion is spent on animal medicines, of which €1.3 billion is spent on vaccines.

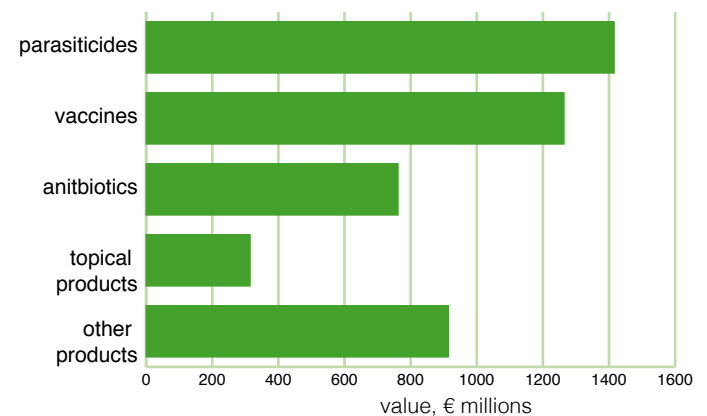
**Table 2-2**  
Value of animal feed sales analysed by country

€ million	value of agricultural animal feed	value of pet food
Albania	n/a	n/a
Austria	1 795	n/a
Belgium	3 057	n/a
Bosnia / Herzegovina	n/a	n/a
Bulgaria	814	n/a
Croatia	685	n/a
Cyprus	187	n/a
Czech Republic	1 201	n/a
Denmark	3 655	n/a
Estonia	255	n/a
Finland	1 030	n/a
France	15 769	n/a
FYROM	n/a	n/a
Germany	18 048	n/a
Greece	2 117	n/a
Hungary	1 799	n/a
Iceland	n/a	n/a
Ireland	2 451	n/a
Italy	8 551	n/a
Latvia	258	n/a
Lithuania	611	n/a
Luxemburg	152	n/a
Malta	34	n/a
Montenegro	n/a	n/a
Netherlands	5 464	n/a
Norway	n/a	n/a
Poland	6 085	n/a
Portugal	2 201	n/a
Romania	2 945	n/a
Serbia	n/a	n/a
Slovakia	311	n/a
Slovenia	410	n/a
Spain	11 091	n/a
Sweden	1 316	n/a
Switzerland	n/a	n/a
Turkey	n/a	n/a
Ukraine	n/a	n/a
United Kingdom	5 700	n/a
<b>EUROPE-38</b>	<b>97 993</b>	<b>13 800</b>

**Chart 2-14**  
Value of animal food and pet products markets



**Chart 2-15**  
Value of animal medicines market



**Table 2-3**  
Value of animal medicines, Europe

	value of sales € million
vaccines	1 264
antibiotics - injectible	426
antibiotics - oral	336
endoparasiticides	564
ectoparasiticides	714
endectocides	138
topical products	314
other products	914
<b>TOTAL EUROPE</b>	<b>4 670</b>

Sources:  
Agricultural animal feed: European Commission EU Agriculture - Statistical and Economic Information 2013 (data sourced from Eurostat)

Value of pet food and products: FEDIAF estimates in 'Facts and Figures 2012' (country break-down not available)

## 2.3 Aggregate Value of Veterinary Practice

In this section of the report we have attempted to **estimate** the total value of the market for Veterinary services. This is based on grossing up the total value of revenue generated by private practices (aggregate revenue). This method is **an approximation of the total market**; it does not include the value of work undertaken for example by government veterinarians, and it specifically excludes the value of Veterinary science and research. **The total market figure is an estimate and should be considered with caution.**

**The estimate is based on a grossing up of each participating country's survey data, and due to the varying confidence levels, individual country market sizes may well be under or over estimates.** We hope that if this survey is repeated in the future

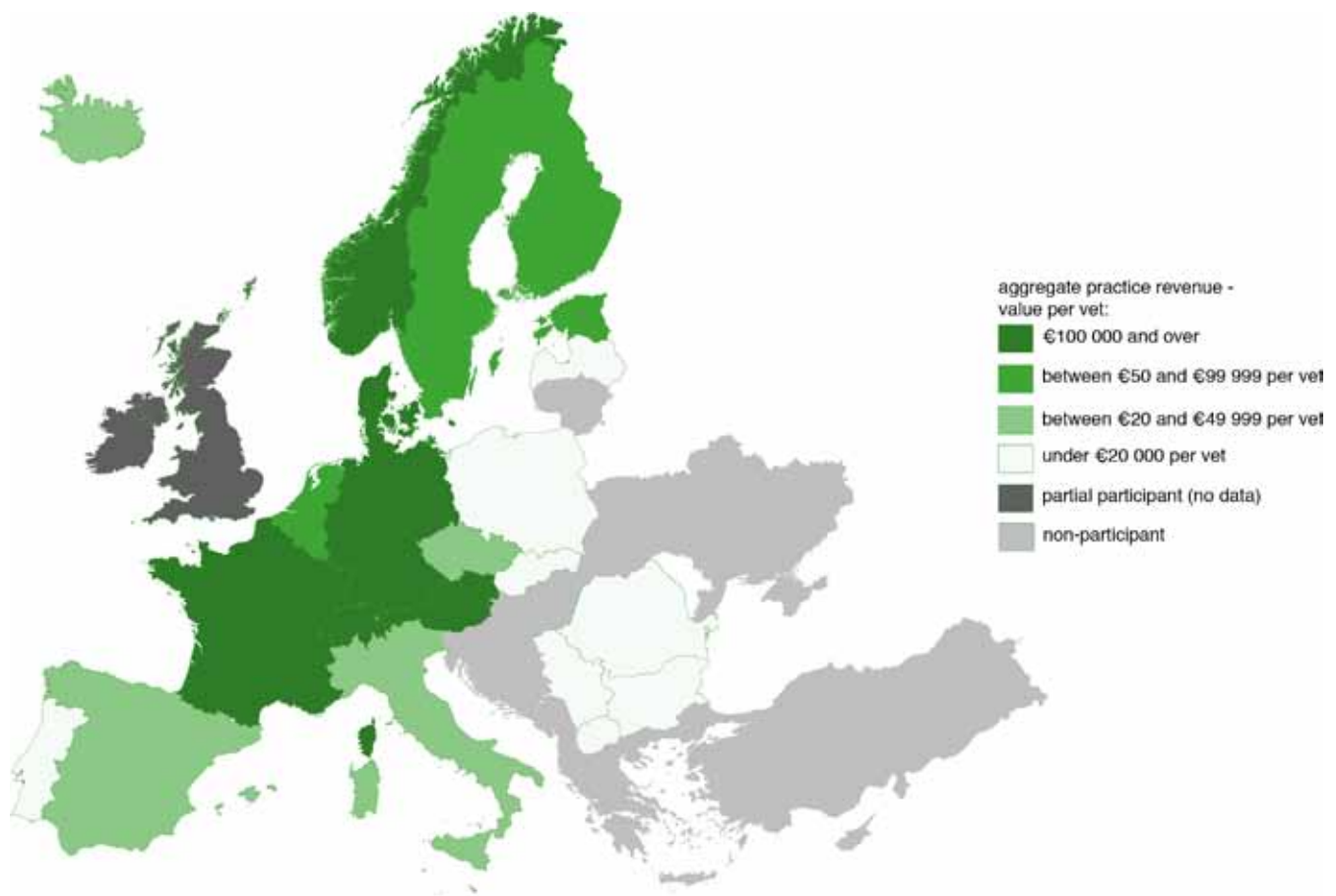
we will gain a better understanding of the data and be able to improve upon this first estimate. Please note, all figures quoted are BEFORE TAX.

The total value of the market for Veterinary services in the 24 surveyed countries is estimated to be €11 102 million. This works out as €111 000 per veterinarian employed in private practice.

France and Germany dominate the market, each having an estimated market size of over €3 billion. The value per veterinarian in private practice varies from nearly €300 000 per veterinarian in Norway to below €20 000 in Romania, Bulgaria and Slovakia.

Chart 2-16

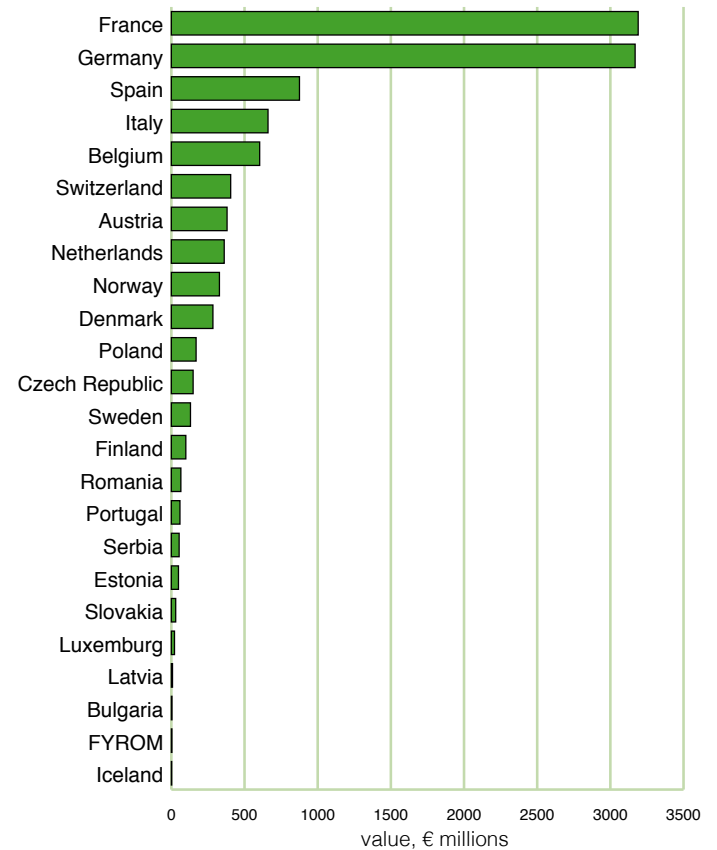
Aggregate practice revenue; average value per veterinarian mapped by country



**Table 2-4**  
Aggregate value of veterinarian practice revenue (= the market for veterinarian services) analysed by country

□	practice revenue (000s)	value per vet in private practice
Austria	380 768	150 213
Belgium	603 612	107 353
Bulgaria*	4 172	10 251
Czech Republic	148 795	51 027
Denmark*	284 068	209 092
Estonia	48 633	102 878
Finland	98 950	152 584
France	3 190 167	234 383
FYROM	3 762	20 940
Germany	3 169 256	181 034
Iceland*	2 416	62 495
Italy	660 662	36 044
Latvia*	7 873	20 923
Luxemburg*	21 530	100 770
Netherlands	361 287	152 355
Norway	328 579	296 658
Poland	169 104	28 904
Portugal	58 766	24 144
Romania	65 017	12 351
Serbia	53 225	39 574
Slovakia	29 728	19 752
Spain	875 508	65 777
Sweden	130 692	128 400
Switzerland	405 411	290 536
Ireland	n/a	n/a
United Kingdom	n/a	n/a
<b>EUROPE-24</b>	<b>11 101 981</b>	<b>111 343</b>

**Chart 2-17**  
Aggregate value of veterinarian practice revenue - Europe



\* caution: small sample  
Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: weighted to reflect total veterinarian population in participating countries  
Please note, all data refers to values BEFORE TAX and excludes VAT

## 2.4 Revenue by Type of Service

Just over half of the total market (aggregate revenue) is for the treatment of animals. This is the largest single type of service in each country. About 20 per cent of the total market is for surgery – this proportion varies little between the countries. Sales of medicines account for 16 per cent of the total revenue, a little more than twice the value of sales of foodstuffs. Please note, respondents themselves decided how to split their practice revenue between treatment, surgery, sales etc.

Chart 2-17  
Revenue by type of service - Europe

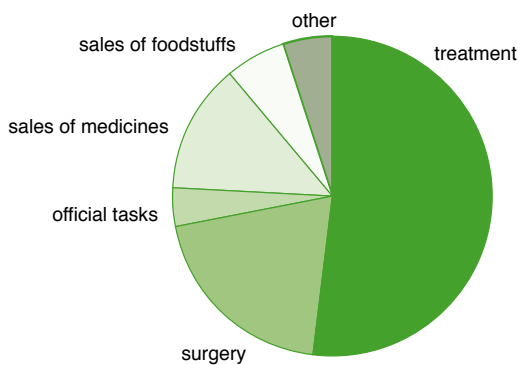


Chart 2-18  
Revenue by type of service - Europe

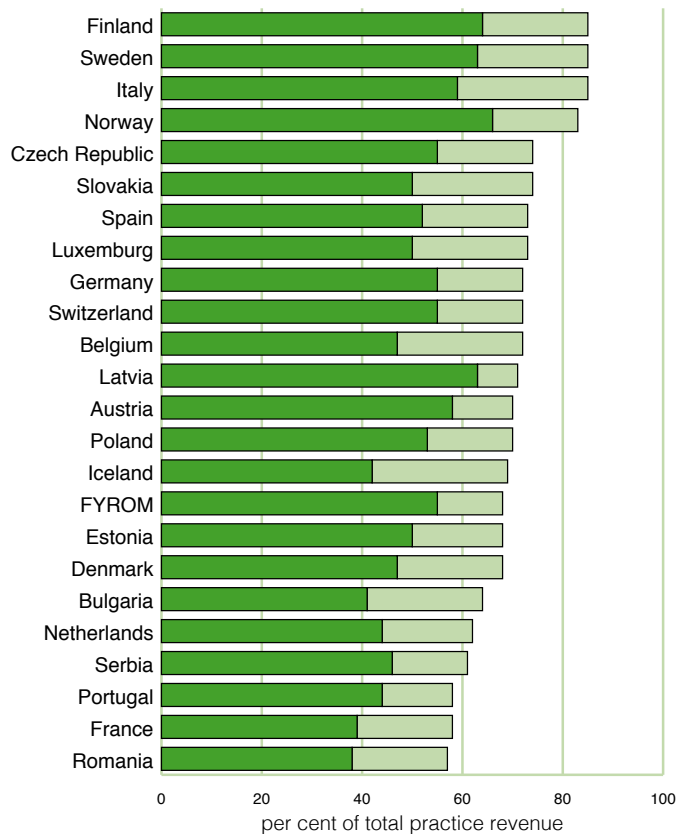


Table 2-5  
Proportion of veterinarian practice revenue analysed by country

per cent	treatment	surgery	official tasks	sales of medicines	sales of foodstuffs	other	TOTAL
Austria	57	12	5	18	5	2	100
Belgium	48	25	5	14	7	2	100
Bulgaria*	41	23	4	26	6	0	100
Czech Republic	55	19	2	15	5	4	100
Denmark*	47	21	4	4	7	17	100
Estonia	49	18	8	14	4	6	100
Finland	64	21	2	5	6	2	100
France	40	19	4	25	10	3	100
FYROM	54	13	10	10	7	7	100
Germany	55	17	2	19	5	2	100
Iceland*	42	27	0	9	18	4	100
Italy	59	26	3	3	1	8	100
Latvia*	63	8	2	6	9	12	100
Luxemburg*	50	23	3	14	10	0	100
Netherlands	45	18	3	21	7	7	100
Norway	66	17	2	3	8	4	100
Poland	53	17	13	8	6	3	100
Portugal	45	14	2	19	10	11	100
Romania	37	19	24	9	3	7	100
Serbia	47	15	16	8	7	8	100
Slovakia	50	24	3	12	7	4	100
Spain	51	21	1	9	11	6	100
Sweden	64	22	2	1	5	7	100
Switzerland	55	17	2	18	5	2	100
Ireland	< 51 >		n/a	< 20 >		29	100
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	52	20	4	13	6	5	100

\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

## 2.5 Revenue by Type of Species

When analysed by type of species, companion animals dominate the veterinarian market, accounting for nearly three quarters of aggregate revenue. In Spain, Portugal and Italy, companion animals account for over 85 per cent of the market. Cattle take 12 per cent of market share. Smaller market shares are provided by horses (7 per cent), while pigs account for 3 per cent and sheep and goats just 2 per cent. Exotic animals account for another 2 per cent of aggregate revenue. The highest share of revenue from horses occurs in Sweden (36 per cent of revenue), while cattle account for a particularly high share of aggregate practice revenue in FYROM, Belgium, Estonia and Austria (29 per cent or more).

Chart 2-20  
Proportion of revenue accounted for by companion animals analysed by country

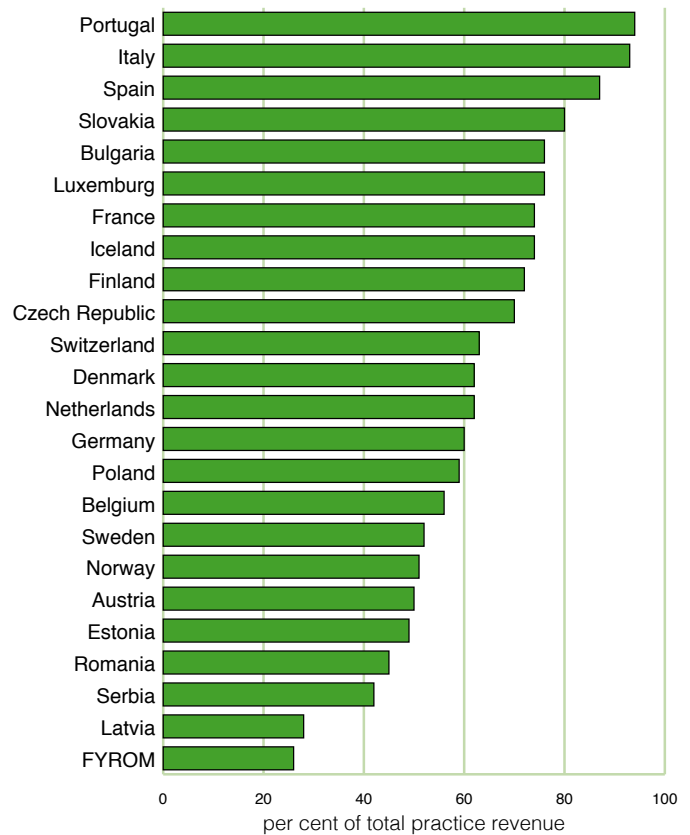


Chart 2-19  
Revenue by type of species - Europe

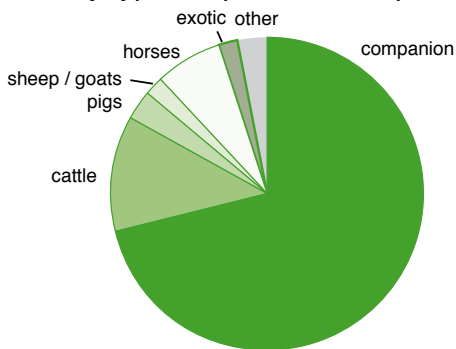


Table 2-6  
Proportion of revenue analysed by type of species and country

\* caution: small sample EUROPE-24: weighted  
\*\* 'other' includes poultry, aquaculture and others

per cent	companion	cattle	pigs	sheep / goats	horses	exotic	other**	TOTAL
Austria	50	29	5	1	12	0	3	100
Belgium	56	32	0	1	5	3	3	100
Bulgaria*	76	10	4	5	1	4	1	100
Czech Republic	70	11	7	2	6	2	2	100
Denmark*	62	23	4	0	7	1	3	100
Estonia	49	31	5	1	9	1	5	100
Finland	72	10	1	0	15	2	0	100
France	74	17	0	1	5	2	1	100
FYROM	26	43	8	18	3	1	2	100
Germany	60	14	3	1	18	1	3	100
Iceland*	74	9	4	4	7	1	0	100
Italy	93	1	0	1	1	2	2	100
Latvia*	28	20	1	12	13	11	15	100
Luxemburg*	76	1	4	0	16	4	0	100
Netherlands	62	17	5	2	9	1	4	100
Norway	51	27	5	6	9	0	2	100
Poland	59	17	11	0	6	1	5	100
Portugal	94	3	1	0	1	1	0	100
Romania	45	21	10	13	6	1	5	100
Serbia	42	26	13	6	2	1	10	100
Slovakia	80	8	2	2	4	2	2	100
Spain	87	4	1	2	3	2	1	100
Sweden	52	10	1	0	36	0	1	100
Switzerland	63	21	3	2	9	1	1	100
Ireland	38	39	2	2	14	<1	<1	100
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	72	12	3	2	7	2	3	100



## 2.6 Trends in practice revenue

As this is the first time Europe’s market has been estimated, we do not have any historical data to show recent trends. However we asked veterinarians how they thought their practice revenue had changed in the last 12 months, and how they expected it would change in the next 12 months.

Over the last 12 months, 40 per cent of veterinarians in this survey say their practice revenue has increased (most saying increased “slightly”). Almost the same proportion, 38 per cent, say their revenue has decreased, although for 14 per cent the decrease was “significant”. Twenty one per cent say ‘no change’. So on balance, very slightly more veterinarians say that their revenue has increased than decreased. Excluding those countries with small samples, the countries with the largest proportion of veterinarians saying revenue has increased are Bulgaria, Slovakia, Norway, the Czech republic, Sweden and France – where at least 50 per cent of veterinarians say their practice revenue has increased. Countries with the largest proportions of veterinarians saying that their practice revenue has decreased include Spain, Italy and Denmark. In Spain and Portugal, more than 25 per cent of veterinarians say their revenue has decreased “significantly”.

More veterinarians expect revenues to increase in the next 12 months than experienced a fall in the previous 12 months – the trend in revenues is clearly up. Forty four per cent of respondents expect their practice revenue to increase, while 27 per cent forecast a fall: the differential between optimists and pessimists is far wider than for the question relating to the last 12 months. In no country do more than 40 per cent of veterinarians predict a fall in practice revenues; while in all but four countries, more than 40 per cent predict revenues will rise. Veterinarians in Belgium, Italy and Serbia are least confident about a rise, whilst in Bulgaria, Norway and Spain more than 50 per cent of veterinarians predict rising revenues.

Chart 2-21  
Practice Revenue - Europe last and next 12 months

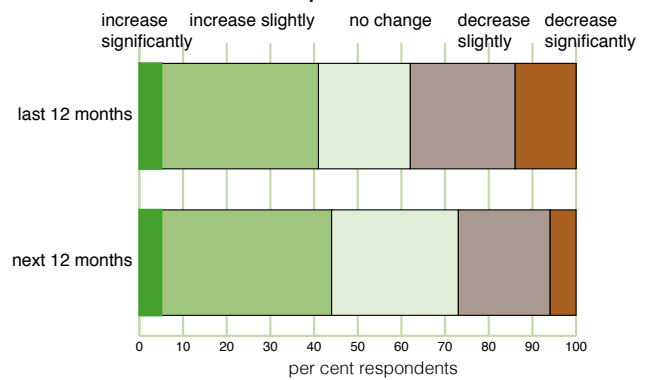


Table 2-7  
Practice revenue - changes last 12 months and next 12 months

per cent	last 12 months					next 12 months				
	increase significant -ly	increase slightly	no change	decrease slightly	decrease significant -ly	increase significant -ly	increase slightly	no change	decrease slightly	decrease significant -ly
Austria	1	46	26	21	6	2	38	36	17	6
Belgium	4	32	29	25	10	2	30	28	29	10
Bulgaria*	0	63	25	0	13	29	43	14	0	14
Czech Republic	7	46	15	24	7	4	47	29	16	4
Denmark*	0	21	18	39	21	0	38	31	28	3
Estonia	5	42	20	25	7	4	40	19	30	7
Finland	8	37	35	15	5	3	45	32	15	5
France	13	38	19	20	10	8	39	26	20	6
FYROM	4	42	17	25	13	0	41	33	19	7
Germany	5	44	24	23	4	3	40	36	19	3
Iceland*	0	100	0	0	0	0	100	0	0	0
Italy	2	23	22	33	19	2	29	34	28	8
Latvia*	0	56	44	0	0	0	50	50	0	0
Luxemburg*	17	67	0	17	0	15	46	23	8	8
Netherlands	5	36	12	29	19	5	41	27	21	5
Norway	11	50	23	15	1	3	49	28	18	1
Poland	10	35	25	20	10	6	39	23	24	8
Portugal	9	36	9	18	27	0	46	15	38	0
Romania	4	32	22	23	19	4	44	19	22	11
Serbia	1	29	28	24	18	4	25	34	25	11
Slovakia	3	52	21	17	6	14	36	44	5	2
Spain	3	28	16	25	28	4	48	24	17	7
Sweden	14	39	30	14	5	9	41	33	11	7
Switzerland	4	39	32	23	3	2	38	41	16	3
Ireland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	5	35	21	24	14	5	39	29	21	6

\* caution: small sample EUROPE-24: figure is weighted

Chart 2-22

Practice revenue - changes last 12 months ranked in order of highest who say 'increase'

