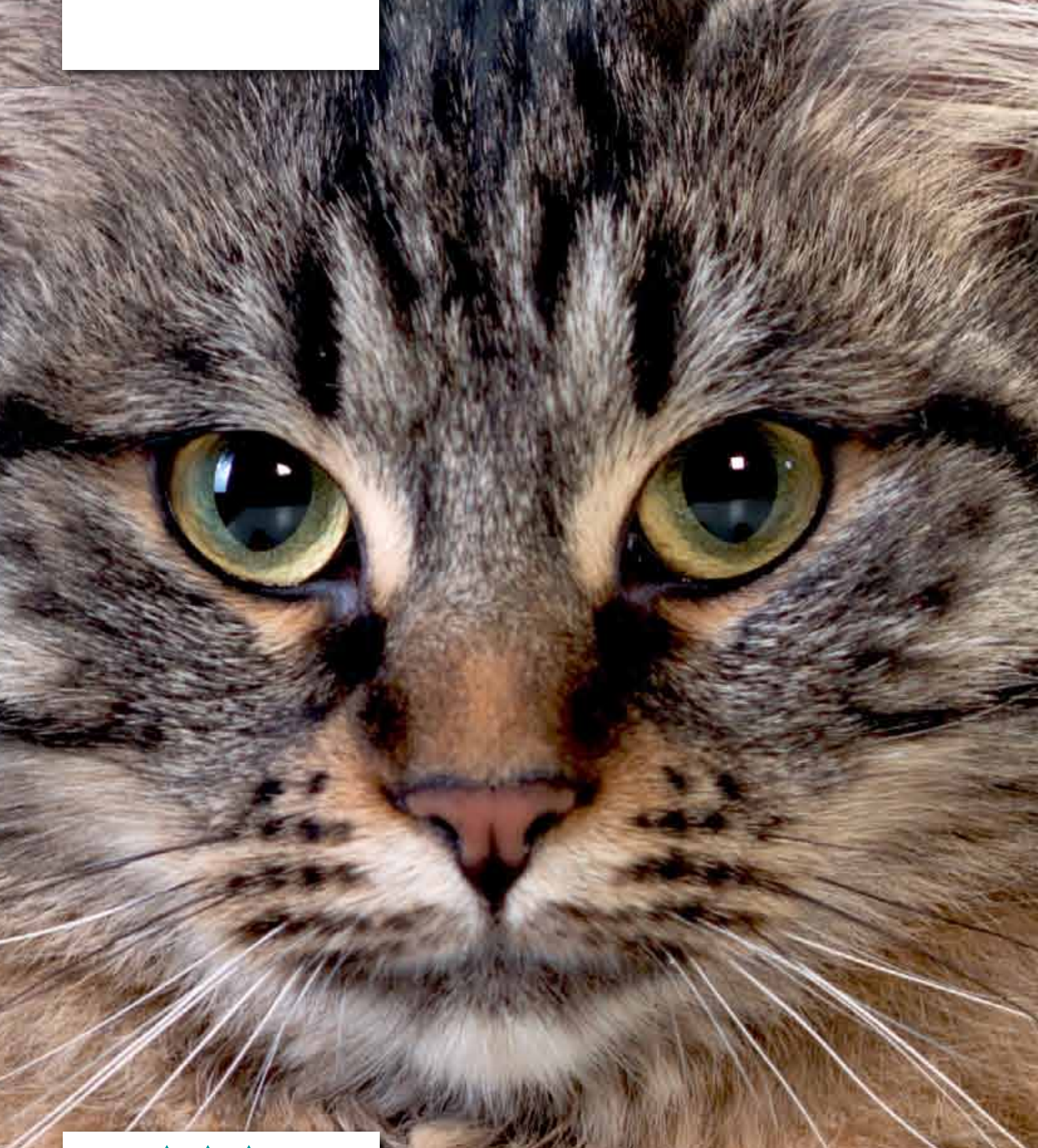




FVE Survey of the Veterinary Profession in Europe



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MIRZA & NACEY RESEARCH

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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 |
| EUROPE-24 | 158 550 | 13 001 | 8 | 0.8 |

* 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

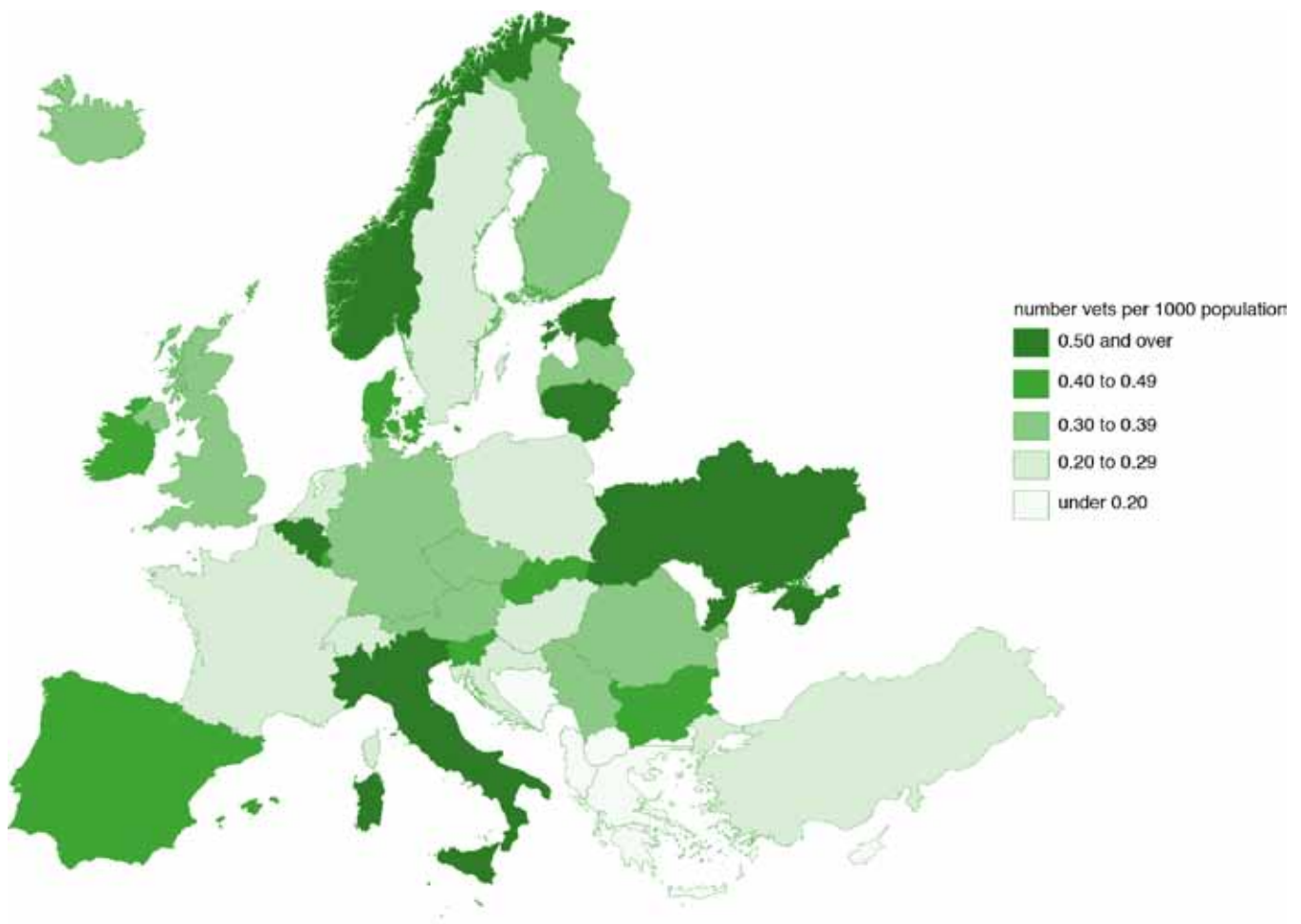
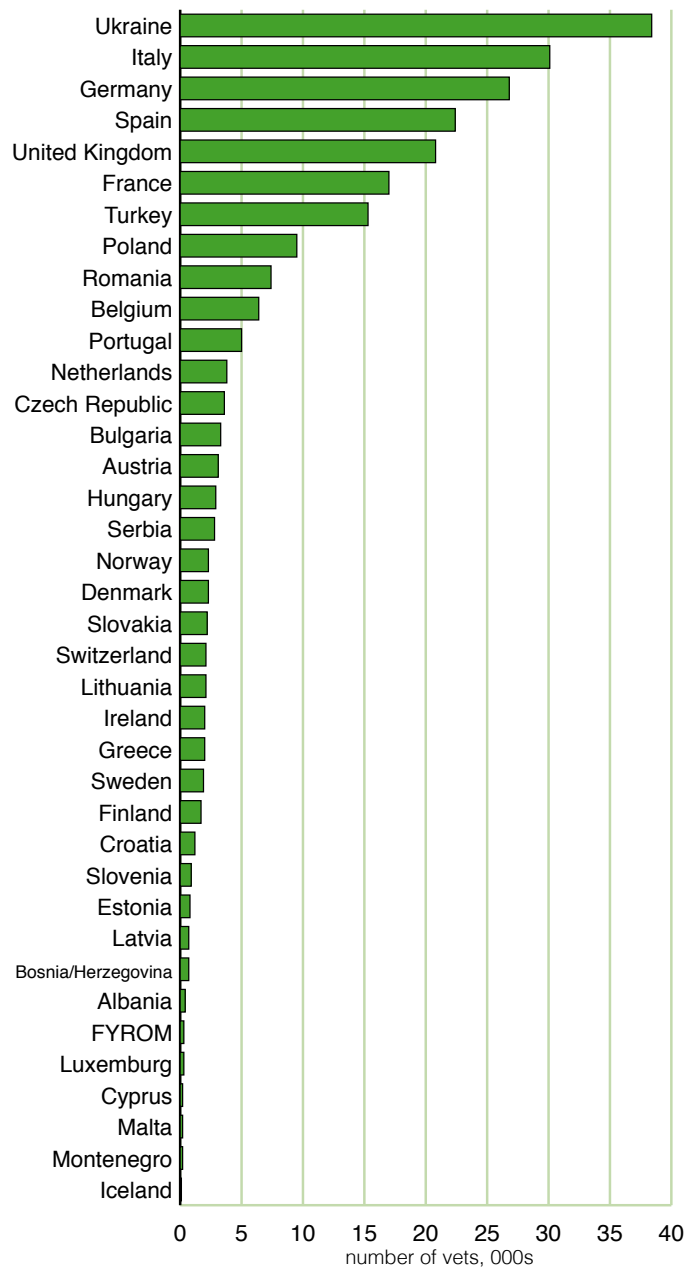


Table 1-1
Estimated number of veterinarians in each European country

| | 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 |
| EUROPE-38 | 242 700 | 647 105 899 | 0.38 |

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

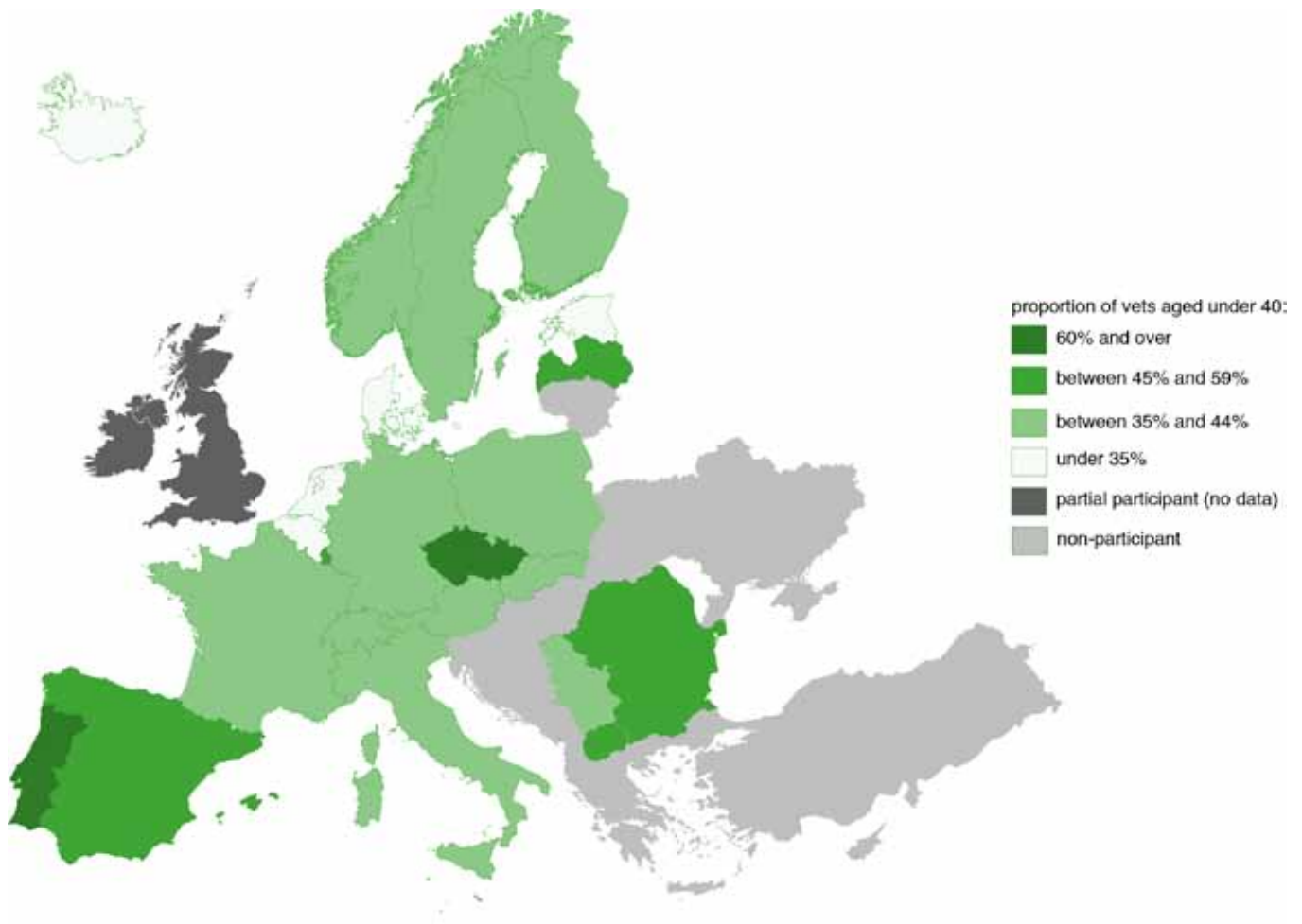


Chart 1-4
Veterinarians by age - Europe

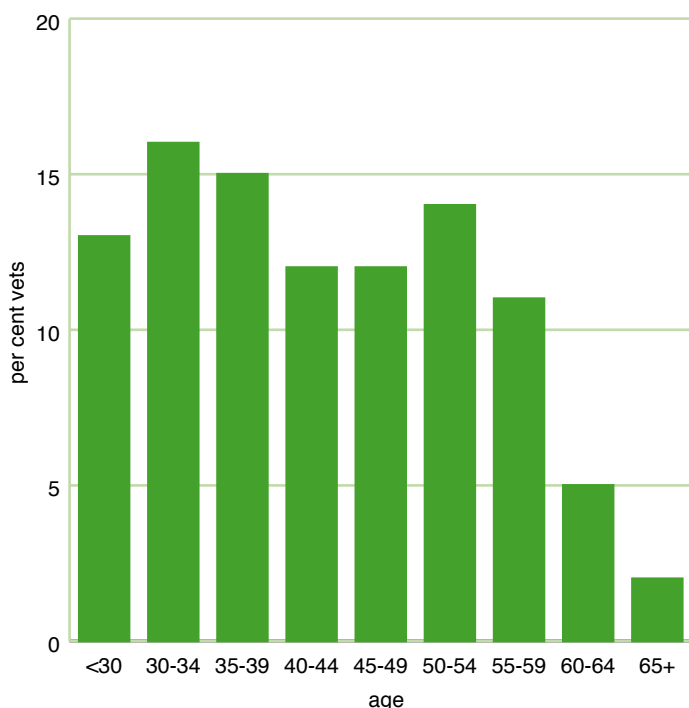


Table 1-2
Age of Veterinarians analysed by country

| 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

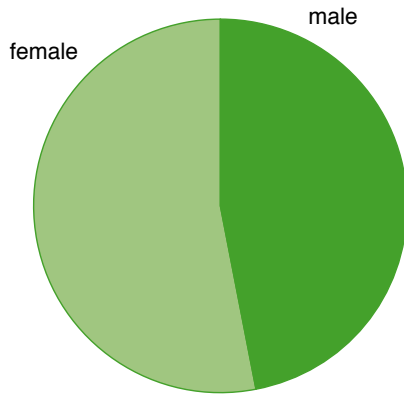
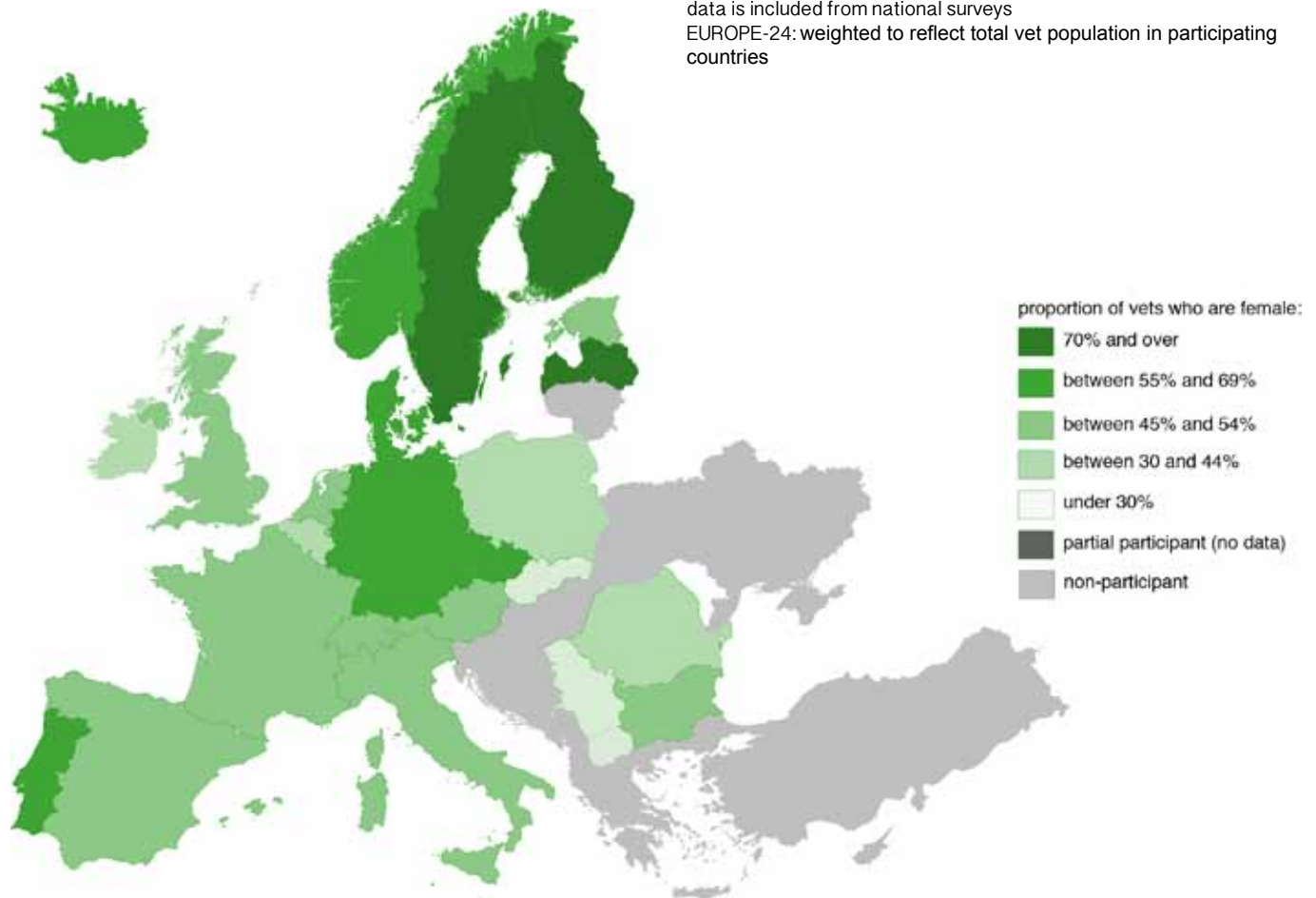
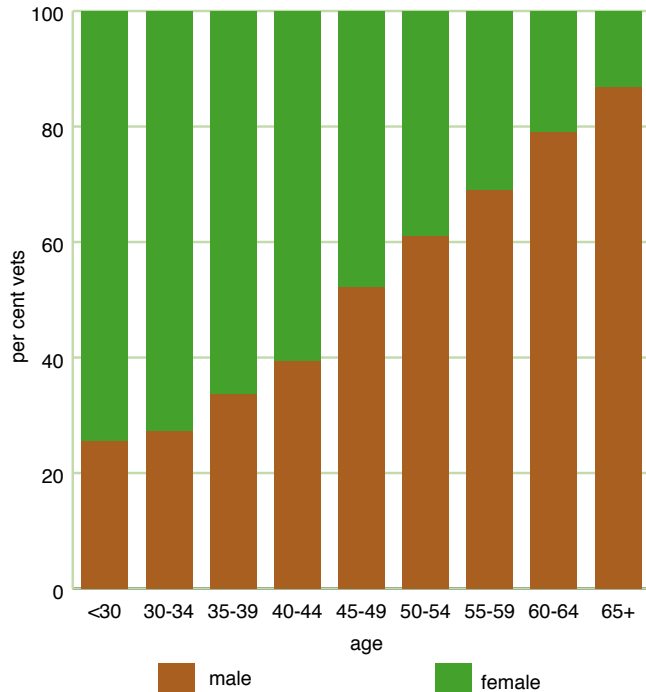


