

Compelling Need to Understand the Current and Future Veterinary Workforce Needs



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Assistant Executive Vice President

Objective



- n Provide context for the veterinarian's role in meeting society's needs
- n Share current and historical knowledge of internal and external environmental changes that affect the need for and supply of veterinarians
- n Justify the profound need for this study.

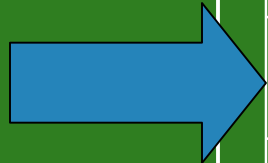


Meeting Society's Needs

n "...I solemnly swear to use my scientific knowledge and skills for the benefit of society through the protection of animal health, the relief of animal suffering, the conservation of animal resources, the promotion of public health, and the advancement of medical knowledge..."

Veterinarians Oath

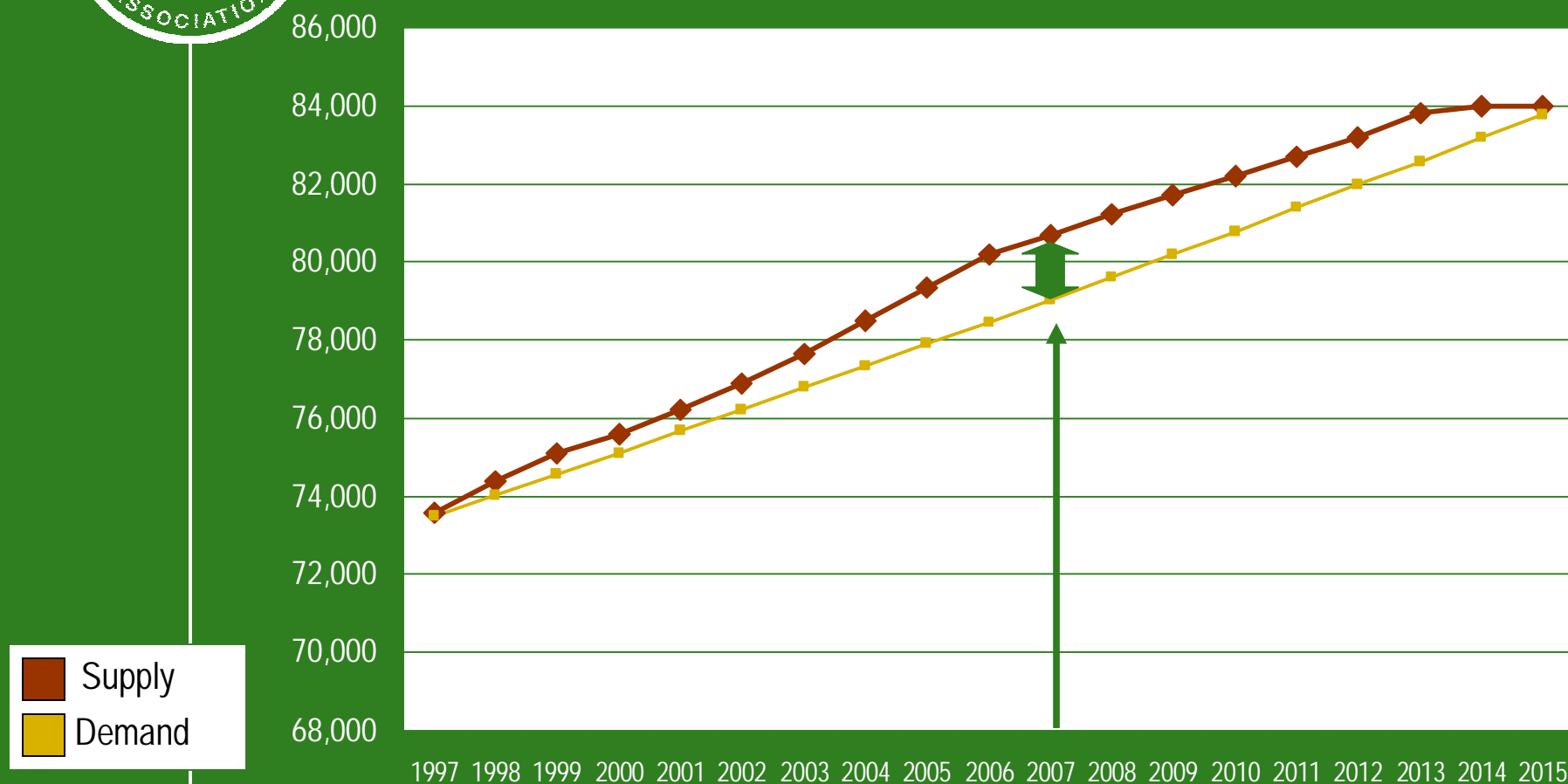
Gallup Poll



Profession	High	Ave.	Low	Net
Nurses	84%	14%	2%	82%
Pharmacists	73%	23%	4%	69%
Veterinarians	71%	23%	2%	69%
Physicians	69%	26%	6%	63%
Clergy	58%	29%	9%	49%
Journalists	26%	48%	25%	1%
Congressmen	14%	45%	40%	-26%



KPMG Supply-Demand



Estimated Supply and Demand of All Veterinarians

KPMG "Mega-Study"-1999

Gender Balance



AVMA Member Percentages by Gender and Year



AVMA Membership Data

Ranking of Most Important Factors (Net of Top 5)



When choosing a Work Environment

Female	Male
1. Salary (70.4%)	1. Salary (85.5%)
2. Relationship w/colleagues (53.2%)	2. Benefits (50.5%)
3. Contact with animals (45.7%)	3. Time off for responsibilities (48.0%)
4. Benefits (43.7%)	4. Time off for vacation (45.3%)
5. Time off for responsibilities (43.4%)	5. Geographic Location (43.3%)
6. Hours required to work (42.5%)	6. Use surgical knowledge (39.8%)
7. Time off for vacation (37.6%)	7. Relationship w/colleagues (38.1%)
8. Geographic Location (35.7%)	8. Hours required to work (37.9%)
9. Flexible hours (35.5%)	9. Contact with animals (36.6%)
10. Use surgical knowledge (34.9%)	10. Relationship w/clients (32.9%)
11. Relationship w/clients (33.2%)	11. Flexible hours (26.9%)