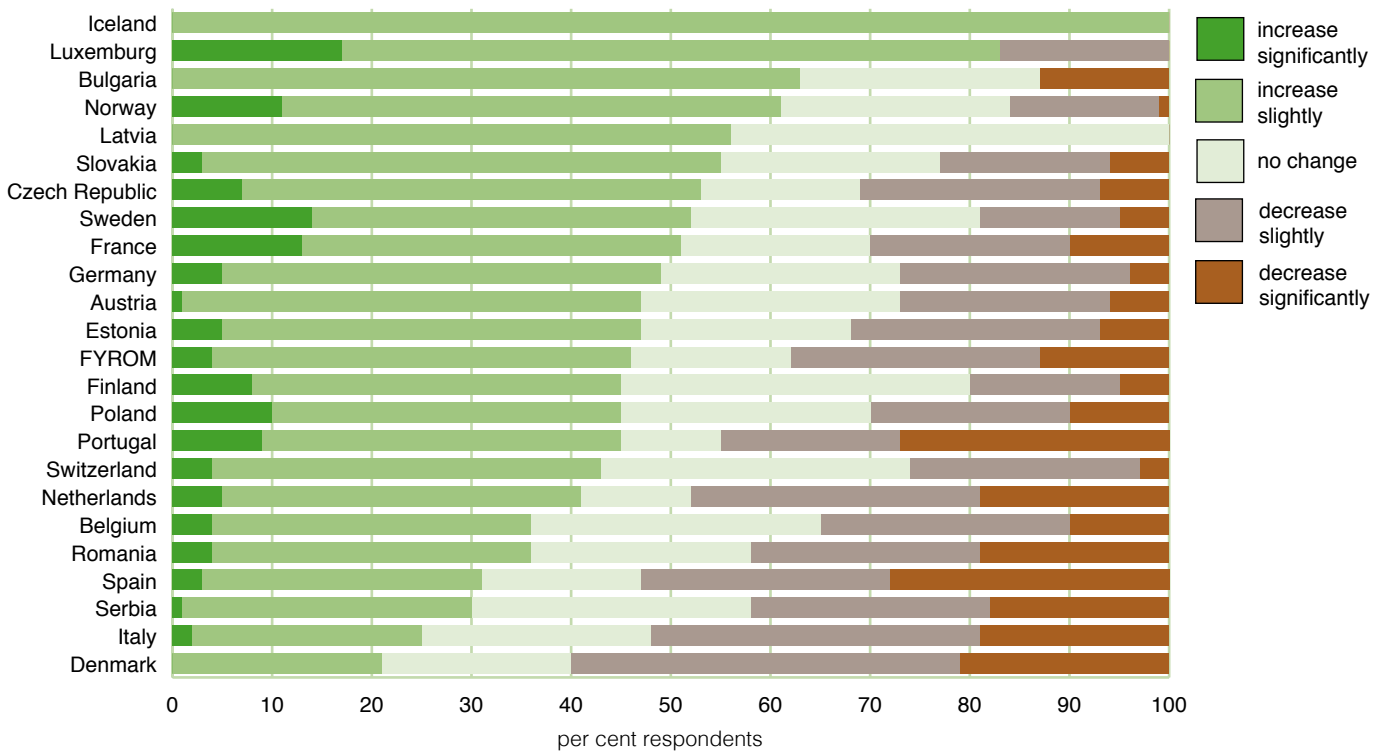
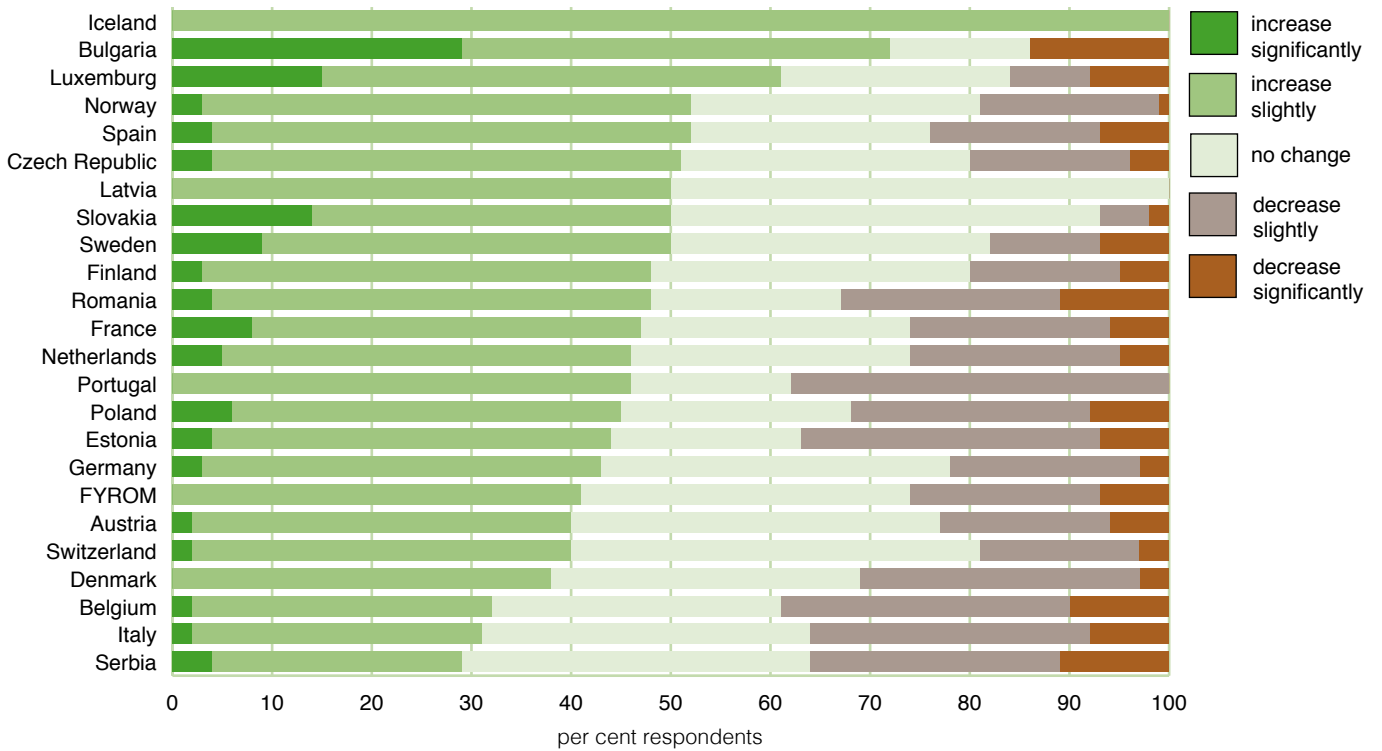


Chart 2-23

Practice revenue - expected changes next 12 months ranked in order of highest who say 'increase'



## 2.7 Future Workloads

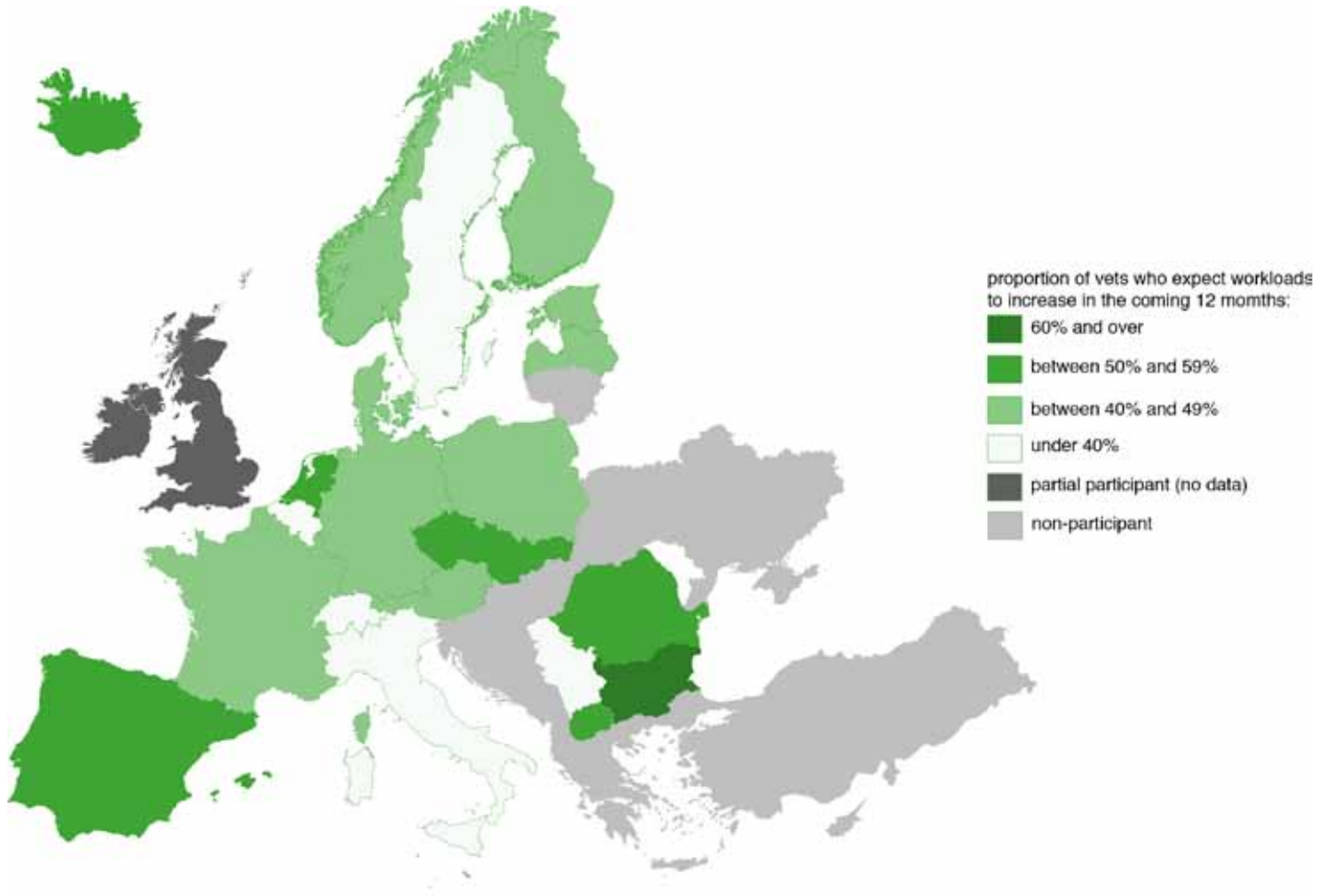
Veterinarians were asked how they expected their future workloads to change over the next 12 months. Forty five per cent report they expect to see more work over the coming year; 34 per cent expect no change, while 21 per cent think workloads will fall. Over 50 per cent of veterinarians in Bulgaria, Slovakia, FYROM, Portugal and Spain expect more work. Most pessimistic are veterinarians in Portugal, Serbia, Belgium and Italy, where more than 30 per cent expect falling workloads. Portugal is unusual in that it is both optimistic and pessimistic - veterinarians in Portugal seem more split about their future prospects

than those elsewhere, with the smallest proportion of veterinarians expecting 'no change'.

The survey results correlate reasonably closely with the results of the changes to revenue question, although fewer veterinarians expect workloads to decrease (21 per cent) compared with those expecting revenues to decrease (27 per cent). This suggests revenues may be falling – at least in some countries – because of falling charges and fees (deflation), rather than necessarily due to less work.

Chart 2-24

Veterinarians expecting their practice workloads to increase next 12 months mapped by country

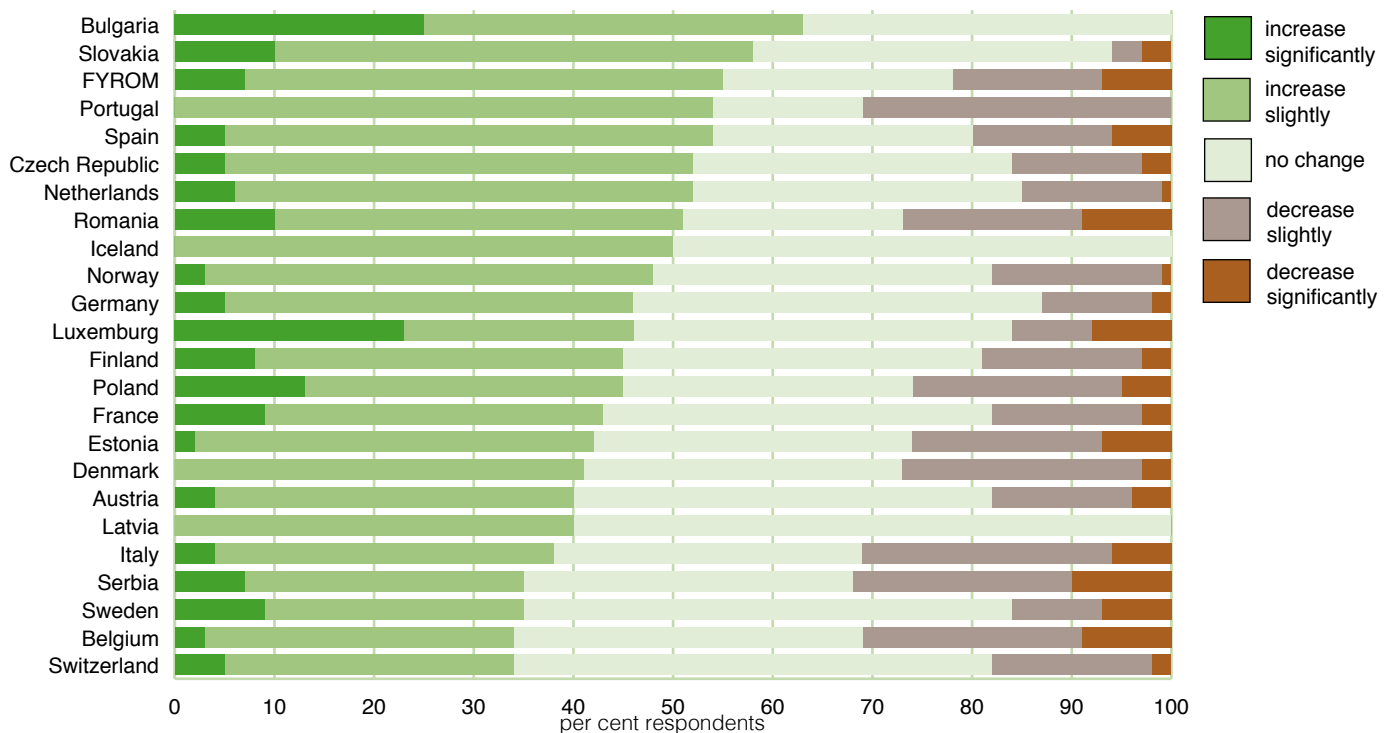


**Table 2-8**  
Anticipated workloads next 12 months

per cent	increase significantly	increase slightly	no change	decrease slightly	decrease significantly
Austria	4	36	42	14	4
Belgium	3	31	35	22	9
Bulgaria*	25	38	38	0	0
Czech Republic	5	47	33	13	3
Denmark*	0	41	31	24	3
Estonia	2	40	33	19	7
Finland	8	37	37	16	3
France	9	34	39	15	3
FYROM	7	48	22	15	7
Germany	5	41	41	11	2
Iceland*	0	50	50	0	0
Italy	4	34	31	25	6
Latvia*	0	40	60	0	0
Luxemburg*	23	23	38	8	8
Netherlands	6	46	32	14	1
Norway	3	45	34	17	1
Poland	13	32	30	21	5
Portugal	0	54	15	31	0
Romania	10	41	23	18	9
Serbia	7	28	34	22	10
Slovakia	10	48	35	3	3
Spain	5	49	26	14	6
Sweden	9	26	50	9	7
Switzerland	5	29	48	16	2
Ireland	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a
EUROPE-24	6	39	34	17	4

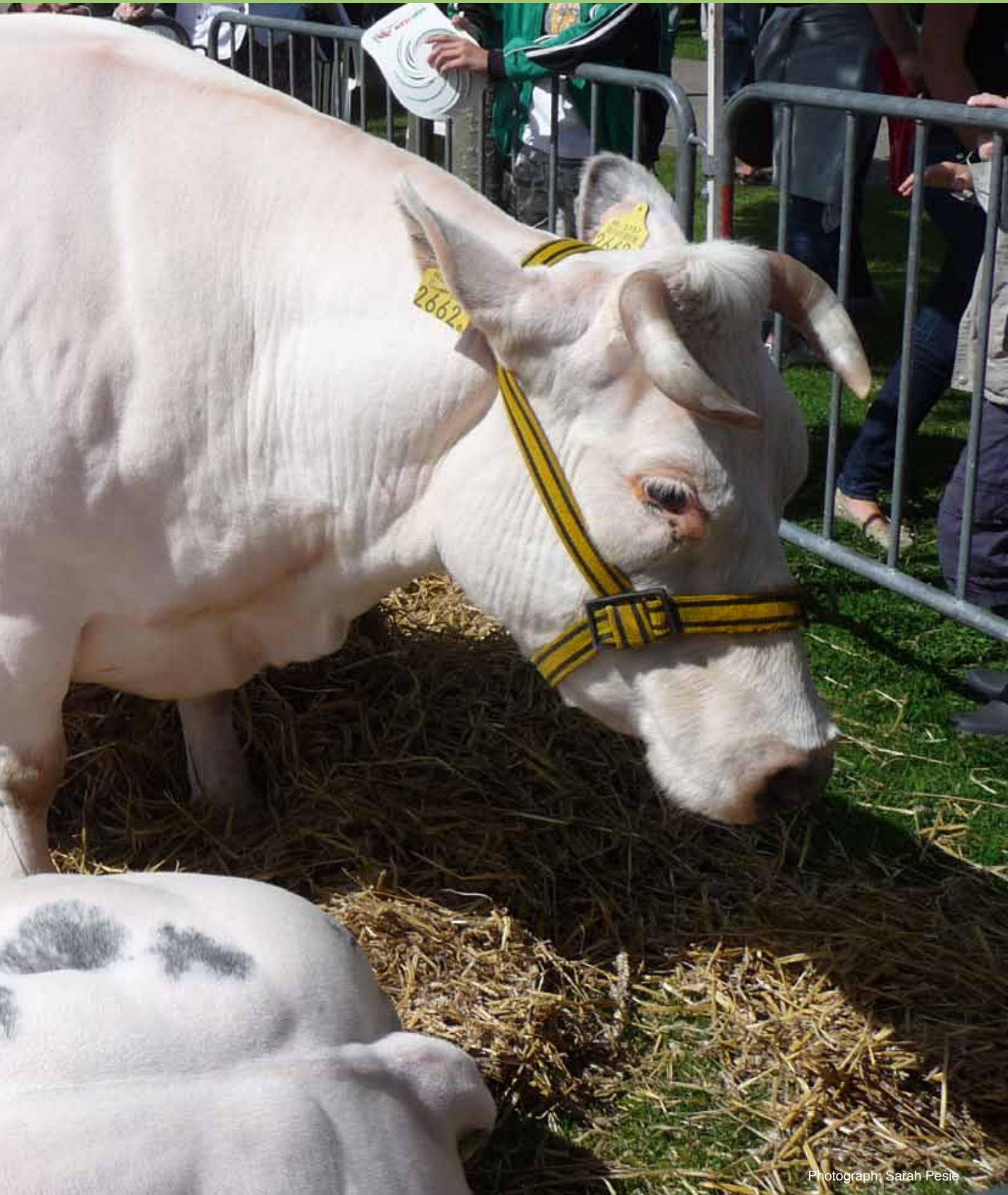
\* caution: small sample      Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

**Chart 2-25**  
Future work - expected changes next 12 months ranked in order of highest who say 'increase'



# 3

## Veterinary Practices



## KEY FINDINGS - CHAPTER 3: Veterinary Practices

- 23 per cent of practices are one person practices
- Another 19 per cent are two person practices
- Nearly three quarters of practices employ fewer than 5 staff
- Only 13 per cent employ more than 10 staff
- 35 per cent of practice staff are veterinarian nurses
- Average practice revenue rises with practice size: one person practice: €85 000; 2 person €163 000; 3 to 5 person €312 000; 6 to 10 person €794 000
- 31 per cent of practices expect to recruit more veterinarians in next 12 months; 28 per cent expect to recruit more veterinarian nurses

## 3.1 Practice Size

Most veterinarian practices are small; nearly three quarters employ no more than five staff. Only 13 per cent of practices have more than ten staff – and just 2 per cent are larger than 50. Nearly one quarter (23 per cent) of veterinarian practices are one person practices; while nearly as many (19 per cent) comprise two people. Thirty per cent of private practices employ three, four or five staff.

There is just one country out of those surveyed which has a significant number of large practices: Sweden. Here, 12 per cent of practices have between 50 and 100 staff, plus another 13 per cent are very large practices employing more than 100 staff. Large

practices are relatively common also in Finland, Switzerland and Portugal – but everywhere else the proportion of large practices is tiny. Medium sized practices, with between 6 and 30 staff, account for the majority of practices in Denmark, Finland and the Netherlands. In Belgium, two thirds of practices are one person firms. Other countries with high proportions of single person practices include Italy (38 per cent), the Czech Republic (36 per cent), Slovakia (34 per cent) and Poland (32 per cent).

The staffing profile shows the percentage composition of staff in different sizes of practice. Clearly most staff in a 1 person practice will be the owner although 10

Table 3-1  
Practice Size analysed by country

per cent	1	2	3-5	6-10	11-30	31-50	51-100	over 100
Austria	28	29	27	11	3	1	1	0
Belgium	66	14	13	3	2	0	1	1
Bulgaria*	11	33	22	11	22	0	0	0
Czech Republic	36	21	27	10	5	0	0	0
Denmark*	11	2	30	39	14	5	0	0
Estonia	21	12	30	27	10	0	0	0
Finland	11	6	17	28	29	1	1	6
France	18	15	32	23	9	1	0	1
FYROM	11	16	36	18	16	0	2	0
Germany	11	15	36	20	13	3	1	0
Iceland*	20	0	40	20	20	0	0	0
Italy	38	21	21	12	4	2	2	0
Latvia*	56	6	25	6	6	0	0	0
Luxemburg*	43	14	29	10	5	0	0	0
Netherlands	8	7	21	27	30	7	1	0
Norway	19	11	25	24	18	2	1	0
Poland	32	26	27	10	4	0	0	0
Portugal	9	9	52	16	4	1	3	6
Romania	19	27	36	11	6	1	1	0
Serbia	27	13	25	26	7	2	0	0
Slovakia	34	24	27	11	4	0	0	0
Spain	20	22	37	14	6	1	1	0
Sweden	14	3	13	14	23	8	12	13
Switzerland	14	11	30	25	11	3	1	5
Ireland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	23	19	30	16	9	2	1	1

\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

### Note:

‘Staff’ includes all staff: veterinarian and non-veterinarian staff

Staff numbers are expressed as Full-time equivalent

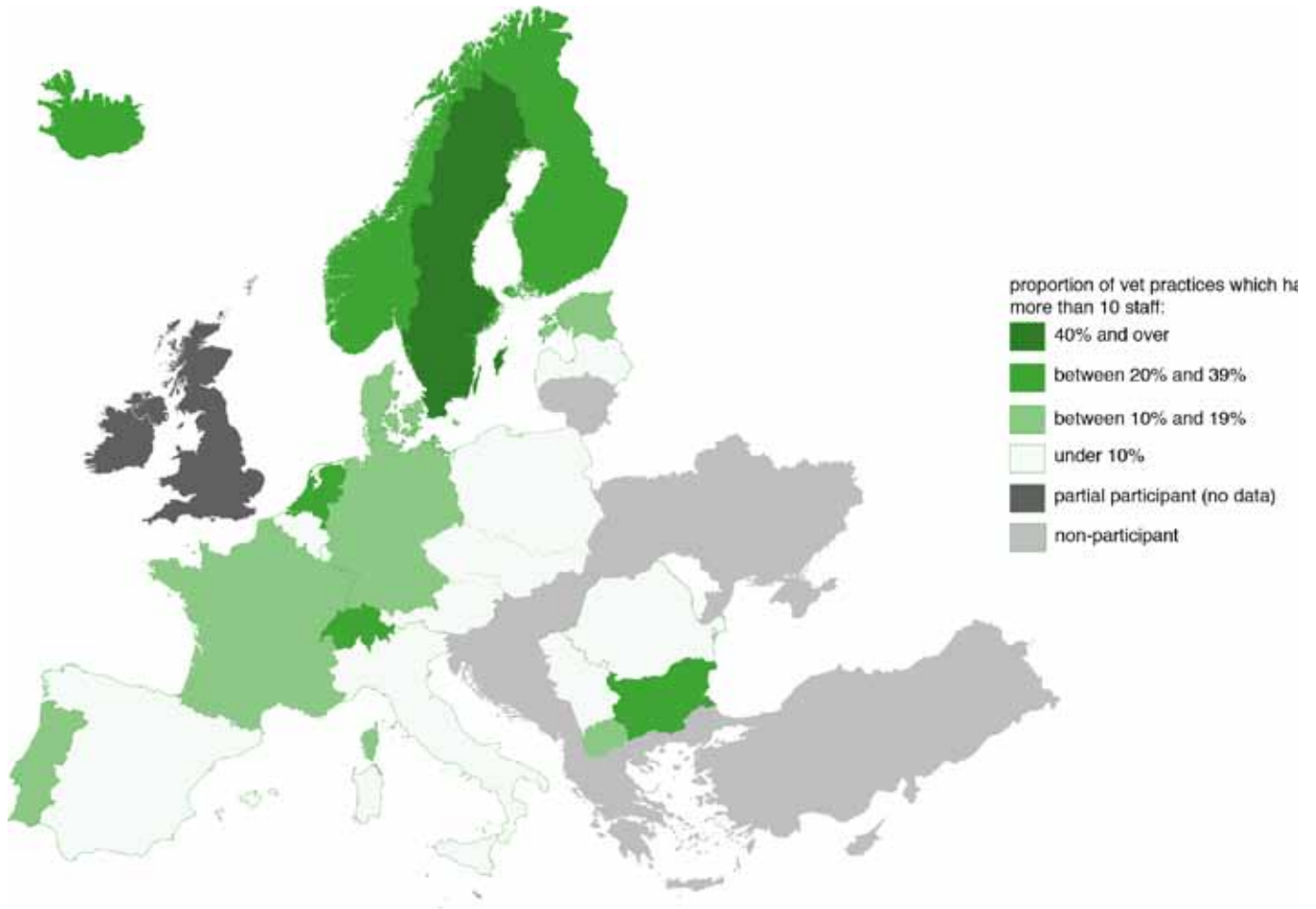
per cent of the staff are veterinarian nurses (including part-time staff as all figures are expressed as Full-Time Equivalent). The proportion of staff who are veterinarian owners falls almost exactly in line with practice size – from 38 per cent in a 4 to 5 person practice, through 27 per cent in a practice with between 100 and 499 staff; to just 8 per cent in practices with 1000 or more staff. The proportion of staff who are non-Veterinarian owners is negligible for all practice sizes.

In medium and large sized practices, veterinarian nurses comprise around 35 per cent of the total staffing (again full-time equivalent) although this rises to reach more than half of the total staffing for very large practices of 1000 or more staff. The proportion of nursing staff is between 31 and 37 per cent for all sizes of practice between 4 and 499 staff – a remarkably consistent figure.

Table 3-2  
Staffing profile - Europe

practice size (number of staff)	average (mean) per cent of staff				
	veterinarian owners	non- veterinarian owners	veterinarian - not owners	veterinarian nurses	other staff
1	84	0	3	10	3
2-3	55	2	10	23	11
4-5	38	2	15	31	13
6-10	29	2	22	35	13
11-30	23	2	24	36	15
31-50	21	0	26	37	15
51-99	n/a	n/a	n/a	n/a	n/a
100-499	27	2	27	32	12
500-999	23	0	23	46	9
1000+	8	1	31	53	7
EUROPE-24	30	1	22	35	11

Chart 3-1  
Practice Size mapped by country - proportion of practices with more than 10 staff





## 3.2 Future staffing

Table 3-3  
Anticipated changes in staffing profile next three years - Europe

practice size (number of staff)	average (mean) per cent of practices responding increase / no change / decrease for each staff group														
	veterinarian owners			non-veterinarian owners			veterinarian - not owners			veterinarian nurses			other staff		
	↑	↔	↓	↑	↔	↓	↑	↔	↓	↑	↔	↓	↑	↔	↓
1	7	91	3	2	96	2	20	78	1	22	76	2	11	87	2
2-3	8	89	3	2	96	2	30	65	5	26	71	3	14	82	4
4-5	9	88	3	2	97	1	30	62	7	26	68	6	12	83	5
6-10	16	79	5	3	93	4	27	59	14	32	61	7	12	80	7
11-30	18	72	10	4	91	5	38	46	16	43	48	9	19	71	10
31-50	20	64	16	8	90	3	55	39	7	57	41	2	23	75	3
51-99	20	73	7	0	100	0	42	58	0	54	46	0	33	67	0
100-499	20	67	13	0	86	14	25	50	25	36	64	0	10	70	20
500-999	14	71	14	0	75	25	0	83	17	0	86	14	20	80	0
1000+	50	50	0	50	50	0	100	0	0	100	0	0	100	0	0
EUROPE-24	8	88	4	3	95	2	31	63	6	28	67	6	15	80	5

Table 3-4  
Anticipated changes in staffing analysed by country

per cent	balance - difference between 'increase' and 'decrease' MAIN staffing categories only:		
	veterinarian owners	veterinarian - not owners	veterinarian nurses
Austria	+5	+7	+14
Belgium	+4	+16	+36
Bulgaria*	+17	+67	+33
Czech Republic	0	+36	+31
Denmark*	-4	-7	+22
Estonia	+4	+36	+20
Finland	0	+39	+47
France	+18	+10	+20
FYROM	+4	+11	-6
Germany	+4	+20	+22
Iceland*	0	+25	+100
Italy	+2	+23	+10
Latvia*	0	+17	+14
Luxemburg*	-10	+40	+63
Netherlands	-6	+21	+22
Norway	+1	+27	+30
Poland	+6	+38	+15
Portugal	0	+42	+18
Romania	+3	+39	+36
Serbia	+2	+23	+8
Slovakia	+14	+43	+49
Spain	+3	+29	+31
Sweden	+3	+24	+25
Switzerland	+7	+21	+25
Ireland	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a
EUROPE-24	+5	+25	+22

\* caution: small sample

Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys

EUROPE-24: weighted to reflect total vet population in participating countries

Looking to the future, survey respondents (practice owners) were asked how they expect the staffing profile within their practice to change over the next three years. Little change is expected in the number of veterinarian and non-veterinarian owners – which is not surprising. The real interest is in anticipated changes to veterinarian and nursing staff. Thirty one per cent of respondents expect to see an increase in the number of veterinarians employed in their practices. Just 6 per cent expect a decrease. Whilst the majority (63 per cent) anticipate no change, the very large difference between the proportions expecting an increase and those expecting a decrease implies a rise in demand over the next three years for veterinarians. The proportion expecting to recruit more veterinarians generally rises in line with practice size; it is noticeable that all of the respondents from very large practices (employing more than 1000 staff) expect to recruit. Nearly as many practice owners say they expect to recruit more veterinarian nurses (28 per cent) as say they plan to recruit more veterinarians (31 per cent). There is a slight difference for nurses – small practices are slightly less likely to recruit nurses than recruit veterinarians but for practices with 6 or more staff, respondents are consistently slightly more likely to recruit nurses than veterinarians.