Chart 1-6
Proportion of Vets who are female mapped by country



* 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



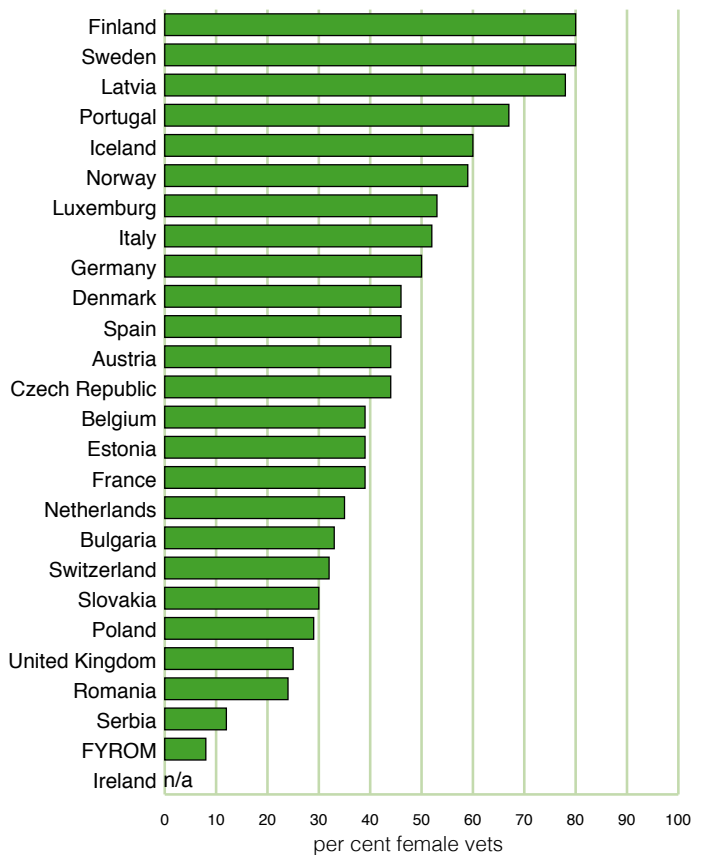
When analysed by age, the split between male and females is dramatic. The chart on the left shows that women account for over 70 per cent of the profession at age 30 but this falls to about 20 per cent at age 60. The pattern for males is almost the exact opposite; rising from about 25 per cent at age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

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

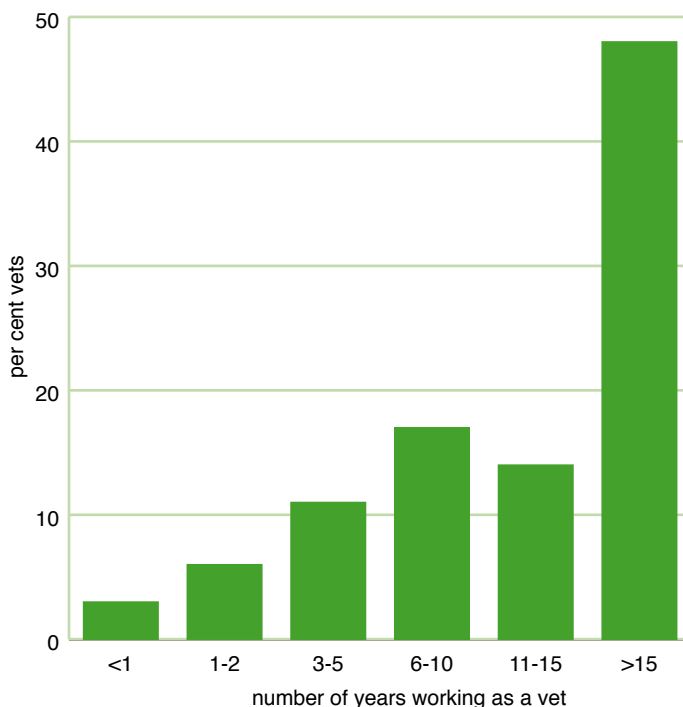


Table 1-5
Number of years working as a Veterinarian analysed by country

| 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

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

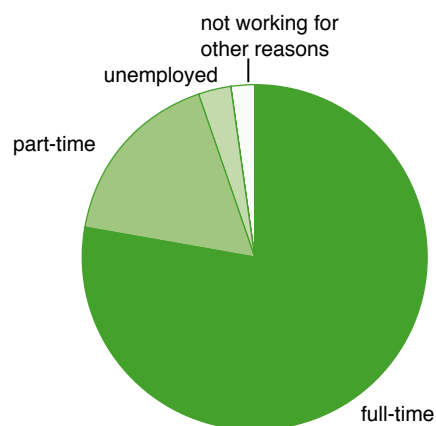


Table 1-6
Employment Status of Veterinarians analysed by country

| 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

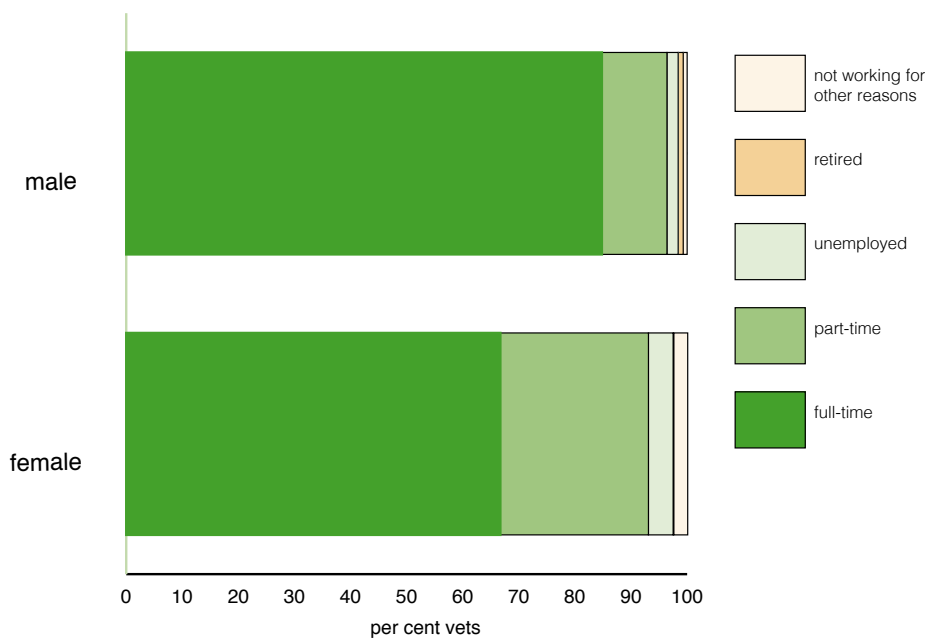
Table 1-7
Employment Status of Veterinarians analysed by gender

| 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).

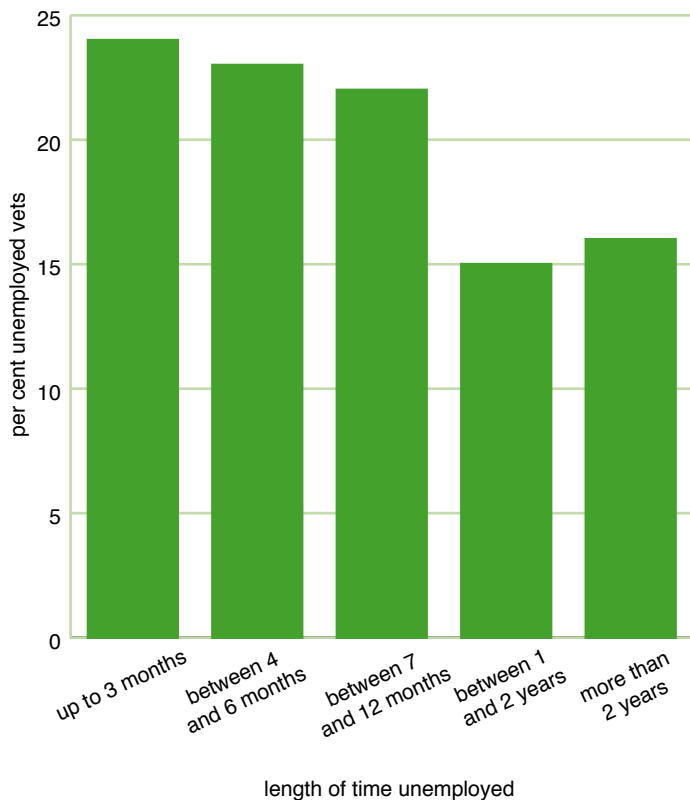
Chart 1-10
Employment status - Europe, analysed by gender



