Introduction and Research Goals

- The goal of this research is to understand economic conditions and job status among veterinarians and registered veterinary technicians in California.

- This research will provide information for analysis of the current state of the veterinary profession and insight into business and professional decision making.

- Topics include work hours, job satisfaction, job seeking and hiring, educational debt, practice ownership, corporate practices, pay, and benefits and salary differences.
Methodology

- Online survey of California veterinarians (DVMs) and registered veterinary technicians (RVTs)
- Survey conducted July 10 – August 25, 2019
  - 1,488 DVM interviews; 15% response rate
  - 684 RVT interviews; 16% response rate
- Where applicable, results compared with surveys from 2016 and 2013

Please note that due to rounding, some percentages may not add up to exactly 100%.
Key Findings – DVM

- The vast majority of DVMs have high job satisfaction, consistent with previous years.
- DVMs have mixed feelings about the future of the industry, but profitability and hiring trends are promising.
- DVM salaries have been increasing since 2013.
- While more established DVMs are less affected by debt, almost two-thirds of DVMs under 40 feel burdened by student loan debt.
- Single owner practices were most common among DVMs, and a majority do not think that growing corporate practices are good for the veterinary industry.
- However, concerns about mental health and student debt rise above corporate practice issues, with 89% of DVMs agreeing that the veterinary profession should do more to address stress and mental health issues.
Key Findings – RVT

- The majority of RVTs have high job satisfaction, consistent with job satisfaction reported in 2016.
- RVT salaries are consistent with numbers seen in 2016.
- Student loans are less of a burden for RVTs.
- A plurality of RVTs work in single owner practices, followed by corporate owned practices. Even among RVTs working in corporate practices, a majority do not think that the growth of corporate practices are good for the industry.
- RVTs are also concerned about mental health and student debt, more than the rise of corporate practices; 93% of RVTs agree that the veterinary profession needs to do more to address problems with stress and mental health.
Profile of DVM Respondents
Profile of DVM Respondents

Practice Type
70% Small animal exclusive
19% Small animal predominant
4% Equine
7% Other

Position
28% Owner
7% Medical Director*
55% Associate
8% Contract/Relief Worker

Hours Worked Per Week
15% Less than 30
27% 31-40
37% 41-50
21% 51 or more

Work Hours
84% Full-time
16% Part-time

Location
16% Sacramento & North
26% Bay Area
9% Central Valley
7% Central Coast
15% Los Angeles
17% LA Area (excludes LA County)
11% San Diego

*Medical director added as an option for the first time in 2019
Profile of DVM Respondents

**Age**
- 7% 18-29
- 30% 30-39
- 24% 40-49
- 27% 50-64
- 10% 65+

**Gender**
- 28% Male
- 70% Female
- 2% Other

**School**
- 37% UC Davis
- 8% Western University
- 37% Outside of CA
- 17% Outside of U.S.

**Practice Ownership**
- 45% Single owner
- 17% Multiple owners
- 29% Corporate owner
- 7% Public/Non-profit
- 1% Other

**CVMA Membership (self-reported)**
- 76% Member
- 21% Non-member
Profile of RVT Respondents

Practice Type
- 60% Small animal exclusive
- 31% Small animal predominant
- 1% Equine
- 8% Other

Position
- 31% Lead RVT
- 56% RVT
- 9% Practice/Office Manager
- 1% Relief Work/Contract Worker
- 3% Other

Hours Worked Per Week
- 17% Less than 30
- 39% 31-40
- 39% 41-50
- 6% 51 or more

Work Hours
- 82% Full-time
- 18% Part-time

Location
- 18% Sacramento & North
- 26% Bay Area
- 6% Central Valley
- 5% Central Coast
- 15% Los Angeles
- 19% LA Area (excludes LA County)
- 11% San Diego
Profile of RVT Respondents

Age
- 18% 18-29
- 39% 30-39
- 20% 40-49
- 21% 50-64
- 1% 65+

Gender
- 7% Male
- 92% Female
- 2% Other

Practice Ownership
- 37% Single owner
- 17% Multiple owners
- 31% Corporate owner
- 11% Public/Non-profit
- 5% Other
Current Job Sentiment
Key Findings

- A large majority of DVMs and RVTs continue to be satisfied with their current job.
- Older DVMs report higher job satisfaction than their younger colleagues.
- DVMs and RVTs value similar job factors, with clinical quality of practice and a positive work environment rising to the top as most important.
- DVMs who do not currently own part or all of a practice are largely uninterested in the prospect, with less than a third reporting that they are interested in the idea of owning.
- RVT responsibilities have remained consistent since 2016.
**Job Satisfaction Over Time Among DVMs**

The vast majority of DVM respondents are satisfied with their job, consistent with past years.