**Least Important Factors: Content of Assignments, Commuting Time , Contact w/people and Time spent business management*

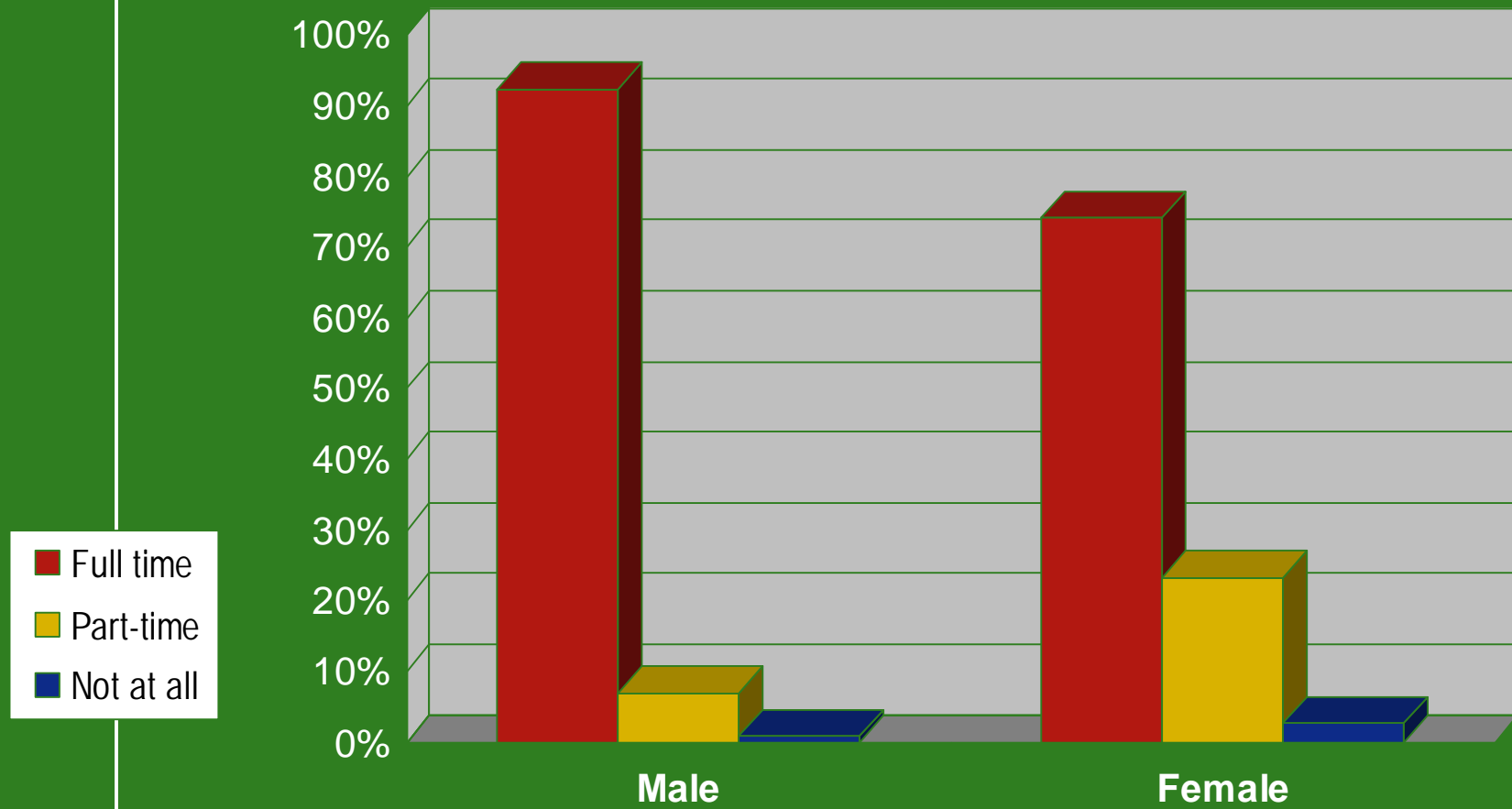
Base: n=1218

Q15b: Veterinary Attitudes Survey



Employment

Full Time/Part Time by Gender