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

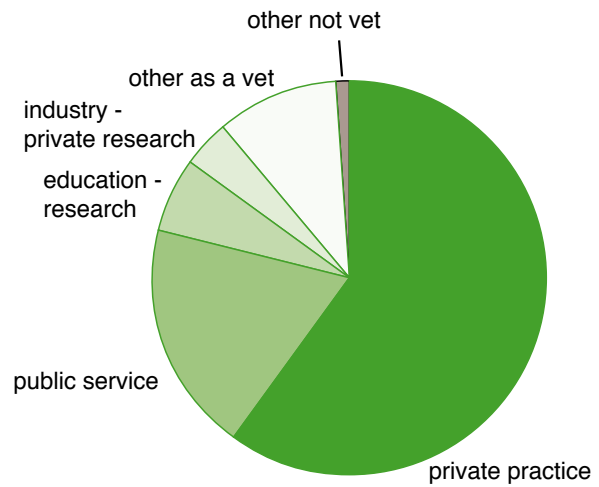


Chart 1-13
Levels of employment in private practice mapped by country

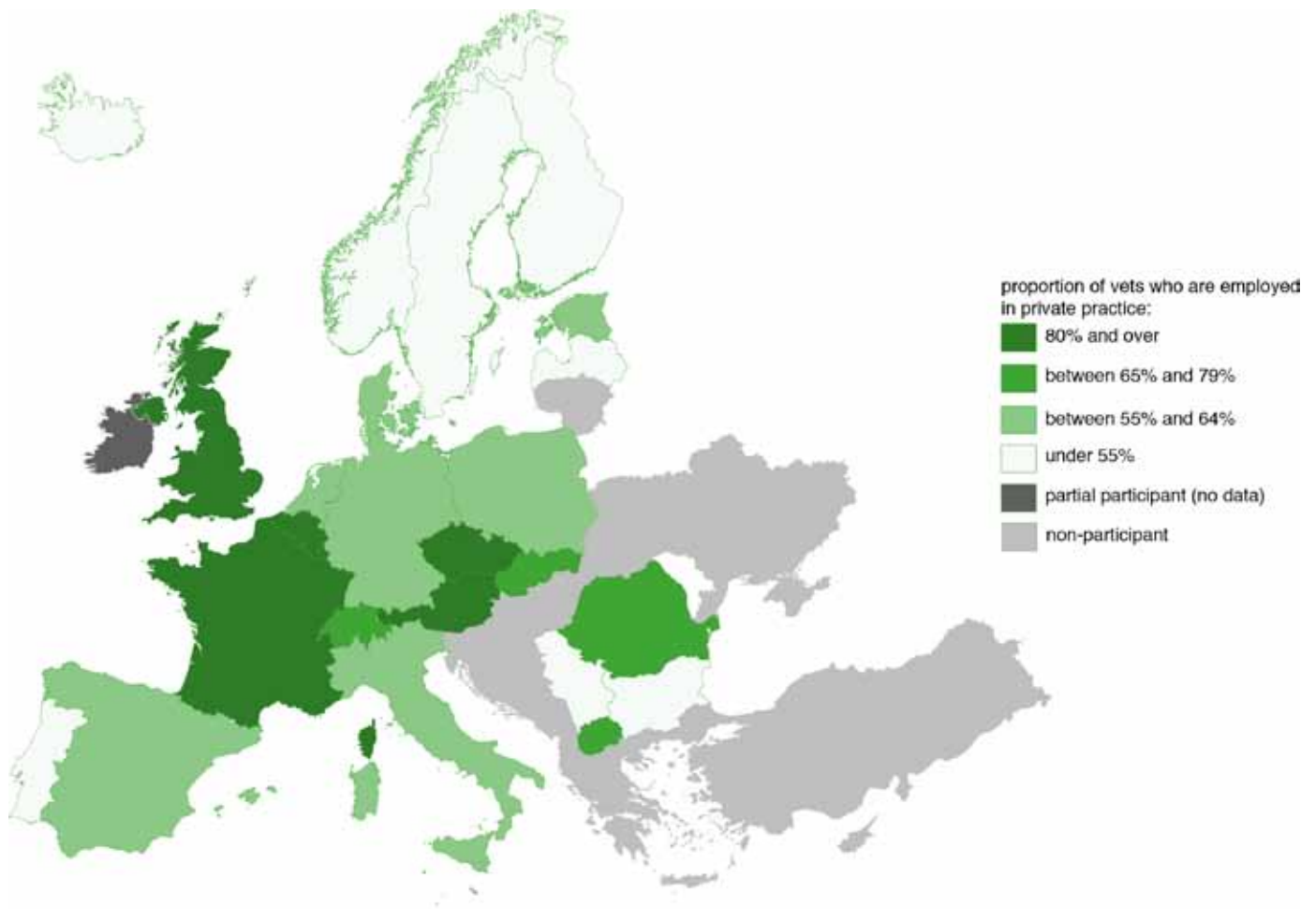


Table 1-13
Veterinarians' Field of Employment analysed by country

| 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

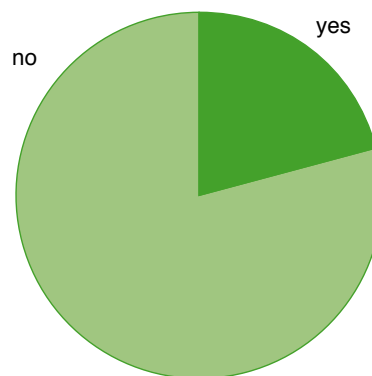


Table 1-14
Veterinarians' Field of Employment analysed by country

| 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

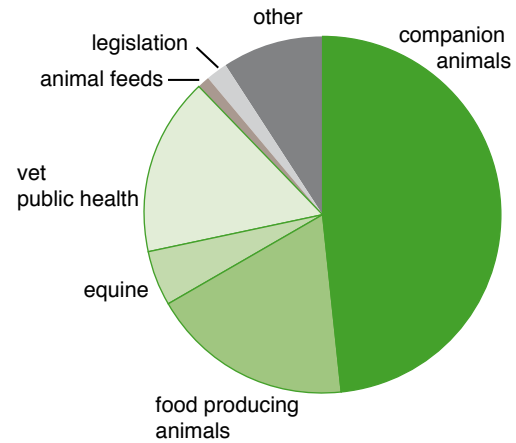


Chart 1-16
Levels of focus on companion animals mapped by country

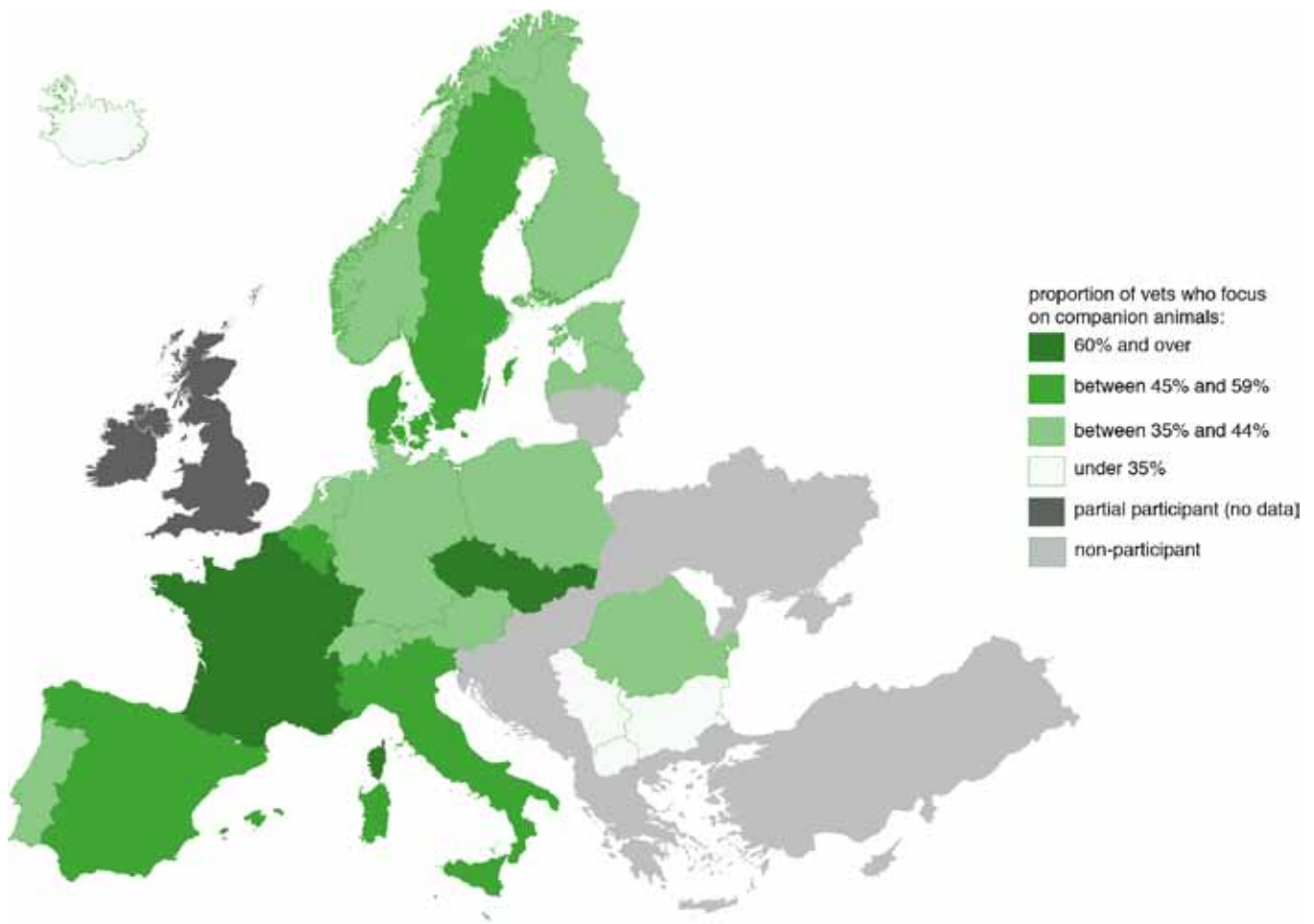


Table 1-15
Veterinarians' area of focus analysed by country

| 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

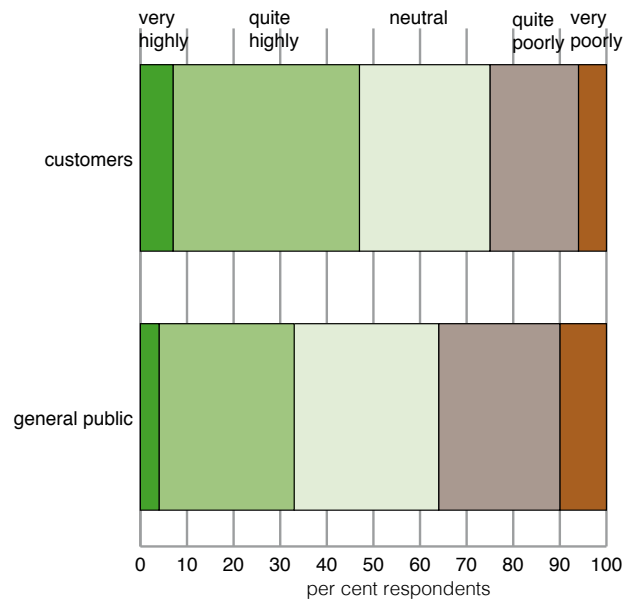


Chart 1-18
How well veterinarians think they are regarded by the public mapped by country

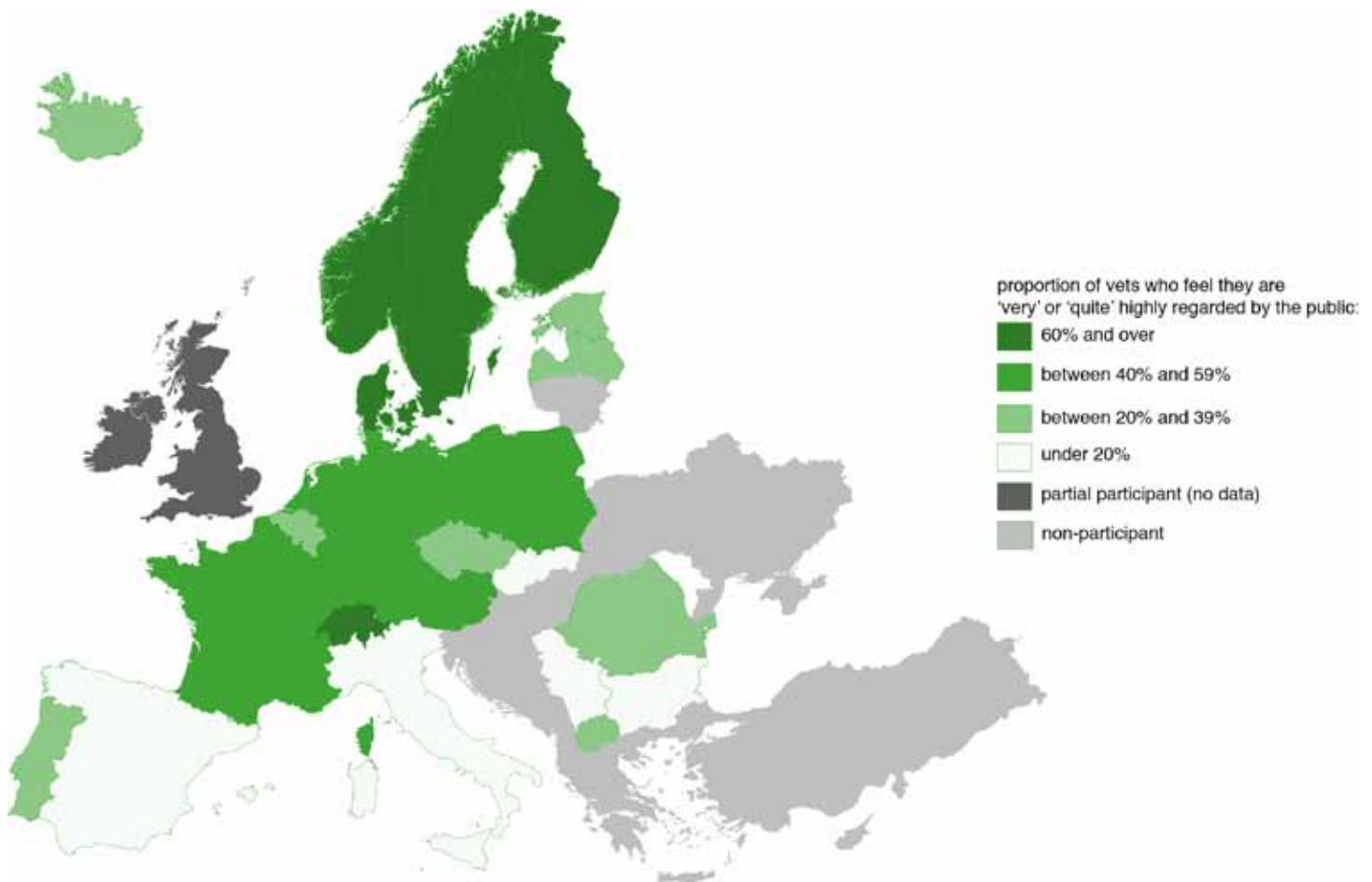


Chart 1-19

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

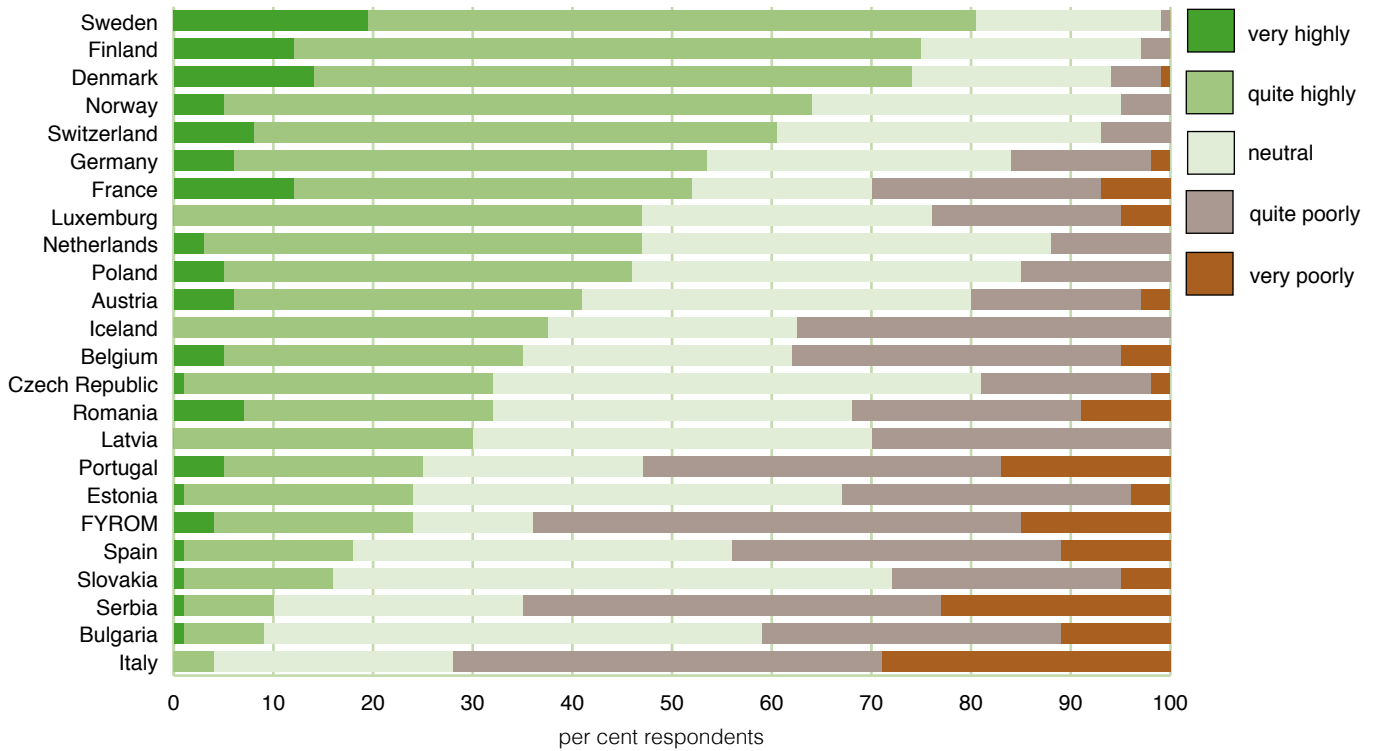
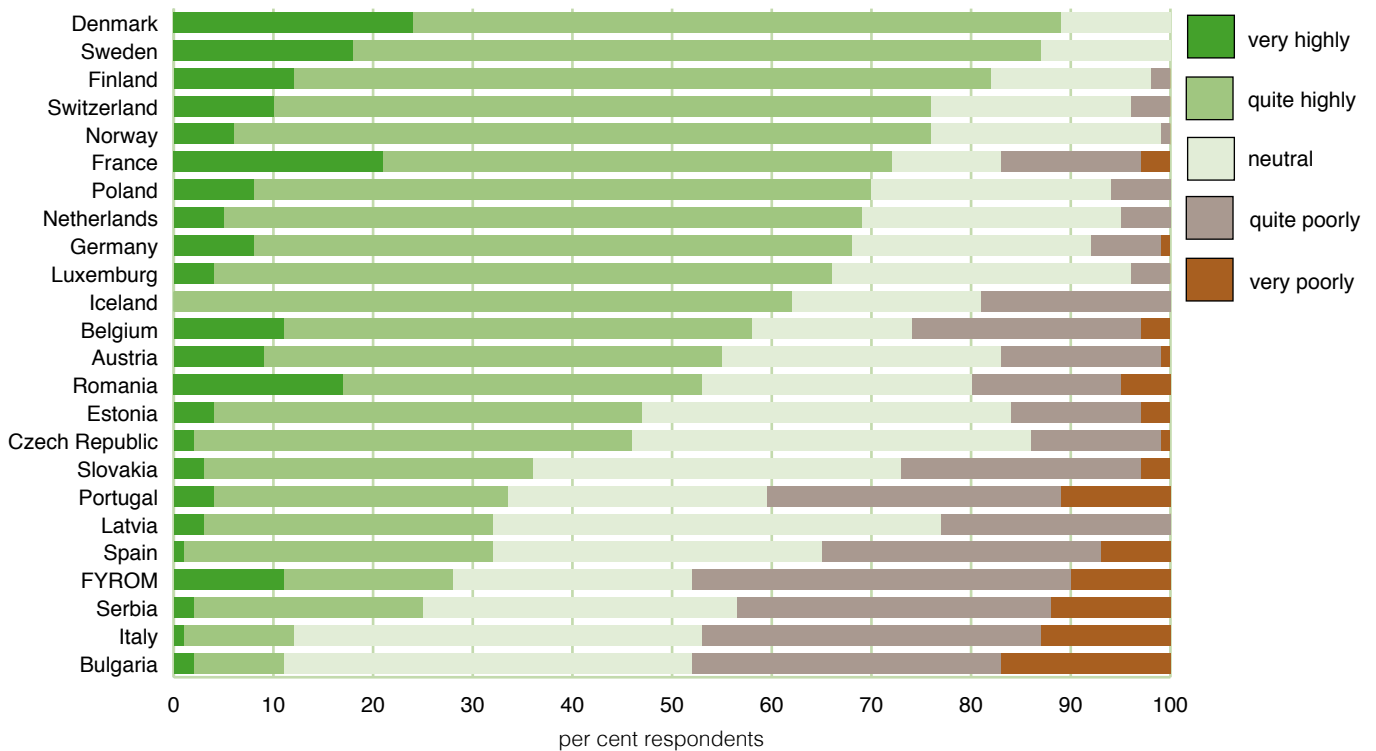


Chart 1-20

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:

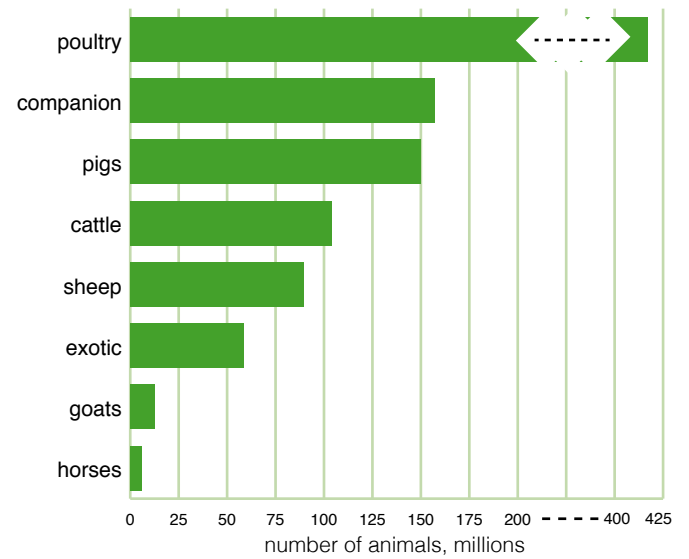
- 157 million companion animals
 - 104 million cattle
 - 90 million sheep
 - 150 million pigs
 - 13 million goats
 - 6 million horses
 - 59 million exotics
 - 417 million poultry
-
- Long-term downward trend in number of pigs and sheep; cattle too although has been trending up for past two years
 - 242 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

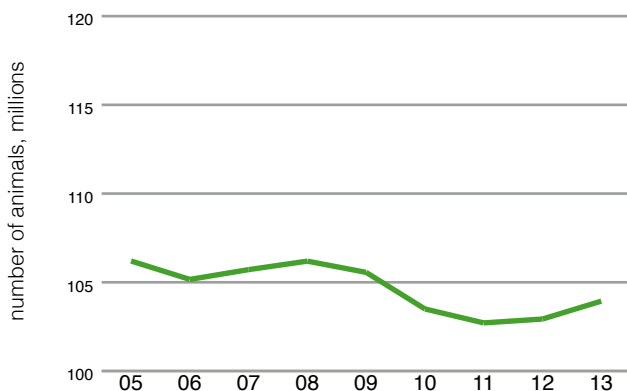


Chart 2-3
Trends in the number of sheep, Europe 2005-2013

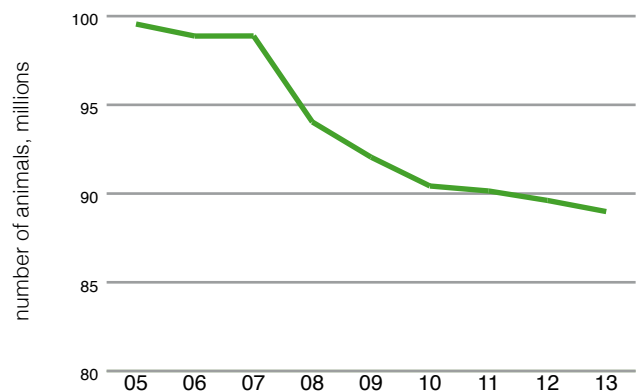


Chart 2-4
Trends in the number of goats, Europe 2005-2013

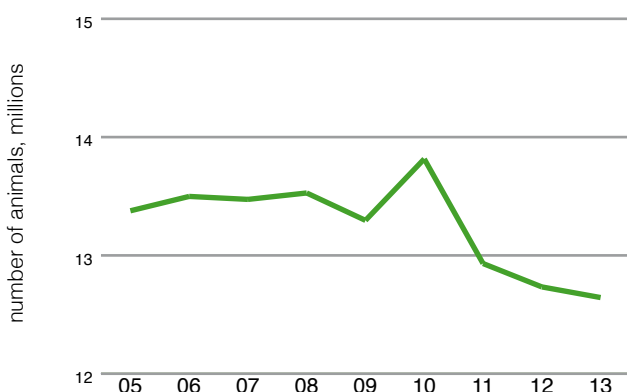
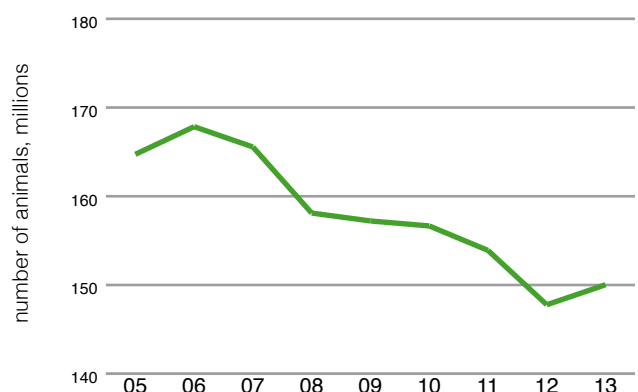


Chart 2-5
Trends in the number of pigs, Europe 2005-2013



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)

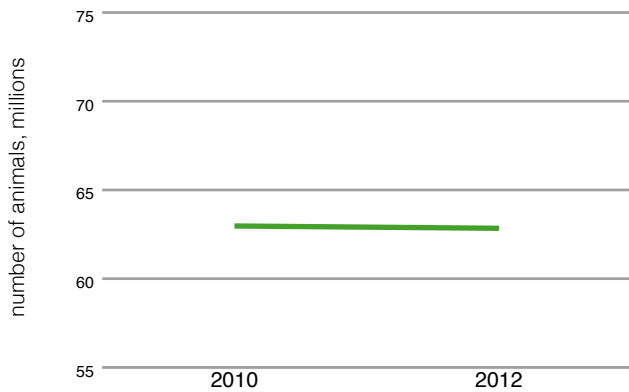


Chart 2-7
Trends in the number of cats, Europe 2010-2012
(Source: FEDIAF)