The difference between the proportion of respondents saying they are likely to 'increase' staff and those who expect to decrease staff numbers gives a 'balance' statistic which is shown in the table, left. Although this ignores those who say 'no change', it provides an impression of future recruitment potential. The 'balance' statistic shows that countries most likely to recruit more veterinarians are Slovakia, Bulgaria, Romania, Finland and Poland. Practices in Slovakia, Finland, Belgium and Romania are most likely to recruit more veterinarian nurses.

### 3.3 Practice Revenue

We have looked earlier (chapter 2) at aggregate revenue – the total of all veterinarians’ practice revenue grossed up for each country: what we have called the market for Veterinary services. Here we use the survey data to examine the average revenue figures reported for each size of practice in each country. Less data is available for the largest practice size groups due to small samples in individual countries.

Average practice revenue approximately doubles in each of the practice sizes from an average of €85 000 for a one person practice to €163 000 in a two person practice to €312 000 in a practice with between 3 and 5 staff. Revenue averages nearly €800 000 for a practice with 6 to 10 staff, rising to €1.4 million for practices with between 11 and 30 staff. Beyond this size the averages are less meaningful given the variety of practice sizes reporting in these large size groups.

In some countries the pattern of a doubling of revenue for consecutive size groups is sometimes less obvious. In many cases this will be because of smaller sample sizes. It may also be due to the way that practice size is measured: the size is based on the number of staff, so sometimes the average revenue for a 2 person practice may be very little higher than for a one person practice – but the 2 person practice may simply comprise a veterinarian plus a nurse, so the potential for a higher fee revenue may be more limited than in a practice with two veterinarians. For practice sizes up to 5 staff the highest average revenue is reported by practices in Switzerland and France.

The average revenue figures are ‘as reported’, and unlike the earnings figures presented later, have **not** been adjusted to take account of purchasing power parity (PPP).

Table 3-5  
Average revenue per practice analysed by country

□	1	2	3-5	6-10	11-30	31-50	51-100	over 101
Austria	111 178	210 252	352 600	398 182	n/a	n/a	n/a	n/a
Belgium	103 280	153 250	360 455	986 000	1 000 000	n/a	n/a	n/a
Bulgaria*	61 348	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Czech Republic	49 008	42 606	59 296	564 297*	n/a	n/a	n/a	n/a
Denmark*	109 257	n/a	168 977	1 623 882	1 058 409*	n/a	n/a	n/a
Estonia	26 999	188 500*	232 017	588 400	689 500*	n/a	n/a	n/a
Finland	82 889	142 500*	291 111	696 500	717 375	2 300 000*	n/a	n/a
France	168 784	245 458	502 620	961 051	2 086 281	4 127 091	n/a	n/a
FYROM	27 094*	14 666	34 638*	25 698*	354 487*	n/a	n/a	n/a
Germany	92 215	249 424	298 516	506 634	1 128 205	2 573 333*	n/a	n/a
Iceland*	71 400*	n/a	361 615*	n/a	n/a	n/a	n/a	n/a
Italy	23 421	48 064	88 720	325 275	n/a	n/a	n/a	n/a
Latvia*	10 750	n/a	35 000	10 000	n/a	n/a	n/a	n/a
Luxemburg*	65 000	85 000	253 500	1 020 000	1 000 000	n/a	n/a	n/a
Netherlands	98 551	181 455	308 075	496 256	1 179 648	4 122 000	n/a	n/a
Norway	146 522	219 732	435 912	1 676 671	1 932 039	n/a	n/a	n/a
Poland	15 164	15 041	61 575	n/a	n/a	n/a	n/a	n/a
Portugal	22 500*	n/a	55 167*	164 000*	n/a	n/a	n/a	n/a
Romania	5 427	10 438	14 038	38 921	143 076*	n/a	n/a	n/a
Serbia	11 284	25 962	44 949	318 293	264 948	1 729 345*	n/a	n/a
Slovakia	10 150	34 786	36 990	195 600	232 500*	n/a	n/a	n/a
Spain	36 769	104 845	136 943	355 250	735 769	2 000 000	4 000 000	n/a
Sweden	75 700	188 557	133 415	714 022	1 663 741	n/a	n/a	n/a
Switzerland	124 089	311 657	589 416	1 523 904	1 933 698	5 123 577	n/a	n/a
Ireland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	85 318	163 097	312 313	794 386	1 414 384	3 394 478	6 488 878	8 994 497

Figures are averages (means) and refer to the year 2013/14 or latest accounting year provided.

Results above are based on a minimum cell size of 10. But for smaller countries we have extended this to 5 and in very exceptional cases to 4. Where there are fewer than four responses or where individual figures vary excessively from the mean we mark the data as n/a. this will often be the case for larger practices where the range of reported values is wider.

\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys

EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

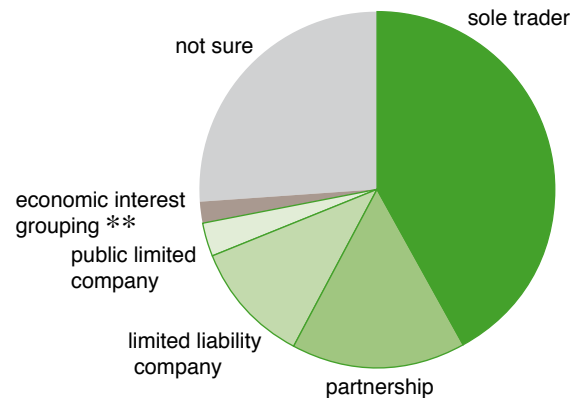
Please note, all data refers to values BEFORE TAX and excludes VAT

### 3.4 Legal Formation

The most common legal formation of Veterinary practice is as a sole trader: 42 per cent of practices in Europe are set up in this way. The majority of practices in the Czech Republic, Germany, Austria and Spain are sole traders. The next most common type of legal formation is a Partnership, accounting for 16 per cent of practices. At least 30 per cent of practices are Partnerships in the Netherlands, Portugal and Denmark.

Limited companies are less popular overall in Europe than Partnerships, accounting for 11 per cent of practices. However in several countries – notably Eastern Europe – Limited Companies are more popular than partnerships; while in one, FYROM the Limited Company is the principal legal formation accounting for 63 per cent of practices. Just 3 per cent of Europe’s veterinarian practices are public limited companies (PLCs) although more than 10 per cent of practices in Switzerland, Norway and Finland are PLCs. The Economic Interest Grouping formation is present in a minority of countries accounting for 2 per cent of practices overall – but more than 30 per cent of veterinarian practices in Portugal (and Latvia, but small sample) are structured this way.

Chart 3-2  
Legal formation of veterinarian practice - Europe



\*\* European Economic Interest Grouping - EEIG. The purpose of the grouping is to facilitate or develop the economic activities of its members by a pooling of resources, activities or skills. An EEIG can be formed by companies, firms and other legal entities. It must have at least two members from different EU member states.

Table 3-6  
Practice legal formation analysed by country

per cent	sole trader	partnership	limited liability company	public limited company	corporation	economic interest grouping**	not sure
Austria	64	9	3	9	0	0	15
Belgium	42	12	22	3	0	4	16
Bulgaria*	5	5	26	0	0	0	63
Czech Republic	69	4	8	3	3	0	14
Denmark*	30	30	0	3	0	11	27
Estonia	37	10	26	4	0	3	20
Finland	18	6	7	12	0	10	46
France	26	29	25	1	0	0	17
FYROM	21	8	63	0	4	4	0
Germany	64	8	3	4	0	0	21
Iceland*	17	50	17	0	0	0	17
Italy	35	23	1	2	0	0	38
Latvia*	10	20	10	10	0	30	20
Luxemburg*	36	36	14	0	0	0	14
Netherlands	22	39	4	2	1	2	30
Norway	28	11	4	19	0	7	32
Poland	49	20	1	0	0	0	30
Portugal	13	31	13	0	0	31	13
Romania	45	7	35	1	0	2	10
Serbia	42	5	34	0	0	0	19
Slovakia	45	2	14	1	8	1	28
Spain	53	6	18	0	1	1	20
Sweden	27	7	2	8	0	7	48
Switzerland	38	5	9	22	0	0	27
Ireland	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	42	16	11	3	0	2	26

\* caution: small sample      Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
 EUROPE-24: figure is weighted to reflect the total vet population in all participating countries      \*\* see footnote below chart 3-2

### 3.5 International and Branches

Twelve per cent of Europe’s veterinarian practices are part of a group practice (operating on more than one site) or a chain. Another one per cent are part of a franchise. The highest proportions of practices which are part of a chain or group practice are to be found in Sweden (35 per cent), Bulgaria (29 per cent) and Portugal (21 per cent). Germany, Austria and Slovakia have extremely low levels of practices being part of a chain (2 per cent or less). Slovakia also has very few of its practices involved with chains, but this country stands out as having an unusually high proportion of practices which are part of a franchise: 26 per cent.

For the vast majority of practices which are part of a group, chain or franchise, the chain’s head office is in the same country as the practice. This is the case for 90 per cent of group, chain or franchise practices. The highest proportion of head offices being outside the practice’s own country are in Denmark (37 per cent of the chain / franchise’s head office is outside the country), Portugal (29 per cent), Belgium (25 per cent), Norway (22 per cent) and Finland (20 per cent).

An average 2.3 per cent of practice revenue was derived from work outside the practice’s own country. Highest proportions are recorded by practices in Portugal (10 per cent) and Italy (4 per cent).

Chart 3-3  
Chain, group or Franchise practices - Europe

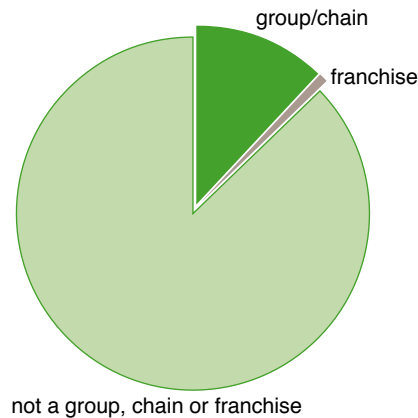


Table 3-7  
Revenue from outside own country and whether practice is part of group chain or franchise analysed by country

	Per cent of All Vet Practices			Per cent of Group, Chain or Franchise Practices
	mean revenue derived from outside own country	practice is part of group practice or chain	practice is part of franchise	head office in same country
Austria	0.5	2	0	94
Belgium	3.2	7	1	75
Bulgaria*	0.2	29	4	92
Czech Republic	3.3	13	0	98
Denmark*	1.3	8	6	63
Estonia	1.7	9	5	100
Finland	2.1	17	0	80
France	0.3	13	1	99
FYROM	1.8	19	0	97
Germany	0.9	1	0	93
Iceland*	0.4	14	7	50
Italy	4.2	16	0	85
Latvia*	10.1	10	0	88
Luxemburg*	2.4	6	13	100
Netherlands	2.5	13	2	83
Norway	1.1	17	3	78
Poland	2.1	12	1	n/a
Portugal	10.0	21	3	71
Romania	0.9	10	3	94
Serbia	1.3	14	1	86
Slovakia	3.3	3	26	91
Spain	1.7	17	0	92
Sweden	1.0	35	1	91
Switzerland	1.0	7	1	89
Ireland	n/a	n/a	n/a	n/a
United Kingdom	1.2	n/a	n/a	n/a
EUROPE-24	2.3	12	1	90

\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

### 3.6 On-line presence: Social Media

A minority of practices use social media; 38 per cent have an official Facebook page while just 5 per cent have an official Twitter feed. The highest use of Facebook is by practices in Portugal (92 per cent have a practice page), Demark (72 per cent), Netherlands (69 per cent), Spain (64 per cent) and Bulgaria (63 per cent).

A quarter (25 per cent) of practices in the Netherlands, and 19 per cent in Spain, have an official Twitter feed – elsewhere (apart from Latvia, which is small sample) fewer than 10 per cent of practices use Twitter. Twenty eight per cent of individual veterinarians (not practices) personally have a LinkedIn page, including more than 50 per cent of veterinarians in Denmark, the Netherlands and Portugal.

Chart 3-4  
Use of Social Media - Europe

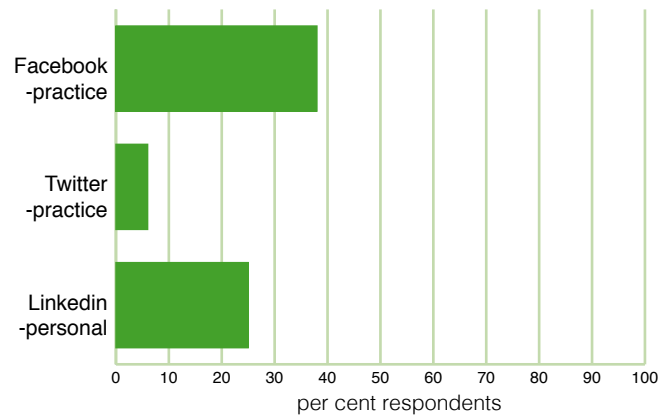


Table 3-8  
Use of Social Media analysed by country

	Per cent of All Vet Practices		Per cent of Vets
	have an official Facebook page	have an official Twitter page	personally have a profile on LinkedIn
Austria	17	3	14
Belgium	15	0	32
Bulgaria*	63	0	22
Czech Republic	37	2	17
Denmark*	72	7	68
Estonia	37	0	23
Finland	48	5	25
France	12	1	23
FYROM	35	9	33
Germany	17	1	10
Iceland*	80	0	44
Italy	39	3	35
Latvia*	30	22	48
Luxemburg*	27	9	45
Netherlands	69	25	62
Norway	54	1	36
Poland	40	0	11
Portugal	92	0	52
Romania	32	3	31
Serbia	33	3	32
Slovakia	38	2	12
Spain	64	19	39
Sweden	16	2	43
Switzerland	48	1	23
Ireland	n/a	n/a	n/a
United Kingdom**	28	9	19
EUROPE-24	38	5	28

\* caution: small sample

\*\* Figures for United Kingdom relate to slightly different question: Which of the following social networking sites do you use for professional purposes?  
EUROPE-24: weighted to reflect total vet population in participating countries

## On-line presence: pet food sales

Online sales of pet food are very much of a minority activity at present, although the rate of growth looks set to be rapid. Just 5 per cent of veterinarian practices currently sell pet food online. This includes more than 10 per cent in Portugal, the Netherlands, Bulgaria and Denmark, and 44 per cent in FYROM. However, over the next three years, 7 per cent of practices expect to start selling food online – while another 27 per cent think they might do so. The highest incidence of practices stating that they will sell food online in the near future, are in the Netherlands (41 per cent of practices expect to start) and Denmark (24 per cent although small sample size). A large proportion of veterinarians in FYROM, France and Romania say “maybe”.

Chart 3-5  
How many practices sell pet food online - Europe

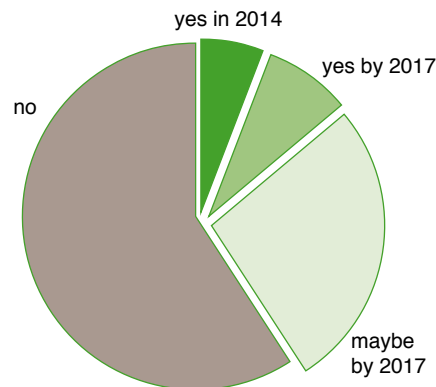


Table 3-9  
On-line sales of pet food now and in three years' time analysed by country

per cent	currently sell pet food online	expect will be selling pet food online in three years' time	
	yes	yes	maybe
Austria	6	4	17
Belgium	3	3	14
Bulgaria*	13	13	25
Czech Republic	3	6	20
Denmark*	10	24	28
Estonia	2	4	37
Finland	6	6	19
France	6	10	37
FYROM	44	7	41
Germany	9	7	26
Iceland*	0	20	40
Italy	1	3	29
Latvia*	0	0	40
Luxemburg*	8	0	45
Netherlands	14	41	26
Norway	4	3	12
Poland	2	3	27
Portugal	15	8	31
Romania	3	9	36
Serbia	4	8	31
Slovakia	1	7	30
Spain	2	6	22
Sweden	2	2	20
Switzerland	8	3	25
Ireland	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a
EUROPE-24	5	7	27

\* caution: small sample  
Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: weighted to reflect total vet population in participating countries

# 4

## Working as a Veterinarian



## KEY FINDINGS -

## CHAPTER 4: Working as a Veterinarian

- Average earnings: €38 500 (adjusted for Purchasing Power Parity PPP)
- Practice owners' earnings vary significantly by size: 1 person €29 000, 3 person practice €55 000 (PPP)
- Outside private practice, highest salaries in industry / research: €55 000 (PPP)
- Veterinarians in public service average €44 000 (PPP)
- Average earnings rise consistently by age, peaking at age 60 to 64
- Differential between average male earnings (€46 000) and female earnings (€33 000) is 28 per cent (PPP)
- 71 per cent of veterinarians plan to retire in their 60s, 13 per cent in their 70s, 2 per cent in their 80s, 9 per cent never
- 28 per cent of veterinarians do not have a pension plan but of those who do only 32 per cent think their pension plan will be adequate for their needs
- Internationally, 8 per cent of veterinarians were educated outside their home country; 6 per cent have worked in another country in the last three years - while 29 per cent have seriously considered working in another country in the last three years



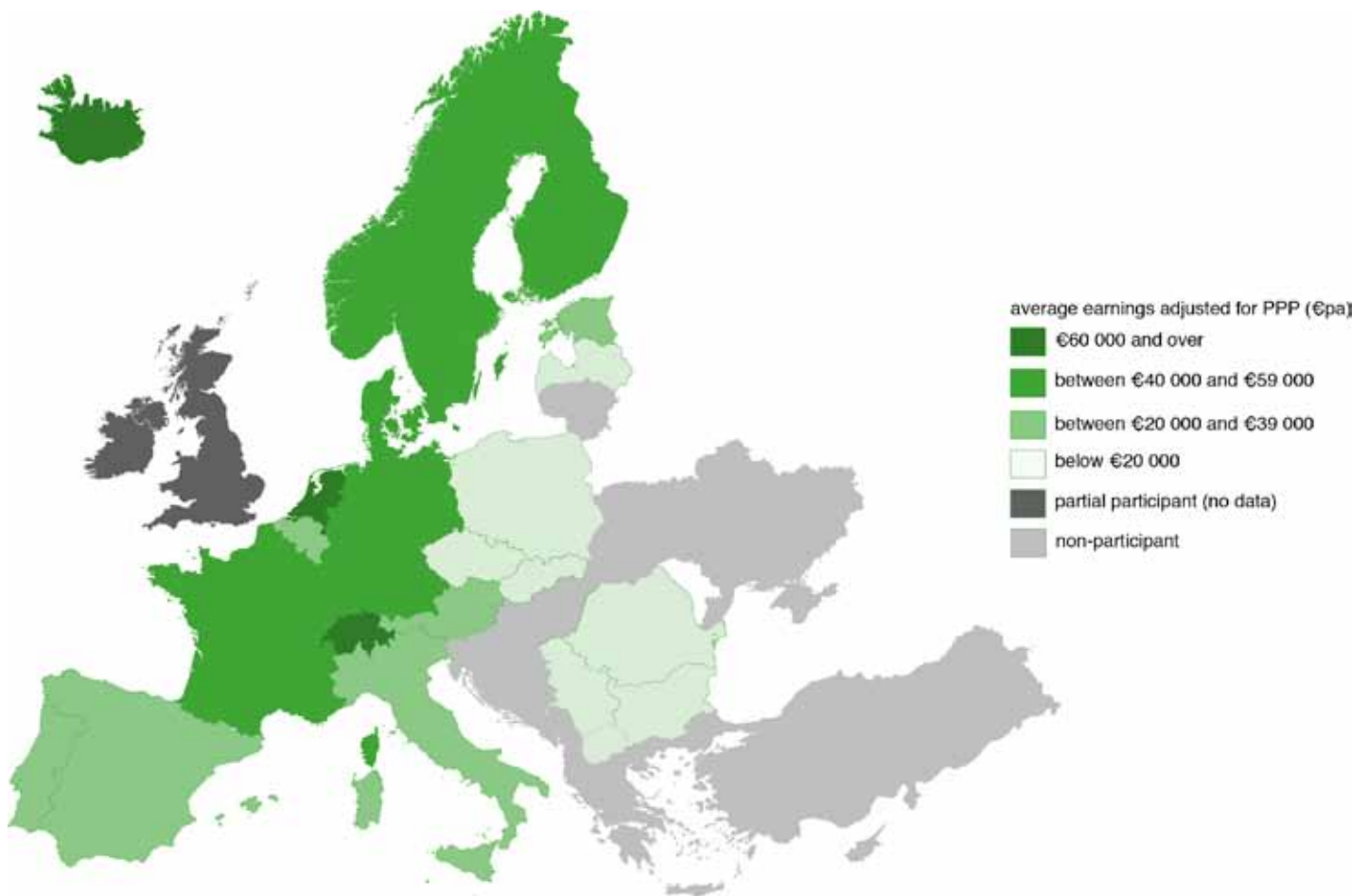
## 4.1 Earnings

The average annual earnings of the veterinarians responding to this survey are €38 500\*. In this analysis, we have adjusted the earnings data to reflect a country's relative purchasing power. This is termed Purchasing Power Parity (PPP) and using the latest PPP index sourced from Eurostat we have adjusted all earnings data for PPP (see 'adjusted for PPP' column in Table 4-1). The PPP adjusted data makes more sense when taking a Europe-wide analysis of the research, so we have concentrated on using PPP adjusted earnings data in the next few pages of this report. Unadjusted data makes more sense when viewing one country on its own, so we present the earnings data unadjusted in the country profiles (see second half of this report).

\*This is the median average, which is considered to be a better 'average' than the more usual mean average, as it is not affected by unusually high, or unusually low, values.

Please note, all data refers to values BEFORE TAX

Chart 4-1  
Average earnings of veterinarians mapped by country



**Table 4-1**  
Average earnings analysed by country: veterinarians compared with national average earnings of all employees

□	average earnings: VETS		average earnings: ALL ** employees
	unadjusted	adjusted for PPP	
Austria	40 000	37 418	33 874
Belgium	35 000	32 022	36 034
Bulgaria*	4 601	9 506	n/a
Czech Republic	10 922	15 470	15 242
Denmark*	65 648	47 026	36 233
Estonia	20 000	25 031	14 197
Finland	51 000	41 296	30 022
France	50 000	45 830	30 159
FYROM	4 867	10 422	n/a
Germany	50 000	49 261	32 737
Iceland*	67 927	60 541	n/a
Italy	35 000	33 915	25 901
Latvia*	9 600	13 483	n/a
Luxemburg*	60 000	48 701	41 984
Netherlands	70 000	63 579	35 666
Norway	72 779	46 984	37 683
Poland	10 098	17 873	16 978
Portugal	21 469	24 963	n/a
Romania	7 229	12 572	n/a
Serbia	6 053	11 313	n/a
Slovakia	12 200	17 280	15 219
Spain	26 000	27 426	26 098
Sweden	55 458	42 726	30 590
Switzerland	98 373	63 100	40 646
Ireland	n/a	n/a	37 102
United Kingdom	n/a	n/a	30 871
<b>EUROPE-24</b>	<b>40 000</b>	<b>38 497</b>	<b>29 855***</b>

\* caution: small sample

Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys

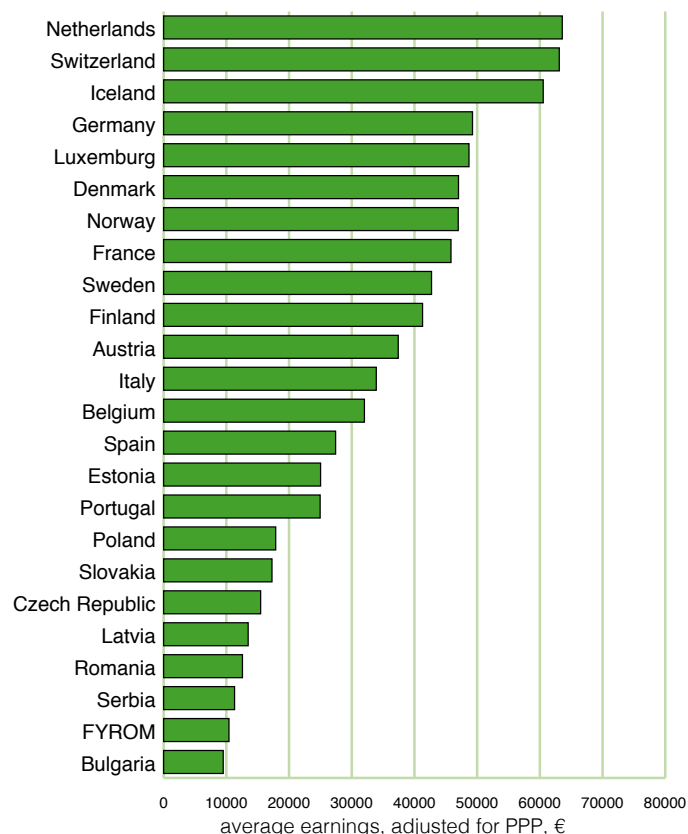
EUROPE-24: weighted to reflect total vet population in participating countries

\*\* Source: OECD average annual wages for full-time employees. Derived from the PPP data series expressed in US Dollars, converted to Euros as at 30.06.2013

\*\*\* The OECD do not provide an average figure for Europe. We have calculated the EUROPE-24 figure for ALL employees as a straight line average of the individual countries.

Please note, all data refers to values BEFORE TAX

**Chart 4-2**  
Average earnings of veterinarians - Europe



## Earnings by Field of Employment

The Europe-wide averages (adjusted for PPP) show that average earnings for veterinarian owners of private practices, and for veterinarians in public service, are almost identical. Veterinarian owners of private practices earn an average of just under €44 000 per year, with the highest average earnings (expressed in PPP adjusted Euros) reported in the Netherlands (€91 000), Switzerland (€71 000) and Germany (€61 600).