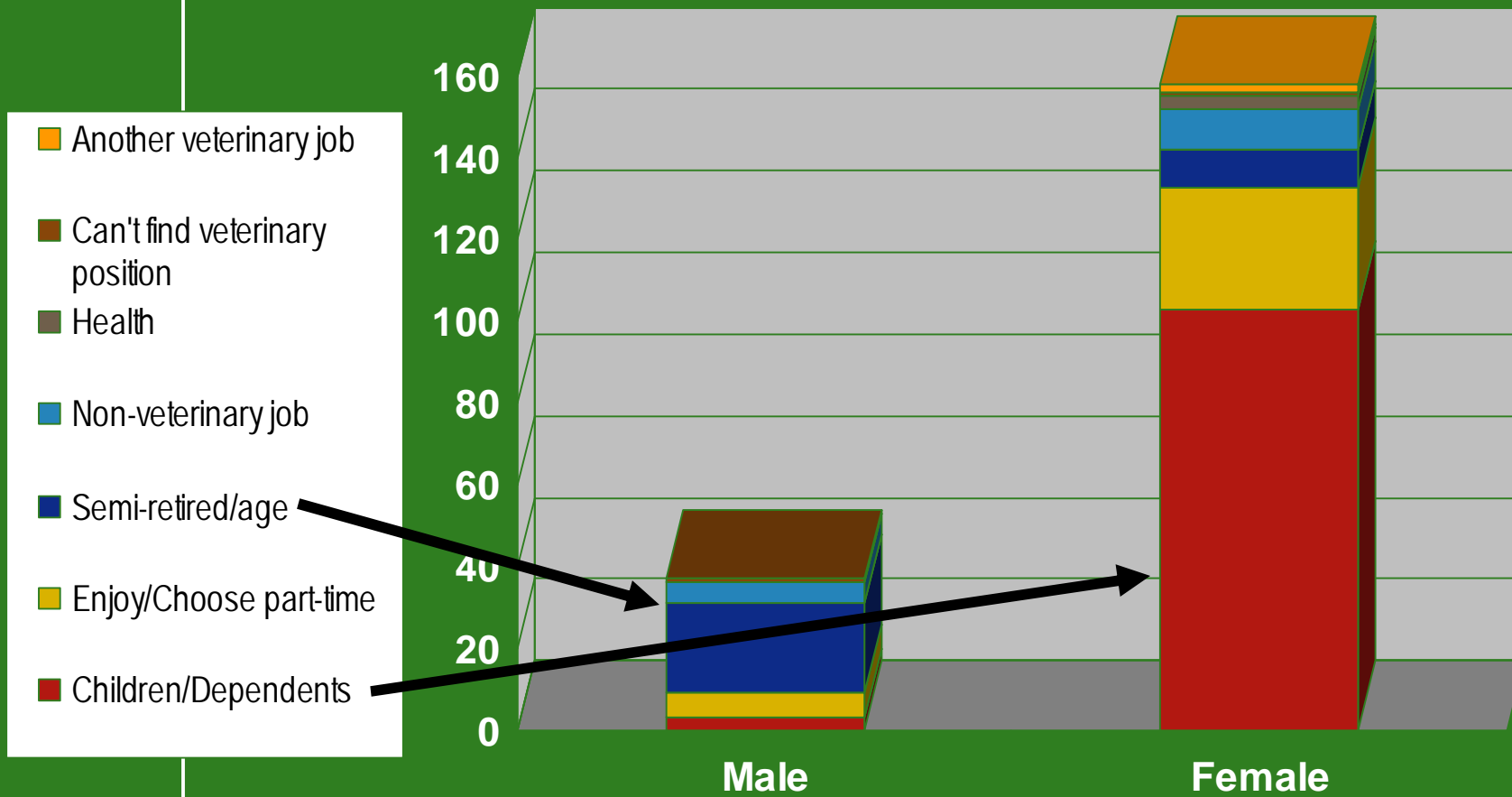
Base: n=1295

Q1: Veterinary Attitudes Survey



Reason for Part-Time Work

All Part Time Respondents



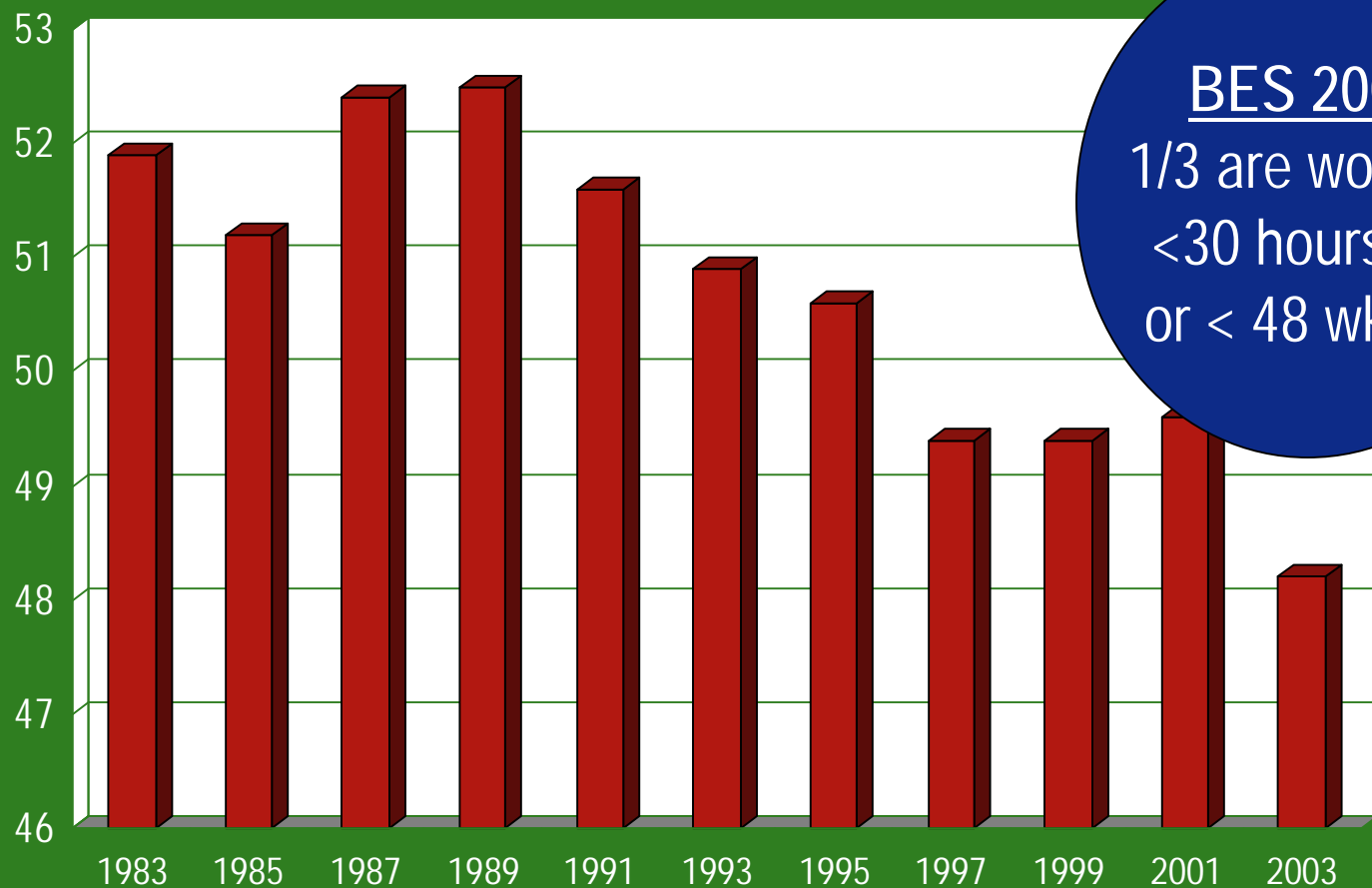
Base: Respondents who work part -time: n=197