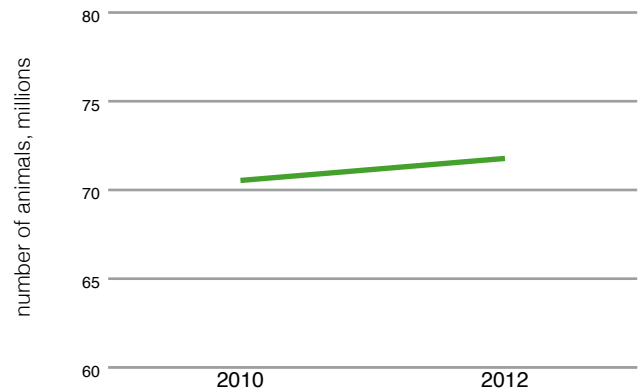


Chart 2-8
Trends in the number of small mammals, Europe 2010-2012 (Source: FEDIAF)

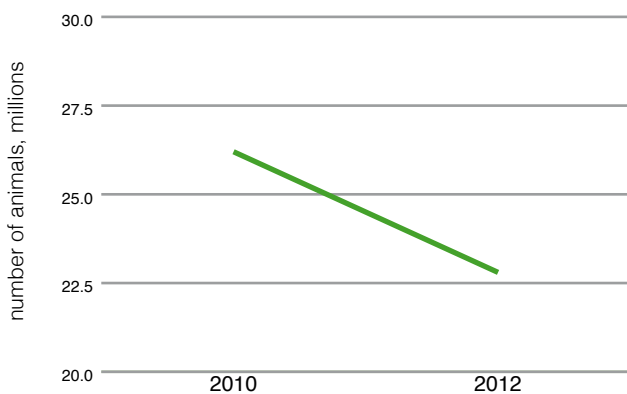


Chart 2-9
Trends in the number of ornamental birds, Europe 2010-2012 (Source: FEDIAF)

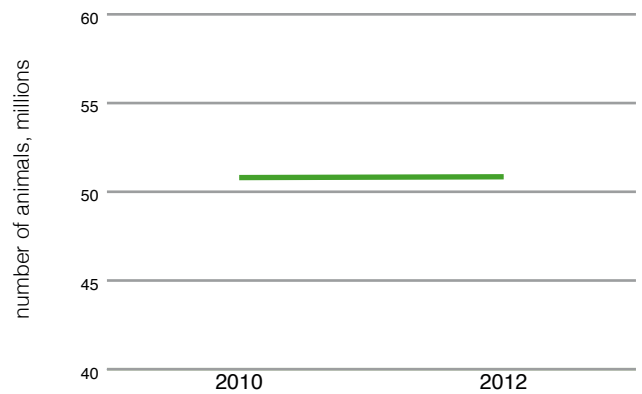


Chart 2-10
Trends in the number of poultry (laying hens), Europe 2003-2010 (Source: Eurostat)

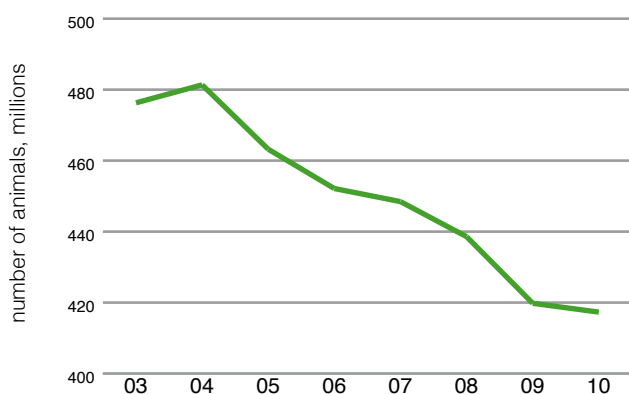


Chart 2-11
Trends in the production of aquaculture (fishery products), Europe 2008-2012 (Source: Eurostat)

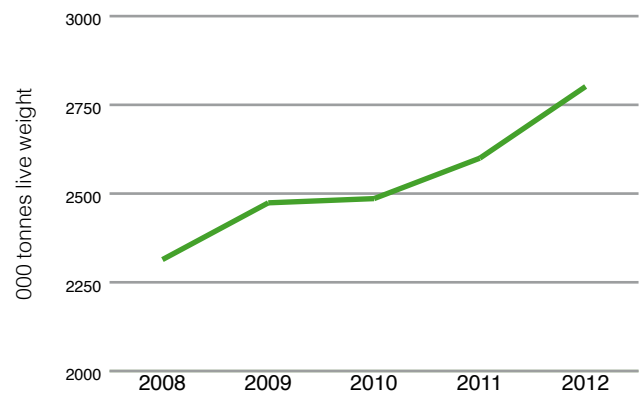


Table 2-1
Number of animals in Europe

| 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 |
| EUROPE-38 | 103 858 | 89 879 | 149 966 | 12 644 | 417 313 | 2 801 722 | 6 361 | 157 401 | 58 793 |
| 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)

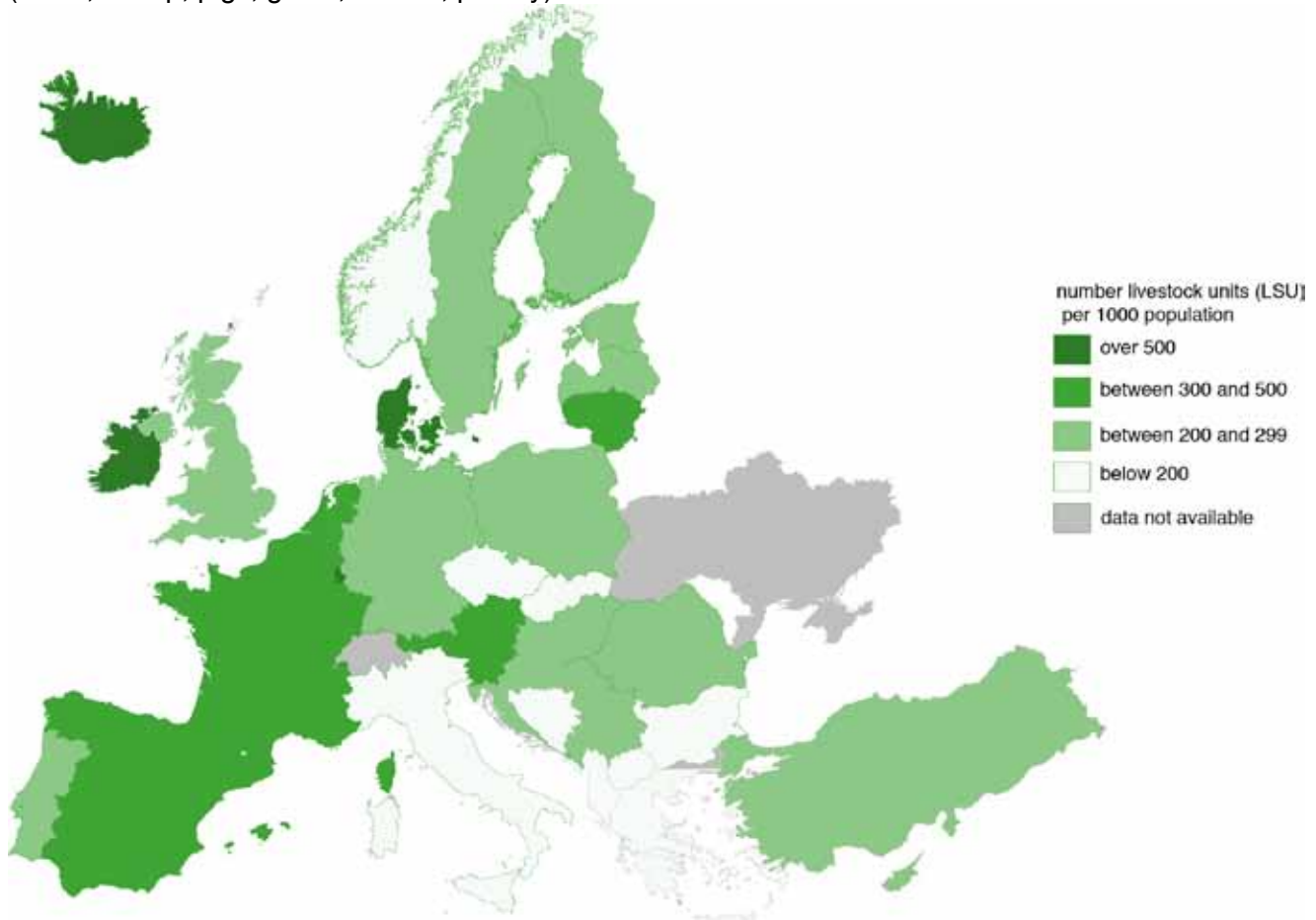
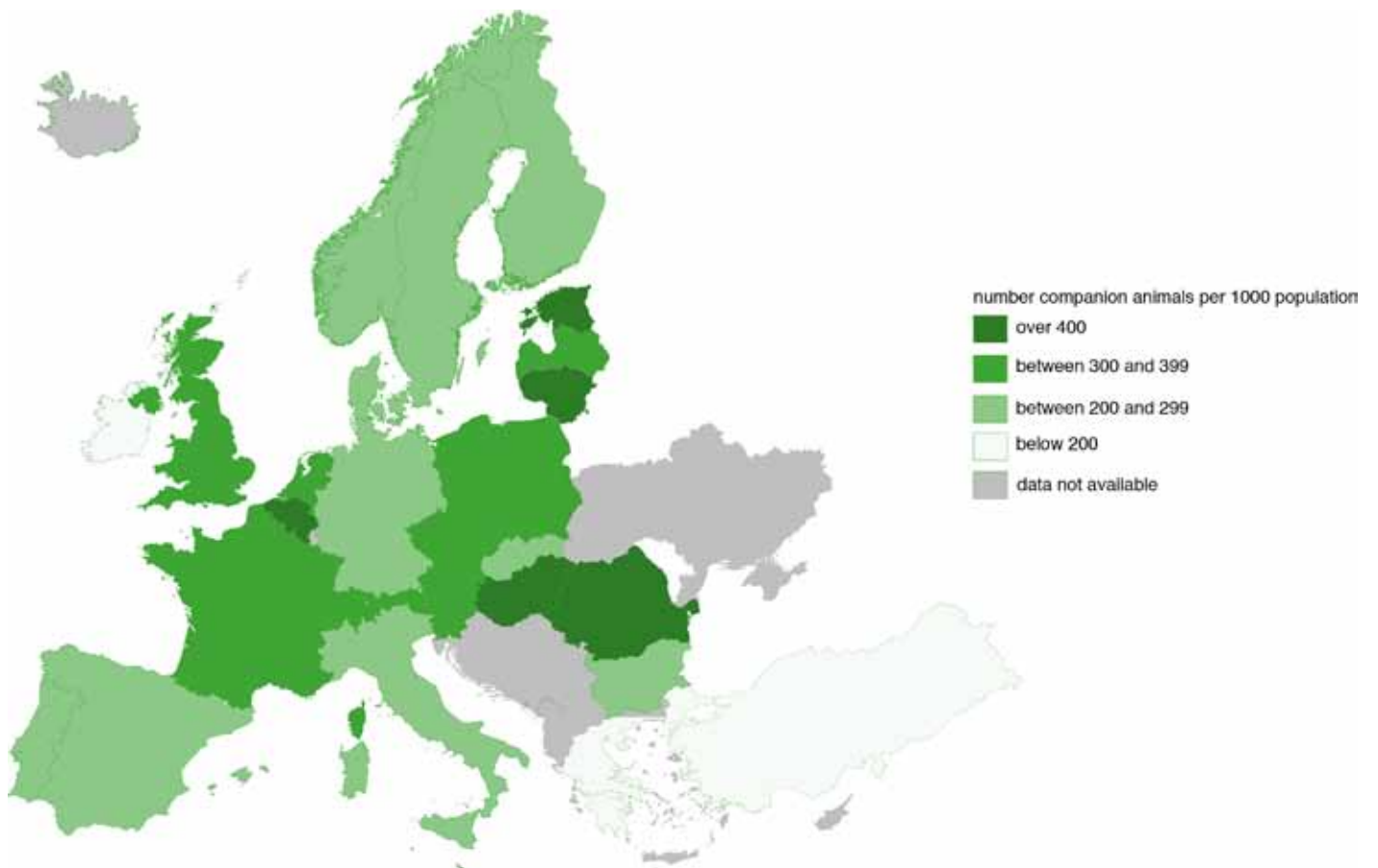


Chart 2-13

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 |
| EUROPE-38 | 97 993 | 13 800 |

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

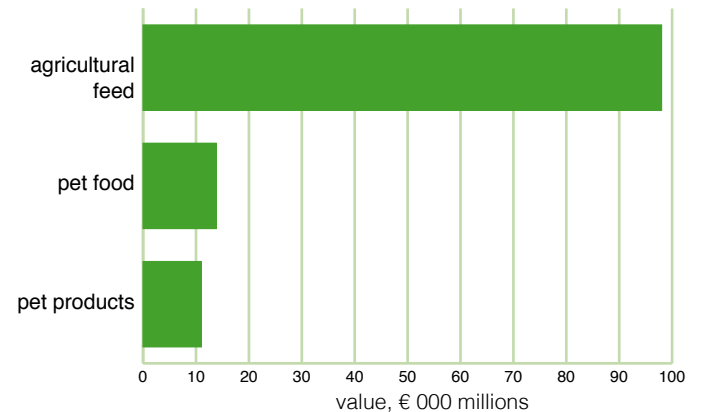


Chart 2-15
Value of animal medicines market

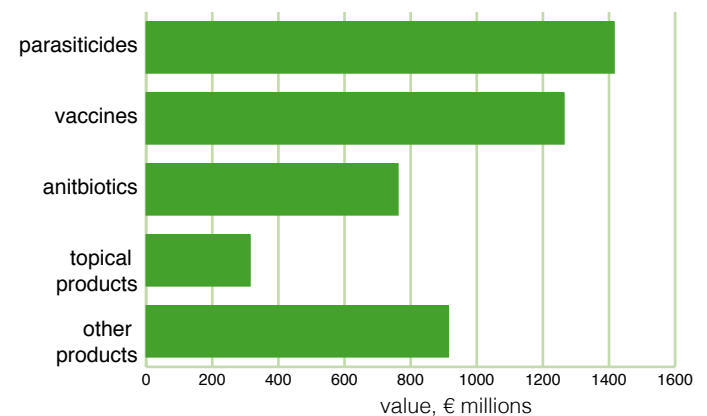


Table 2-3
Value of animal medicines, Europe

| | 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 |
| TOTAL EUROPE | 4 670 |

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

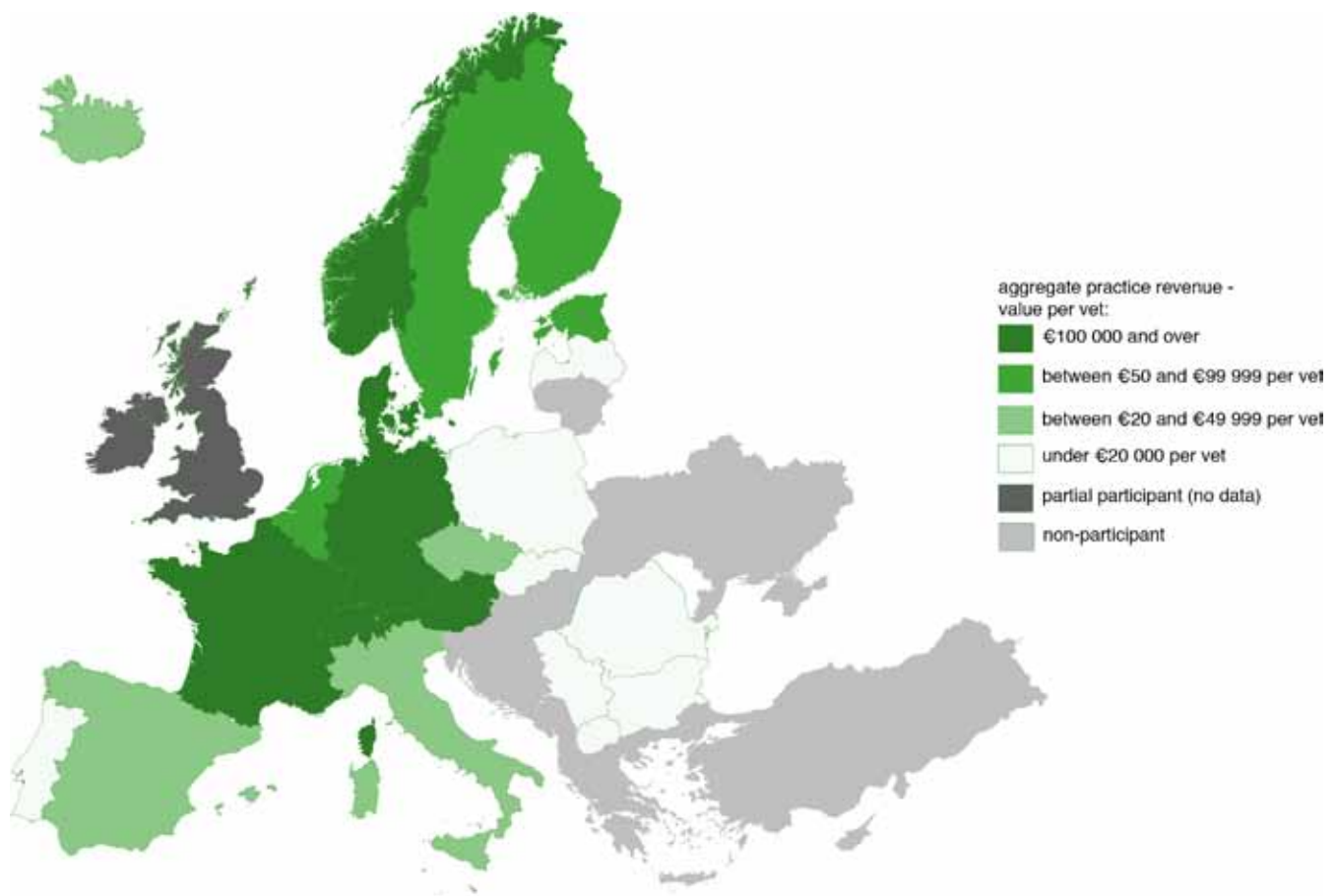
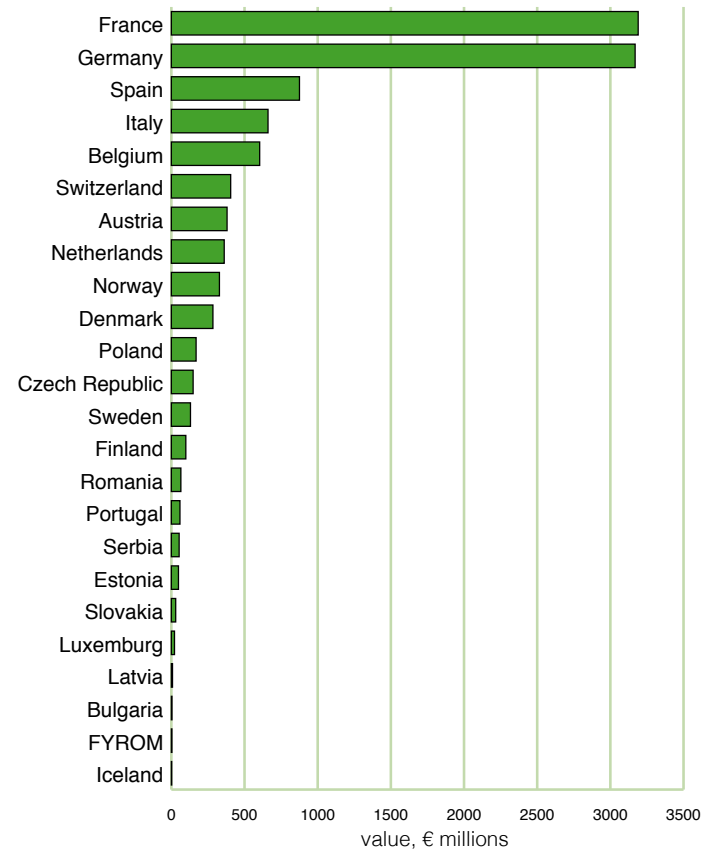