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Somewhat Satisfied</th>
<th>(Don't Know)</th>
<th>Somewhat Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>Total Satisfied</th>
<th>Total Dissatisfied</th>
<th>Net Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>43%</td>
<td>43%</td>
<td>1%</td>
<td>11%</td>
<td>3%</td>
<td>85%</td>
<td>14%</td>
<td>+71</td>
</tr>
<tr>
<td>2016</td>
<td>37%</td>
<td>46%</td>
<td>1%</td>
<td>13%</td>
<td>3%</td>
<td>83%</td>
<td>16%</td>
<td>+68</td>
</tr>
<tr>
<td>2013</td>
<td>48%</td>
<td>39%</td>
<td>2%</td>
<td>9%</td>
<td>2%</td>
<td>86%</td>
<td>12%</td>
<td>+75</td>
</tr>
</tbody>
</table>

Q14. In general, how satisfied are you with each of the following:...Your current job
Job Satisfaction by Age Among DVMs

Job satisfaction among DVM respondents increases with age, with 94% of DVMs age 65+ being satisfied with their current job.

Q14. In general, how satisfied are you with each of the following:...Your current job
**Job Factor Satisfaction Among DVMs**

*DVM respondents reported being most satisfied with their work environment. DVMs are split when it comes to satisfaction with the health of the veterinary industry.*

<table>
<thead>
<tr>
<th>Factor</th>
<th>Very Satisfied</th>
<th>Somewhat Satisfied</th>
<th>(Don't Know)</th>
<th>Somewhat Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>Total Satisfied</th>
<th>Total Dissatisfied</th>
<th>Net Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your work environment</td>
<td>38%</td>
<td>42%</td>
<td>16%</td>
<td>4%</td>
<td></td>
<td>80%</td>
<td>20%</td>
<td>+60</td>
</tr>
<tr>
<td>Your salary</td>
<td>31%</td>
<td>46%</td>
<td>1%</td>
<td>16%</td>
<td>6%</td>
<td>77%</td>
<td>22%</td>
<td>+55</td>
</tr>
<tr>
<td>The opportunities for professional growth</td>
<td>34%</td>
<td>38%</td>
<td>8%</td>
<td>14%</td>
<td>6%</td>
<td>72%</td>
<td>21%</td>
<td>+51</td>
</tr>
<tr>
<td>offered by your employer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your benefits</td>
<td>30%</td>
<td>40%</td>
<td>4%</td>
<td>18%</td>
<td>9%</td>
<td>69%</td>
<td>27%</td>
<td>+43</td>
</tr>
<tr>
<td>Your work-life balance</td>
<td>24%</td>
<td>40%</td>
<td>23%</td>
<td>12%</td>
<td></td>
<td>65%</td>
<td>35%</td>
<td>+30</td>
</tr>
<tr>
<td>The health of the veterinary industry</td>
<td>8%</td>
<td>40%</td>
<td>1%</td>
<td>34%</td>
<td>17%</td>
<td>48%</td>
<td>51%</td>
<td>-4</td>
</tr>
</tbody>
</table>

Q15-20. In general, how satisfied are you with each of the following:
## Industry Health by Age Among DVMs

Younger DVMs are less satisfied with the health of the veterinary industry.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Very Satisfied</th>
<th>Somewhat Satisfied</th>
<th>(Don't Know)</th>
<th>Somewhat Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>Total Satisfied</th>
<th>Total Dissatisfied</th>
<th>Net Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>8%</td>
<td>40%</td>
<td>1%</td>
<td>34%</td>
<td>17%</td>
<td>48%</td>
<td>51%</td>
<td>-4</td>
</tr>
<tr>
<td>18-29 (7%)</td>
<td>8%</td>
<td>38%</td>
<td>37%</td>
<td>16%</td>
<td></td>
<td>46%</td>
<td>54%</td>
<td>-7</td>
</tr>
<tr>
<td>30-39 (30%)</td>
<td>4%</td>
<td>36%</td>
<td>39%</td>
<td>20%</td>
<td></td>
<td>40%</td>
<td>60%</td>
<td>-19</td>
</tr>
<tr>
<td>40-49 (24%)</td>
<td>5%</td>
<td>36%</td>
<td>1%</td>
<td>37%</td>
<td>22%</td>
<td>41%</td>
<td>59%</td>
<td>-18</td>
</tr>
<tr>
<td>50-64 (27%)</td>
<td>11%</td>
<td>46%</td>
<td>1%</td>
<td>31%</td>
<td>12%</td>
<td>57%</td>
<td>43%</td>
<td>+14</td>
</tr>
<tr>
<td>65+ (10%)</td>
<td>20%</td>
<td>46%</td>
<td>3%</td>
<td>22%</td>
<td>10%</td>
<td>65%</td>
<td>32%</td>
<td>+33</td>
</tr>
</tbody>
</table>