Q2: Veterinary Attitudes Survey



Declining Work Hours

Average Hours of Work per Week, Full Time Clinical Practice



BES 2005
1/3 are working
<30 hours/wk
or < 48 wks/yr

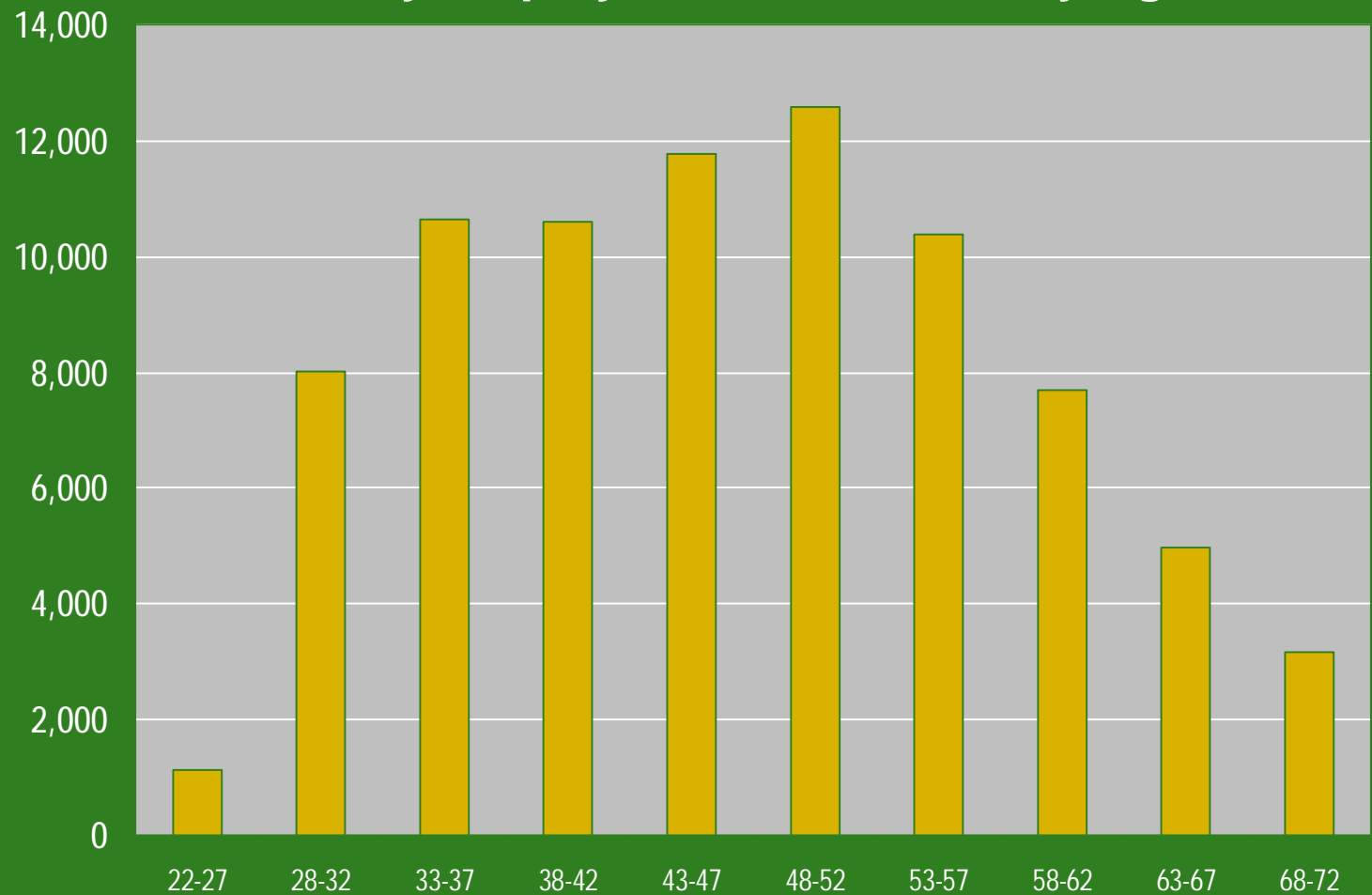
Longitudinal Analysis, 1983-2003

AVMA Biennial Economic Survey

Veterinary Workforce