Table 2-4
Aggregate value of veterinarian practice revenue (= the market for veterinarian services) analysed by country

| □ | 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 |
| EUROPE-24 | 11 101 981 | 111 343 |

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

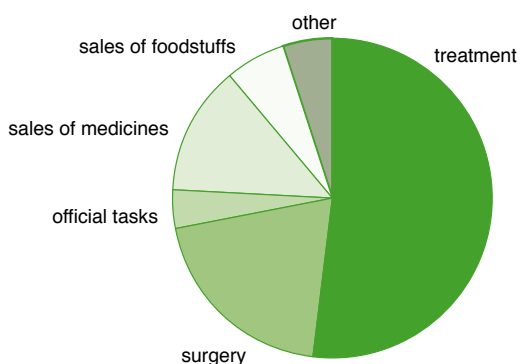


Chart 2-18
Revenue by type of service - Europe

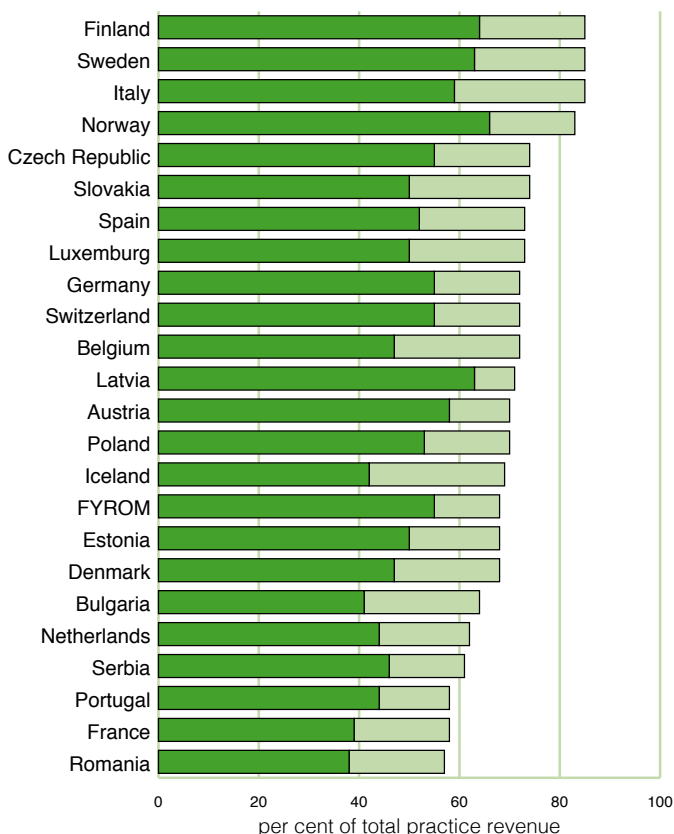


Table 2-5
Proportion of veterinarian practice revenue analysed by country

| 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

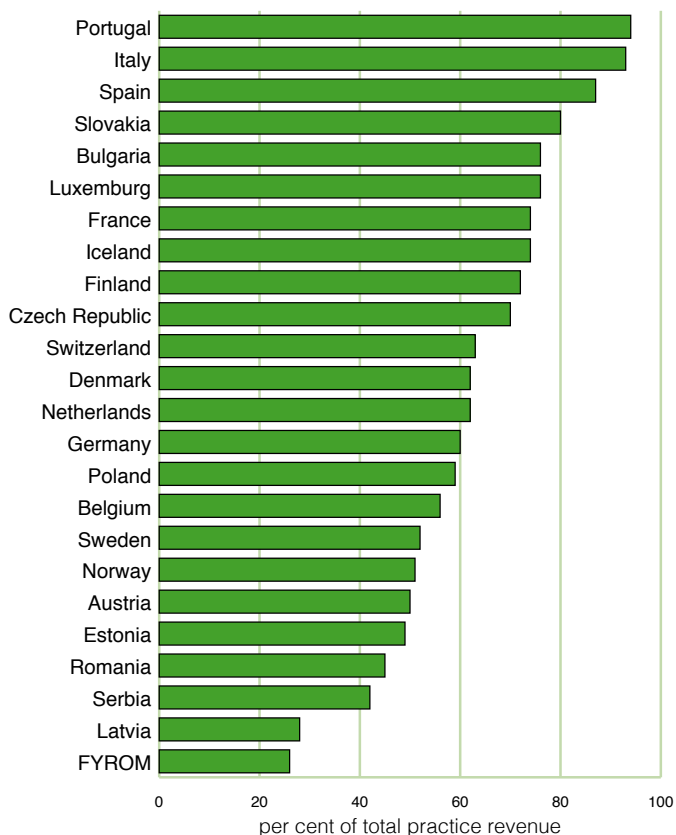


Chart 2-19
Revenue by type of species - Europe

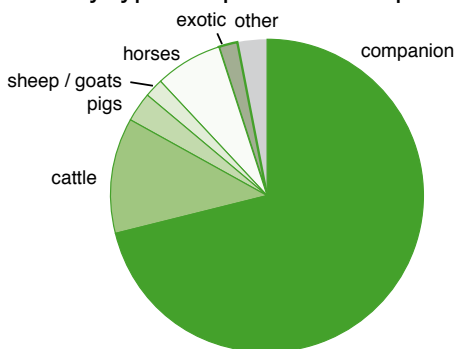


Table 2-6
Proportion of revenue analysed by type of species and country

* 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

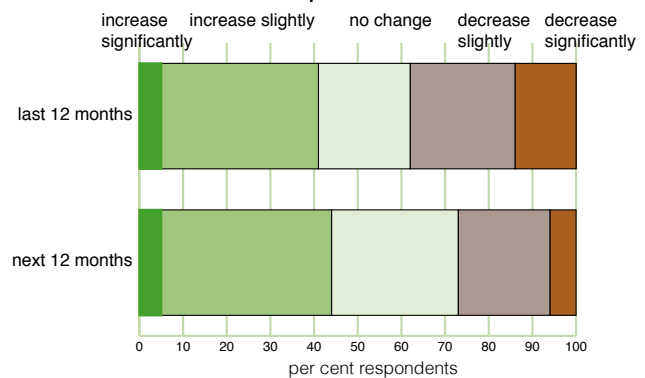


Table 2-7
Practice revenue - changes last 12 months and next 12 months

| 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'

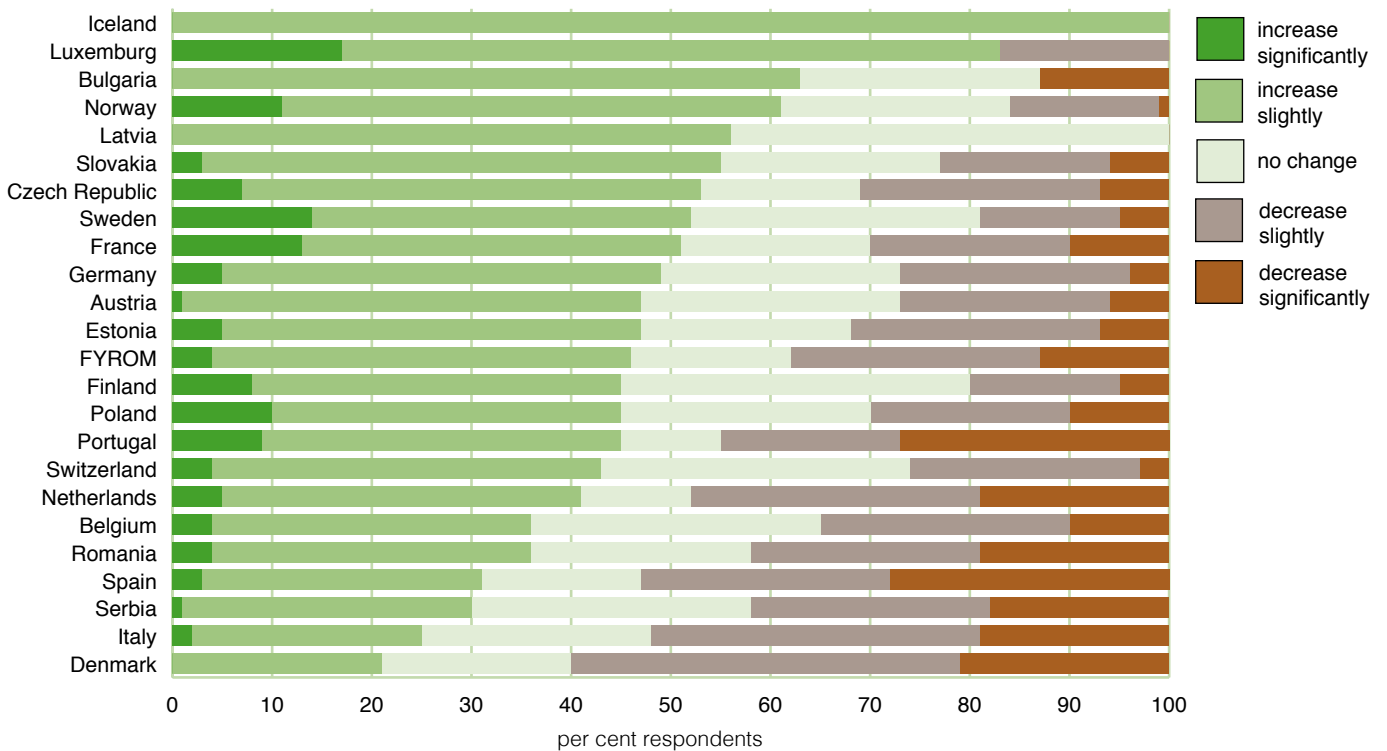
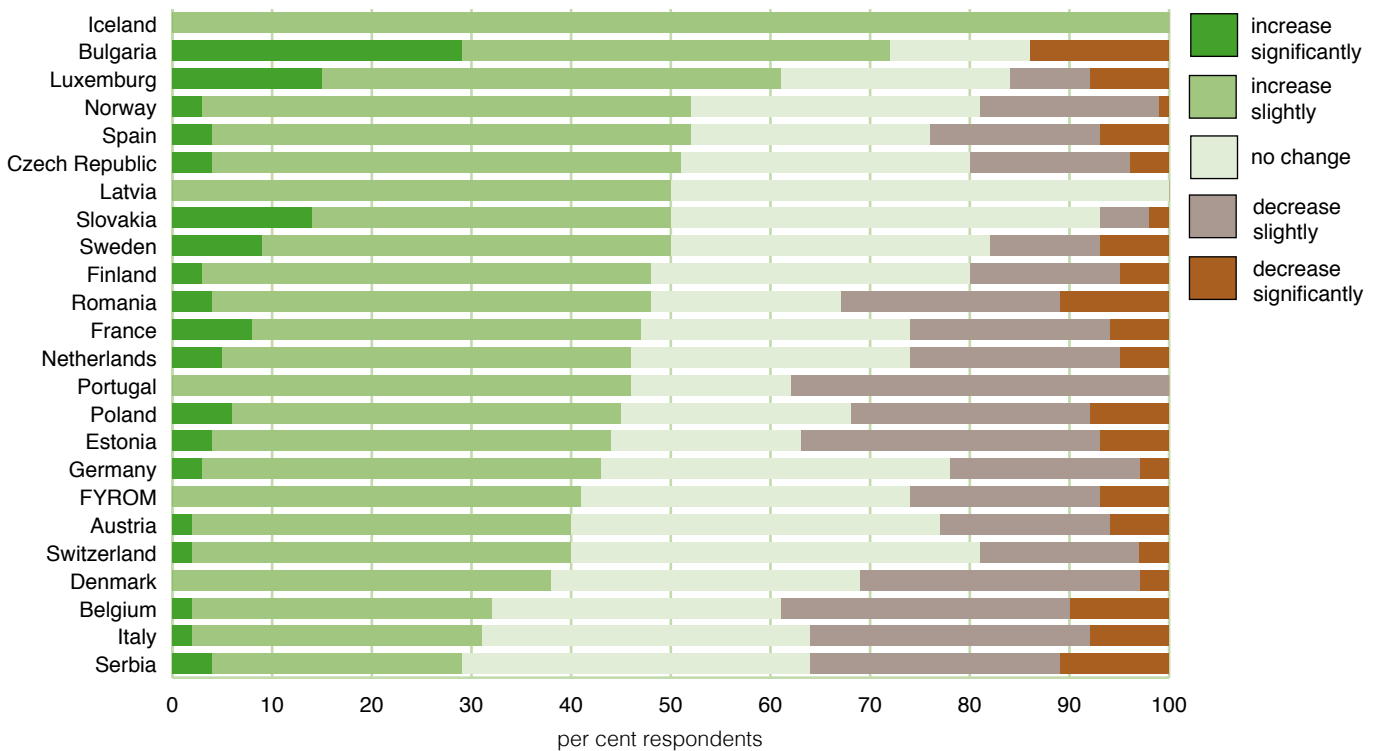


Chart 2-23

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

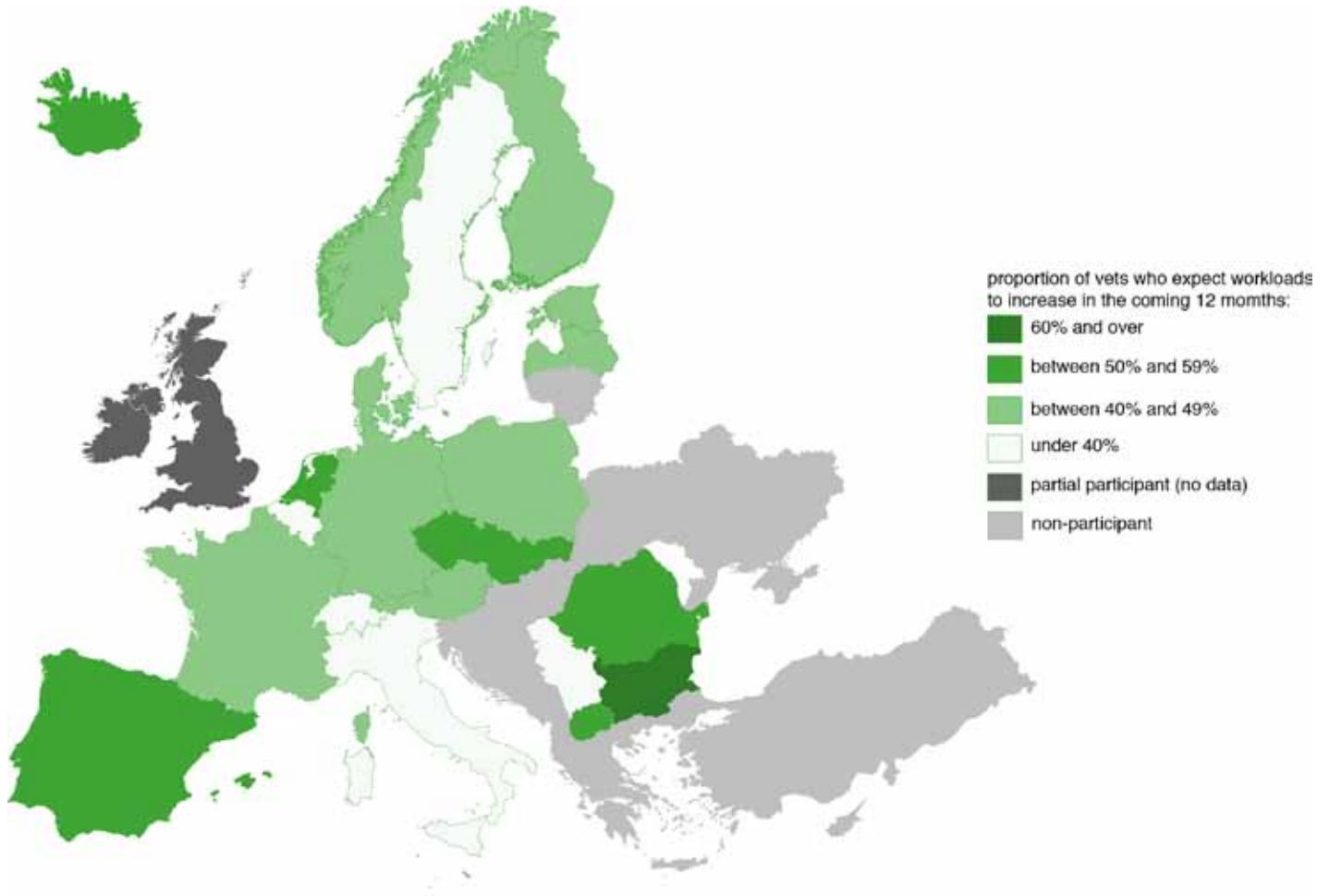
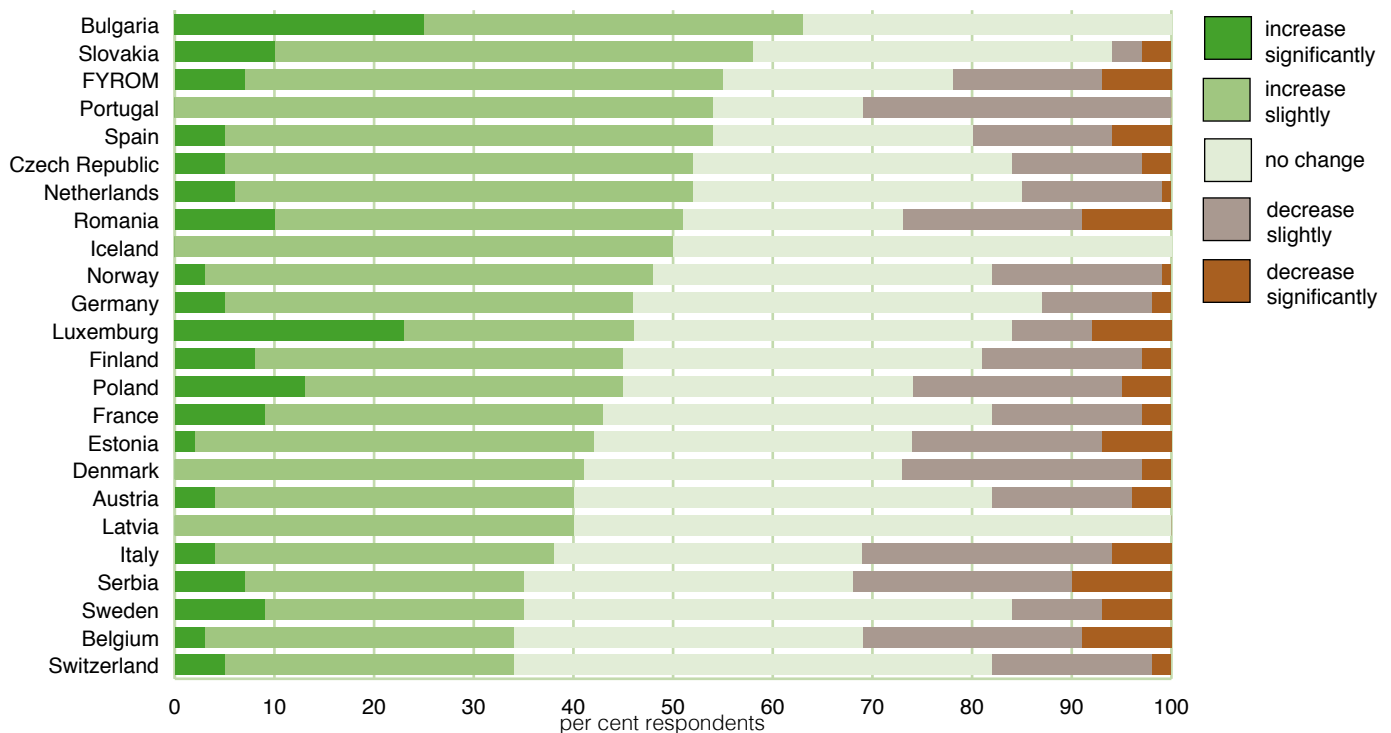