We have split veterinarian owners by size of practice, to separate out owners in 1 or 2 person practices from other small, medium and large practices. The owner of 1 person practices earns on average just over €29 000 (adjusted for PPP), which is 15 per cent less than the owner of a two person practice (around €34 000) but substantially less than the average earnings of veterinarian owners in practices with 3 or more staff, where average owners' earnings are about €55 000.

The average earnings for veterinarians in private practice who are not owners (that is, employees of the practice or 'salaried veterinarians') are €25 300. These are the lowest average earnings of any of the veterinarian employment fields analysed in this research. The differential between owners

and salaried veterinarians approaches 50 per cent in several countries, and is even greater than 50 per cent in Denmark and the Netherlands. The differential is smallest in Sweden, Serbia, Romania, and Belgium. Portugal stands out as being the only country to record higher average earnings for salaried veterinarians than for owner veterinarians – due to the average earnings of owners being particularly low.

Veterinarians working in private industry record the highest average earnings of any employment field. The average PPP figure is €55 000; salaries in Denmark, Switzerland, France and the Netherlands are around €70 000.

Within public service, highest average veterinarians' earnings are recorded in Switzerland and Italy. In both these countries (and Austria and Romania) veterinarians in public service earn more than any other employment group.

Veterinarians working outside the profession earn an average of €48 500 although this group is made up of a relatively small sample size compared with other employment fields.

Chart 4-3  
Average earnings of veterinarians by field of employment - Europe (adjusted for PPP)

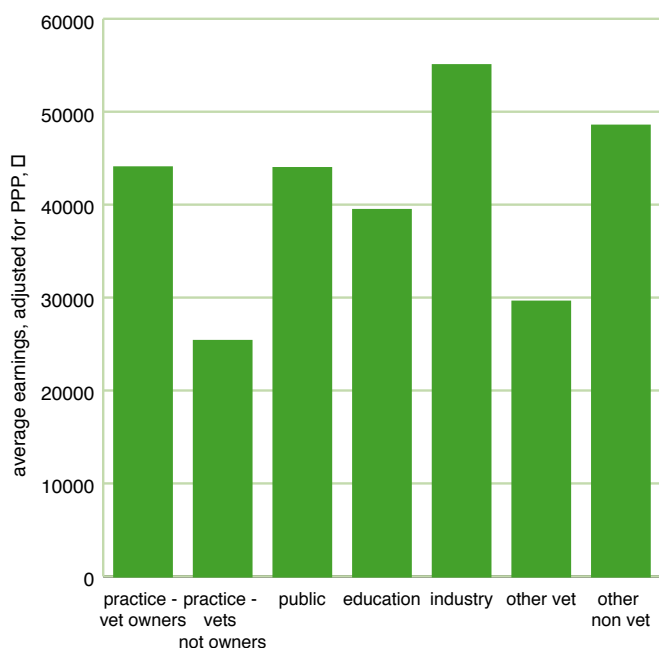
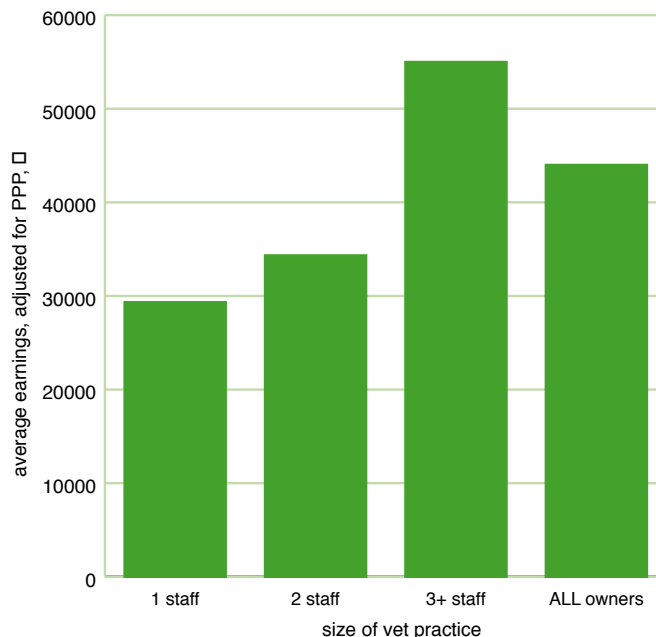


Chart 4-4  
Average earnings of veterinarian owners analysed by practice size - Europe (adjusted for PPP)



**Table 4-2**  
Average earnings of veterinarians by field of employment analysed by country (full-time veterinarians only)

□ adjusted for PPP	practice - vet owners				practice - vets not owners	public	education	industry	other vet	other non vet
	practice size 1 staff	practice size 2 staff	practice size 3+ staff	ALL owners						
Austria	33 676	41 628	46 773	37 418	28 655	58 934	44 902	n/a	n/a	n/a
Belgium	25 160	36 597	36 597	28 820	27 447	36 597	32 022	59 469	n/a	n/a
Bulgaria*	n/a	n/a	n/a	2 641	n/a	8 873	12 253	n/a	n/a	n/a
Czech Republic	19 131	17 533	30 682	20 627	12 376	n/a	n/a	n/a	18 564	n/a
Denmark*	n/a	n/a	56 959	52 256	13 968	33 590	49 905	69 099	n/a	n/a
Estonia	30 038	n/a	30 038	30 038	28 411	14 018	23 279	n/a	19 524	n/a
Finland	40 486	n/a	41 296	40 486	34 008	42 105	45 344	48 583	5 668	n/a
France	32 997	42 163	54 995	50 412	29 331	49 496	36 664	71 036	44 581	91 659
FYROM	n/a	n/a	15 459	10 422	n/a	n/a	n/a	n/a	n/a	n/a
Germany	39 409	50 739	77 833	61 576	35 468	48 276	44 335	66 995	56 294	48 000
Iceland*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Italy	17 442	25 048	29 070	22 384	16 473	67 829	38 760	40 698	29 070	46 512
Latvia*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxemburg*	36 526	n/a	n/a	40 584	n/a	n/a	n/a	n/a	n/a	n/a
Netherlands	49 046	54 496	90 827	90 827	40 436	56 130	49 955	70 391	61 308	59 037
Norway	61 080	46 984	58 731	58 731	37 588	45 418	43 069	56 773	57 164	54 228
Poland	17 175	15 565	25 762	19 322	n/a	17 175	25 762	n/a	n/a	n/a
Portugal	n/a	n/a	8 488	8 488	15 233	34 011	37 791	30 250	32 576	n/a
Romania	16 973	10 176	12 022	11 865	10 608	14 340	n/a	n/a	13 162	n/a
Serbia	7 375	12 930	11 123	9 697	7 435	15 516	21 011	12 930	9 697	10 667
Slovakia	23 371	28 329	21 246	23 371	15 297	22 663	n/a	n/a	16 643	n/a
Spain	21 097	18 987	26 371	25 316	15 243	42 194	36 920	33 755	26 371	41 139
Sweden	25 635	n/a	39 991	38 453	35 368	45 375	51 271	64 089	46 998	n/a
Switzerland	51 269	52 583	78 875	70 987	39 700	76 246	52 846	69 673	42 329	n/a
Ireland	n/a	n/a	n/a	75 000	40 000	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	29 331	34 332	54 995	43 996	25 318	43 921	39 411	54 995	29 546	48 486

\* caution: small sample      Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys

EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

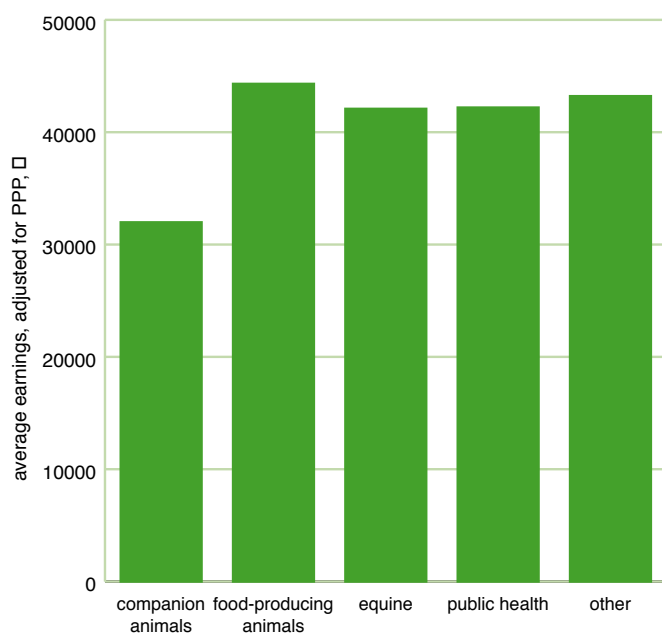
Please note, all data refers to values BEFORE TAX

**Table 4-3**  
Average earnings of veterinarians by main area of focus analysed by country (full-time veterinarians only)

□ adjusted for PPP	companion animals	food producing animals	equine	public health	other
Austria	33 676	46 773	32 741	62 011	28 064
Belgium	26 532	34 767	10 979	36 597	38 884
Bulgaria*	11 408	n/a	n/a	9 506	8 873
Czech Republic	14 387	22 689	15 470	20 627	30 425
Denmark*	39 636	57 583	9 000	n/a	4 223
Estonia	25 031	26 533	n/a	13 767	23 154
Finland	40 486	40 486	39 676	44 332	44 534
France	41 247	54 995	39 413	45 830	54 995
FYROM	n/a	10 109	n/a	n/a	n/a
Germany	41 379	54 187	53 202	47 066	52 709
Iceland*	n/a	n/a	n/a	n/a	n/a
Italy	19 380	46 512	38 760	67 829	37 791
Latvia*	n/a	n/a	n/a	n/a	n/a
Luxemburg*	36 526	n/a	n/a	n/a	n/a
Netherlands	66 985	72 661	51 317	57 242	54 496
Norway	43 069	50 900	39 463	45 418	47 768
Poland	18 785	21 469	n/a	17 175	17 175
Portugal	13 953	41 805	n/a	34 011	32 594
Romania	10 608	14 230	n/a	12 572	7 465
Serbia	8 146	11 443	15 758	13 253	12 606
Slovakia	16 997	24 079	n/a	n/a	n/a
Spain	18 844	31 646	18 882	40 084	34 810
Sweden	35 890	46 998	44 008	50 416	46 144
Switzerland	58 630	68 358	47 325	74 931	60 471
Ireland	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a
<b>EUROPE-24</b>	<b>31 977</b>	<b>44 304</b>	<b>42 081</b>	<b>42 194</b>	<b>43 209</b>

\* caution: small sample      Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
 EUROPE-24: figure is weighted to reflect the total vet population in all participating countries  
 Please note, all data refers to values BEFORE TAX

**Chart 4-5**  
Average earnings of veterinarian owners analysed by main area of focus - Europe (adjusted for PPP)



Analysed by main area of focus, veterinarians involved in the care of companion animals record lower average earnings than those in any other area. The average earnings of veterinarians who focus on companion animals are €32 000, some 28 per cent lower than the €44 300 average recorded by veterinarians who focus on food-producing animals. Equine veterinarians and those who focus on public health earn very slightly less at around €42 000 on average.

## Earnings by age

When analysed by age, average earnings show a clear and consistent relationship between increasing age and increasing earnings. Average earnings rise steeply from under 30 (€21 300) to age 40 to 44 (€40 500). Beyond this, veterinarians' average earnings continue to rise, initially at a slow rate when veterinarians are in their forties, but at an accelerating rate from age 50 on. Peak earnings are reached at age 60 to 64; after age 65 earnings start to fall.

Chart 4-6  
Average earnings of vets by age - Europe (PPP)

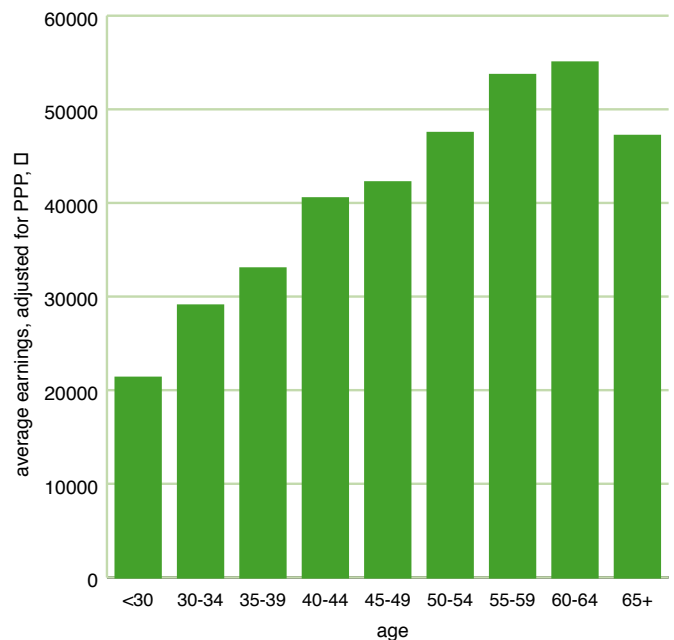


Table 4-4  
Average earnings of veterinarians by age analysed by country (full-time veterinarians only)

Country	<30	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
Austria	16 838	35 080	28 064	28 064	46 773	43 499	46 773	51 450	n/a
Belgium	21 958	32 937	33 394	33 193	24 703	31 565	32 022	32 479	n/a
Bulgaria*	n/a	7 985	8 239	n/a	7 922	10 752	10 563	2 113	n/a
Czech Republic	10 520	12 685	14 439	25 783	24 752	22 689	24 752	24 236	n/a
Denmark*	n/a	n/a	n/a	57 583	47 986	40 788	57 391	59 982	n/a
Estonia	17 146	25 031	23 029	20 025	31 289	21 277	30 038	68 836	n/a
Finland	31 984	42 105	39 932	40 486	42 105	46 754	48 583	45 344	n/a
France	25 665	32 997	41 247	46 416	46 288	50 412	55 458	56 829	53 162
FYROM	n/a	n/a	n/a	10 109	10 075	n/a	n/a	n/a	n/a
Germany	33 103	39 409	39 409	55 665	57 143	59 113	59 113	68 966	48 276
Iceland*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Italy	11 628	14 729	24 225	34 884	36 822	52 326	67 829	70 175	n/a
Latvia*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxemburg*	n/a	n/a	41 802	n/a	n/a	n/a	n/a	n/a	n/a
Netherlands	36 331	39 510	54 496	72 661	72 661	81 744	74 478	66 757	n/a
Norway	35 238	36 961	42 678	48 551	49 318	50 900	51 957	58 731	50 117
Poland	n/a	25 762	15 028	20 395	20 395	13 620	18 248	n/a	n/a
Portugal	14 186	16 860	32 576	36 137	n/a	56 680	n/a	42 514	n/a
Romania	6 679	12 572	14 144	12 180	11 787	13 751	9 822	11 020	n/a
Serbia	6 626	7 435	12 930	10 344	11 281	12 930	16 162	14 546	n/a
Slovakia	11 048	17 705	24 788	28 329	22 663	16 643	24 788	n/a	n/a
Spain	14 768	17 688	25 316	26 371	36 920	40 084	42 194	47 468	51 688
Sweden	30 335	30 763	44 862	41 188	46 144	48 280	53 681	45 930	n/a
Switzerland	33 916	40 591	47 851	63 100	65 729	78 875	75 194	78 875	55 212
Ireland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	21 320	29 036	32 997	40 486	42 194	47 468	53 661	54 995	47 155

\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries  
Please note, all data refers to values BEFORE TAX

## Earnings by gender

There is a 28 per cent differential between male and female earnings; male veterinarians earn an average of  $\square 45\ 800$  (adjusted for PPP) compared with female veterinarians' earnings of  $\square 32\ 900$ . These are average earnings of full-time veterinarians. Average male earnings exceed female earnings in nearly all countries; only in Belgium is there exact parity, while Poland is the only country to record higher average earnings for female veterinarians than for male veterinarians. The differential in favour of male veterinarians is greater than 40 per cent in Italy, the Czech Republic, Portugal and Austria. A word of caution; these are the average earnings for all veterinarians, we do not have sufficient data to compare average male and female earnings for each country by field of employment.

The differential of 28 per cent between male and female veterinarians' average earnings compares with an average differential of 17 per cent across the EU, for all employees in full-time employment (source: Eurostat).

Chart 4-7

Average earnings of veterinarians by gender - Europe (PPP)

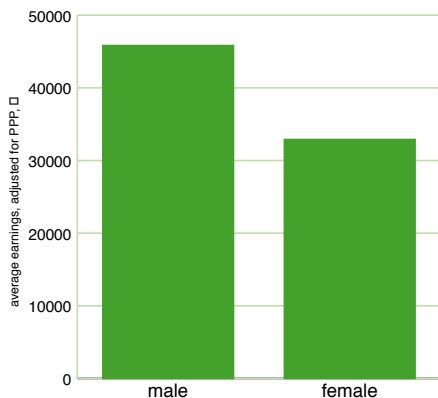


Table 4-5

Average earnings of veterinarians by gender analysed by country (full-time veterinarians only)

$\square$ adjusted for PPP	male	female	differential**
Austria	46 773	26 193	+44
Belgium	32 022	32 022	0
Bulgaria*	9 887	8 112	+18
Czech Republic	24 752	12 376	+50
Denmark*	55 183	39 636	+28
Estonia	31 289	18 773	+40
Finland	48 583	40 486	+17
France	54 995	34 097	+38
FYROM	10 422	n/a	n/a
Germany	61 576	39 409	+36
Iceland*	n/a	n/a	n/a
Italy	44 574	19 380	+57
Latvia*	n/a	n/a	n/a
Luxemburg*	46 672	n/a	n/a
Netherlands	72 661	49 955	+31
Norway	54 815	43 069	+21
Poland	17 390	20 288	-17
Portugal	32 594	17 616	+46
Romania	14 144	8 644	+39
Serbia	11 637	10 021	+14
Slovakia	18 414	16 997	+8
Spain	31 646	20 968	+34
Sweden	51 271	41 820	+18
Switzerland	73 616	44 170	+40
Ireland	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a
EUROPE-24	45 830	32 889	+28

\* caution: small sample

Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys

EUROPE-24: weighted to reflect total vet population in participating countries

\*\* differential = difference between average male and female earnings expressed as a percentage of male earnings. A positive (+) differential means male vets' average earnings exceed those of female vets ; a negative (-) differential means female earnings exceed those of males. Please note, all data refers to values BEFORE TAX

## Earnings by age and gender

When analysed by both age and gender, the results show that male veterinarians earn more than female veterinarians at every age group to age 64. Only amongst veterinarians aged 65 or more is there a very slight differential in favour of female veterinarians' earnings (but relatively small sample size). When analysed by the three largest fields of employment, the differentials in favour of male veterinarians are largest

amongst veterinarian owners. For veterinarians working in private practices, female veterinarians earn more than male veterinarians in three out of seven age groups. Differentials are smallest amongst veterinarians in public service, although here again the figures show that male earnings exceed female earnings in most age groups.

**Table 4-6**  
Per cent differential between average earnings by age (adjusted for PPP) analysed by country (full-time veterinarians only)

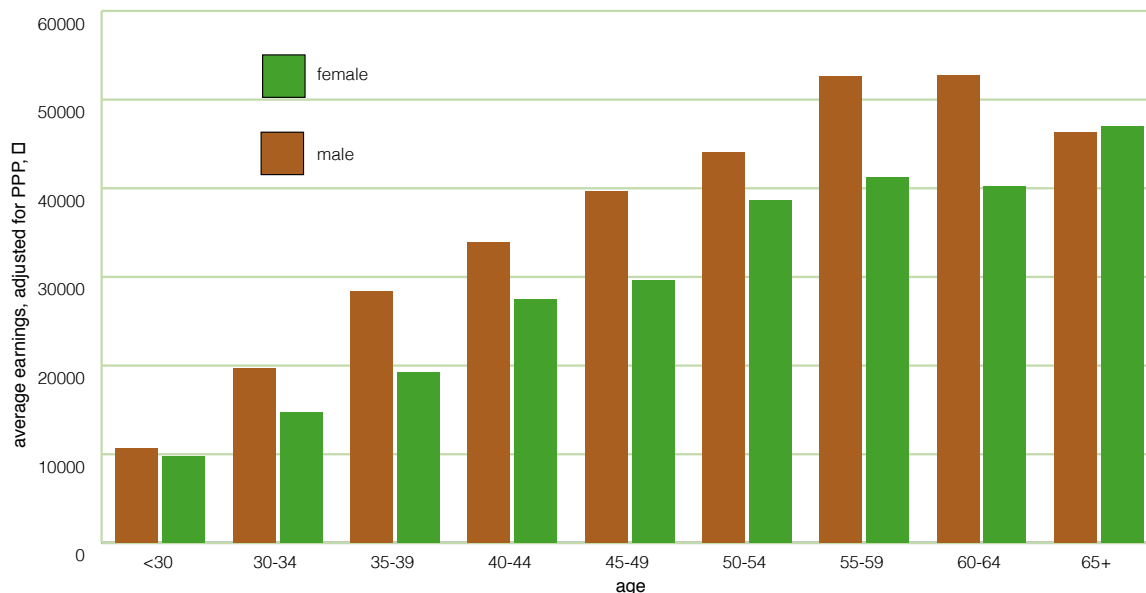
differential *	<30	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
Practice - vet owners	+10	+33	+58	+14	+74	+15	+75	+72	+1
Practice - vets not owners	-34	-5	+29	+87	+17	-43	+4	n/a	n/a
Public Service	n/a	n/a	+20	+15	+12	+12	-4	+75	n/a
EUROPE-24	+10	+33	+48	+23	+34	+14	+27	+31	-1

EUROPE-24: weighted to reflect total vet population in participating countries

Earnings are adjusted for PPP

\* differential = difference between average male and female earnings expressed as a percentage of male earnings. A positive (+) differential means male vets' average earnings exceed those of female vets ; a negative (-) differential means female earnings exceed those of males.

**Chart 4-8**  
Average earnings of veterinarians by age group and by gender - Europe (PPP)





## 4.2 Education and CPD (Life Long Learning)

Veterinarians undertake an average of 40 hours' CPD (Life Long Learning) per year. This does vary quite considerably at the top end, peaking at an average of 100 hours in Bulgaria and the Czech Republic. No countries average fewer than 30 hours per year.

Veterinarians are reasonably satisfied with the quality of the CPD they receive, in most countries veterinarians give a score of between 6 and 7 out of ten. This is on a scale between 0 (complete dissatisfaction) and 10 (complete satisfaction). The average in FYROM and Poland is slightly lower than this, and in Finland, Denmark and Switzerland slightly higher.

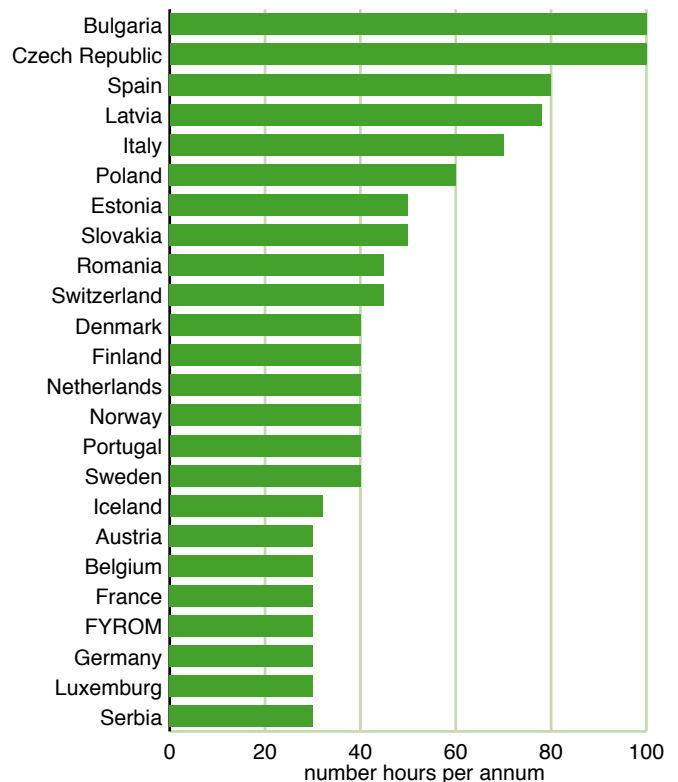
Veterinarians gave information on how they had expanded their knowledge after graduating. About a third (34 per cent) had specialised; about a fifth (21 per cent) had gone on to undertake a Masters Degree or Doctorate. The largest proportion, 73 per cent, had expanded their knowledge by undertaking CPD.

**Table 4-7**  
How veterinarians expanded their knowledge after graduating analysed by country

per cent	Specialise *	PHD	CPD	Other
Austria	48	22	80	19
Belgium	16	13	90	14
Bulgaria**	43	10	41	47
Czech Republic	28	7	77	27
Denmark**	38	24	65	24
Estonia	20	23	83	20
Finland	40	23	66	23
France	18	9	82	19
FYROM	5	11	70	32
Germany	43	29	71	20
Iceland**	27	27	67	27
Italy	39	20	74	23
Latvia**	37	30	70	20
Luxemburg**	23	14	91	18
Netherlands	21	14	83	15
Norway	15	18	63	30
Poland	68	11	60	38
Portugal	17	22	81	17
Romania	21	37	81	16
Serbia	23	20	70	33
Slovakia	30	6	59	38
Spain	28	29	73	20
Sweden	39	21	65	20
Switzerland	48	30	70	15
Ireland	n/a	n/a	n/a	n/a
United Kingdom	n/a	10	n/a	n/a
EUROPE-24	34	21	73	23

\* Specialise = EBVS specialisation or national type of specialisation  
 \*\* caution: small sample  
 Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
 EUROPE-24: weighted to reflect total vet population in participating countries

**Chart 4-9**  
Average number of hours spent on CPD



**Table 4-8**  
Number of hours of CPD analysed by country

	average (median**) number of CPD hours undertaken per annum	average (mean) score - satisfaction with quality of CPD (10= highest)
Austria	30	7.0
Belgium	30	6.8
Bulgaria*	100	6.0
Czech Republic	100	7.0
Denmark*	40	7.3
Estonia	50	6.7
Finland	40	7.3
France	30	7.0
FYROM	30	5.9
Germany	30	7.1
Iceland*	32	7.3
Italy	70	6.3
Latvia*	78	7.1
Luxemburg*	30	7.6
Netherlands	40	7.0
Norway	40	6.9
Poland	60	5.8
Portugal	40	6.5
Romania	45	7.1
Serbia	30	6.2
Slovakia	50	6.9
Spain	80	6.1
Sweden	40	6.9
Switzerland	45	7.2
Ireland	n/a	n/a
United Kingdom	n/a	n/a
EUROPE-24	40	6.6

\*\* median used as it is a better indicator of the range of hours; some respondents stated very high numbers of hours which has affected the mean average figure.

Veterinarians personally spend on average €500 per year undertaking CPD. More than twice this is spent by veterinarians in Denmark, Switzerland, Norway and Sweden; while the lowest spend is recorded by veterinarians in Romania and Bulgaria (these are unadjusted figures and some sample sizes in these countries are small).

The favourite method of undertaking CPD is through lectures; 86 per cent of veterinarians prefer this method of accessing CPD. This is the most popular method in all countries. Second most popular is to undertake CPD via journals; 61 per cent of veterinarians say they prefer this method, ranging from 74 per cent in France to 17 per cent in FYROM. Forty one per cent prefer self study (over 60 per cent in Slovakia, Czech Republic and Poland) while online methods are favoured by 37 per cent of veterinarians (highest in Portugal, Spain, Bulgaria and Romania). Twenty three per cent prefer to undertake CPD through wetlabs, another 23 per cent by interactive webinars.