Q14. In general, how satisfied are you with each of the following:...The health of the veterinary industry
Important Job Factors Among DVMs

Top factors when choosing a job include a positive work environment and the clinical quality of practice. The potential for practice ownership is less important to DVMs when it comes to choosing a job.

Q22-33. Thinking about your preferred job and work environment, please rate the following factors in choosing a job, regardless of whether you are currently seeking a new position.

- Positive work environment: 65%
- Clinical quality of practice: 63%
- Owners' philosophy of animal care: 59%
- Work-life balance: 55%
- Hours / schedule: 47%
- Compensation amount: 40%
- Night or weekend hours required: 37%
- Compensation structure (flat salary or production compensation): 33%
- Benefits: 30%
- Distance / commute time: 27%
- Opportunities for professional growth: 27%
- Potential for practice ownership: 11%

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Interest in owning part or all of a practice has been decreasing since 2013.

Among non-practice owners only, n=1,064

<table>
<thead>
<tr>
<th>Year</th>
<th>Very interested</th>
<th>Somewhat interested</th>
<th>Not sure</th>
<th>Only a little interested</th>
<th>Not at all interested</th>
<th>Total Interested</th>
<th>Total Not Interested</th>
<th>Net Interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>15%</td>
<td>17%</td>
<td>3%</td>
<td>21%</td>
<td>46%</td>
<td>31%</td>
<td>66%</td>
<td>-35</td>
</tr>
<tr>
<td>2016</td>
<td>17%</td>
<td>21%</td>
<td>2%</td>
<td>20%</td>
<td>41%</td>
<td>38%</td>
<td>60%</td>
<td>-23</td>
</tr>
<tr>
<td>2013</td>
<td>22%</td>
<td>22%</td>
<td>2%</td>
<td>20%</td>
<td>34%</td>
<td>44%</td>
<td>54%</td>
<td>-11</td>
</tr>
</tbody>
</table>

Q37. Which best describes your interest in owning all or part of a veterinary practice in the future?
Job Satisfaction Over Time Among RVTs

Job satisfaction among RVTs in 2019 mirrors 2016, with 84% of RVTs being satisfied with their current job.

Q14. In general, how satisfied are you with each of the following:...Your current job

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Somewhat Satisfied</th>
<th>(Don't Know)</th>
<th>Somewhat Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>Total Satisfied</th>
<th>Total Dissatisfied</th>
<th>Net Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>36%</td>
<td>48%</td>
<td></td>
<td>1% 9%</td>
<td>5%</td>
<td>84%</td>
<td>15%</td>
<td>+69</td>
</tr>
<tr>
<td>2016</td>
<td>36%</td>
<td>48%</td>
<td></td>
<td>2% 11%</td>
<td>4%</td>
<td>83%</td>
<td>15%</td>
<td>+69</td>
</tr>
</tbody>
</table>
Job Factor Satisfaction Among RVTs

RVT respondents are the most satisfied with their work environment and benefits.

Q15-20. In general, how satisfied are you with each of the following:

- **Your work environment**: 29% Very Satisfied, 43% Somewhat Satisfied, Total Satisfied 71%
- **Your benefits**: 28% Very Satisfied, 37% Somewhat Satisfied, Total Satisfied 65%
- **The opportunities for professional growth offered by your employer**: 26% Very Satisfied, 36% Somewhat Satisfied, Total Satisfied 62%
- **Your work-life balance**: 22% Very Satisfied, 40% Somewhat Satisfied, Total Satisfied 62%
- **Your salary**: 15% Very Satisfied, 37% Somewhat Satisfied, Total Satisfied 52%
- **The health of the veterinary industry**: 10% Very Satisfied, 42% Somewhat Satisfied, Total Satisfied 51%
Important Job Factors Among RVTs

Clinical quality of practice, work environment, and philosophy of animal care are the most important job factors among RVT respondents.