Table 2-8
Anticipated workloads next 12 months

| 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 |

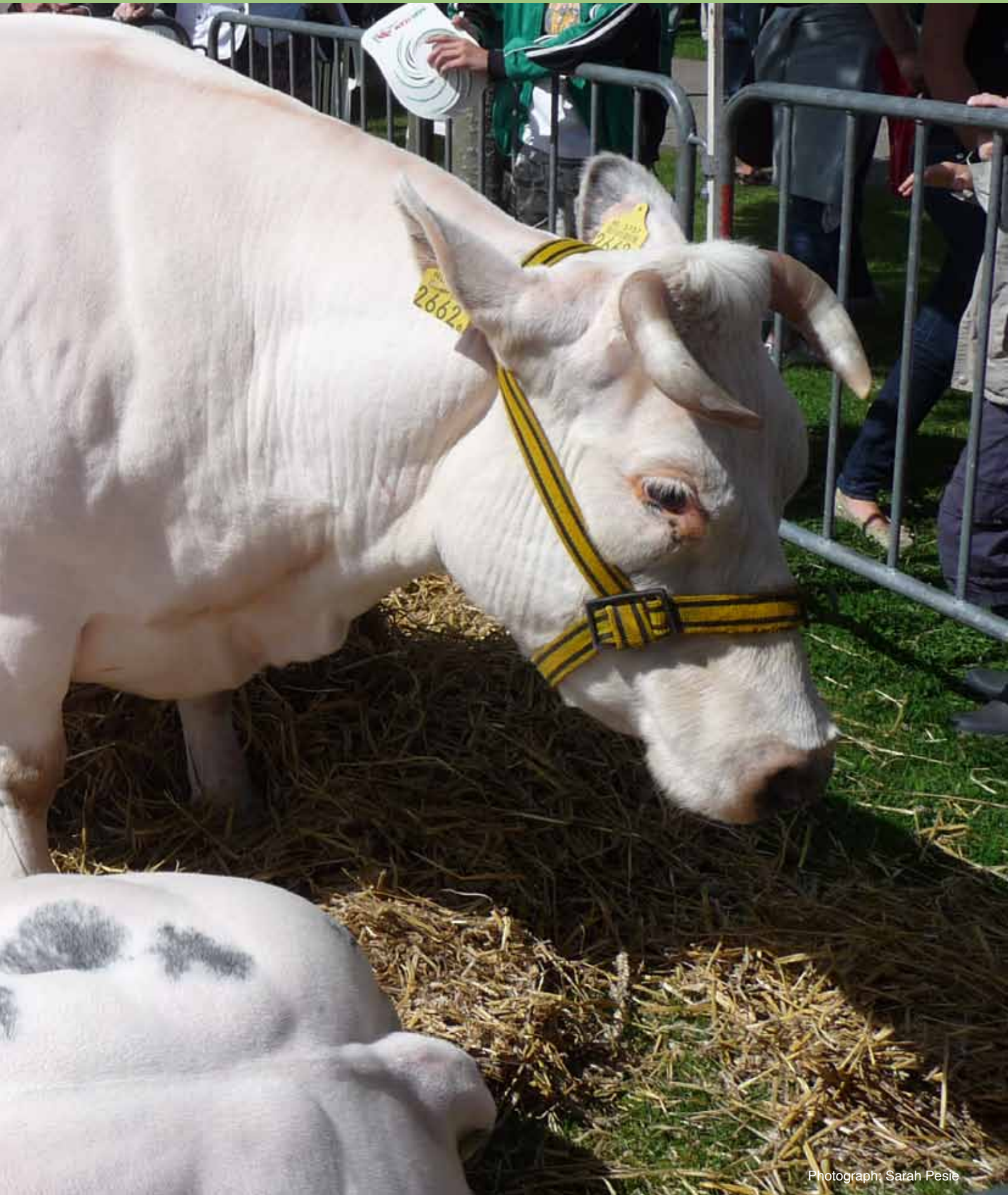
* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

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, 11 per cent of practices have between 50 and 100 staff, plus another 12 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 | 10 | 6 | 16 | 26 | 27 | 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 | 8 | 8 | 49 | 15 | 4 | 1 | 2 | 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 | 19 | 22 | 37 | 14 | 6 | 1 | 1 | 0 |
| Sweden | 12 | 3 | 12 | 12 | 21 | 7 | 11 | 12 |
| Switzerland | 14 | 10 | 28 | 24 | 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

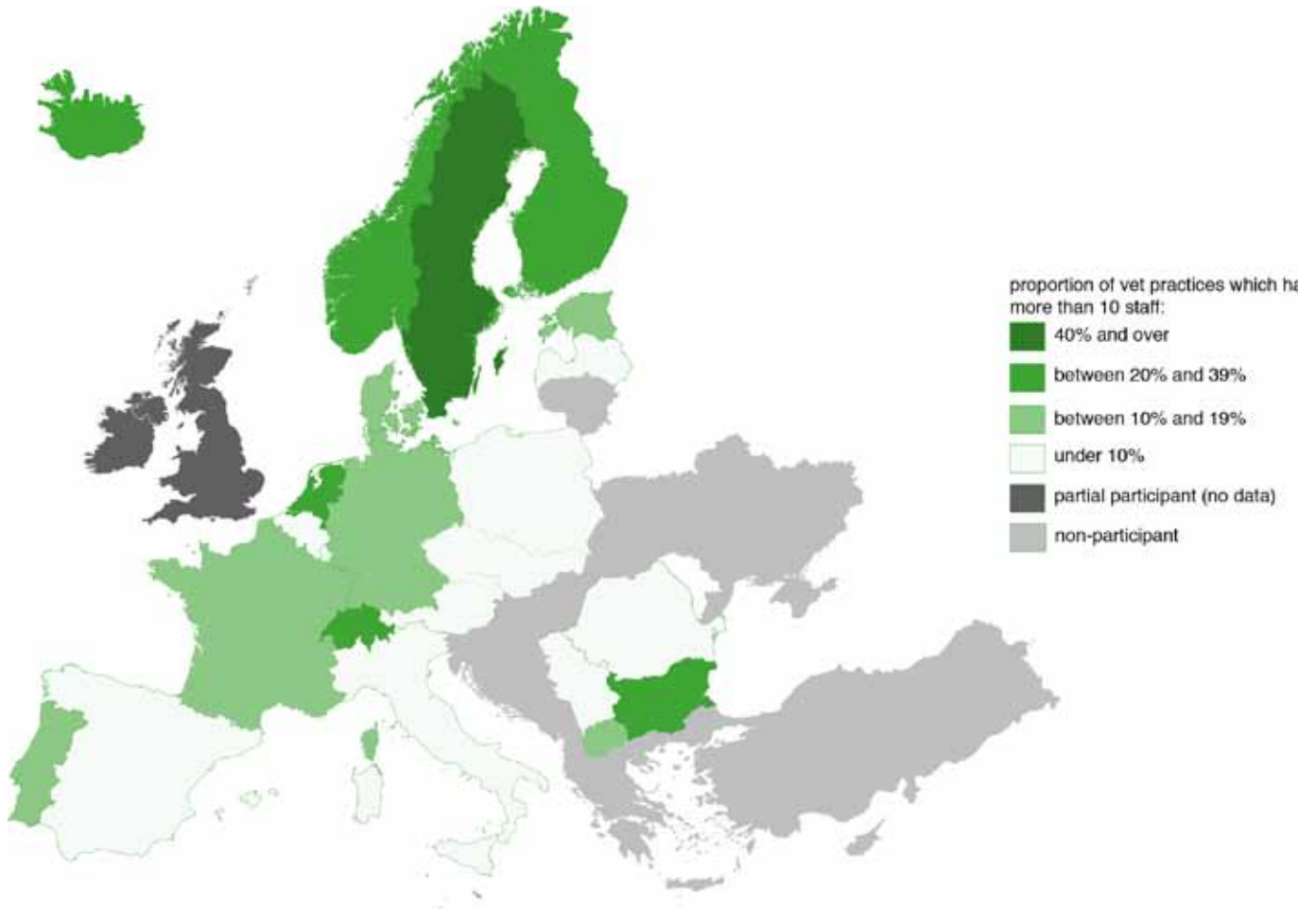
per cent of the staff are veterinarian nurses (including part-time staff as all figures are expressed as Full-Time Equivalent). The proportion of staff who are veterinarian owners falls almost exactly in line with practice size – from 38 per cent in a 4 to 5 person practice, through 27 per cent in a 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

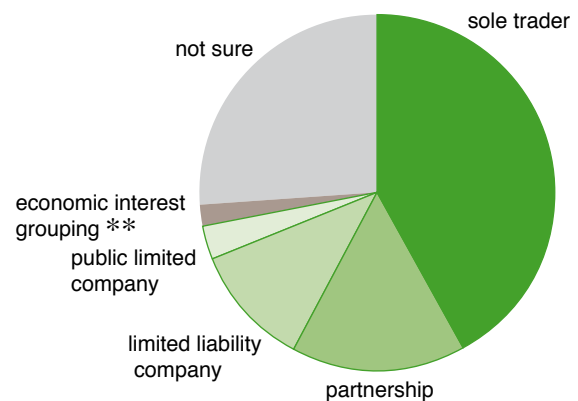
Please note, all data refers to values BEFORE TAX and excludes VAT

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 |

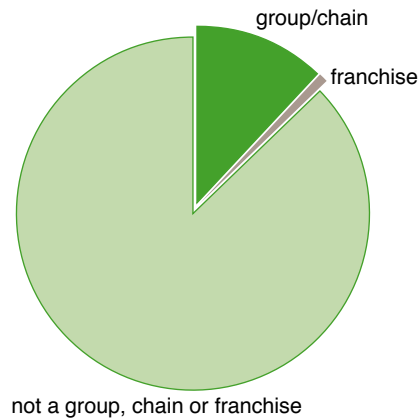
* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys
 EUROPE-24: figure is weighted to reflect the total vet population in all participating countries ** see footnote below chart 3-2

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.

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



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).

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

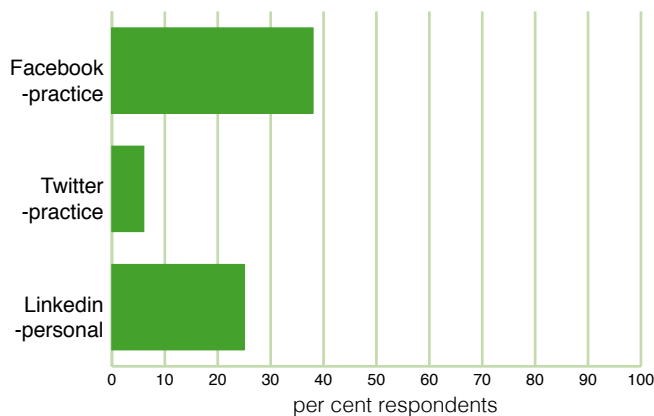


Table 3-8
Use of Social Media analysed by country

| | 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

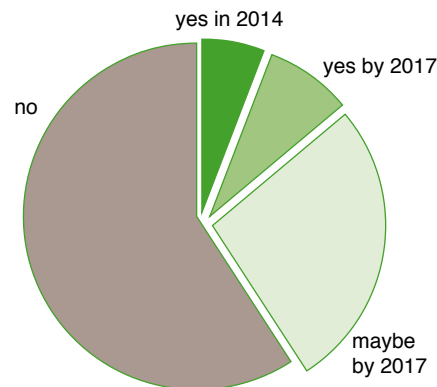


Table 3-9
On-line sales of pet food now and in three years' time analysed by country

| 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

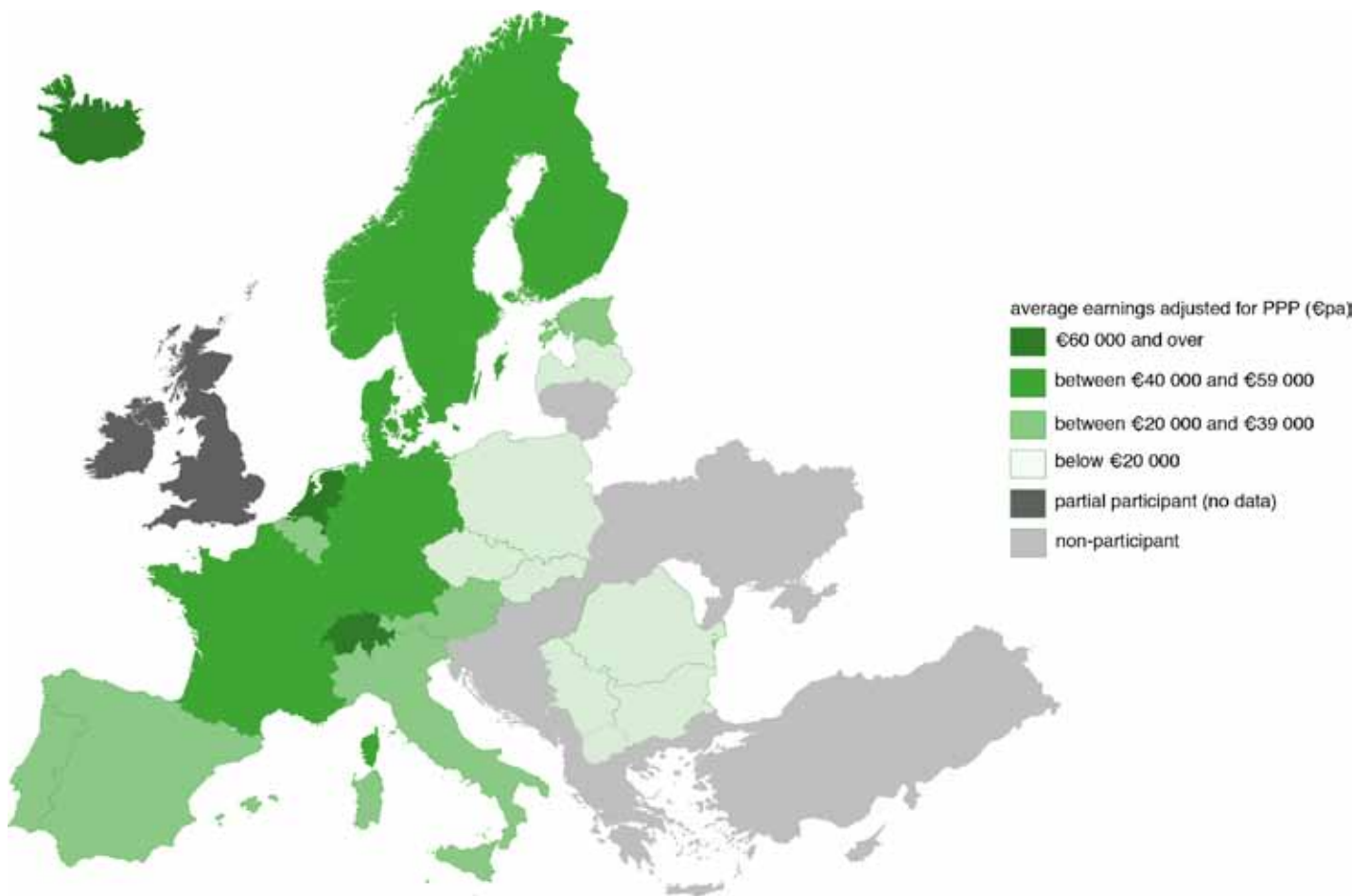


Table 4-1
Average earnings analysed by country: veterinarians compared with national average earnings of all employees

| □ | 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 |
| EUROPE-24 | 40 000 | 38 497 | 29 855*** |

* caution: small sample

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

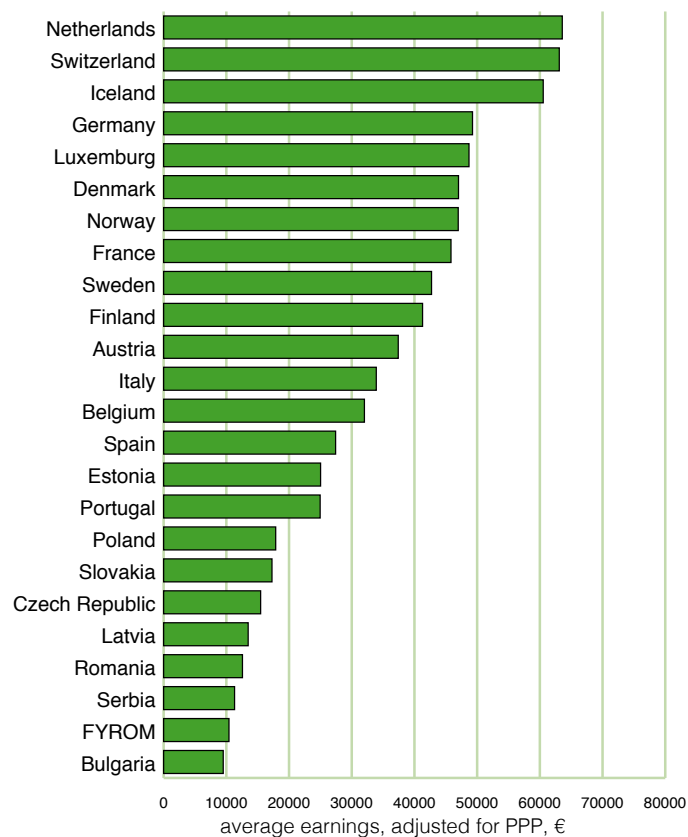
EUROPE-24: weighted to reflect total vet population in participating countries