Chart 4-10  
How veterinarians prefer to undertake their CPD - Europe

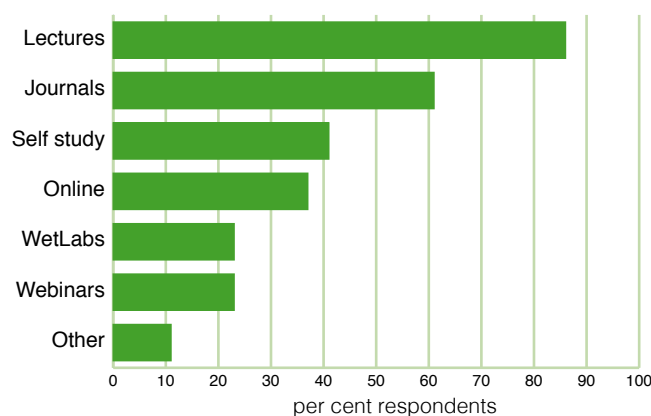


Table 4-9  
How veterinarians prefer to undertake their CPD analysed by country

per cent	Lectures	Journals	WetLabs	Online	Self study	Webinars	Other	average (median) spend €
Austria	91	62	13	23	43	29	12	1 000
Belgium	90	68	43	31	31	17	7	600
Bulgaria*	69	49	31	49	64	22	18	102
Czech Republic	79	69	15	40	66	54	8	364
Denmark*	96	45	41	23	23	19	7	1 340
Estonia	91	65	50	41	55	28	10	400
Finland	97	62	29	19	45	11	6	500
France	85	74	32	30	25	15	9	800
FYROM	80	17	14	21	43	14	26	260
Germany	91	62	11	28	33	16	13	700
Iceland*	93	29	36	50	29	36	7	928
Italy	85	66	18	38	38	29	15	800
Latvia*	87	55	29	39	45	29	16	250
Luxemburg*	96	57	43	17	17	17	13	1 750
Netherlands	93	59	33	37	38	27	11	1 000
Norway	90	47	31	21	38	16	11	1 213
Poland	93	64	10	26	64	10	8	182
Portugal	81	59	30	60	51	36	6	272
Romania	79	38	30	49	41	20	7	136
Serbia	90	40	41	24	49	19	21	173
Slovakia	95	63	12	18	72	10	10	300
Spain	81	58	31	58	42	36	9	400
Sweden	95	59	34	23	36	19	8	1 109
Switzerland	92	64	22	13	40	9	10	1 230
Ireland	73	40	41	35	11	n/a	2	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	86	61	23	37	41	23	11	500

Note: row percentages sum to more than 100% because respondents could choose more than one method

\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

Time emerges as being the biggest challenge in undertaking CPD – two thirds (67 per cent) of veterinarians feel this is the case. Apart from FYROM, where only 33 per cent of veterinarians think time is a challenge, the scores in most countries are within a narrow range of 10 percentage points either side of the average. The next most significant consideration are the fees charged – 55 per cent report this as a challenge although there is greater variation with this challenge than with time, as the figures vary between 73 per cent of respondents in Italy to 40 per cent in Sweden and Romania. The location is only a major challenge for 25 per cent of veterinarians, being a challenge for 5 per cent or fewer veterinarians in Denmark and Sweden.

Chart 4-11  
Greatest challenges in undertaking CPD - Europe

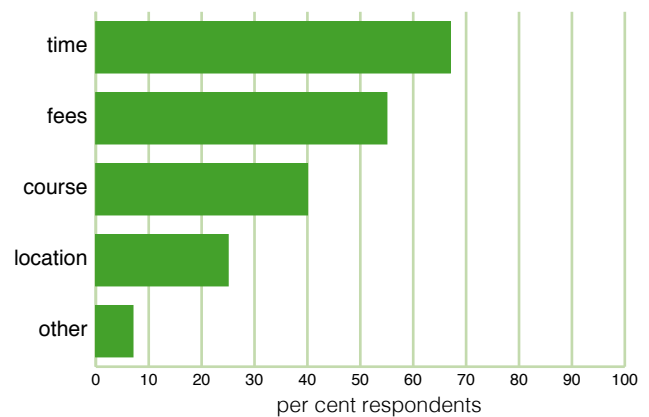


Table 4-10  
Challenges of undertaking CPD analysed by country

	time	course	location	fees	other
Austria	75	46	32	44	9
Belgium	74	39	27	56	5
Bulgaria*	62	46	16	30	20
Czech Republic	62	30	30	48	5
Denmark*	65	46	3	38	7
Estonia	64	38	14	57	6
Finland	75	35	12	38	7
France	77	30	38	50	5
FYROM	33	30	24	43	26
Germany	68	43	31	49	6
Iceland*	64	43	29	43	7
Italy	62	31	31	73	4
Latvia*	68	61	0	52	19
Luxemburg*	74	30	30	61	4
Netherlands	61	53	7	35	7
Norway	76	31	7	35	9
Poland	62	46	24	52	12
Portugal	63	47	16	64	6
Romania	56	51	16	40	9
Serbia	59	30	22	63	14
Slovakia	64	40	25	43	7
Spain	74	47	16	64	4
Sweden	74	27	5	40	10
Switzerland	76	39	19	31	7
Ireland	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a
EUROPE-24	67	40	25	55	7

\* caution: small sample      Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

### 4.3 Retirement and Pension

The peak age at which veterinarians expect to retire is age 65 to 69; approaching half of the profession, 47 per cent, plan to retire then. Another 24 per cent plan to retire at age 60 to 64 – so nearly three quarters of the profession expects to retire when in their sixties. Most of the remainder expect to retire in their seventies or later; while 9 per cent say they will “never” retire. More veterinarians in FYROM, Romania and Slovakia plan to retire at age 60 to 64 than aged 65 to 69. Countries with the largest number of veterinarians planning to retire in their seventies, or later, include Italy (43 per cent), the Czech Republic (38 per cent), Poland (34 per cent), Serbia (33 per cent) and Denmark (30 per cent). This includes veterinarians who ‘never’ plan to retire – which in Serbia and the Czech Republic account for more than 20 per cent of all veterinarians.

More than three quarters of veterinarians (78 per cent) will “definitely” or ‘probably’ work as a veterinarian until retirement. Bulgaria (25 per cent but small sample), the Netherlands (13 per cent) and Portugal (12 per cent), have the largest proportions of veterinarians who will ‘probably’ or ‘definitely’ not continue to work as a veterinarian until retirement – the Europe average is 8 per cent.

Chart 4-12  
At what age veterinarians expect to retire - Europe

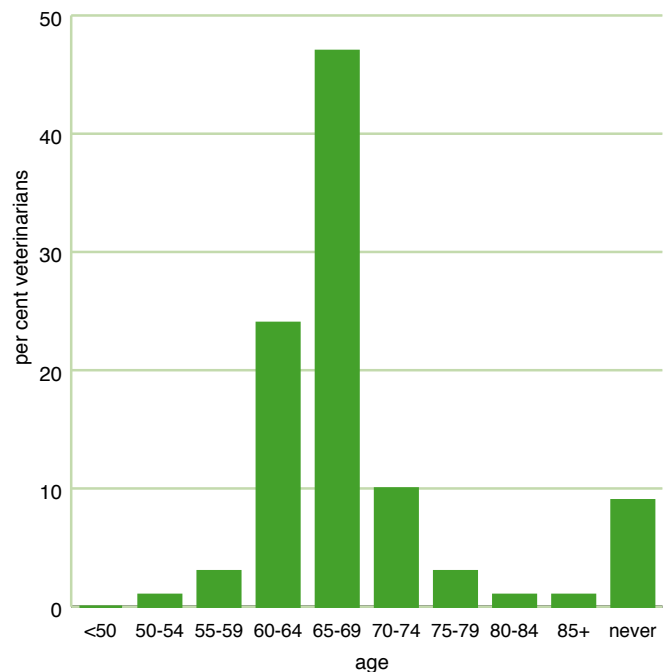


Table 4-11  
Age at which veterinarians expect to retire analysed by country

per cent	<50	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85+	never
Austria	0	0	1	22	56	16	1	0	0	3
Belgium	1	1	7	23	49	10	3	0	0	7
Bulgaria*	1	2	8	37	33	7	0	1	1	9
Czech Republic	0	1	6	22	34	12	3	1	1	21
Denmark*	0	0	3	20	48	21	4	0	0	5
Estonia	1	0	1	29	39	19	3	1	1	6
Finland	0	0	3	40	47	5	2	0	0	2
France	1	1	4	39	44	7	2	0	0	2
FYROM	2	1	6	56	15	6	4	0	0	9
Germany	0	0	2	23	63	7	2	1	1	2
Iceland*	0	0	6	6	50	31	6	0	0	0
Italy	0	0	1	12	42	17	4	2	1	19
Latvia*	0	3	0	16	42	13	6	6	3	10
Luxemburg*	0	0	5	45	50	0	0	0	0	0
Netherlands	0	1	5	29	58	6	1	0	0	1
Norway	0	0	1	20	63	13	2	0	0	1
Poland	1	1	2	18	44	8	7	2	0	17
Portugal	1	2	4	19	47	15	4	0	1	7
Romania	2	4	9	36	21	9	3	0	2	14
Serbia	0	0	5	23	39	7	2	0	1	23
Slovakia	0	2	6	34	27	11	3	1	1	12
Spain	0	1	4	24	51	8	2	1	1	8
Sweden	0	0	2	22	63	9	2	0	0	1
Switzerland	1	0	4	36	51	5	1	0	1	1
Ireland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	0	1	3	24	47	10	3	1	1	9

\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

Twenty eight per cent of veterinarians do not currently have a pension plan. This includes 67 per cent of veterinarians in Spain, 59 per cent of Romanian veterinarians, 58 per cent in Portugal and more than 30 per cent of veterinarians in Slovakia, Italy, Finland and France. More than 95 per cent of veterinarians in Switzerland and the Netherlands do have a pension plan. However, only one third of veterinarians with a pension plan believe this plan will be adequate for their needs. Veterinarians in Bulgaria, Serbia, Spain, Poland, Belgium and Portugal record the lowest figures – fewer than 20 per cent of veterinarians in these countries think their pension will be adequate for their needs.

Chart 4-13  
Whether expect to work as a vet until retirement

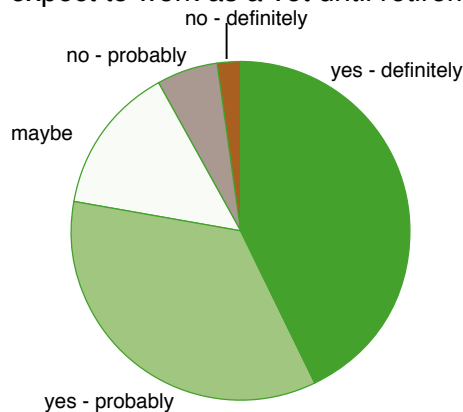


Table 4-13  
Pension Plan provision analysed by country

	no - DO NOT have a pension plan per cent of all respondents	'yes' - DO have a pension plan per cent of those who do have a pension plan		
		set up by employer/business		pension plan will be adequate for needs
		set up by self		
Austria	12	44	62	37
Belgium	13	16	81	17
Bulgaria*	31	56	18	7
Czech Republic	21	12	72	11
Denmark*	6	56	65	83
Estonia	18	35	60	21
Finland	33	45	38	67
France	30	23	52	27
FYROM	6	92	7	22
Germany	9	50	62	44
Iceland*	6	44	75	57
Italy	34	35	40	30
Latvia*	32	19	48	21
Luxemburg*	17	26	70	47
Netherlands	3	64	43	61
Norway	15	64	35	67
Poland	6	47	54	14
Portugal	58	20	25	18
Romania	59	3	38	62
Serbia	12	69	26	13
Slovakia	37	6	60	30
Spain	67	7	28	16
Sweden	13	64	62	63
Switzerland	5	70	58	63
Ireland	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a
EUROPE-24	28	30	42	32

Note: respondents may have more than one pension plan so sum of columns 1, 2 and 3 may exceed 100%

\* caution: small sample EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

Table 4-12  
Expect to work as a veterinarian until retirement

hours	yes-definitely	yes-probably	maybe	no-probably	no-definitely
Austria	48	36	9	4	3
Belgium	38	44	10	7	1
Bulgaria*	17	27	31	15	10
Czech Republic	41	48	9	2	1
Denmark*	36	49	12	3	0
Estonia	23	50	15	9	3
Finland	47	40	7	6	1
France	43	31	15	8	2
FYROM	22	41	27	7	2
Germany	41	42	10	5	2
Iceland*	40	47	13	0	0
Italy	41	35	17	5	3
Latvia*	47	43	7	3	0
Luxemburg*	43	29	19	0	10
Netherlands	30	41	16	9	4
Norway	33	45	14	5	3
Poland	52	36	9	1	2
Portugal	21	47	20	10	2
Romania	57	32	6	4	1
Serbia	30	38	23	7	2
Slovakia	50	37	10	3	1
Spain	56	19	17	5	2
Sweden	46	44	6	3	1
Switzerland	36	45	12	5	2
Ireland	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a
EUROPE-24	43	35	14	6	2

\* caution: small sample EUROPE-24: weighted

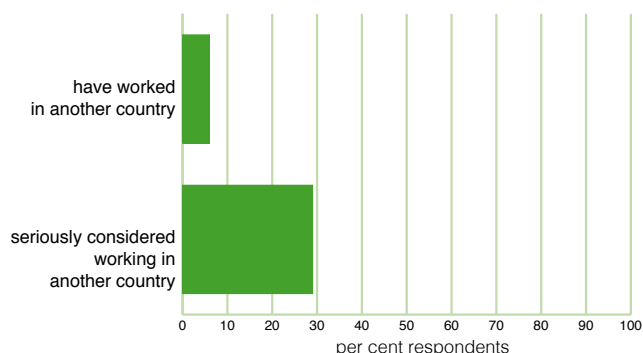
## 4.4 Working in another country

Few veterinarians – just 6 per cent of respondents – have worked in another European country in the last three years. But many more – 29 per cent – have ‘seriously considered’ working in another country. Portugal stands out as having had the largest proportion of veterinarians who have worked in another country: 23 per cent have done so in the last three years. Furthermore, in Portugal, a massive 66 per cent of the profession there has seriously considered working in another country. Very high proportions of veterinarians (40 per cent or more) in FYROM, Serbia, Bulgaria, Romania and Spain have similarly considered working in another country – although in each of these countries no more than 6 per cent of veterinarians actually have worked elsewhere.

More than 30 per cent of veterinarians in FYROM, Portugal and Norway were at least partly educated in another country. None of the responding veterinarians from Italy or Poland were.

Data held by Eurostat allows us to compare survey results with the number of veterinarians who were **formally** recognised for **permanent** establishment in

Chart 4-14  
How many veterinarians in last 3 years have worked, or seriously considered working, in another country - Europe



an EU country and Switzerland. Official statistics show that 8 700 veterinarians (5 per cent of all veterinarians in the EU) have been recognised for establishment since 1997, including 3 000 veterinarians (1.7 per cent of veterinarians in the EU) in the last three years. Note, the survey figures refer to both permanent and temporary establishment.

Table 4-14  
Nationality, education, work analysed by country

per cent	same nationality as registration country	educated OUTSIDE registration country	working in another European country - last THREE years	
			have worked	seriously considered working
Austria	91	7	7	18
Belgium	96	1	11	20
Bulgaria*	99	1	1	42
Czech Republic	93	5	7	29
Denmark*	94	4	11	31
Estonia	59	41	11	32
Finland	95	17	6	24
France	91	20	3	18
FYROM	95	43	4	57
Germany	94	9	5	19
Iceland*	45	100	13	56
Italy	99	0	4	33
Latvia*	94	13	16	23
Luxemburg*	61	100	14	23
Netherlands	96	8	9	20
Norway	95	32	7	16
Poland	100	0	4	21
Portugal	65	34	23	66
Romania	95	1	6	40
Serbia	50	5	3	50
Slovakia	90	12	4	28
Spain	98	2	5	40
Sweden	91	19	8	24
Switzerland	92	8	6	16
Ireland	90	n/a	n/a	n/a
United Kingdom	n/a	n/a	7	n/a
EUROPE-24	90	8	6	29

\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

The biggest single concern about working in another European country relates to practical, relocation or personal issues. Sixty per cent of respondents say this is a main concern. The next most important concern is having insufficient language skills – cited by 46 per cent of veterinarians including around two thirds of veterinarians in France and Poland. Having insufficient knowledge of Veterinary regulations was considered to be less of a concern, with just 21 per cent of veterinarians saying this – again including a higher proportion in France (32 per cent). Only in Portugal was being unable to find work a major concern (40 per cent of veterinarians there compared with 13 per cent overall) and veterinarian qualification issues were similarly less important, being mentioned by just 12 per cent of veterinarians overall although highest concern on this issue was raised by veterinarians in Serbia (34 per cent).

Chart 4-15  
Main concerns about working in another European country - Europe

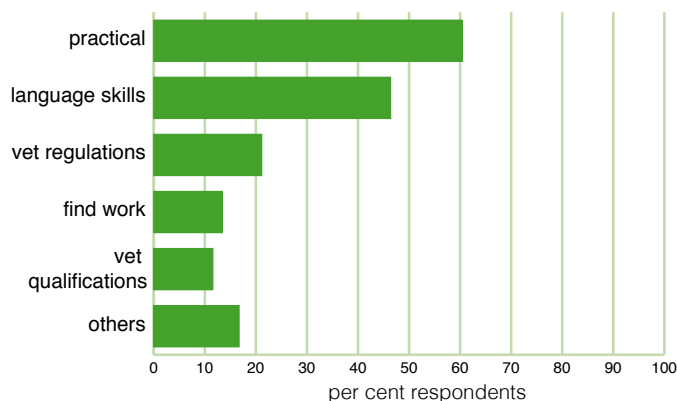


Table 4-15  
Main concerns about working in another European country analysed by respondent’s country

per cent	unable to find work	insufficient language skills	insufficient knowledge of Veterinary regulations	Veterinarian qualification issues	practical, relocation or personal issues	other concerns
Austria	8	33	17	11	67	16
Belgium	9	33	18	6	71	16
Bulgaria*	9	42	10	4	57	26
Czech Republic	15	60	25	12	71	7
Denmark*	8	15	11	7	78	18
Estonia	7	35	7	7	70	18
Finland	16	28	18	18	65	14
France	14	65	32	4	65	8
FYROM	20	26	16	10	40	22
Germany	8	45	29	16	58	14
Iceland*	14	14	14	0	86	7
Italy	10	45	16	7	66	13
Latvia*	15	41	7	15	59	22
Luxemburg*	6	6	22	6	72	17
Netherlands	6	19	7	4	73	21
Norway	10	11	10	5	74	22
Poland	13	66	29	12	63	18
Portugal	40	33	20	20	56	9
Romania	20	32	19	17	35	34
Serbia	27	32	9	34	47	20
Slovakia	14	59	12	27	38	19
Spain	20	59	21	16	52	22
Sweden	10	15	18	7	73	19
Switzerland	16	14	13	9	64	26
Ireland	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	13	46	21	12	60	17

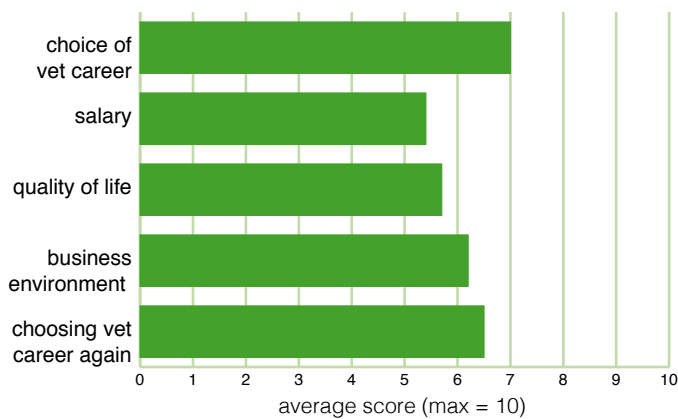
\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

## 4.5 Satisfaction

Participating veterinarians were invited to say how satisfied they were with their professional life, by choosing a rating from a scale of 0 to 10, where 10 represents complete satisfaction and 0 is complete dissatisfaction. Using this scale, veterinarians' average score for how satisfied they are with their choice of career as a veterinarian scores an average 7.3 out of 10. The highest scores are recorded by veterinarians in Denmark Finland, Romania and

Sweden. Veterinarians score other measures of satisfaction less highly. Satisfaction with the business environment is rated 6.2 out of 10; highest satisfaction is recorded by veterinarians in Denmark, Finland, the Netherlands and Switzerland and lowest in Bulgaria and Serbia. Satisfaction with general quality of life comes in at 5.7 out of 10, highest in Denmark and lowest in Portugal. The lowest rating is reserved for satisfaction with salary – veterinarians rate this as 5.4 out of 10. Veterinarians in Finland rate salary highest, those in Portugal give the lowest rating.

Chart 4-16  
Satisfaction - Europe



Finally, veterinarians were asked how likely they would choose a career as a veterinarian, if they were starting out again. The average rating here is 6.5 out of 10, lower than the rating given to the question about how satisfied veterinarians are with their choice of a career as a veterinarian. The lowest rating for the starting again question comes from veterinarians in Portugal, while veterinarians in Finland, Denmark and Sweden give the highest ratings.

Table 4-16  
Satisfaction analysed by country

average (mean) scale where 0=complete dissatisfaction and 10=complete satisfaction					
per cent	choice of career as a vet	salary	quality of life	business environment	likelihood of choosing vet career if start again
Austria	7.2	5.2	5.3	6.2	5.6
Belgium	7.7	5.2	4.9	6.1	5.8
Bulgaria*	6.7	3.6	4.4	4.8	5.5
Czech Republic	7.5	5.4	6.0	6.8	6.5
Denmark*	8.3	6.6	8.1	7.5	7.3
Estonia	7.6	5.4	6.1	6.5	6.6
Finland	8.3	7.0	7.6	7.5	7.6
France	7.7	5.9	5.9	6.5	6.2
FYROM	6.2	3.6	4.4	5.1	5.0
Germany	7.0	5.5	5.9	6.7	6.1
Iceland*	7.2	4.9	7.1	6.5	5.4
Italy	6.8	4.7	5.0	5.7	5.2
Latvia*	7.5	5.6	6.6	6.1	6.7
Luxemburg*	6.9	5.7	5.4	6.7	5.6
Netherlands	7.6	6.6	7.3	7.2	6.7
Norway	7.3	5.9	7.3	7.1	5.9
Poland	7.6	4.9	5.5	5.7	6.3
Portugal	6.0	3.7	4.1	5.2	4.4
Romania	8.2	5.4	5.7	6.3	7.0
Serbia	6.6	4.2	4.9	4.8	5.3
Slovakia	7.6	5.0	5.9	6.4	6.6
Spain	7.2	4.3	4.8	5.5	6.0
Sweden	7.9	6.5	7.4	7.1	7.1
Switzerland	7.7	6.4	6.7	7.2	6.6
Ireland	n/a	n/a	n/a	n/a	n/a
United Kingdom**	n/a	5.9	n/a	n/a	46%
EUROPE-24	7.3	5.4	5.7	6.2	6.5

\* caution: small sample

EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

\*\* United Kingdom survey asked questions in slightly different way. 46% of respondents said they would choose a vet career again.



## 4.6 Working Hours

Survey respondents were asked how many hours they were contracted to work, and how many they actually worked.

The average working week that veterinarians responding to this survey actually worked is 46.8 hours. This is 6.6 hours more than their contracts require. Veterinarians in Austria and Sweden work longer hours than elsewhere, averaging a working week in excess of 50 hours. In both these countries, veterinarians exceed their contracted hours by an average of 11 hours per week.

Chart 4-17  
Average working hours

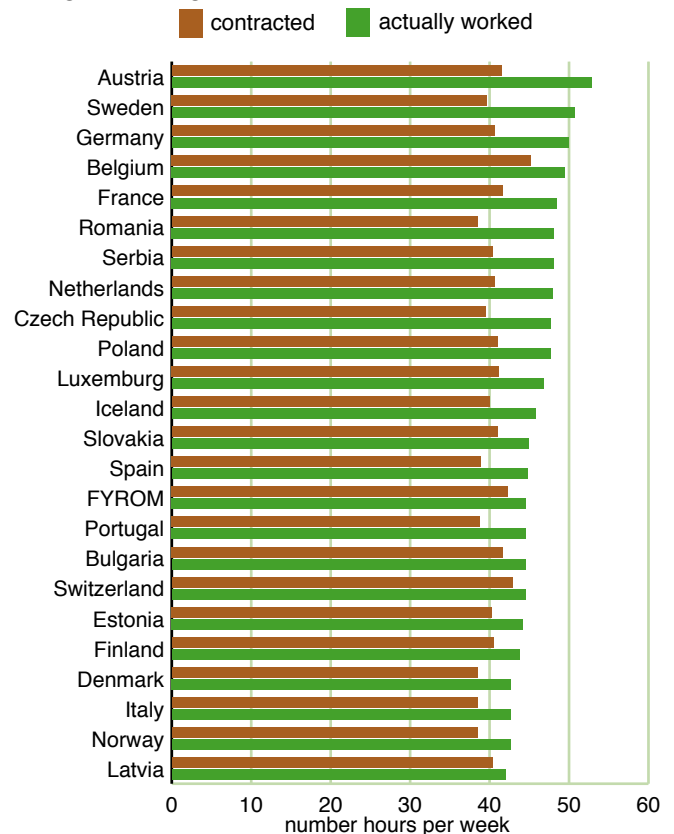


Table 4-17  
Average number of hours worked analysed by country

average (mean) number hours per week	number hours actually worked						ALL number of hours contracted	ALL number of hours actually worked	difference: hours contracted & actually worked
	practice vet owners	practice - vets not owners	public	education	industry	other vets			
Austria	53.6	55.8	47.0	53.8	50.0	52.5	41.5	52.8	+11.3
Belgium	50.4	50.5	45.4	49.4	52.5	36.0	45.2	49.5	+4.3
Bulgaria*	58.3	46.0	42.7	45.0	n/a	58.0	41.7	44.5	+2.7
Czech Republic	48.6	48.0	43.0	50.7	55.0	45.9	39.5	47.7	+8.2
Denmark*	45.0	40.9	39.7	47.8	42.7	41.0	38.5	42.7	+4.2
Estonia	46.0	45.1	41.2	42.2	n/a	43.9	40.3	44.2	+3.9
Finland	46.1	41.8	44.8	43.4	43.0	42.0	40.5	43.8	+3.3
France	50.3	44.2	44.6	50.9	47.7	46.8	41.6	48.5	+6.9
FYROM	45.4	44.1	35.0	n/a	n/a	43.2	42.3	44.6	+2.3
Germany	53.1	51.3	43.3	49.2	47.8	46.8	40.6	49.9	+9.2
Iceland*	55.0	n/a	44.9	n/a	40.0	41.0	40.0	45.8	+5.7
Italy	43.9	46.6	40.3	44.3	45.1	43.4	38.5	42.6	+4.2
Latvia*	50.0	22.0	40.0	40.0	n/a	42.6	40.4	42.0	+1.6
Luxembourg*	46.9	47.3	40.0	50.0	n/a	n/a	41.2	46.8	+5.6
Netherlands	52.3	45.6	39.8	48.7	46.7	50.9	40.6	47.9	+7.3
Norway	45.9	43.2	39.6	44.9	43.5	44.5	38.5	42.6	+4.1
Poland	52.8	47.3	42.5	51.7	40.0	46.2	41.0	47.7	+6.8
Portugal	45.1	47.0	40.5	52.5	47.0	42.2	38.8	44.6	+5.8
Romania	51.3	46.2	43.8	42.2	49.4	48.9	38.5	48.1	+9.6
Serbia	52.5	48.6	45.5	43.6	46.4	47.3	40.4	48.1	+7.7
Slovakia	50.2	46.2	47.7	n/a	n/a	40.8	41.0	44.9	+3.9
Spain	46.8	47.4	39.2	45.1	46.8	45.2	38.9	44.8	+5.9
Sweden	47.6	44.0	45.7	44.5	43.3	43.1	39.7	50.7	+11.0
Switzerland	53.4	47.9	48.4	52.0	45.9	57.9	42.9	44.5	+1.6
Ireland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	49	n/a
United Kingdom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
EUROPE-24	50.2	47.0	42.0	47.1	46.6	45.7	40.2	46.8	+6.6

\* caution: small sample      EUROPE-24: weighted to reflect total vet population in participating countries  
Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys

When analysed by gender, male veterinarians have slightly longer contracted hours than female veterinarians in all employment fields except the public sector. In private practice, male veterinarians' contracted hours are 44.2, compared with 40.4 for female veterinarians. In all other employment fields the difference is much smaller, being no more than one hour difference.