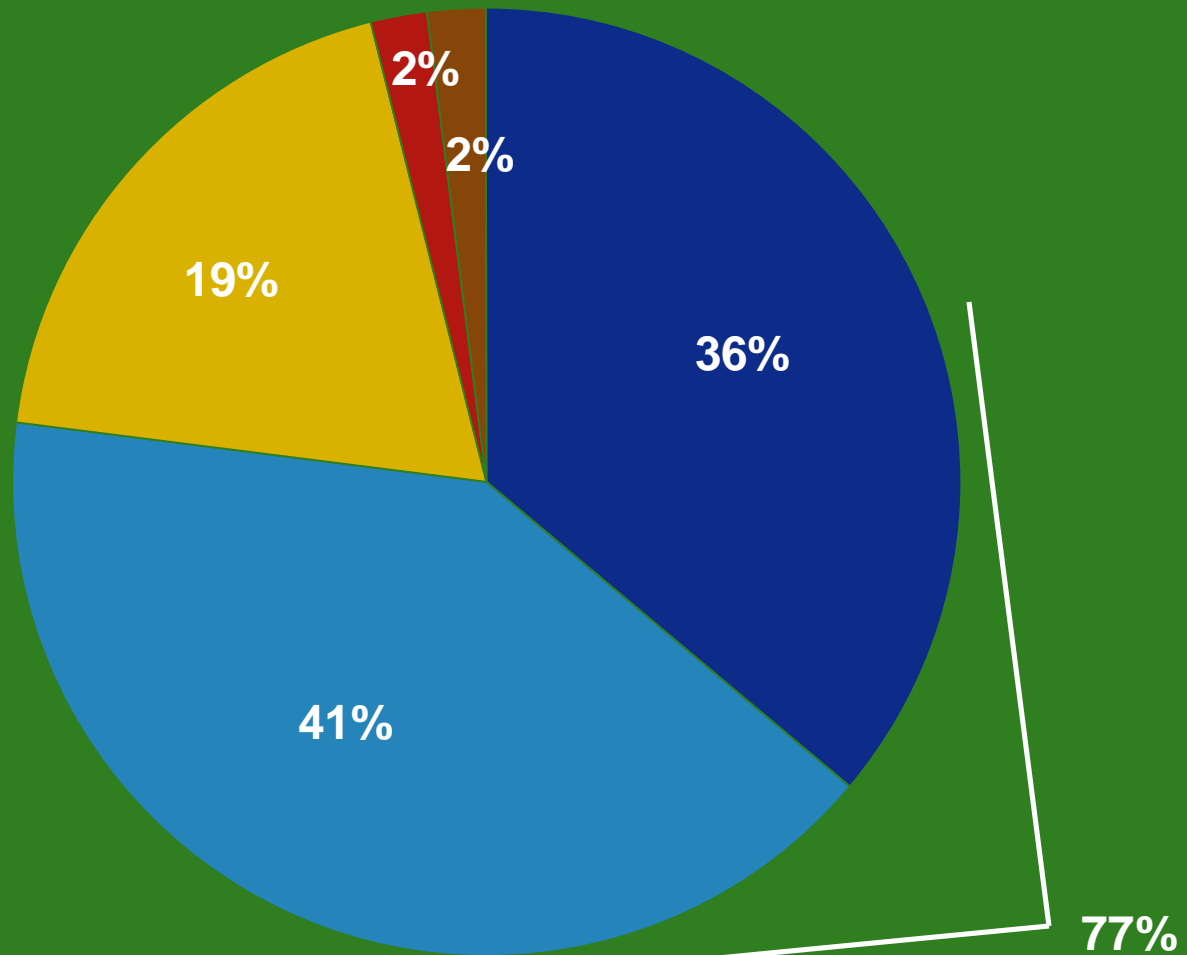


Actively Employed Veterinarians by Age



AVMA Member Database

Relationship with Pets

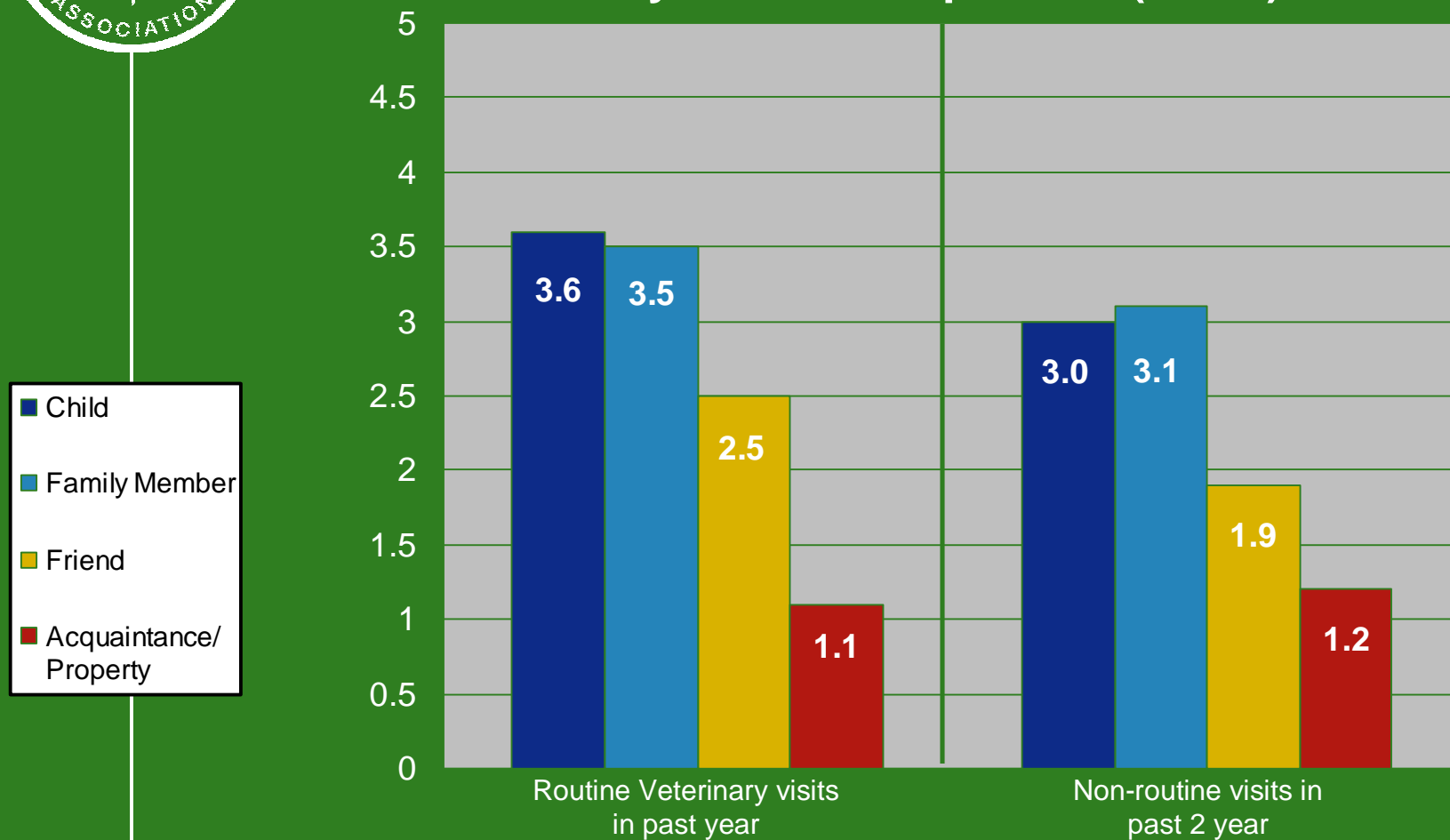


Based to current pet owners: n=1927

Use of Veterinary Services



Visits By Relationship to Pet (Mean)



Based to current pet owner (n=1927)