- Clinical quality of practice: 74%
- Positive work environment: 74%
- Owners' philosophy of animal care: 74%
- Work-life balance: 61%
- Compensation amount: 57%
- Hours / schedule: 51%
- Benefits: 48%
- Opportunities for professional growth: 44%
- Distance / commute time: 32%
- Night or weekend hours required: 28%

Q22-31. Thinking about your preferred job and work environment, please rate the following factors in choosing a job, regardless of whether you are currently seeking a new position.
RVT Tasks

How are RVTs utilized in your practice?

- Technical work: 95% (2019), 99% (2016)
- Staff training: 77% (2019), 81% (2016)
- Inventory management: 66% (2019), 69% (2016)
- Drug reporting: 66% (2019), 71% (2016)
- Hiring and/or firing: 31% (2019), 39% (2016)
- Other: 9% (2019), 8% (2016)

RVT responsibilities are largely the same as in 2016, with 95% of RVTs being utilized for technical work at their practice.
RVT Tasks

Q13. Which of the following RVT-only tasks do RVTs in your practice perform? Please select all that apply.

- Induce anesthesia (94% in 2019, 94% in 2016)
- Apply cast and splints (65% in 2019, 69% in 2016)
- Perform dental extractions (61% in 2019, 59% in 2016)
- Suture cutaneous and subcutaneous tissues, gingiva and oral mucous membranes (58% in 2019, 60% in 2016)
- Create a relief hole in the skin to facilitate placement of an intravascular catheter (57% in 2019, 63% in 2016)
- None of the above (4% in 2019, 3% in 2016)

RVT-only tasks have remained consistent since 2016.
Key Findings

- Salaries have been increasing across the board for DVMs since 2013, with both owners and non-owners seeing gains.
- Salary increases with ownership and age.
- More DVMs report receiving a combination of flat and production based pay than in previous years.
- RVT salaries are consistent with salaries reported in 2016.
- Most RVTs making less than $20,000 per year report only working part-time.
- DVMs and RVTs report receiving a wide variety of benefits, and a majority get benefits for continuing education.
Salaries among associates are trending upward, with fewer DVMs reporting salaries under $80,000 and more reporting salaries over $120,000 compared to previous years.

Among non-practice owners only, n=1,064
Non-Owner Salary Among DVMs by Hours

A greater proportion of full-time DVMs make over $80,000 per year compared to part-time DVMs.

Full-time (84%)

- $0-$80k: 8%
- $81k-$120k: 45%
- $121k-$160k: 28%
- $160k+: 18%

Part-time (16%)

- $0-$80k: 58%
- $81k-$120k: 28%
- $121k-$160k: 8%
- $160k+: 4%

Q34. What is your current pre-tax annual salary, including bonuses but not including benefits?
Among practice owners only, n=424

Salaries among owners are also slightly increasing. Over a quarter of owners report making over $200,000 per year.
A greater proportion of owners and older DVMs report salaries that fall into higher salary brackets.

<table>
<thead>
<tr>
<th>Category</th>
<th>$0k-$80k</th>
<th>$81k-$120k</th>
<th>$121k-$160k</th>
<th>$161k+</th>
<th>Refuse</th>
<th>% $120k+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>17%</td>
<td>36%</td>
<td>22%</td>
<td>22%</td>
<td>4%</td>
<td>45%</td>
</tr>
<tr>
<td>Owner (28%)</td>
<td>17%</td>
<td>20%</td>
<td>16%</td>
<td>38%</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>Associate (55%)</td>
<td>15%</td>
<td>47%</td>
<td>23%</td>
<td>31%</td>
<td>13%</td>
<td>2%</td>
</tr>
<tr>
<td>18-29 (7%)</td>
<td>18%</td>
<td>45%</td>
<td>62%</td>
<td>18%</td>
<td>2%</td>
<td>20%</td>
</tr>
<tr>
<td>30-39 (30%)</td>
<td>17%</td>
<td>37%</td>
<td>24%</td>
<td>24%</td>
<td>1%</td>
<td>37%</td>
</tr>
<tr>
<td>40-49 (24%)</td>
<td>14%</td>
<td>23%</td>
<td>24%</td>
<td>24%</td>
<td>3%</td>
<td>48%</td>
</tr>
<tr>
<td>50-64 (27%)</td>
<td>17%</td>
<td>25%</td>
<td>23%</td>
<td>31%</td>
<td>4%</td>
<td>56%</td>
</tr>
<tr>
<td>65+ (10%)</td>
<td>27%</td>
<td>20%</td>
<td>14%</td>
<td>32%</td>
<td>6%</td>
<td>49%</td>
</tr>
<tr>
<td>LA (15%)</td>
<td>10%</td>
<td>37%</td>
<td>20%</td>
<td>29%</td>
<td>4%</td>
<td>50%</td>
</tr>
<tr>
<td>LA Area (17%)</td>
<td>14%</td>
<td>33%</td>
<td>25%</td>
<td>25%</td>
<td>4%</td>
<td>50%</td>
</tr>
<tr>
<td>Bay Area (26%)</td>
<td>18%</td>
<td>33%</td>
<td>24%</td>
<td>24%</td>
<td>5%</td>
<td>49%</td>
</tr>
<tr>
<td>San Diego (11%)</td>
<td>16%</td>
<td>45%</td>
<td>21%</td>
<td>24%</td>
<td>13%</td>
<td>41%</td>
</tr>
<tr>
<td>Central Coast (7%)</td>
<td>23%</td>
<td>33%</td>
<td>22%</td>
<td>17%</td>
<td>5%</td>
<td>40%</td>
</tr>
<tr>
<td>Central Valley (9%)</td>
<td>12%</td>
<td>39%</td>
<td>26%</td>
<td>20%</td>
<td>2%</td>
<td>48%</td>
</tr>
<tr>
<td>Sacramento &amp; North (16%)</td>
<td>29%</td>
<td>35%</td>
<td>18%</td>
<td>16%</td>
<td>2%</td>
<td>35%</td>
</tr>
</tbody>
</table>
### Combined Owner/Non-Owner Salary Among DVMs