Examining the number of hours actually worked, the differences between male and female veterinarians are similar for private practice but greater in other employment fields. Both male and female veterinarians work longer hours than their contract states, however male veterinarians work say they actually work several hours more than their contract states, than female veterinarians say they work.

Overall, male veterinarians work on average 48.5 hours, compared with 45.6 hours for female veterinarians. Male veterinarians, work 6.5 hours longer than their contract requires them to, compared with an extra 5.7 hours worked by female veterinarians.

Chart 4-18  
Average working hours analysed by gender and by employment field

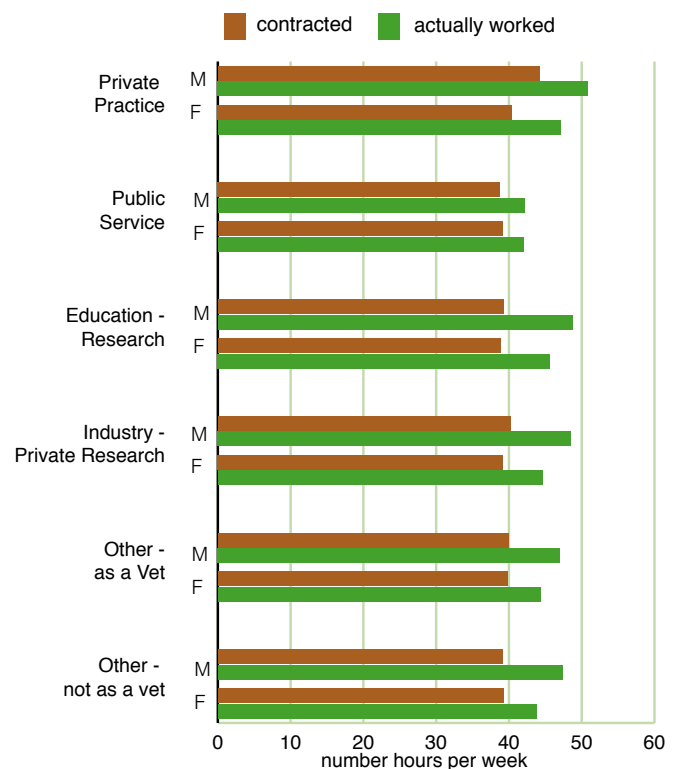


Table 4-18  
Average number of hours contracted and worked analysed by gender and by country

average (mean) number hours per week	number hours contracted to work		number hours actually worked	
	male	female	male	female
Austria	45.7	41.9	55.2	50.6
Belgium	46.6	45.7	51.4	47.7
Bulgaria*	42.4	41.0	46.1	42.7
Czech Republic	42.7	39.2	51.1	45.6
Denmark*	40.8	37.7	45.0	42.0
Estonia	41.3	39.7	44.8	43.9
Finland	44.7	40.6	48.3	43.3
France	43.9	39.4	50.9	45.8
FYROM	42.8	41.2	45.7	41.0
Germany	43.6	40.3	51.9	48.9
Iceland*	42.6	40.0	49.3	43.2
Italy	39.5	39.8	42.9	43.4
Latvia*	39.5	42.4	44.3	39.0
Luxemburg*	44.0	40.1	49.4	43.8
Netherlands	42.3	39.3	50.1	45.4
Norway	39.1	38.6	43.5	42.5
Poland	43.1	40.9	50.0	46.1
Portugal	39.8	38.9	45.2	44.0
Romania	41.2	40.8	49.2	47.0
Serbia	41.2	40.5	49.9	44.9
Slovakia	44.7	40.6	47.1	44.7
Spain	40.1	39.4	45.4	44.6
Sweden	40.6	39.9	44.2	45.0
Switzerland	44.6	42.6	53.2	48.2
Ireland	n/a	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a	n/a
EUROPE-24	42.0	39.9	48.5	45.6

\* caution: small sample      EUROPE-24: weighted to reflect total vet population in participating countries

## 4.7 Holidays and Sick Leave

The number of holidays taken varies quite significantly between veterinarians in different countries, with veterinarians in France and Finland taking twice as many holidays as those in the Czech Republic and Slovakia. The Europe average is 21.7 days.

Veterinarians rarely take off days sick – the Europe average is 2.7 days a year, although more than four sick days are taken in Bulgaria, Finland and Switzerland.

**Table 4-19**  
Average holidays and sick leave analysed by country

average (mean) number days per year	holidays taken	sick days taken
Austria	18.2	3.2
Belgium	16.4	3.0
Bulgaria*	14.6	4.9
Czech Republic	13.7	2.2
Denmark*	25.3	2.0
Estonia	16.8	2.7
Finland	28.4	4.4
France	29.7	2.0
FYROM	15.5	1.3
Germany	22.0	3.4
Iceland*	23.0	1.1
Italy	18.8	3.0
Latvia*	20.5	3.2
Luxemburg*	19.4	0.7
Netherlands	23.6	2.6
Norway	22.3	3.5
Poland	15.3	3.5
Portugal	16.5	1.9
Romania	16.4	2.1
Serbia	14.4	1.7
Slovakia	11.0	1.8
Spain	17.7	2.4
Sweden	24.7	1.7
Switzerland	22.0	4.2
Ireland	19.9	2.5
United Kingdom	n/a	n/a
<b>EUROPE-24</b>	<b>21.7</b>	<b>2.7</b>

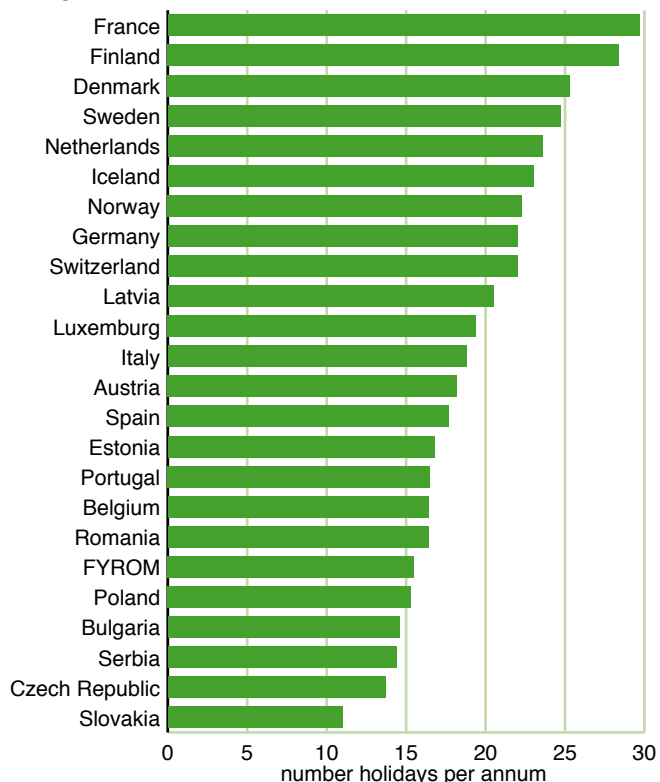
\* caution: small sample

Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys

EUROPE-24: weighted to reflect total vet population in participating countries

Please note, it is possible that in some countries the survey questionnaire was distributed unevenly so there may be under-reporting of vets on long-term sick leave

**Chart 4-19**  
Average number of holidays



## 4.8 Professional Indemnity Insurance

Eighty six per cent of veterinarians have Professional Indemnity Insurance cover, fourteen per cent do not, or are not sure. The highest proportion of veterinarians who do not carry PII cover are in Serbia (83 per cent do not have PII), Bulgaria (81 per cent) and Romania (80 per cent).

Of the veterinarians who do have PII cover two thirds organise this cover personally; one third have the cover arranged for them through their employer.

Please note, in some fields of employment it is not necessary for a veterinarian to hold Professional Indemnity Insurance.

Table 4-20  
PII cover analysed by country

per cent	yes - have PII cover		no cover or not sure
	organise personally	cover through employer	
Austria	71	15	14
Belgium	81	9	9
Bulgaria*	5	15	81
Czech Republic	62	28	10
Denmark*	32	28	40
Estonia	16	35	48
Finland	19	49	32
France	59	23	18
FYROM	11	16	73
Germany	44	33	23
Iceland*	n/a	n/a	n/a
Italy	47	13	40
Latvia*	13	10	77
Luxemburg*	n/a	n/a	n/a
Netherlands	41	33	25
Norway	35	40	26
Poland	45	26	29
Portugal	18	36	46
Romania	15	5	80
Serbia	7	10	83
Slovakia	69	26	5
Spain	44	20	36
Sweden	28	40	32
Switzerland	36	50	15
Ireland	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a
EUROPE-24	57	29	14

\* caution: small sample

Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys

EUROPE-24: weighted to reflect total vet population in participating countries

# 5

## The Future



## KEY FINDINGS - CHAPTER 5: The Future

The statement about future challenges veterinarians are most likely to agree with is:

- “Too many newly qualified veterinarians are emerging from Veterinary schools”

Areas where more veterinarians will be needed:

- Half of veterinarians feel more veterinarians will be needed in the next five years to support animal welfare
- About 40 per cent of veterinarians think more veterinarians will be needed in four more areas:
  - companion animals
  - exotic animals
  - disease control
  - environment

In order to meet the challenges of the next five years:

- 83 per cent of veterinarians think they need to specialise more
- 80 per cent need more business training
- 49 per cent think there should be more legislation for the profession

## 5.1 Future Challenges

Veterinarians were invited to say to what extent they agreed with a number of challenges facing the profession today. Agreement was indicated on a scale of 0 to 10, where 10 meant complete agreement with the statement, and 0 meant complete disagreement with the statement. The Europe averages for each of the statements lies between 5 and 7 out of 10 – suggesting that veterinarians in general are slightly more inclined to agree than disagree with the statements, and any agreement is generally only mild. More extreme scores emerge from certain countries, suggesting that the issues there are more significant than elsewhere.

For example, the statement “too many newly qualified veterinarians are emerging from Veterinary schools”, produced a Europe-wide score of 6.8 (mild agreement) but in the Czech Republic, Poland and Portugal the average score is about 9 out of 10, demonstrating, a much higher level of concern in those countries. Responses from veterinarians in each country are shown in the charts below.

Charts 5-2 to 5-7:

Level of agreement - average (mean) score where 0=disagree completely 10=agree completely

Chart 5-2

“Too many newly qualified Veterinarians are graduating from Veterinary Schools”

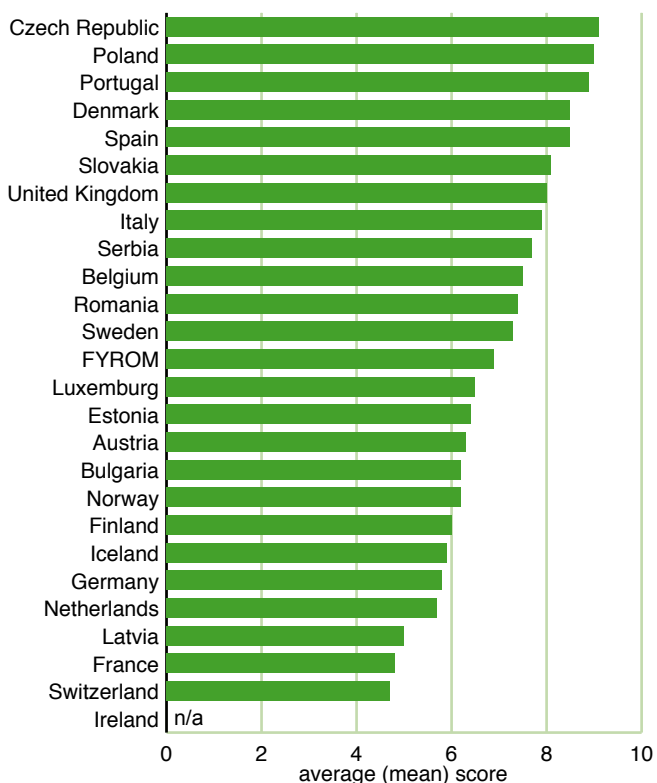


Chart 5-1

Extent to which veterinarians agree with challenges Europe

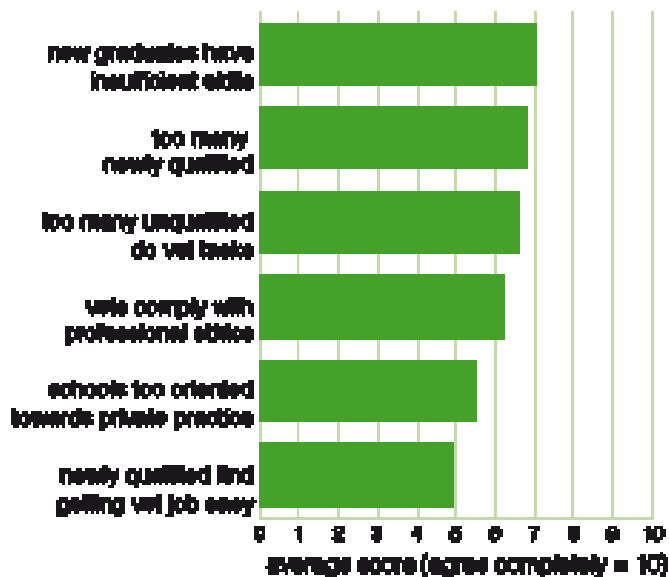
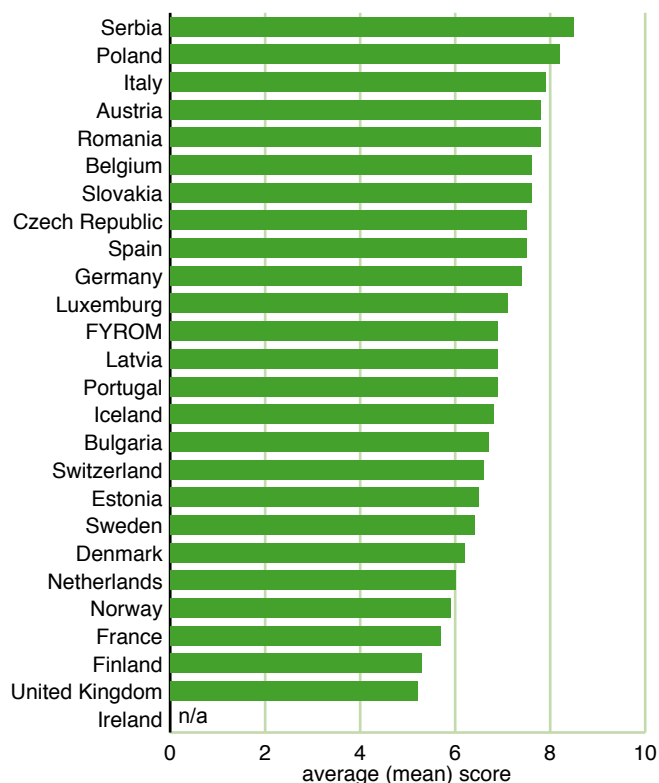


Chart 5-3

“Veterinary Schools do not equip graduates with sufficient skills \*\*”



\* Note: undergraduate veterinary training is a general training preparing graduates for all fields of employment but additional job-specific training will often be necessary.

Charts 5-2 to 5-7:

Level of agreement - average (mean) score where 0=disagree completely 10=agree completely

Chart 5-4

“Veterinary schools are too far oriented towards private practice”

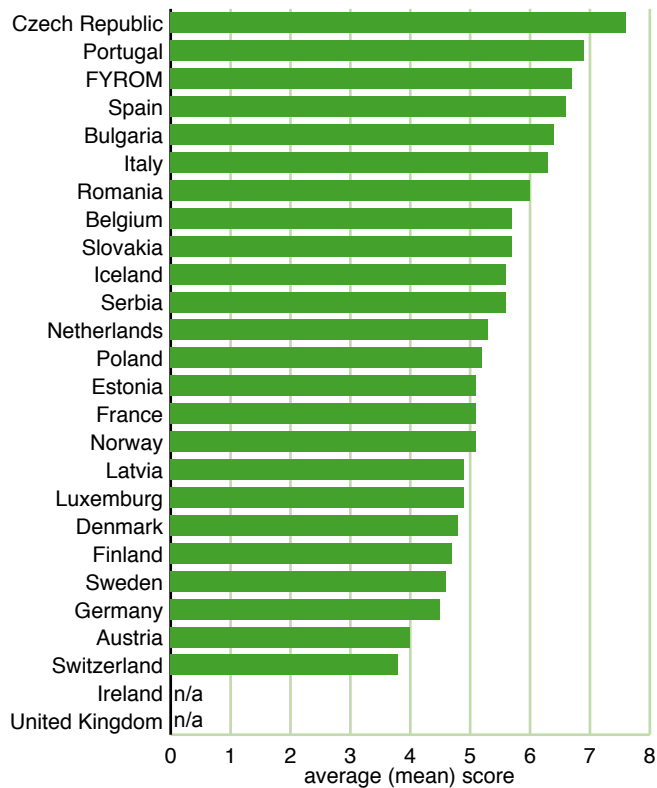


Chart 5-5

“Too many unqualified people take over veterinary tasks”

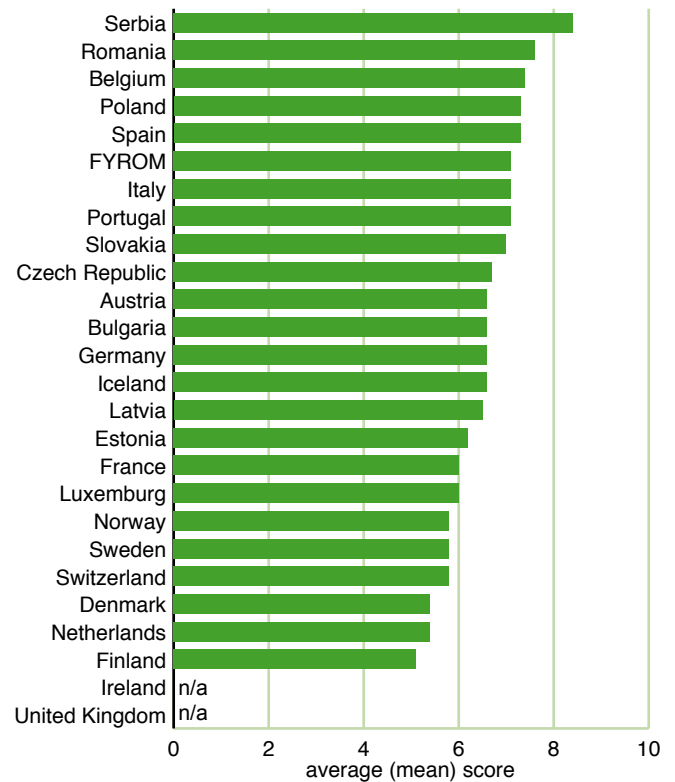


Chart 5-6

“Newly qualified graduates find it easy to gain employment in the Veterinary profession”

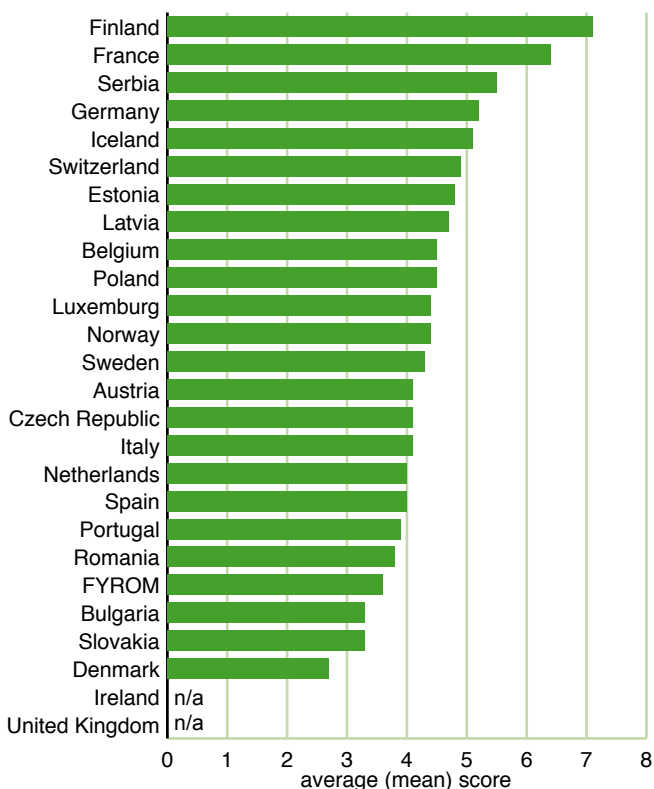
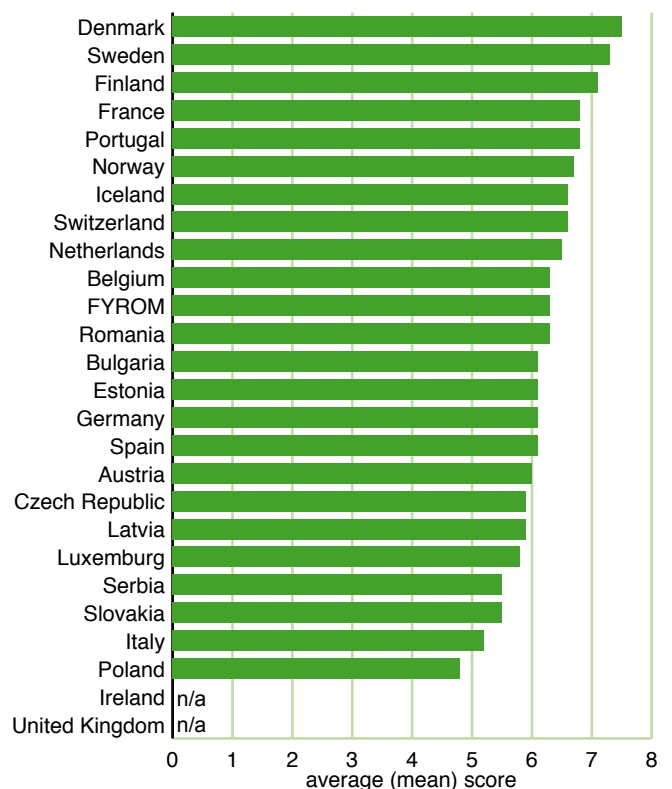


Chart 5-7

“Veterinarians comply with professional ethics in their everyday practice”

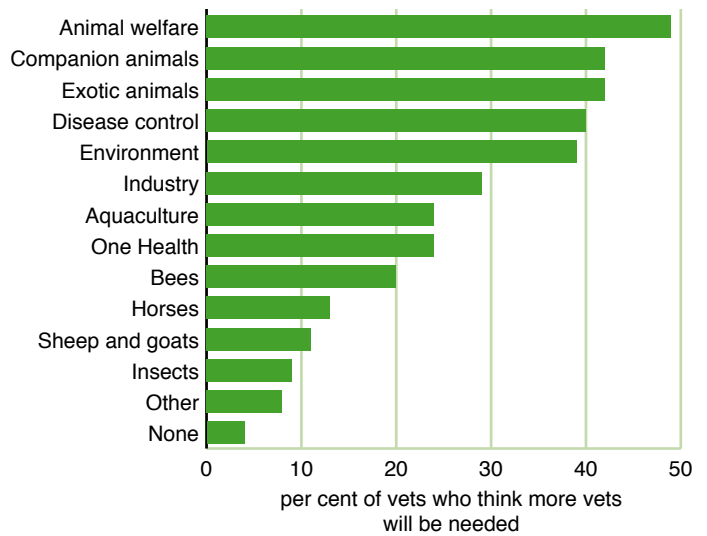




## 5.2 How vets think the market will change - next five years

Survey respondents were asked in which areas they thought that more veterinarians would be needed in the future. Half of respondents (49 per cent) think more veterinarians will be needed for animal welfare purposes – this is the largest single area identified of future need. Forty two per cent of veterinarians think more veterinarians will be needed to support companion animals, and another 42 per cent say more veterinarians will be needed to care for exotic animals. Around 40 per cent of veterinarians think in the future more veterinarians are needed for disease control and for the environment.

Chart 5-8  
Areas where more veterinarians will be needed - Europe



### 5.3 What vets think will be required to meet the challenges of the next five years

In order to meet future challenges, a significant number of veterinarians believe they need to specialise more (83 per cent of respondents say this) and almost as many need more business training (80 per cent). All or very nearly all veterinarians responding from Spain, Switzerland, Austria, Belgium, Slovakia and FYROM say they need to specialise more.

Similarly, extremely high proportions of veterinarians from Slovakia, Switzerland, Spain, Austria, France and Belgium – over 98 per cent in each case – say they need more business training to meet future challenges. Fewer than 60 per cent of veterinarians in the Czech Republic, Sweden and Finland say they require business training.

Far fewer – although still about half – of veterinarians say that more legislation for the profession is required, in order to meet future challenges. Lowest support for this idea comes from veterinarians in Germany, Finland, Italy and Sweden; while more legislation would be welcomed by more than 90 per cent of veterinarians in Slovakia, Switzerland and Belgium.