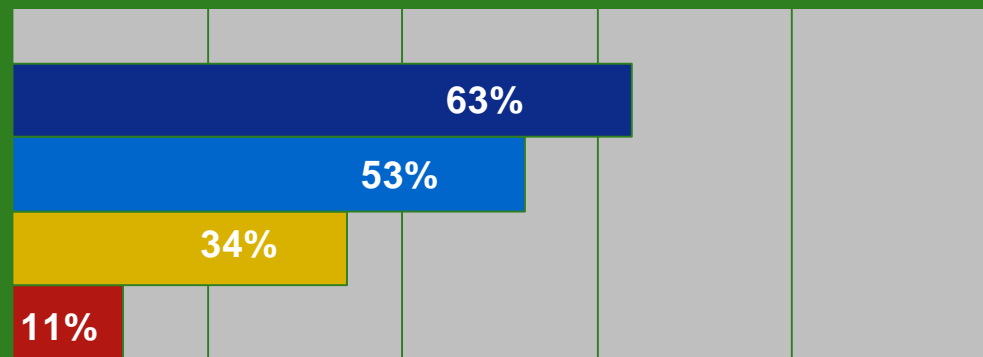
QA6

Use of Veterinary Services

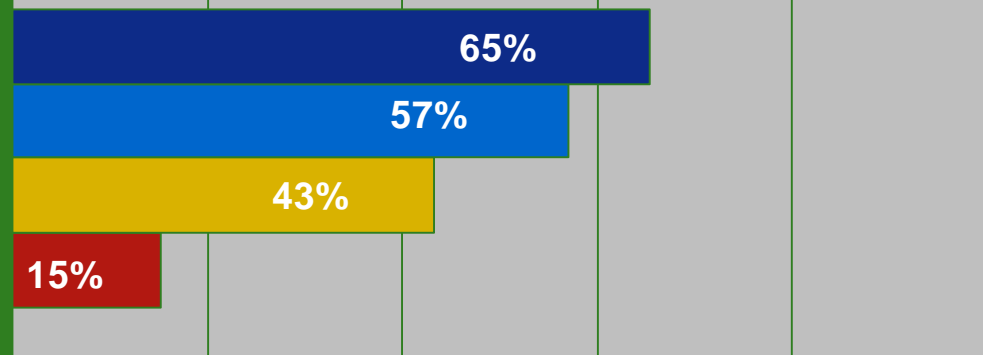


By Relationship to Pet (Top 3 Box)

I would pay any
amt to save my
pet's life



If my vet
recommended it,
I'd go to a
specialist despite
cost



0% 20% 40% 60% 80% 100%

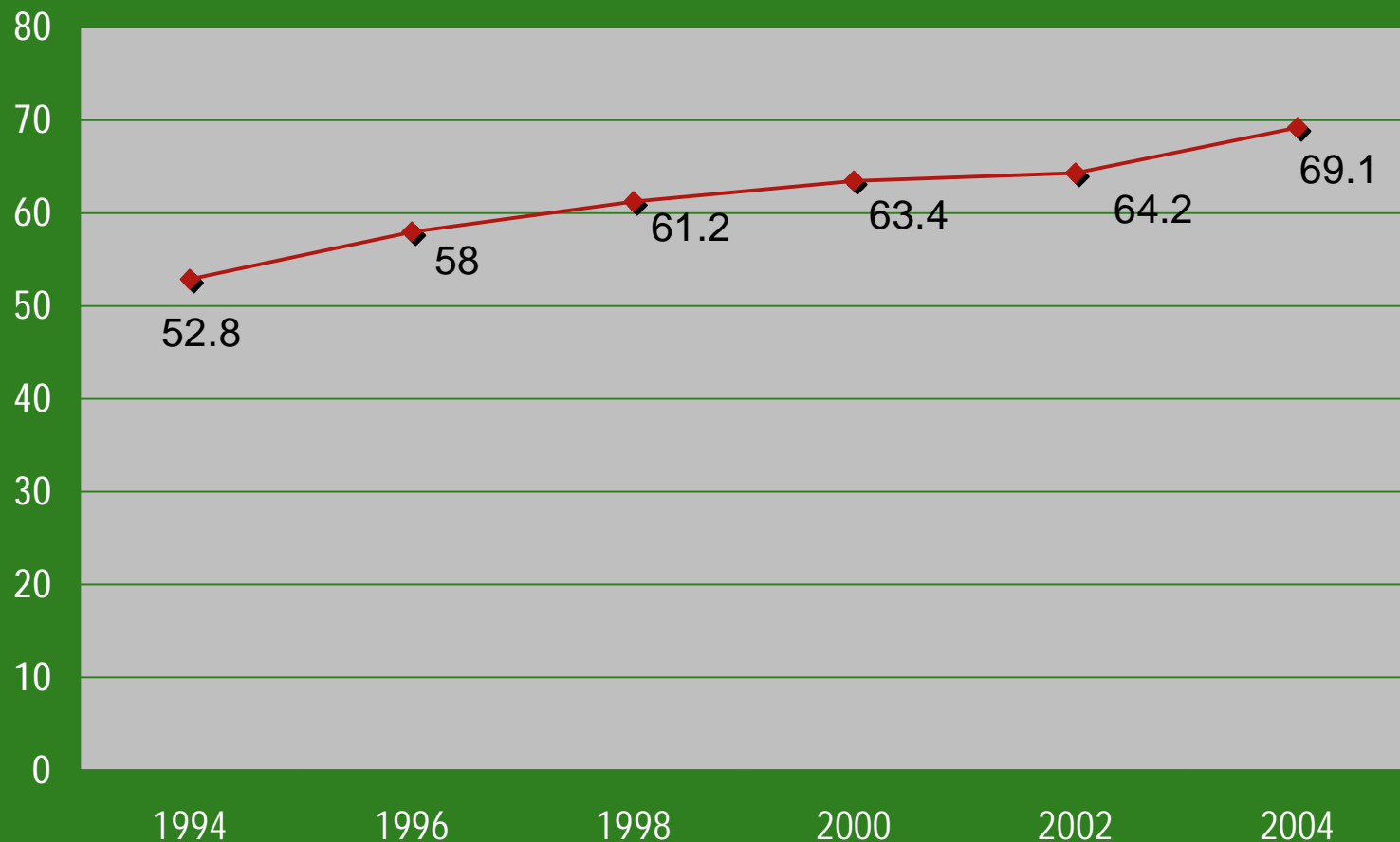
Based to current pet owner (n=1927)

QC4, C7, C8

Pet Ownership Trend



Number of U.S. Households with a Pet (in Millions)



APPMA National Pet Owners Survey-2005-2006



Spending-Veterinary Care

Spending on Veterinary Care (in Billions)