** 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)

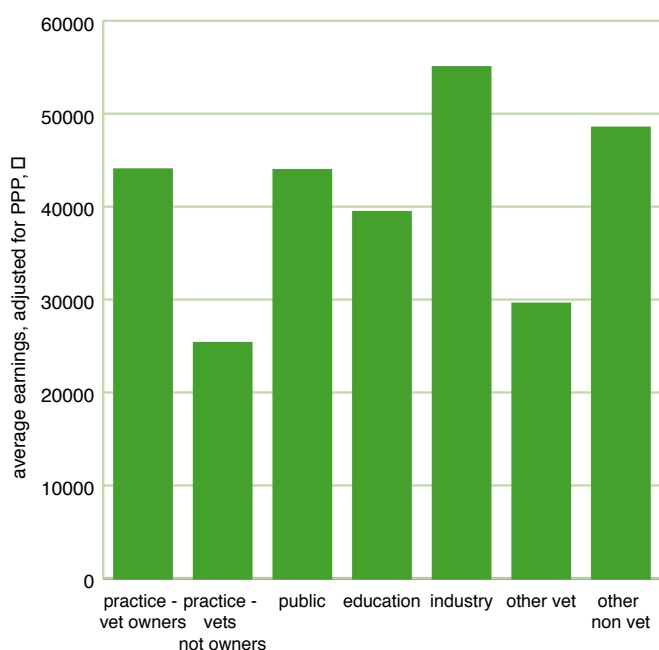


Chart 4-4
Average earnings of veterinarian owners analysed by practice size - Europe (adjusted for PPP)

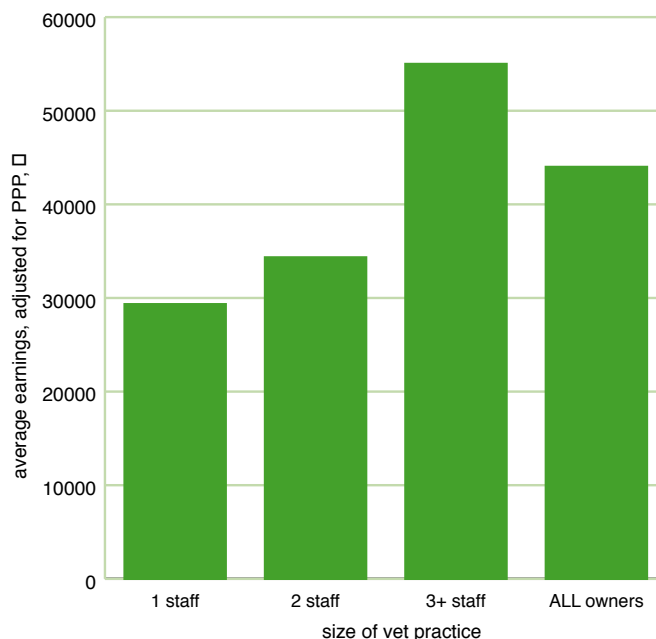


Table 4-2
Average earnings of veterinarians by field of employment analysed by country (full-time veterinarians only)

| □ 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

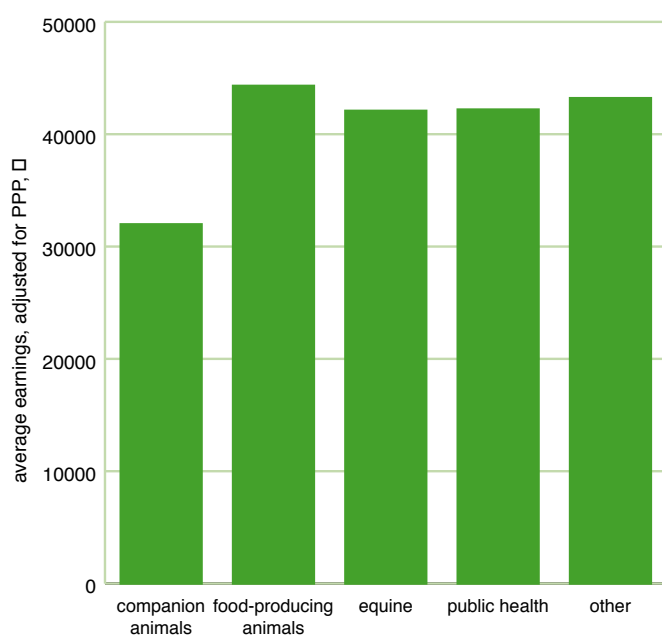
Please note, all data refers to values BEFORE TAX

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 |
| EUROPE-24 | 31 977 | 44 304 | 42 081 | 42 194 | 43 209 |

* 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)

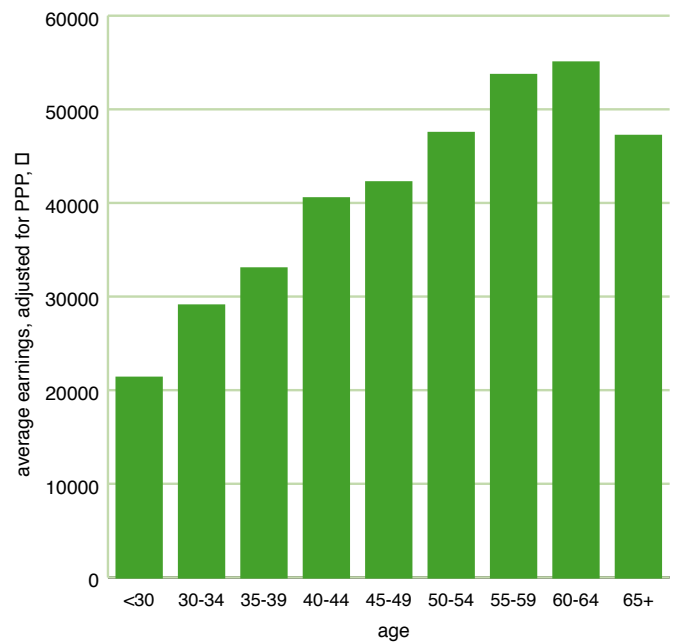


Table 4-4
Average earnings of veterinarians by age analysed by country (full-time veterinarians only)

| 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 €45 800 (adjusted for PPP) compared with female veterinarians' earnings of €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)

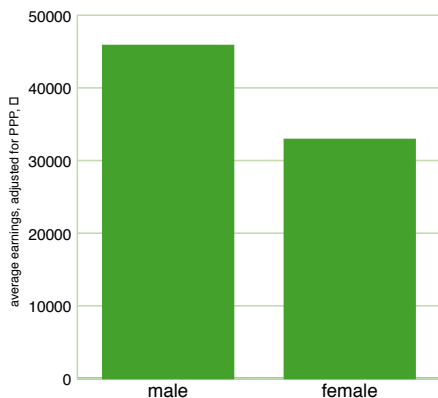


Table 4-5

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

| □ 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)

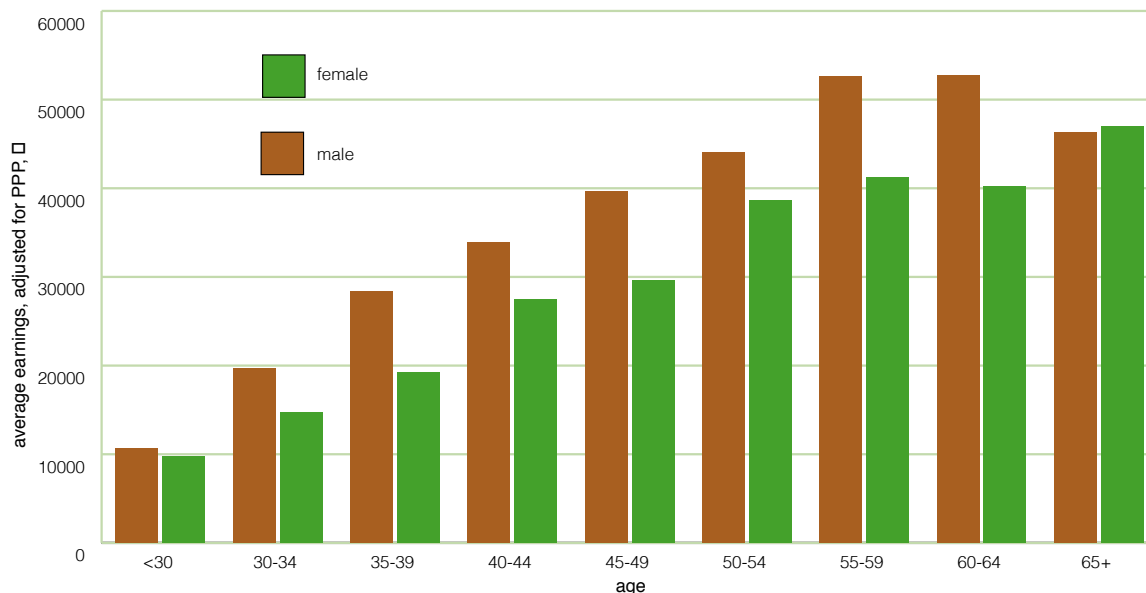
| differential * | <30 | 30-34 | 35-39 | 40-44 | 45-49 | 50-54 | 55-59 | 60-64 | 65+ |
|----------------------------|-----|-------|-------|-------|-------|-------|-------|-------|-----|
| Practice - vet owners | +10 | +33 | +58 | +14 | +74 | +15 | +75 | +72 | +1 |
| Practice - vets not owners | -34 | -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

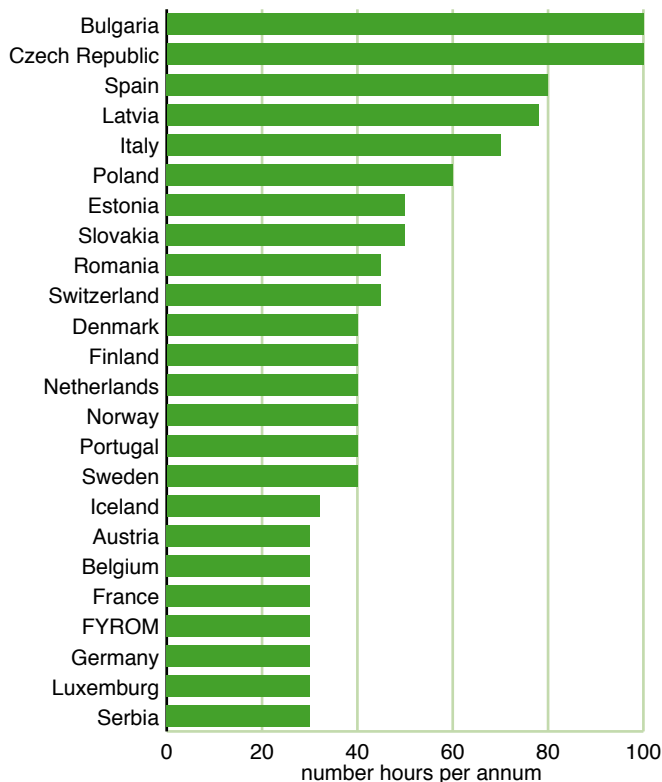


Table 4-8
Number of hours of CPD analysed by country

| | 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

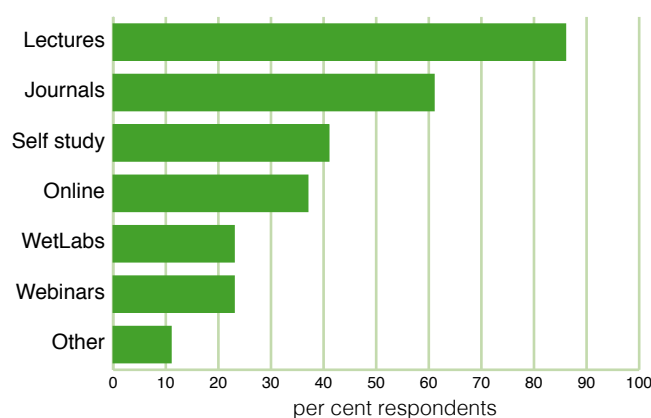


Table 4-9
How veterinarians prefer to undertake their CPD analysed by country

| 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

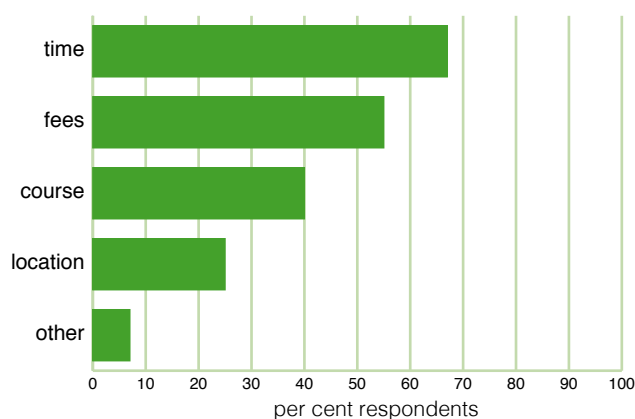


Table 4-10
Challenges of undertaking CPD analysed by country

| | 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

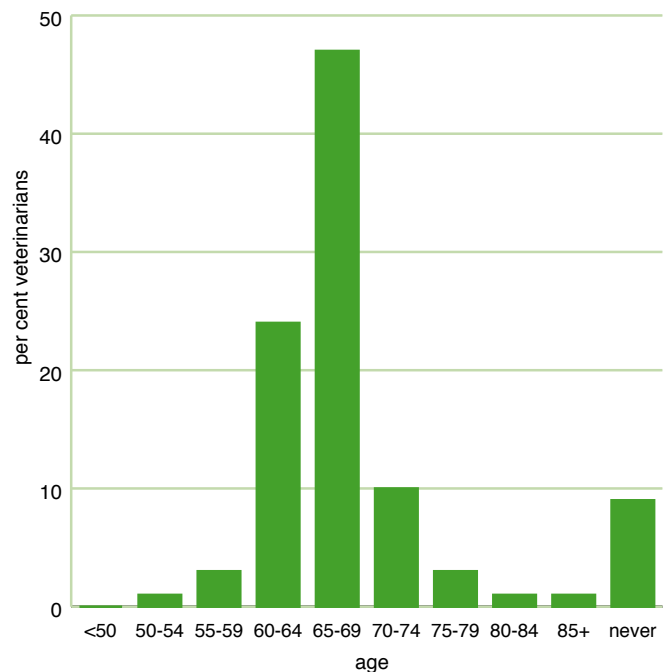


Table 4-11
Age at which veterinarians expect to retire analysed by country

| 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

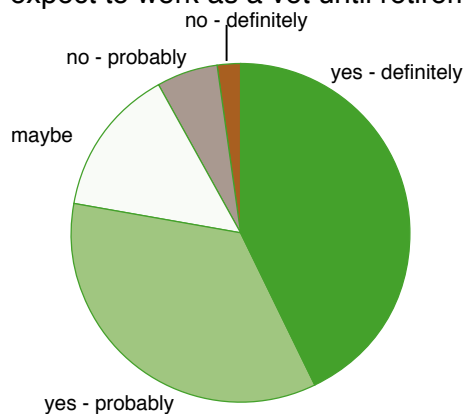


Table 4-13
Pension Plan provision analysed by country

| | 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

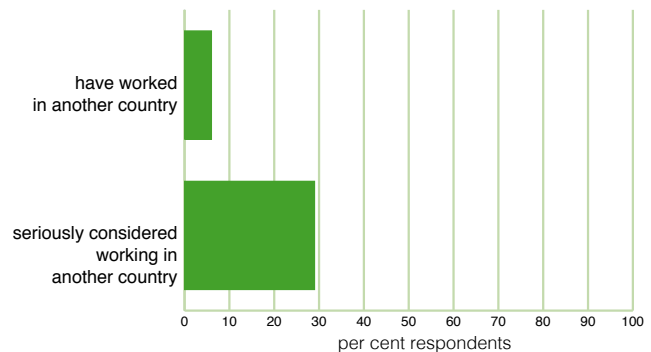
4.4 Working in another country

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

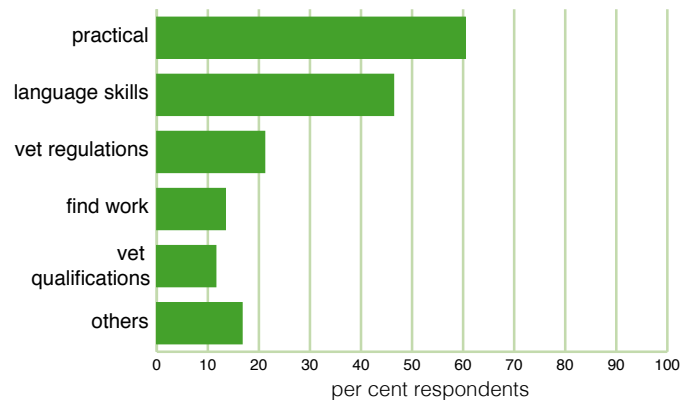


Table 4-15
Main concerns about working in another European country analysed by respondent’s country

| 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 |

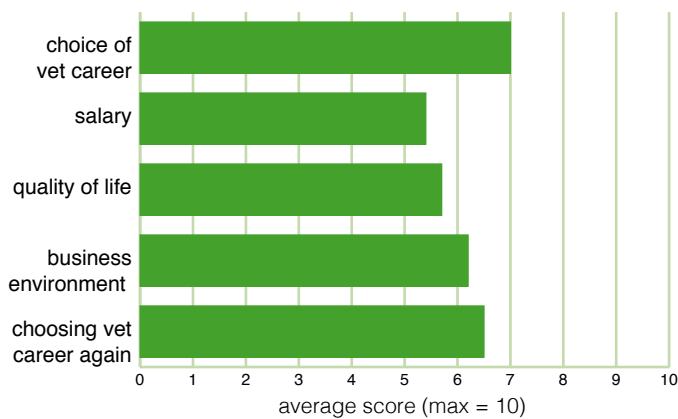
* caution: small sample Ireland and United Kingdom: did not participate in the survey but similar data is included from national surveys
EUROPE-24: figure is weighted to reflect the total vet population in all participating countries