Chart 5-9  
What veterinarians require to meet the challenges of the next five years - Europe

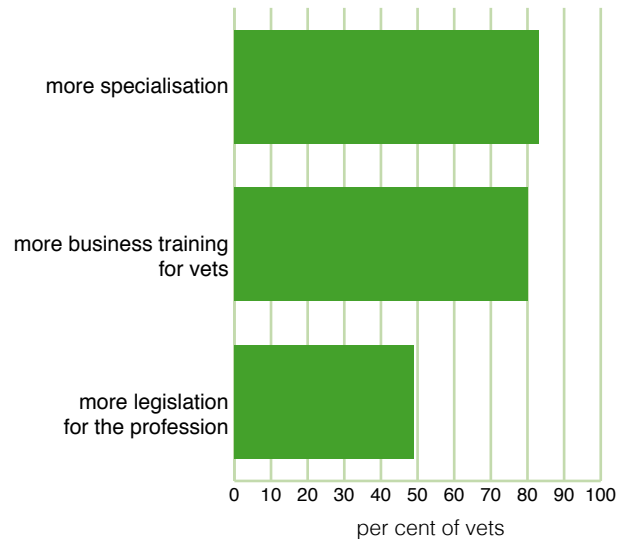


Table 5-1  
What veterinarians think they need in order to meet the changes of the next five years analysed by country

per cent	more specialisation	more business training for vets	more legislation for the profession
Austria	99	98	86
Belgium	99	97	95
Bulgaria*	81	46	50
Czech Republic	73	57	30
Denmark*	86	85	36
Estonia	81	87	56
Finland	86	59	18
France	91	98	79
FYROM	98	90	67
Germany	72	80	14
Iceland*	67	75	22
Italy	81	67	21
Latvia*	88	80	50
Luxemburg*	70	65	45
Netherlands	61	84	50
Norway	83	70	32
Poland	75	77	27
Portugal	77	65	67
Romania	91	72	48
Serbia	51	65	63
Slovakia	99	100	100
Spain	100	99	99
Sweden	77	57	22
Switzerland	100	100	100
Ireland	n/a	n/a	n/a
United Kingdom	n/a	n/a	n/a
EUROPE-24	83	80	49

\* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys  
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

## Part 2: Country Pages



Photograph: Nancy De Briyne

# AT

## Austria



### Social & Economic Data

	number / □ / index
total population	8 507 786
GDP (millions)	□ 313,067
GDP per inhabitant	□ 37,000
agriculture output (millions)	□ 7,484
UN human development index (max 1.0)	0.88

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	2 858
exotic	399
cattle	1 958
sheep	357
pigs	2 896
goats	n/a
horses	103

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	65
private vet practice: vets not owners	18
public service	6
education - research	6
industry - research	1
other - as a vet	3
other - outside the vet profession	<1
have a second occupation	28

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	3 100
number vets per 1000 population	0.36
% aged under 40	36
% aged 40 to 49	31
% aged over 50	33
% male	47
% female	53

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	80
working part-time	19
unemployed	0
not working for other reasons	<1
retired	0

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	7
have worked in another country - last three years	7
have seriously considered working in another country - last three years	18

Source: Survey respondents

# AT

## Austria



### Practice Size

size of vet practice	per cent
1	28
2	29
3-5	27
6-10	11
11-30	3
31-50	1
51-100	1
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	€
1	111 178
2	210 252
3-5	352 600
6-10	398 182
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	57
surgery	12
official tasks	5
sales of medicines	18
sales of foodstuffs	5
other	2

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	50
cattle	29
pigs	5
sheep / goats	1
horses	12
exotic	0
other	3

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	36 000
owners - 2 staff	44 500
owners - 3 or more staff	50 000
ALL owners	40 000
vet practice - vets (salaried)	30 632
public service	63 000
education - research	48 000
industry - research	n/a
other - as a vet	n/a
other - outside the vet profession	n/a
ALL	40 000

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	220
vet participants as % of all active vets	7
accuracy of results	+/- 6.4

BE

Belgium



## Social & Economic Data

	number / □ / index
total population	11 203 992
GDP (millions)	□ 382,692
GDP per inhabitant	□ 34,500
agriculture output (millions)	□ 7,163
UN human development index (max 1.0)	0.88

Sources: Eurostat, United Nations Development Programme

## Number of Animals

	number, 000s
companion animals	4 580
exotic	3 064
cattle	2 441
sheep	146
pigs	6 351
goats	289
horses	536

Sources:

Companion animals, exotics derived from FEDIAF 'Facts &amp; Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

## Employment Field

	per cent
private vet practice: vet owners	80
private vet practice: vets not owners	9
public service	3
education - research	4
industry - research	2
other - as a vet	2
other - outside the vet profession	0
have a second occupation	32

Source: Survey respondents

## Demography

	number / per cent
total number of active* vets	6 400
number vets per 1000 population	0.57
% aged under 40	30
% aged 40 to 49	25
% aged over 50	45
% male	60
% female	40

\* Number of Active Vets: Figure refers to the number of active vets ie **excluding** retired, unemployed, not working.

## Employment Status

	per cent
working full-time	91
working part-time	9
unemployed	1
not working for other reasons	0
retired	0

Source: Survey respondents

## Working outside own country

	per cent
educated in another country	1
have worked in another country - last three years	11
have seriously considered working in another country - last three years	20

Source: Survey respondents

# BE

## Belgium



### Practice Size

size of vet practice	per cent
1	66
2	14
3-5	13
6-10	3
11-30	2
31-50	0
51-100	1
over 100	1

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	103 280
2	153 250
3-5	360 455
6-10	986 000
11-30	1 000 000
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	48
surgery	25
official tasks	5
sales of medicines	14
sales of foodstuffs	7
other	2

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	56
cattle	32
pigs	0
sheep / goats	1
horses	5
exotic	3
other	3

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	27 500
owners - 2 staff	40 000
owners - 3 or more staff	40 000
ALL owners	31 500
vet practice - vets (salaried)	30 000
public service	40 000
education - research	35 000
industry - research	65 000
other - as a vet	n/a
other - outside the vet profession	n/a
ALL	35 000

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	170
vet participants as % of all active vets	3
accuracy of results	+/- 7.4

# BG

## Bulgaria



### Social & Economic Data

	number / □ / index
total population	7 245 677
GDP (millions)	□ 39,940
GDP per inhabitant	□ 5,500
agriculture output (millions)	□ 5,264
UN human development index (max 1.0)	0.78

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	1 577
exotic	53
cattle	586
sheep	1 370
pigs	586
goats	22
horses	98

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	7
private vet practice: vets not owners	5
public service	76
education - research	6
industry - research	0
other - as a vet	5
other - outside the vet profession	1
have a second occupation	18

Source: Survey respondents (caution: small sample)

### Demography

	number / per cent
total number of active* vets	3 400
number vets per 1000 population	0.47
% aged under 40	45
% aged 40 to 49	19
% aged over 50	36
% male	51
% female	49

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	99
working part-time	1
unemployed	0
not working for other reasons	0
retired	0

Source: Survey respondents (caution: small sample)

### Working outside own country

	per cent
educated in another country	1
have worked in another country - last three years	1
have seriously considered working in another country - last three years	42

Source: Survey respondents (caution: small sample)



# BG

## Bulgaria



### Practice Size

size of vet practice	per cent
1	11
2	33
3-5	22
6-10	11
11-30	22
31-50	0
51-100	0
over 100	0

Source: Survey respondents - practice owners (caution: small sample)

### Practice Revenue

size of vet practice	□
1	61 348
2	n/a
3-5	n/a
6-10	n/a
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners (caution: small sample)

### Practice revenue - service type

	per cent
treatment	41
surgery	23
official tasks	4
sales of medicines	26
sales of foodstuffs	6
other	0

Source: Survey respondents - practice owners (caution: small sample)

### Practice revenue - main focus

	per cent
companion	76
cattle	10
pigs	4
sheep / goats	5
horses	1
exotic	4
other	1

Source: Survey respondents - practice owners (caution: small sample)

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	n/a
owners - 2 staff	n/a
owners - 3 or more staff	n/a
ALL owners	1 278
vet practice - vets (salaried)	n/a
public service	4 294
education - research	5 930
industry - research	n/a
other - as a vet	n/a
other - outside the vet profession	n/a
ALL	4 601

Source: Survey respondents (caution: small sample)

### Survey Response

	per cent
number of vets participating in survey	93
vet participants as % of all active vets	3
accuracy of results	+/- 10.0

CZ

## Czech Republic



## Social &amp; Economic Data

	number / □ / index
total population	10 512 419
GDP (millions)	□ 149,491
GDP per inhabitant	□ 14,200
agriculture output (millions)	□ 6,811
UN human development index (max 1.0)	0.86

Sources: Eurostat, United Nations Development Programme

## Number of Animals

	number, 000s
companion animals	3 464
exotic	75
cattle	1 332
sheep	197
pigs	1 548
goats	n/a
horses	33

Sources:

Companion animals, exotics derived from FEDIAF 'Facts &amp; Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

## Employment Field

	per cent
private vet practice: vet owners	49
private vet practice: vets not owners	32
public service	2
education - research	3
industry - research	1
other - as a vet	12
other - outside the vet profession	1
have a second occupation	20

Source: Survey respondents

## Demography

	number / per cent
total number of active* vets	3 600
number vets per 1000 population	0.34
% aged under 40	65
% aged 40 to 49	13
% aged over 50	23
% male	42
% female	58

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

## Employment Status

	per cent
working full-time	75
working part-time	18
unemployed	2
not working for other reasons	5
retired	1

Source: Survey respondents

## Working outside own country

	per cent
educated in another country	5
have worked in another country - last three years	7
have seriously considered working in another country - last three years	29

Source: Survey respondents

# CZ

## Czech Republic



### Practice Size

size of vet practice	per cent
1	36
2	21
3-5	27
6-10	10
11-30	5
31-50	0
51-100	0
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	49 008
2	42 606
3-5	59 296
6-10	564 297*
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

### Practice revenue - service type

	per cent
treatment	55
surgery	19
official tasks	2
sales of medicines	15
sales of foodstuffs	5
other	4

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	70
cattle	11
pigs	7
sheep / goats	2
horses	6
exotic	2
other	2

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	13 507
owners - 2 staff	12 378
owners - 3 or more staff	21 662
ALL owners	14 563
vet practice - vets (salaried)	8 738
public service	n/a
education - research	n/a
industry - research	n/a
other - as a vet	13 106
other - outside the vet profession	n/a
ALL	10 922

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	348
vet participants as % of all active vets	10
accuracy of results	+/- 5.0

DK

Denmark



## Social & Economic Data

	number / □ / index
total population	5 627 235
GDP (millions)	□ 248,975
GDP per inhabitant	□ 44,400
agriculture output (millions)	□ 9,597
UN human development index (max 1.0)	0.90

Sources: Eurostat, United Nations Development Programme

## Number of Animals

	number, 000s
companion animals	1 647
exotic	327
cattle	1 583
sheep	90
pigs	12 402
goats	130
horses	122

Sources:

Companion animals, exotics derived from FEDIAF 'Facts &amp; Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

## Employment Field

	per cent
private vet practice: vet owners	37
private vet practice: vets not owners	24
public service	16
education - research	7
industry - research	11
other - as a vet	4
other - outside the vet profession	1
have a second occupation	26

Source: Survey respondents (caution: small sample)

## Demography

	number / per cent
total number of active* vets	2 250
number vets per 1000 population	0.40
% aged under 40	30
% aged 40 to 49	27
% aged over 50	45
% male	38
% female	63

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

## Employment Status

	per cent
working full-time	81
working part-time	13
unemployed	4
not working for other reasons	3
retired	0

Source: Survey respondents (caution: small sample)

## Working outside own country

	per cent
educated in another country	4
have worked in another country - last three years	11
have seriously considered working in another country - last three years	31

Source: Survey respondents (caution: small sample)

DK

Denmark



## Practice Size

size of vet practice	per cent
1	11
2	2
3-5	30
6-10	39
11-30	14
31-50	5
51-100	0
over 100	0

Source: Survey respondents - practice owners (caution: small sample)

## Practice Revenue

size of vet practice	□
1	109 257
2	n/a
3-5	168 977
6-10	1 623 882
11-30	1 058 409*
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

## Practice revenue - service type

	per cent
treatment	47
surgery	21
official tasks	4
sales of medicines	4
sales of foodstuffs	7
other	17

Source: Survey respondents - practice owners (caution: small sample)

## Practice revenue - main focus

	per cent
companion	62
cattle	23
pigs	4
sheep / goats	0
horses	7
exotic	1
other	3

Source: Survey respondents - practice owners (caution: small sample)

## Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	n/a
owners - 2 staff	n/a
owners - 3 or more staff	79 515
ALL owners	72 950
vet practice - vets (salaried)	19 500
public service	46 892
education - research	69 667
industry - research	96 463
other - as a vet	0
other - outside the vet profession	n/a
ALL	65 648

Source: Survey respondents (caution: small sample)

## Survey Response

	per cent
number of vets participating in survey	80
vet participants as % of all active vets	4
accuracy of results	+/- 10.8

EE

Estonia



## Social & Economic Data

	number / □ / index
total population	1 315 819
GDP (millions)	□ 18,613
GDP per inhabitant	□ 13,900
agriculture output (millions)	□ 892
UN human development index (max 1.0)	0.84

Sources: Eurostat, United Nations Development Programme

## Number of Animals

	number, 000s
companion animals	580
exotic	21
cattle	261
sheep	62
pigs	359
goats	8
horses	8

Sources:

Companion animals, exotics derived from FEDIAF 'Facts &amp; Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

## Employment Field

	per cent
private vet practice: vet owners	38
private vet practice: vets not owners	21
public service	18
education - research	7
industry - research	0
other - as a vet	14
other - outside the vet profession	2
have a second occupation	30

Source: Survey respondents

## Demography

	number / per cent
total number of active* vets	800
number vets per 1000 population	0.61
% aged under 40	32
% aged 40 to 49	33
% aged over 50	35
% male	47
% female	53

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

## Employment Status

	per cent
working full-time	85
working part-time	12
unemployed	0
not working for other reasons	2
retired	1

Source: Survey respondents

## Working outside own country

	per cent
educated in another country	41
have worked in another country - last three years	11
have seriously considered working in another country - last three years	32

Source: Survey respondents

# EE

## Estonia



### Practice Size

size of vet practice	per cent
1	21
2	12
3-5	30
6-10	27
11-30	10
31-50	0
51-100	0
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	26 999
2	188 500*
3-5	232 017
6-10	588 400
11-30	689 500*
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

### Practice revenue - service type

	per cent
treatment	49
surgery	18
official tasks	8
sales of medicines	14
sales of foodstuffs	4
other	6

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	49
cattle	31
pigs	5
sheep / goats	1
horses	9
exotic	1
other	5

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	24 000
owners - 2 staff	n/a
owners - 3 or more staff	24 000
ALL owners	24 000
vet practice - vets (salaried)	22 700
public service	11 200
education - research	18 600
industry - research	n/a
other - as a vet	15 600
other - outside the vet profession	n/a
ALL	20 000

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	144
vet participants as % of all active vets	18
accuracy of results	+/- 7.4

FI

Finland



## Social & Economic Data

	number / □ / index
total population	5 451 270
GDP (millions)	□ 193,443
GDP per inhabitant	□ 35,600
agriculture output (millions)	□ 5,121
UN human development index (max 1.0)	0.88

Sources: Eurostat, United Nations Development Programme

## Number of Animals

	number, 000s
companion animals	1 310
exotic	57
cattle	903
sheep	94
pigs	1 258
goats	6
horses	74

Sources:

Companion animals, exotics derived from FEDIAF 'Facts &amp; Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

## Employment Field

	per cent
private vet practice: vet owners	13
private vet practice: vets not owners	25
public service	39
education - research	14
industry - research	4
other - as a vet	4
other - outside the vet profession	1
have a second occupation	18

Source: Survey respondents

## Demography

	number / per cent
total number of active* vets	1 700
number vets per 1000 population	0.31
% aged under 40	39
% aged 40 to 49	30
% aged over 50	30
% male	13
% female	87

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

## Employment Status

	per cent
working full-time	79
working part-time	16
unemployed	1
not working for other reasons	3
retired	<1

Source: Survey respondents

## Working outside own country

	per cent
educated in another country	17
have worked in another country - last three years	6
have seriously considered working in another country - last three years	24

Source: Survey respondents



# FI

## Finland



### Practice Size

size of vet practice	per cent
1	11
2	6
3-5	17
6-10	28
11-30	29
31-50	1
51-100	1
over 100	6

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	€
1	82 889
2	142 500*
3-5	291 111
6-10	696 500
11-30	717 375
31-50	2 300 000*
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

### Practice revenue - service type

	per cent
treatment	64
surgery	21
official tasks	2
sales of medicines	5
sales of foodstuffs	6
other	2

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	72
cattle	10
pigs	1
sheep / goats	0
horses	15
exotic	2
other	0

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	50 000
owners - 2 staff	n/a
owners - 3 or more staff	51 000
ALL owners	50 000
vet practice - vets (salaried)	42 000
public service	52 000
education - research	56 000
industry - research	60 000
other - as a vet	7 000
other - outside the vet profession	n/a
ALL	51 000

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	406
vet participants as % of all active vets	24
accuracy of results	+/- 4.2

# FR

## France



### Social & Economic Data

	number / □ / index
total population	65 856 609
GDP (millions)	□ 2,059,852
GDP per inhabitant	□ 31,300
agriculture output (millions)	□ 78,813
UN human development index (max 1.0)	0.88

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	21 488
exotic	9 174
cattle	19 129
sheep	7 193
pigs	13 428
goats	69
horses	840

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	60
private vet practice: vets not owners	20
public service	13
education - research	3
industry - research	3
other - as a vet	1
other - outside the vet profession	0
have a second occupation	14

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	17 000
number vets per 1000 population	0.26
% aged under 40	39
% aged 40 to 49	25
% aged over 50	37
% male	51
% female	49

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	85
working part-time	14
unemployed	1
not working for other reasons	0
retired	<1

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	20
have worked in another country - last three years	3
have seriously considered working in another country - last three years	18

Source: Survey respondents

# FR

## France



### Practice Size

size of vet practice	per cent
1	18
2	15
3-5	32
6-10	23
11-30	9
31-50	1
51-100	0
over 100	1

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	€
1	168 784
2	245 458
3-5	502 620
6-10	961 051
11-30	2 086 281
31-50	4 127 091
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	40
surgery	19
official tasks	4
sales of medicines	25
sales of foodstuffs	10
other	3

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	74
cattle	17
pigs	0
sheep / goats	1
horses	5
exotic	2
other	1

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	36 000
owners - 2 staff	46 000
owners - 3 or more staff	60 000
ALL owners	55 000
vet practice - vets (salaried)	32 000
public service	54 000
education - research	40 000
industry - research	77 500
other - as a vet	48 638
other - outside the vet profession	100 000
ALL	50 000

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	1 945
vet participants as % of all active vets	11
accuracy of results	+/- 2.1

# MK FYROM



## Social & Economic Data

	number / □ / index
total population	2 065 769
GDP (millions)	□ 7,454
GDP per inhabitant	□ 3,600
agriculture output (millions)	□ 1,297
UN human development index (max 1.0)	0.73

Sources: Eurostat, United Nations Development Programme

## Number of Animals

	number, 000s
companion animals	n/a
exotic	n/a
cattle	251
sheep	732
pigs	152
goats	225
horses	n/a

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

## Employment Field

	per cent
private vet practice: vet owners	33
private vet practice: vets not owners	40
public service	3
education - research	0
industry - research	0
other - as a vet	24
other - outside the vet profession	0
have a second occupation	21

Source: Survey respondents

## Demography

	number / per cent
total number of active* vets	250
number vets per 1000 population	0.12
% aged under 40	53
% aged 40 to 49	43
% aged over 50	3
% male	81
% female	19

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

## Employment Status

	per cent
working full-time	89
working part-time	4
unemployed	5
not working for other reasons	2
retired	0

Source: Survey respondents

## Working outside own country

	per cent
educated in another country	43
have worked in another country - last three years	4
have seriously considered working in another country - last three years	57

Source: Survey respondents

# MK FYROM



## Practice Size

size of vet practice	per cent
1	11
2	16
3-5	36
6-10	18
11-30	16
31-50	0
51-100	2
over 100	0

Source: Survey respondents - practice owners

## Practice Revenue

size of vet practice	□
1	27 094*
2	14 666
3-5	34 638*
6-10	25 698*
11-30	354 487*
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

## Practice revenue - service type

	per cent
treatment	54
surgery	13
official tasks	10
sales of medicines	10
sales of foodstuffs	7
other	7

Source: Survey respondents - practice owners

## Practice revenue - main focus

	per cent
companion	26
cattle	43
pigs	8
sheep / goats	18
horses	3
exotic	1
other	2

Source: Survey respondents - practice owners

## Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	n/a
owners - 2 staff	n/a
owners - 3 or more staff	7 220
ALL owners	4 867
vet practice - vets (salaried)	n/a
public service	n/a
education - research	n/a
industry - research	n/a
other - as a vet	n/a
other - outside the vet profession	n/a
ALL	4 867

Source: Survey respondents

## Survey Response

	per cent
number of vets participating in survey	87
vet participants as % of all active vets	36
accuracy of results	+/- 8.5

# DE

## Germany



### Social & Economic Data

	number / □ / index
total population	80 780 000
GDP (millions)	□ 2,737,600
GDP per inhabitant	□ 33,300
agriculture output (millions)	□ 45,730
UN human development index (max 1.0)	0.91

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	18 800
exotic	4 850
cattle	12 686
sheep	1 574
pigs	28 046
goats	2
horses	481

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	35
private vet practice: vets not owners	31
public service	15
education - research	7
industry - research	6
other - as a vet	4
other - outside the vet profession	1
have a second occupation	18

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	26 800
number vets per 1000 population	0.33
% aged under 40	43
% aged 40 to 49	26
% aged over 50	31
% male	32
% female	68

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	71
working part-time	23
unemployed	2
not working for other reasons	3
retired	1

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	9
have worked in another country - last three years	5
have seriously considered working in another country - last three years	19

Source: Survey respondents

# DE

## Germany



### Practice Size

size of vet practice	per cent
1	11
2	15
3-5	36
6-10	20
11-30	13
31-50	3
51-100	1
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	92 215
2	249 424
3-5	298 516
6-10	506 634
11-30	1 128 205
31-50	2 573 333*
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

### Practice revenue - service type

	per cent
treatment	55
surgery	17
official tasks	2
sales of medicines	19
sales of foodstuffs	5
other	2

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	60
cattle	14
pigs	3
sheep / goats	1
horses	18
exotic	1
other	3

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	40 000
owners - 2 staff	51 500
owners - 3 or more staff	79 000
ALL owners	62 500
vet practice - vets (salaried)	36 000
public service	n/a
education - research	45 000
industry - research	68 000
other - as a vet	57 139
other - outside the vet profession	48 720
ALL	50 000

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	2 183
vet participants as % of all active vets	8
accuracy of results	+/- 2.0

# IS

## Iceland



### Social & Economic Data

	number / □ / index
total population	325 671
GDP (millions)	□ 11,000
GDP per inhabitant	□ 34,000
agriculture output (millions)	□ 274
UN human development index (max 1.0)	0.89

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	n/a
exotic	n/a
cattle	73
sheep	474
pigs	36
goats	n/a
horses	n/a

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	33
private vet practice: vets not owners	0
public service	47
education - research	0
industry - research	7
other - as a vet	13
other - outside the vet profession	0
have a second occupation	33

Source: Survey respondents (caution: small sample)

### Demography

	number / per cent
total number of active* vets	100
number vets per 1000 population	0.36
% aged under 40	31
% aged 40 to 49	44
% aged over 50	25
% male	44
% female	56

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	94
working part-time	6
unemployed	0
not working for other reasons	0
retired	0

Source: Survey respondents (caution: small sample)

### Working outside own country

	per cent
educated in another country	100
have worked in another country - last three years	13
have seriously considered working in another country - last three years	56

Source: Survey respondents (caution: small sample)



# IS

## Iceland



### Practice Size

size of vet practice	per cent
1	20
2	0
3-5	40
6-10	20
11-30	20
31-50	0
51-100	0
over 100	0

Source: Survey respondents - practice owners (caution: small sample)

### Practice Revenue

size of vet practice	□
1	71 400*
2	n/a
3-5	361 615*
6-10	n/a
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

### Practice revenue - service type

	per cent
treatment	42
surgery	27
official tasks	0
sales of medicines	9
sales of foodstuffs	18
other	4

Source: Survey respondents - practice owners (caution: small sample)

### Practice revenue - main focus

	per cent
companion	74
cattle	9
pigs	4
sheep / goats	4
horses	7
exotic	1
other	0

Source: Survey respondents - practice owners (caution: small sample)

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	n/a
owners - 2 staff	n/a
owners - 3 or more staff	n/a
ALL owners	n/a
vet practice - vets (salaried)	n/a
public service	n/a
education - research	n/a
industry - research	n/a
other - as a vet	n/a
other - outside the vet profession	n/a
ALL	67 927

Source: Survey respondents (caution: small sample)

### Survey Response

	per cent
number of vets participating in survey	16
vet participants as % of all active vets	14
accuracy of results	+/- 22.8

# IT

## Italy



### Social & Economic Data

	number / □ / index
total population	60 782 668
GDP (millions)	□ 1,560,024
GDP per inhabitant	□ 25,600
agriculture output (millions)	□ 49,618
UN human development index (max 1.0)	0.87

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	16 269
exotic	14 296
cattle	6 249
sheep	7 182
pigs	8 561
goats	243
horses	469

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'  
 Cattle sheep pigs, goats: Eurostat data refers to 2013  
 Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	26
private vet practice: vets not owners	35
public service	27
education - research	4
industry - research	3
other - as a vet	4
other - outside the vet profession	2
have a second occupation	16

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	30 100
number vets per 1000 population	0.50
% aged under 40	37
% aged 40 to 49	21
% aged over 50	41
% male	51
% female	49

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	69
working part-time	23
unemployed	5
not working for other reasons	2
retired	1

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	0
have worked in another country - last three years	4
have seriously considered working in another country - last three years	33

Source: Survey respondents

# IT

## Italy



### Practice Size

size of vet practice	per cent
1	38
2	21
3-5	21
6-10	12
11-30	4
31-50	2
51-100	2
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	23 421
2	48 064
3-5	88 720
6-10	325 275
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	59
surgery	26
official tasks	3
sales of medicines	3
sales of foodstuffs	1
other	8

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	93
cattle	1
pigs	0
sheep / goats	1
horses	1
exotic	2
other	2

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	18 000
owners - 2 staff	25 850
owners - 3 or more staff	30 000
ALL owners	23 100
vet practice - vets (salaried)	17 000
public service	70 000
education - research	40 000
industry - research	42 000
other - as a vet	30 000
other - outside the vet profession	48 000
ALL	35 000

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	1 301
vet participants as % of all active vets	4
accuracy of results	+/- 2.7

# LV

## Latvia



### Social & Economic Data

	number / □ / index
total population	2 001 468
GDP (millions)	□ 23,372
GDP per inhabitant	□ 11,600
agriculture output (millions)	□ 943
UN human development index (max 1.0)	0.81

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	720
exotic	n/a
cattle	406
sheep	67
pigs	368
goats	14
horses	11

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	29
private vet practice: vets not owners	23
public service	6
education - research	6
industry - research	0
other - as a vet	32
other - outside the vet profession	3
have a second occupation	74

Source: Survey respondents (caution: small sample)

### Demography

	number / per cent
total number of active* vets	700
number vets per 1000 population	0.36
% aged under 40	49
% aged 40 to 49	29
% aged over 50	22
% male	26
% female	74

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	55
working part-time	45
unemployed	0
not working for other reasons	0
retired	0

Source: Survey respondents (caution: small sample)

### Working outside own country

	per cent
educated in another country	13
have worked in another country - last three years	16
have seriously considered working in another country - last three years	23

Source: Survey respondents (caution: small sample)

# LV

## Latvia



### Practice Size

size of vet practice	per cent
1	56
2	6
3-5	25
6-10	6
11-30	6
31-50	0
51-100	0
over 100	0

Source: Survey respondents - practice owners (caution: small sample)

### Practice Revenue

size of vet practice	□
1	10 750
2	n/a
3-5	35 000
6-10	10 000
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	63
surgery	8
official tasks	2
sales of medicines	6
sales of foodstuffs	9
other	12