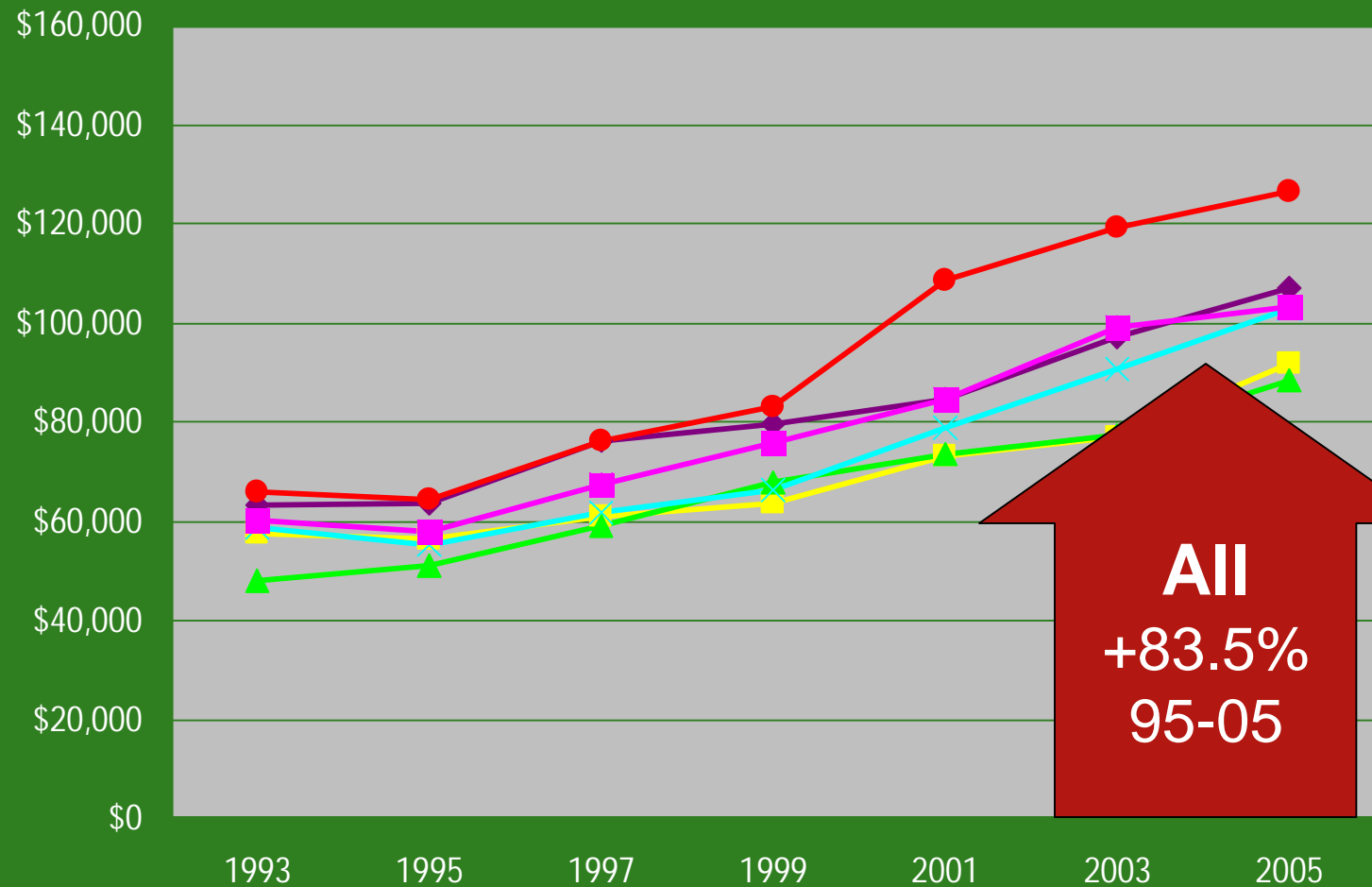


Professional Income

Private Practice Mean Trends



- ◆ LAE
- LAP
- ▲ MIX
- ✕ SAP
- SAE
- Equine

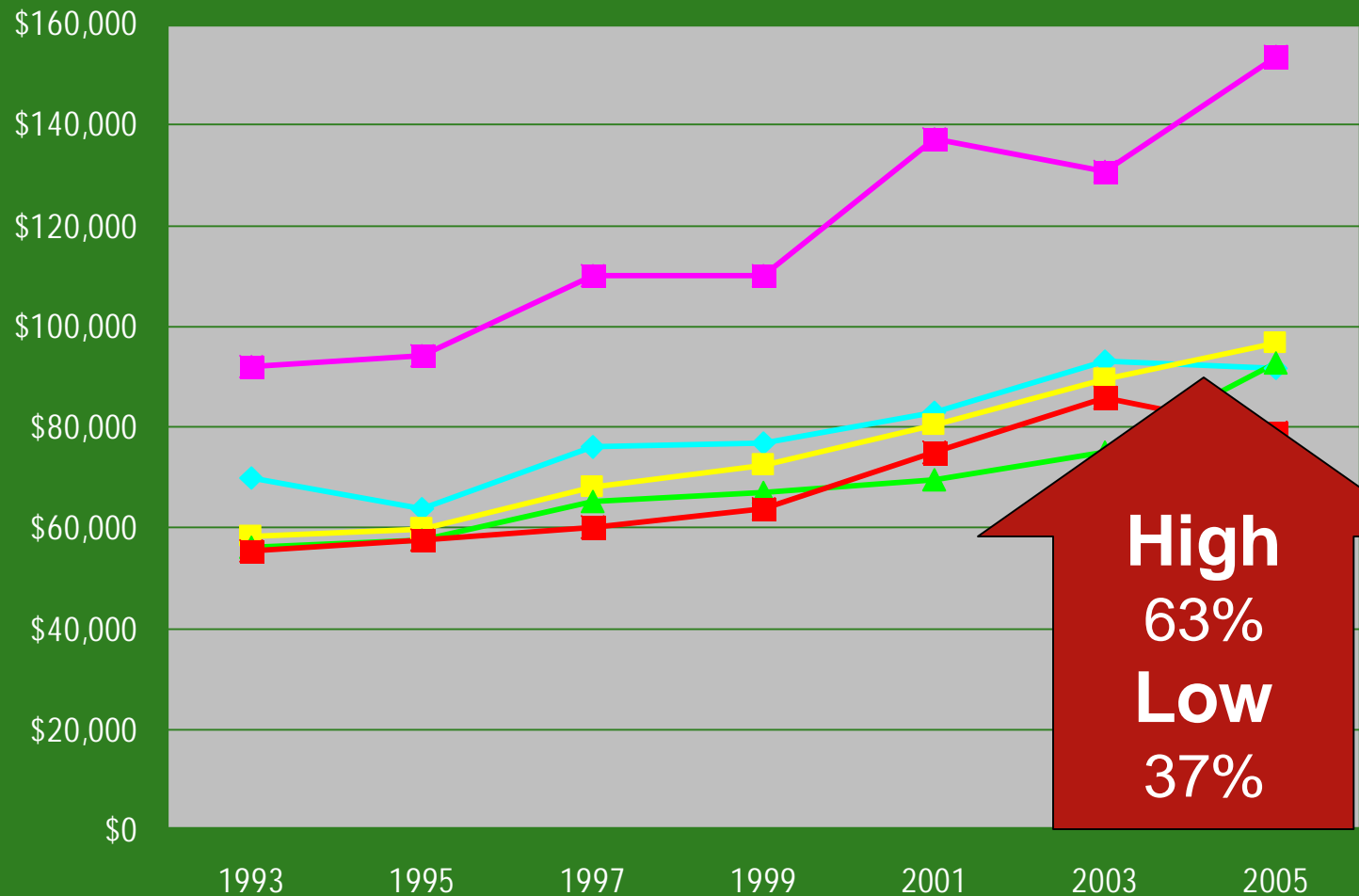
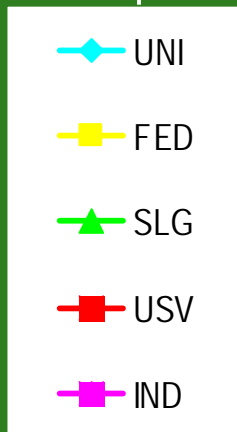