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

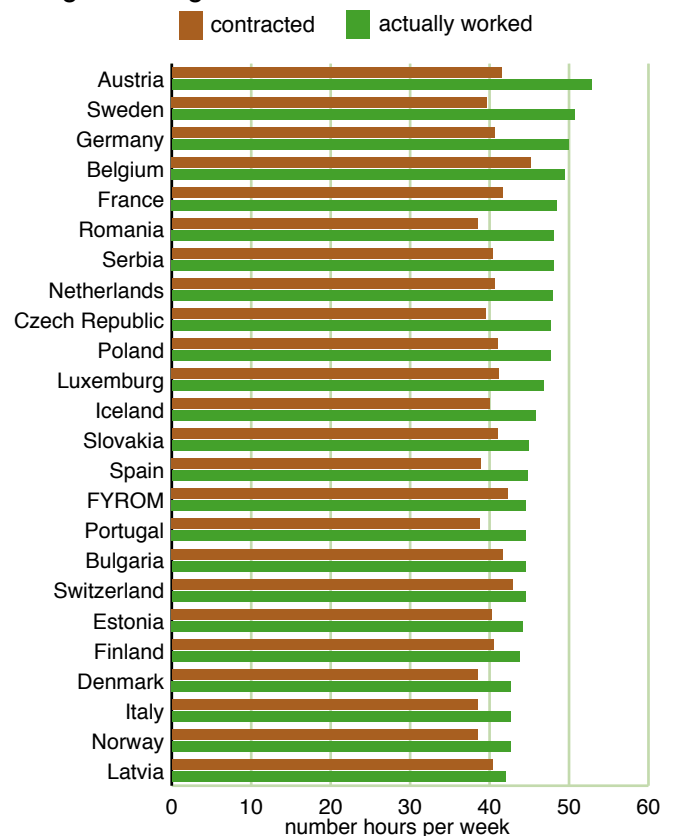


Table 4-17
Average number of hours worked analysed by country

| 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

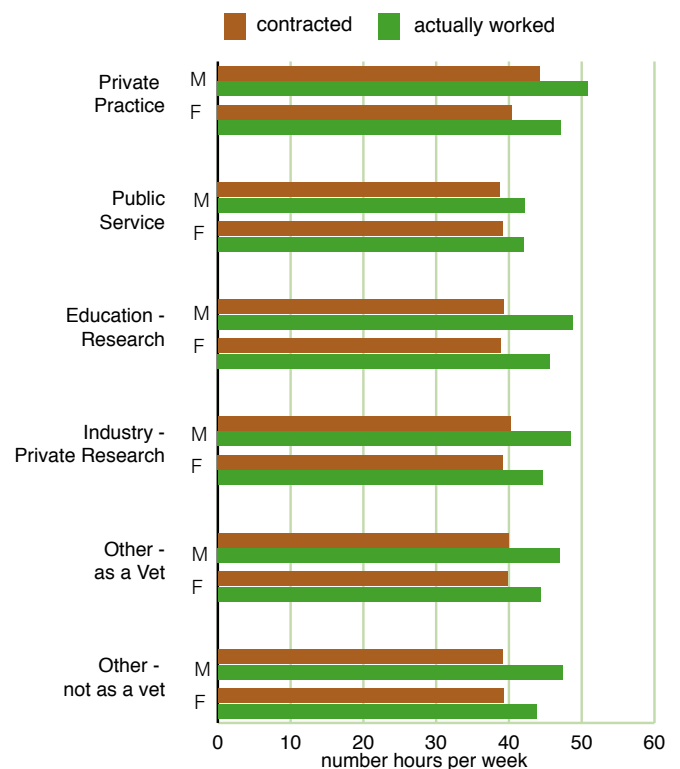


Table 4-18
Average number of hours contracted and worked analysed by gender and by country

| 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 |
| EUROPE-24 | 21.7 | 2.7 |

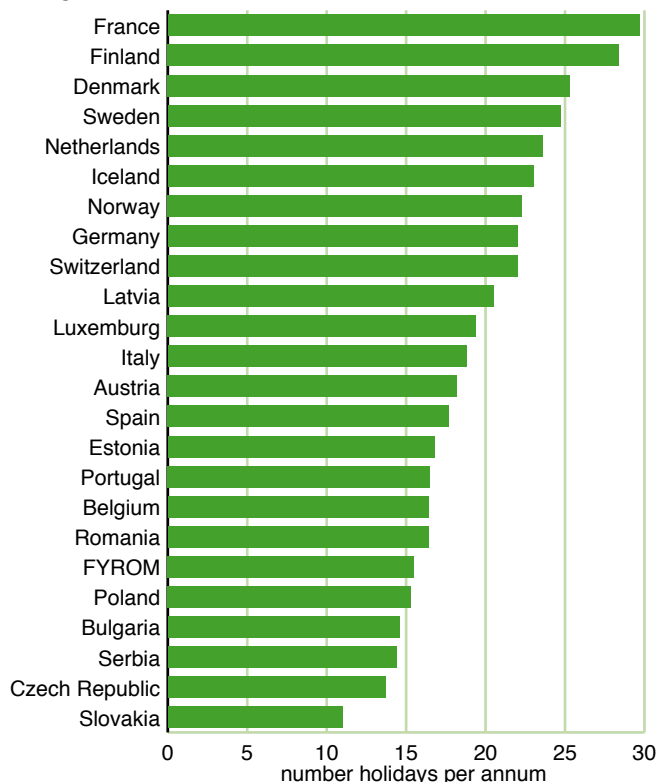
* caution: small sample

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”

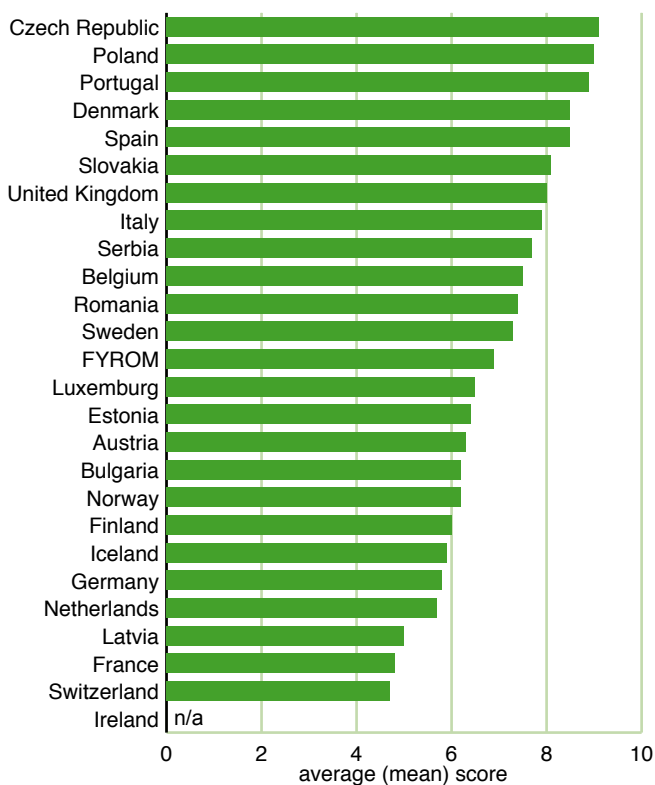


Chart 5-1

Extent to which veterinarians agree with challenges Europe

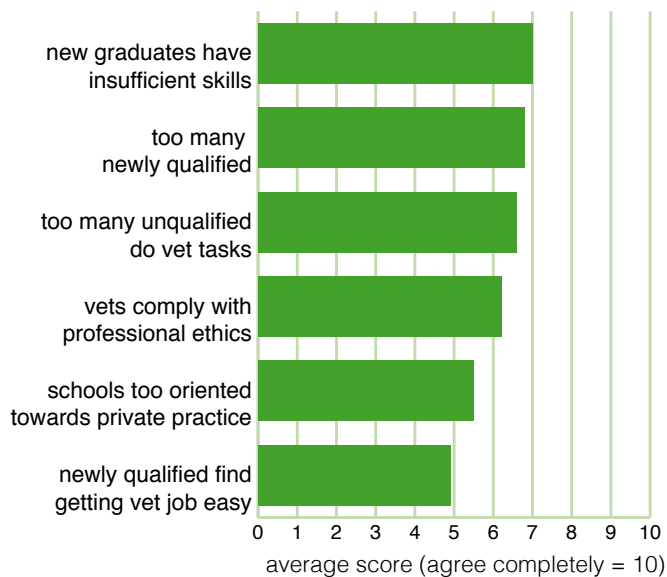
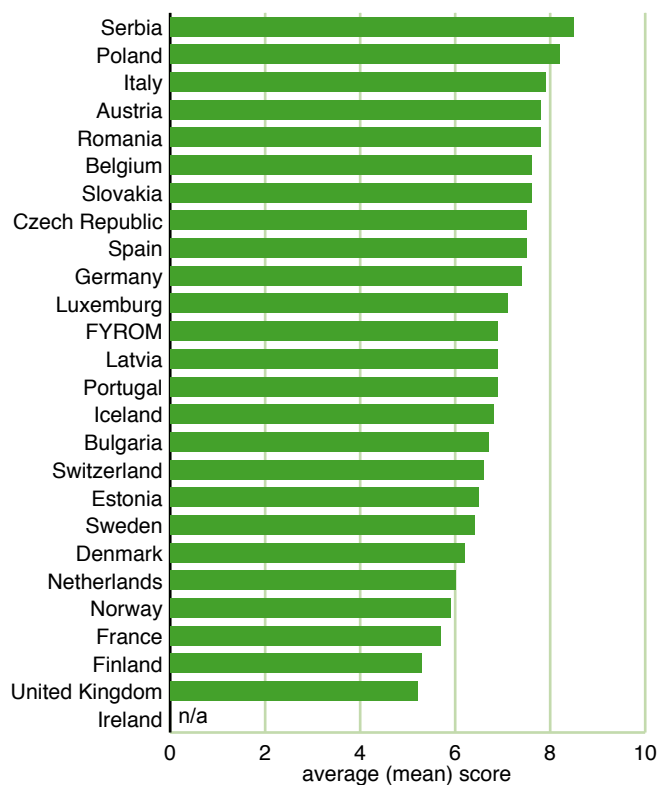


Chart 5-3

“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”

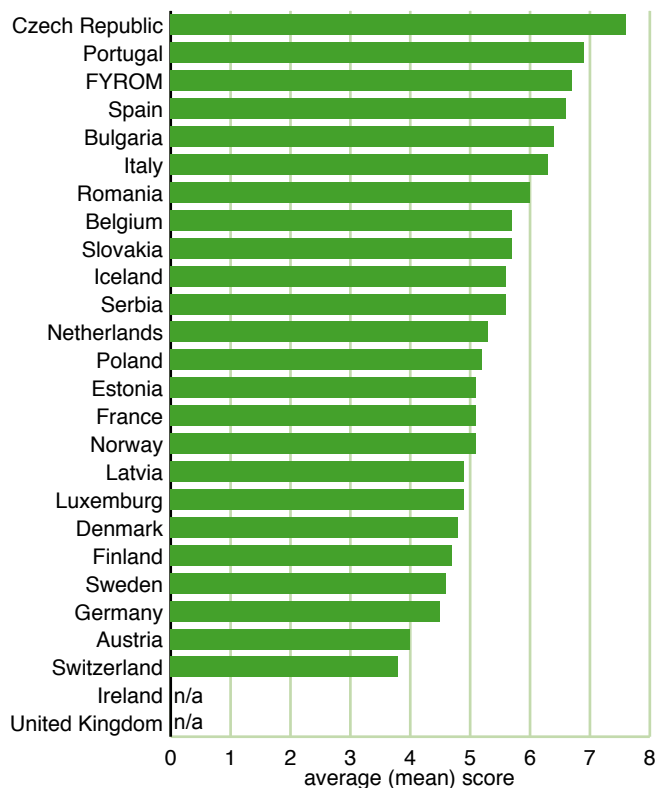


Chart 5-5

“Too many unqualified people take over veterinary tasks”

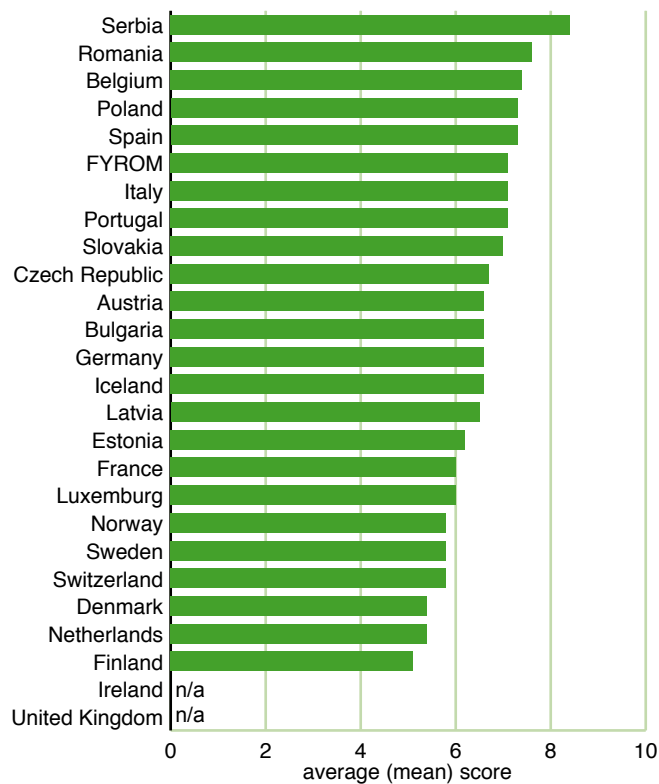


Chart 5-6

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

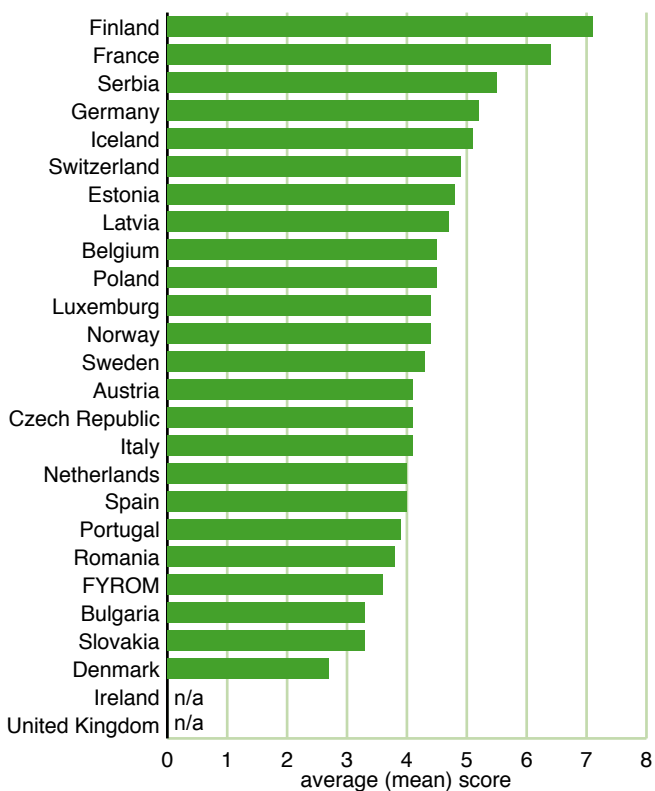
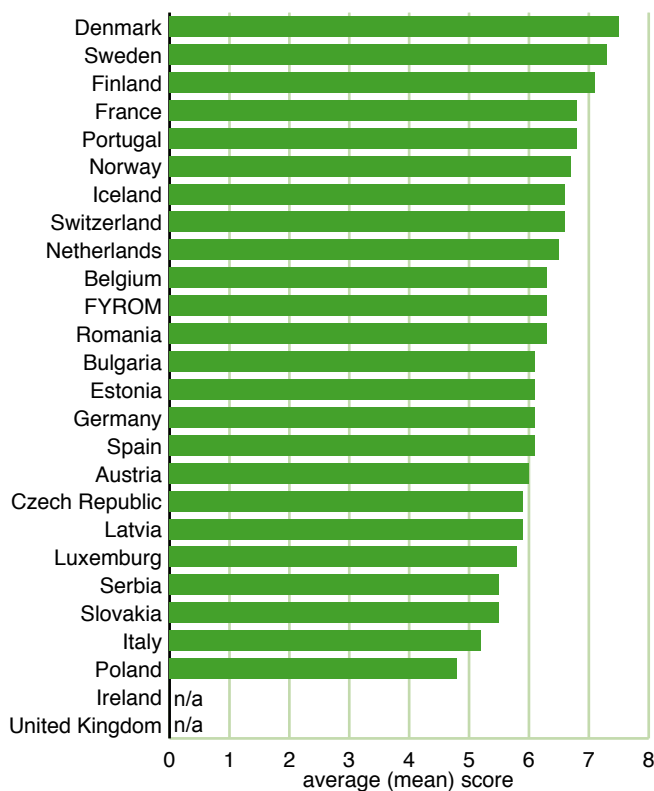


Chart 5-7

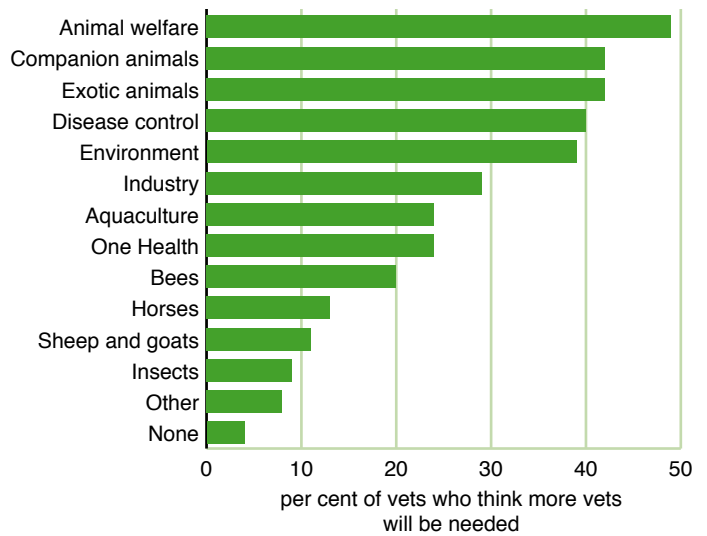
“Veterinarians comply with professional ethics in their everyday practice”



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

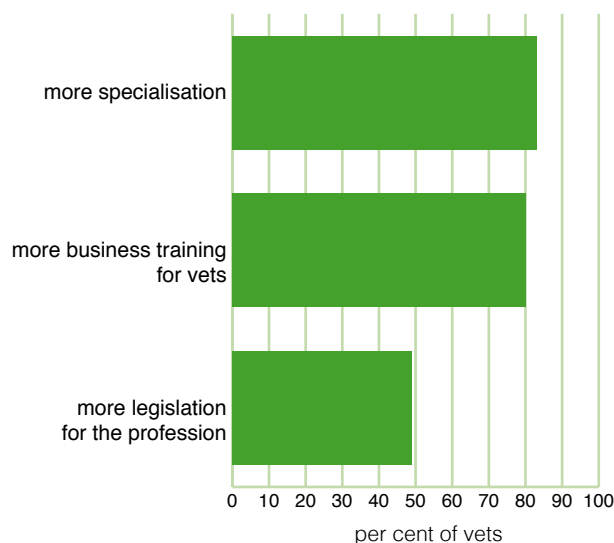


Table 5-1
What veterinarians think they need in order to meet the changes of the next five years analysed by country

| 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 & 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 & 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 & 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 & 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 & 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 & 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 | 10 |
| 2 | 6 |
| 3-5 | 16 |
| 6-10 | 26 |
| 11-30 | 27 |
| 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)

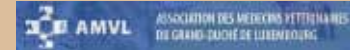
Working outside own country

| | 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 & 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 & 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 |

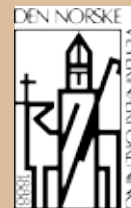
Source: Survey respondents

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

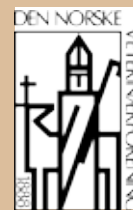
Working outside own country

| | 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 | 8 |
| 2 | 8 |
| 3-5 | 49 |
| 6-10 | 15 |
| 11-30 | 4 |
| 31-50 | 1 |
| 51-100 | 2 |
| 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 & 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 | 12 |
| 2 | 3 |
| 3-5 | 12 |
| 6-10 | 12 |
| 11-30 | 21 |
| 31-50 | 7 |
| 51-100 | 11 |
| over 100 | 12 |

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 | 10 |
| 3-5 | 28 |
| 6-10 | 24 |
| 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:



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Hill's Pet Nutrition
www.hillspet.com

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