Source: Survey respondents - practice owners (caution: small sample)

### Practice revenue - main focus

	per cent
companion	28
cattle	20
pigs	1
sheep / goats	12
horses	13
exotic	11
other	15

Source: Survey respondents - practice owners (caution: small sample)

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	n/a
owners - 2 staff	n/a
owners - 3 or more staff	n/a
ALL owners	n/a
vet practice - vets (salaried)	n/a
public service	n/a
education - research	n/a
industry - research	n/a
other - as a vet	n/a
other - outside the vet profession	n/a
ALL	9 600

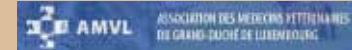
Source: Survey respondents (caution: small sample)

### Survey Response

	per cent
number of vets participating in survey	31
vet participants as % of all active vets	4
accuracy of results	+/- 17.2

# LU

## Luxembourg



### Social & Economic Data

	number / □ / index
total population	549 680
GDP (millions)	□ 45,478
GDP per inhabitant	□ 83,400
agriculture output (millions)	□ 397
UN human development index (max 1.0)	0.88

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	n/a
exotic	n/a
cattle	198
sheep	8
pigs	90
goats	66
horses	5

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	65
private vet practice: vets not owners	26
public service	4
education - research	4
industry - research	0
other - as a vet	0
other - outside the vet profession	0
have a second occupation	9

Source: Survey respondents (caution: small sample)

### Demography

	number / per cent
total number of active* vets	250
number vets per 1000 population	0.43
% aged under 40	52
% aged 40 to 49	13
% aged over 50	35
% male	39
% female	61

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	87
working part-time	13
unemployed	0
not working for other reasons	0
retired	0

Source: Survey respondents (caution: small sample)

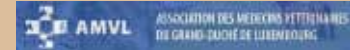
### Working outside own country

	per cent
educated in another country	100
have worked in another country - last three years	14
have seriously considered working in another country - last three years	23

Source: Survey respondents (caution: small sample)

# LU

## Luxembourg



### Practice Size

size of vet practice	per cent
1	43
2	14
3-5	29
6-10	10
11-30	5
31-50	0
51-100	0
over 100	0

Source: Survey respondents - practice owners (caution: small sample)

### Practice Revenue

size of vet practice	□
1	65 000
2	85 000
3-5	253 500
6-10	1 020 000
11-30	1 000 000
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners (caution: small sample)

### Practice revenue - service type

	per cent
treatment	50
surgery	23
official tasks	3
sales of medicines	14
sales of foodstuffs	10
other	0

Source: Survey respondents - practice owners (caution: small sample)

### Practice revenue - main focus

	per cent
companion	76
cattle	1
pigs	4
sheep / goats	0
horses	16
exotic	4
other	0

Source: Survey respondents - practice owners (caution: small sample)

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	45 000
owners - 2 staff	n/a
owners - 3 or more staff	n/a
ALL owners	50 000
vet practice - vets (salaried)	n/a
public service	n/a
education - research	n/a
industry - research	n/a
other - as a vet	n/a
other - outside the vet profession	n/a
ALL	60 000

Source: Survey respondents (caution: small sample)

### Survey Response

	per cent
number of vets participating in survey	23
vet participants as % of all active vets	10
accuracy of results	+/- 19.4

NL

## Netherlands



## Social &amp; Economic Data

	number / □ / index
total population	16 829 289
GDP (millions)	□ 602,658
GDP per inhabitant	□ 35,900
agriculture output (millions)	□ 27,587
UN human development index (max 1.0)	0.92

Sources: Eurostat, United Nations Development Programme

## Number of Animals

	number, 000s
companion animals	5 932
exotic	4 910
cattle	4 090
sheep	1 074
pigs	12 013
goats	72
horses	294

Sources:

Companion animals, exotics derived from FEDIAF 'Facts &amp; Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

## Employment Field

	per cent
private vet practice: vet owners	33
private vet practice: vets not owners	29
public service	12
education - research	11
industry - research	8
other - as a vet	5
other - outside the vet profession	2
have a second occupation	16

Source: Survey respondents

## Demography

	number / per cent
total number of active* vets	3 800
number vets per 1000 population	0.23
% aged under 40	32
% aged 40 to 49	24
% aged over 50	44
% male	51
% female	49

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

## Employment Status

	per cent
working full-time	65
working part-time	31
unemployed	1
not working for other reasons	1
retired	2

Source: Survey respondents

## Working outside own country

	per cent
educated in another country	8
have worked in another country - last three years	9
have seriously considered working in another country - last three years	20

Source: Survey respondents



# NL

## Netherlands



### Practice Size

size of vet practice	per cent
1	8
2	7
3-5	21
6-10	27
11-30	30
31-50	7
51-100	1
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	98 551
2	181 455
3-5	308 075
6-10	496 256
11-30	1 179 648
31-50	4 122 000
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	45
surgery	18
official tasks	3
sales of medicines	21
sales of foodstuffs	7
other	7

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	62
cattle	17
pigs	5
sheep / goats	2
horses	9
exotic	1
other	4

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	54 000
owners - 2 staff	60 000
owners - 3 or more staff	100 000
ALL owners	100 000
vet practice - vets (salaried)	44 520
public service	61 799
education - research	55 000
industry - research	77 500
other - as a vet	67 500
other - outside the vet profession	65 000
ALL	70 000

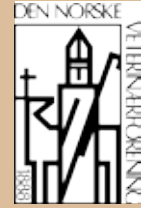
Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	653
vet participants as % of all active vets	17
accuracy of results	+/- 3.5

# NO

## Norway



### Social & Economic Data

	number / □ / index
total population	5 109 056
GDP (millions)	□ 385,747
GDP per inhabitant	□ 75,900
agriculture output (millions)	□ 3,691
UN human development index (max 1.0)	0.94

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	1 375
exotic	303
cattle	n/a
sheep	n/a
pigs	n/a
goats	n/a
horses	n/a

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	25
private vet practice: vets not owners	24
public service	29
education - research	8
industry - research	5
other - as a vet	5
other - outside the vet profession	3
have a second occupation	23

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	2 250
number vets per 1000 population	0.44
% aged under 40	40
% aged 40 to 49	24
% aged over 50	36
% male	33
% female	67

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	86
working part-time	12
unemployed	1
not working for other reasons	1
retired	0

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	32
have worked in another country - last three years	7
have seriously considered working in another country - last three years	16

Source: Survey respondents

# NO

## Norway



### Practice Size

size of vet practice	per cent
1	19
2	11
3-5	25
6-10	24
11-30	18
31-50	2
51-100	1
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	146 522
2	219 732
3-5	435 912
6-10	1 676 671
11-30	1 932 039
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	66
surgery	17
official tasks	2
sales of medicines	3
sales of foodstuffs	8
other	4

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	51
cattle	27
pigs	5
sheep / goats	6
horses	9
exotic	0
other	2

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	94 613
owners - 2 staff	72 779
owners - 3 or more staff	90 974
ALL owners	90 974
vet practice - vets (salaried)	58 223
public service	70 353
education - research	66 714
industry - research	87 941
other - as a vet	88 548
other - outside the vet profession	83 999
ALL	72 779

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	640
vet participants as % of all active vets	28
accuracy of results	+/- 3.3

# PL

## Poland



### Social & Economic Data

	number / □ / index
total population	38 495 659
GDP (millions)	□ 389,695
GDP per inhabitant	□ 10,100
agriculture output (millions)	□ 28,449
UN human development index (max 1.0)	0.83

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	13 984
exotic	1 325
cattle	5 500
sheep	219
pigs	10 994
goats	398
horses	276

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	47
private vet practice: vets not owners	14
public service	27
education - research	5
industry - research	1
other - as a vet	6
other - outside the vet profession	0
have a second occupation	39

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	9 500
number vets per 1000 population	0.25
% aged under 40	44
% aged 40 to 49	16
% aged over 50	40
% male	62
% female	38

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	90
working part-time	10
unemployed	1
not working for other reasons	<1
retired	0

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	0
have worked in another country - last three years	4
have seriously considered working in another country - last three years	21

Source: Survey respondents

# PL

## Poland



### Practice Size

size of vet practice	per cent
1	32
2	26
3-5	27
6-10	10
11-30	4
31-50	0
51-100	0
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	15 164
2	15 041
3-5	61 575
6-10	n/a
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	53
surgery	17
official tasks	13
sales of medicines	8
sales of foodstuffs	6
other	3

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	59
cattle	17
pigs	11
sheep / goats	0
horses	6
exotic	1
other	5

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	9 704
owners - 2 staff	8 794
owners - 3 or more staff	14 556
ALL owners	10 917
vet practice - vets (salaried)	n/a
public service	9 704
education - research	14 556
industry - research	n/a
other - as a vet	n/a
other - outside the vet profession	n/a
ALL	10 098

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	127
vet participants as % of all active vets	1
accuracy of results	+/- 8.6

# PT

## Portugal



### Social & Economic Data

	number / □ / index
total population	10 427 301
GDP (millions)	□ 165,690
GDP per inhabitant	□ 15,800
agriculture output (millions)	□ 6,288
UN human development index (max 1.0)	0.82

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	2 978
exotic	666
cattle	1 471
sheep	2 074
pigs	2 014
goats	1 313
horses	179

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	7
private vet practice: vets not owners	42
public service	31
education - research	4
industry - research	3
other - as a vet	12
other - outside the vet profession	0
have a second occupation	16

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	5 000
number vets per 1000 population	0.48
% aged under 40	76
% aged 40 to 49	15
% aged over 50	9
% male	38
% female	62

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	90
working part-time	4
unemployed	5
not working for other reasons	1
retired	0

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	34
have worked in another country - last three years	23
have seriously considered working in another country - last three years	66

Source: Survey respondents

# PT

## Portugal



### Practice Size

size of vet practice	per cent
1	9
2	9
3-5	52
6-10	16
11-30	4
31-50	1
51-100	3
over 100	6

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	22 500*
2	n/a
3-5	55 167*
6-10	164 000*
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

### Practice revenue - service type

	per cent
treatment	45
surgery	14
official tasks	2
sales of medicines	19
sales of foodstuffs	10
other	11

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	94
cattle	3
pigs	1
sheep / goats	0
horses	1
exotic	1
other	0

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	n/a
owners - 2 staff	n/a
owners - 3 or more staff	7 300
ALL owners	7 300
vet practice - vets (salaried)	13 100
public service	29 249
education - research	32 500
industry - research	26 015
other - as a vet	28 015
other - outside the vet profession	n/a
ALL	21 469

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	173
vet participants as % of all active vets	3
accuracy of results	+/- 7.3

# RO

## Romania



### Social & Economic Data

	number / □ / index
total population	19 942 642
GDP (millions)	□ 142,245
GDP per inhabitant	□ 7,100
agriculture output (millions)	□ 11,983
UN human development index (max 1.0)	0.78

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	8 307
exotic	294
cattle	2 022
sheep	9 136
pigs	5 180
goats	30
horses	729

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	52
private vet practice: vets not owners	19
public service	14
education - research	3
industry - research	2
other - as a vet	9
other - outside the vet profession	2
have a second occupation	34

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	7 400
number vets per 1000 population	0.37
% aged under 40	52
% aged 40 to 49	29
% aged over 50	20
% male	69
% female	31

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	85
working part-time	10
unemployed	<1
not working for other reasons	4
retired	0

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	1
have worked in another country - last three years	6
have seriously considered working in another country - last three years	40

Source: Survey respondents



# RO

## Romania



### Practice Size

size of vet practice	per cent
1	19
2	27
3-5	36
6-10	11
11-30	6
31-50	1
51-100	1
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	5 427
2	10 438
3-5	14 038
6-10	38 921
11-30	143 076*
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

### Practice revenue - service type

	per cent
treatment	37
surgery	19
official tasks	24
sales of medicines	9
sales of foodstuffs	3
other	7

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	45
cattle	21
pigs	10
sheep / goats	13
horses	6
exotic	1
other	5

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	9 759
owners - 2 staff	5 851
owners - 3 or more staff	6 913
ALL owners	6 822
vet practice - vets (salaried)	6 100
public service	8 246
education - research	n/a
industry - research	n/a
other - as a vet	7 568
other - outside the vet profession	n/a
ALL	7 229

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	439
vet participants as % of all active vets	6
accuracy of results	+/- 4.5

RS

Serbia



## Social & Economic Data

	number / □ / index
total population	7 146 759
GDP (millions)	□31 198
GDP per inhabitant	□4 366
agriculture output (millions)	n/a
UN human development index (max 1.0)	0.74

Sources: Eurostat, United Nations Development Programme

## Number of Animals

	number, 000s
companion animals	n/a
exotic	n/a
cattle	913
sheep	1 616
pigs	3 144
goats	69
horses	n/a

Sources:

Companion animals, exotics derived from FEDIAF 'Facts &amp; Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

## Employment Field

	per cent
private vet practice: vet owners	31
private vet practice: vets not owners	18
public service	14
education - research	9
industry - research	3
other - as a vet	23
other - outside the vet profession	2
have a second occupation	19

Source: Survey respondents

## Demography

	number / per cent
total number of active* vets	2 750
number vets per 1000 population	0.38
% aged under 40	35
% aged 40 to 49	37
% aged over 50	28
% male	72
% female	28

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

## Employment Status

	per cent
working full-time	90
working part-time	3
unemployed	6
not working for other reasons	1
retired	0

Source: Survey respondents

## Working outside own country

	per cent
educated in another country	5
have worked in another country - last three years	3
have seriously considered working in another country - last three years	50

Source: Survey respondents



# RS

## Serbia

### Practice Size

size of vet practice	per cent
1	27
2	13
3-5	25
6-10	26
11-30	7
31-50	2
51-100	0
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	11 284
2	25 962
3-5	44 949
6-10	318 293
11-30	264 948
31-50	1 729 345*
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

### Practice revenue - service type

	per cent
treatment	47
surgery	15
official tasks	16
sales of medicines	8
sales of foodstuffs	7
other	8

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	42
cattle	26
pigs	13
sheep / goats	6
horses	2
exotic	1
other	10

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	3 946
owners - 2 staff	6 917
owners - 3 or more staff	5 951
ALL owners	5 188
vet practice - vets (salaried)	3 977
public service	8 301
education - research	11 241
industry - research	6 917
other - as a vet	5 188
other - outside the vet profession	5 707
ALL	6 053

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	536
vet participants as % of all active vets	20
accuracy of results	+/- 3.8

# SK

## Slovakia



### Social & Economic Data

	number / □ / index
total population	5 415 949
GDP (millions)	□ 72,134
GDP per inhabitant	□ 13,300
agriculture output (millions)	□ 3,544
UN human development index (max 1.0)	0.83

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	1 411
exotic	30
cattle	468
sheep	400
pigs	637
goats	6
horses	7

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	31
private vet practice: vets not owners	39
public service	6
education - research	2
industry - research	0
other - as a vet	19
other - outside the vet profession	3
have a second occupation	32

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	2 150
number vets per 1000 population	0.40
% aged under 40	43
% aged 40 to 49	18
% aged over 50	40
% male	72
% female	28

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	86
working part-time	13
unemployed	0
not working for other reasons	1
retired	0

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	12
have worked in another country - last three years	4
have seriously considered working in another country - last three years	28

Source: Survey respondents

# SK

## Slovakia



### Practice Size

size of vet practice	per cent
1	34
2	24
3-5	27
6-10	11
11-30	4
31-50	0
51-100	0
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	10 150
2	34 786
3-5	36 990
6-10	195 600
11-30	232 500*
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

\* caution: small sample

### Practice revenue - service type

	per cent
treatment	50
surgery	24
official tasks	3
sales of medicines	12
sales of foodstuffs	7
other	4

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	80
cattle	8
pigs	2
sheep / goats	2
horses	4
exotic	2
other	2

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	16,500
owners - 2 staff	20,000
owners - 3 or more staff	15,000
ALL owners	16,500
vet practice - vets (salaried)	10,800
public service	16,000
education - research	n/a
industry - research	n/a
other - as a vet	11,750
other - outside the vet profession	n/a
ALL	12,200

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	214
vet participants as % of all active vets	10
accuracy of results	+/- 6.4

# ES

## Spain



### Social & Economic Data

	number / □ / index
total population	46 507 760
GDP (millions)	□ 1,022,988
GDP per inhabitant	□ 22,300
agriculture output (millions)	□ 37,852
UN human development index (max 1.0)	0.87

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	10 755
exotic	3 468
cattle	5 697
sheep	16 119
pigs	25 495
goats	1 283
horses	681

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	25
private vet practice: vets not owners	34
public service	18
education - research	5
industry - research	5
other - as a vet	11
other - outside the vet profession	1
have a second occupation	18

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	22 400
number vets per 1000 population	0.48
% aged under 40	52
% aged 40 to 49	26
% aged over 50	22
% male	48
% female	52

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	78
working part-time	13
unemployed	8
not working for other reasons	1
retired	<1

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	2
have worked in another country - last three years	5
have seriously considered working in another country - last three years	40

Source: Survey respondents

# ES

## Spain



### Practice Size

size of vet practice	per cent
1	19
2	22
3-5	37
6-10	14
11-30	6
31-50	1
51-100	1
over 100	0

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	36 769
2	104 845
3-5	136 943
6-10	355 250
11-30	735 769
31-50	2 000 000
51-100	4 000 000
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	51
surgery	21
official tasks	1
sales of medicines	9
sales of foodstuffs	11
other	6

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	87
cattle	4
pigs	1
sheep / goats	2
horses	3
exotic	2
other	1

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	20 000
owners - 2 staff	18 000
owners - 3 or more staff	25 000
ALL owners	24 000
vet practice - vets (salaried)	14 450
public service	40 000
education - research	35 000
industry - research	32 000
other - as a vet	25 000
other - outside the vet profession	39 000
ALL	26 000

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	2 281
vet participants as % of all active vets	10
accuracy of results	+/- 1.9

# SE

## Sweden



### Social & Economic Data

	number / □ / index
total population	9 644 864
GDP (millions)	□ 420,849
GDP per inhabitant	□ 43,800
agriculture output (millions)	□ 5,615
UN human development index (max 1.0)	0.90

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	2 520
exotic	373
cattle	1 444
sheep	585
pigs	1 478
goats	96
horses	229

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	16
private vet practice: vets not owners	37
public service	19
education - research	7
industry - research	5
other - as a vet	15
other - outside the vet profession	1
have a second occupation	21

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	1 900
number vets per 1000 population	0.20
% aged under 40	35
% aged 40 to 49	28
% aged over 50	36
% male	20
% female	80

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	78
working part-time	20
unemployed	<1
not working for other reasons	1
retired	<1

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	19
have worked in another country - last three years	8
have seriously considered working in another country - last three years	24

Source: Survey respondents



# SE

## Sweden



### Practice Size

size of vet practice	per cent
1	14
2	3
3-5	13
6-10	14
11-30	23
31-50	8
51-100	12
over 100	13

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	75 700
2	188 557
3-5	133 415
6-10	714 022
11-30	1 663 741
31-50	n/a
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	64
surgery	22
official tasks	2
sales of medicines	1
sales of foodstuffs	5
other	7

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	52
cattle	10
pigs	1
sheep / goats	0
horses	36
exotic	0
other	1

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	33 275
owners - 2 staff	n/a
owners - 3 or more staff	51 909
ALL owners	49 912
vet practice - vets (salaried)	45 908
public service	58 896
education - research	66 550
industry - research	83 187
other - as a vet	61 004
other - outside the vet profession	n/a
ALL	55 458

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	290
vet participants as % of all active vets	15
accuracy of results	+/- 5.3

# CH

## Switzerland



### Social & Economic Data

	number / □ / index
total population	8 136 689
GDP (millions)	□ 489,673
GDP per inhabitant	□ 61,100
agriculture output (millions)	n/a
UN human development index (max 1.0)	0.92

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	2 502
exotic	399
cattle	n/a
sheep	n/a
pigs	n/a
goats	n/a
horses	n/a

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'

Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	39
private vet practice: vets not owners	27
public service	12
education - research	12
industry - research	6
other - as a vet	4
other - outside the vet profession	1
have a second occupation	18

Source: Survey respondents

### Demography

	number / per cent
total number of active* vets	2 100
number vets per 1000 population	0.26
% aged under 40	39
% aged 40 to 49	24
% aged over 50	37
% male	48
% female	52

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

### Employment Status

	per cent
working full-time	75
working part-time	22
unemployed	2
not working for other reasons	1
retired	<1

Source: Survey respondents

### Working outside own country

	per cent
educated in another country	8
have worked in another country - last three years	6
have seriously considered working in another country - last three years	16

Source: Survey respondents

# CH

## Switzerland



### Practice Size

size of vet practice	per cent
1	14
2	11
3-5	30
6-10	25
11-30	11
31-50	3
51-100	1
over 100	5

Source: Survey respondents - practice owners

### Practice Revenue

size of vet practice	□
1	124 089
2	311 657
3-5	589 416
6-10	1 523 904
11-30	1 933 698
31-50	5 123 577
51-100	n/a
over 100	n/a

Source: Survey respondents - practice owners

### Practice revenue - service type

	per cent
treatment	55
surgery	17
official tasks	2
sales of medicines	18
sales of foodstuffs	5
other	2

Source: Survey respondents - practice owners

### Practice revenue - main focus

	per cent
companion	63
cattle	21
pigs	3
sheep / goats	2
horses	9
exotic	1
other	1

Source: Survey respondents - practice owners

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	79 928
owners - 2 staff	81 977
owners - 3 or more staff	122 966
ALL owners	110 669
vet practice - vets (salaried)	61 893
public service	118 867
education - research	82 387
industry - research	108 620
other - as a vet	65 992
other - outside the vet profession	n/a
ALL	98 373

Source: Survey respondents

### Survey Response

	per cent
number of vets participating in survey	594
vet participants as % of all active vets	28
accuracy of results	+/- 3.4

# IE

## Ireland



### Social & Economic Data

	number / □ / index
total population	4 604 029
GDP (millions)	□ 164,050
GDP per inhabitant	□ 35,600
agriculture output (millions)	□ 11,258
UN human development index (max 1.0)	0.90

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	898
exotic	139
cattle	6 309
sheep	3 321
pigs	1 468
goats	4 250
horses	159

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'  
Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	} 71
private vet practice: vets not owners	
public service	20
education - research	3
industry - research	4
other - as a vet	2
other - outside the vet profession	1
have a second occupation	n/a

Source: Veterinary Ireland Survey of the Veterinary Profession, 2013.  
Ireland did not participate in the FVE Survey.

### Demography

	number / per cent
total number of active* vets	2 000
number vets per 1000 population	0.43
% aged under 40	43
% aged 40 to 49	24
% aged over 50	32
% male	59
% female	41

\* Number of Active Vets source: FVE. Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. This is the number of vets declared to the FVE.

Percentage break-down: data sourced from Veterinary Ireland Survey of the Veterinary Profession, 2013.

### Employment Status

	per cent
working full-time	} 95
working part-time	
unemployed	1
not working for other reasons	2
retired	3

Source: Veterinary Ireland Survey of the Veterinary Profession, 2013.

### Working outside own country

	per cent
educated in another country	n/a
have worked in another country - last three years	n/a
have seriously considered working in another country - last three years	n/a

# IE

## Ireland



### Practice Size

size of vet practice	per cent
1	n/a
2	n/a
3-5	n/a
6-10	n/a
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

### Practice Revenue

size of vet practice	□
1	n/a
2	n/a
3-5	n/a
6-10	n/a
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

### Practice revenue - service type

	per cent
treatment	} 51
surgery	
official tasks	n/a
sales of medicines	} 20
sales of foodstuffs	
other	29

Source: Veterinary Ireland Survey of the Veterinary Profession, 2013.

### Practice revenue - main focus

	per cent
companion	38
cattle	39
pigs	2
sheep / goats	2
horses	14
exotic	<1
other	<1

Source: Veterinary Ireland Survey of the Veterinary Profession, 2013.

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	n/a
owners - 2 staff	n/a
owners - 3 or more staff	n/a
ALL owners	75 000
vet practice - vets (salaried)	40 000
public service	n/a
education - research	n/a
industry - research	n/a
other - as a vet	n/a
other - outside the vet profession	n/a
ALL	0

Source: Veterinary Ireland Survey of the Veterinary Profession, 2013.

### Survey Response

	per cent
number of vets participating in survey	724
vet participants as % of all active vets	36
accuracy of results	+/- 3.1

Refers to response to the Veterinary Ireland Survey of the Veterinary Profession, 2013.

# GB

## United Kingdom



### Social & Economic Data

	number / □ / index
total population	64 308 261
GDP (millions)	□ 1,899,098
GDP per inhabitant	□ 29,600
agriculture output (millions)	□ 27,162
UN human development index (max 1.0)	0.89

Sources: Eurostat, United Nations Development Programme

### Number of Animals

	number, 000s
companion animals	19 900
exotic	1 900
cattle	9 682
sheep	22 624
pigs	4 383
goats	1
horses	796

Sources:

Companion animals, exotics derived from FEDIAF 'Facts & Figures 2012'  
Cattle sheep pigs, goats: Eurostat data refers to 2013

Horses: Horses: World Horse Welfare and Eurogroup for Animals (2015) – EU Equine Welfare Project

### Employment Field

	per cent
private vet practice: vet owners	48
private vet practice: vets not owners	37
public service	10
education - research	10
industry - research	10
other - as a vet	10
other - outside the vet profession	5
have a second occupation	n/a

Source: RCVS Survey 2014. The UK did not participate in the FVE Survey.

### Demography

	number / per cent
total number of active* vets	20 800
number vets per 1000 population	0.32
% aged under 40	46
% aged 40 to 49	20
% aged over 50	34
% male	46
% female	54

\* Number of Active Vets: Figure refers to the number of active vets ie **excluding** retired, unemployed, not working. Source: RCVS.

Percentage break-down: data sourced from RCVS Survey 2014

### Employment Status

	per cent
working full-time	65
working part-time	19
unemployed	2
not working for other reasons	4
retired	10

Source: RCVS Survey 2014

### Working outside own country

	per cent
educated in another country	n/a
have worked in another country - last three years	7
have seriously considered working in another country - last three years	n/a

Source: RCVS Survey 2014

# GB

## United Kingdom



### Practice Size

size of vet practice	per cent
1	n/a
2	n/a
3-5	n/a
6-10	n/a
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

### Practice Revenue

size of vet practice	□
1	n/a
2	n/a
3-5	n/a
6-10	n/a
11-30	n/a
31-50	n/a
51-100	n/a
over 100	n/a

### Practice revenue - service type

	per cent
treatment	n/a
surgery	n/a
official tasks	n/a
sales of medicines	n/a
sales of foodstuffs	n/a
other	n/a

### Practice revenue - main focus

	per cent
companion	n/a
cattle	n/a
pigs	n/a
sheep / goats	n/a
horses	n/a
exotic	n/a
other	n/a

### Earnings Full-time Vets, unadjusted for PPP

	□ average, local values not adjusted for PPP
vet practice owners - 1 staff	n/a
owners - 2 staff	n/a
owners - 3 or more staff	n/a
ALL owners	n/a
vet practice - vets (salaried)	n/a
public service	n/a
education - research	n/a
industry - research	n/a
other - as a vet	n/a
other - outside the vet profession	n/a
ALL	n/a

### Survey Response

	per cent
number of vets participating in survey	6988
vet participants as % of all active vets	27
accuracy of results	+/- 1.0

Refers to response to the RCVS Survey, 2014

This survey has been undertaken with the assistance of FVE members:



The FVE would like to thank the project sponsors:

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