All
+83.5%
95-05

2007 Economic Report-Preliminary

Professional Income

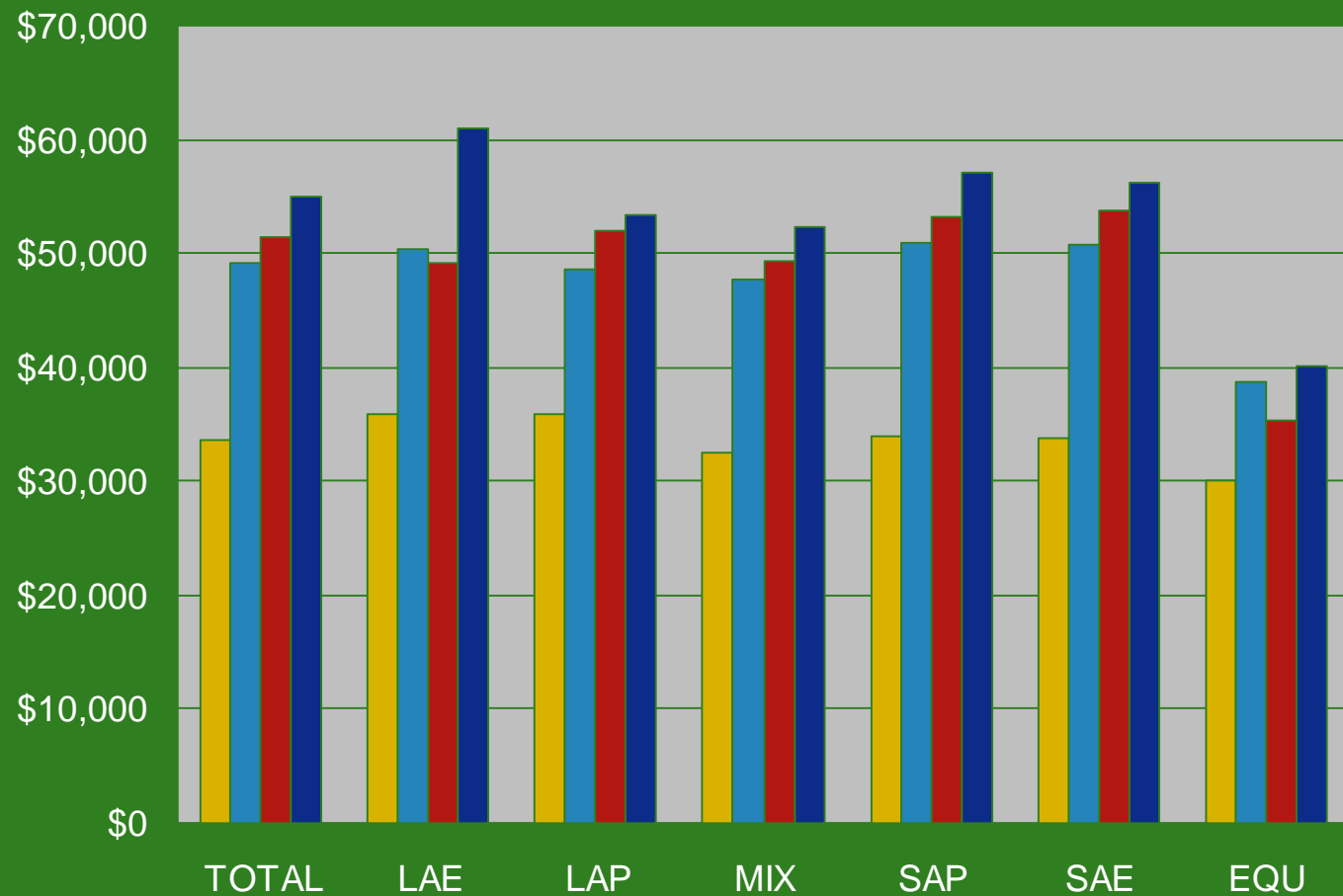
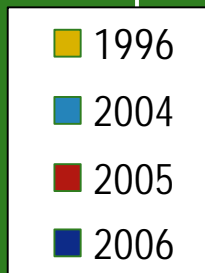
Public/Corporate Mean Trends



2007 Economic Report-Preliminary

Starting Salary

Private Practice Mean



1996-2006 Graduates Survey

Research Veterinarians



- n 1,608 research institutions, but just 666 board certified lab animal veterinarians.
- n Veterinarians completing residencies in lab animal medicine 25% less in 2002 than 1996.
- n Deficit of 67 pathologists in 2002 estimated to rise to 336 by 2007.
- n "...there is a distinct lack of qualified applicants for all types of postgraduate training programs."

w National Academy of Sciences, "National Need and Priorities for Veterinarians in Biomedical Research"



Food Supply Veterinarians

Sector	Mean Estimated Shortage
Small Ruminant	-2.23%
Swine	-4.42%
State Government	-4.85%
Beef	-5.40%
Academia	-5.46%
Federal Food Safety	-6.57%
Mixed	-6.60%
All	-4.61%



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