**DVMs in practices with multiple owners are more likely to have higher salaries.**

<table>
<thead>
<tr>
<th>Category</th>
<th>$0k-$80k</th>
<th>$81k-$120k</th>
<th>$121k-$160k</th>
<th>$161k+</th>
<th>Refuse</th>
<th>% $120k+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>17%</td>
<td>36%</td>
<td>22%</td>
<td>22%</td>
<td>4%</td>
<td>45%</td>
</tr>
<tr>
<td>Small animal exclusive (70%)</td>
<td>15%</td>
<td>37%</td>
<td>22%</td>
<td>23%</td>
<td>4%</td>
<td>47%</td>
</tr>
<tr>
<td>Equine (4%)</td>
<td>29%</td>
<td>24%</td>
<td>17%</td>
<td>27%</td>
<td>3%</td>
<td>46%</td>
</tr>
<tr>
<td>Single owner practice (45%)</td>
<td>23%</td>
<td>32%</td>
<td>18%</td>
<td>23%</td>
<td>5%</td>
<td>43%</td>
</tr>
<tr>
<td>Multiple owner practice (17%)</td>
<td>13%</td>
<td>32%</td>
<td>22%</td>
<td>29%</td>
<td>4%</td>
<td>53%</td>
</tr>
<tr>
<td>Corporate owned practice (29%)</td>
<td>11%</td>
<td>44%</td>
<td>25%</td>
<td>19%</td>
<td>2%</td>
<td>44%</td>
</tr>
<tr>
<td>Public/Non-profit (7%)</td>
<td>19%</td>
<td>37%</td>
<td>27%</td>
<td>15%</td>
<td>2%</td>
<td>43%</td>
</tr>
<tr>
<td>Men (28%)</td>
<td>11%</td>
<td>24%</td>
<td>23%</td>
<td>38%</td>
<td>4%</td>
<td>63%</td>
</tr>
<tr>
<td>Women (70%)</td>
<td>20%</td>
<td>41%</td>
<td>21%</td>
<td>16%</td>
<td>3%</td>
<td>38%</td>
</tr>
<tr>
<td>Men &lt;50 (11%)</td>
<td>7%</td>
<td>30%</td>
<td>30%</td>
<td>30%</td>
<td>4%</td>
<td>62%</td>
</tr>
<tr>
<td>Women &lt;50 (49%)</td>
<td>18%</td>
<td>47%</td>
<td>21%</td>
<td>13%</td>
<td>1%</td>
<td>35%</td>
</tr>
<tr>
<td>Men 50+ (17%)</td>
<td>14%</td>
<td>21%</td>
<td>18%</td>
<td>43%</td>
<td>4%</td>
<td>64%</td>
</tr>
<tr>
<td>Women 50+ (20%)</td>
<td>25%</td>
<td>26%</td>
<td>23%</td>
<td>22%</td>
<td>5%</td>
<td>47%</td>
</tr>
<tr>
<td></td>
<td>$0k-$80k</td>
<td>$81k-$120k</td>
<td>$121k-$160k</td>
<td>$161k+</td>
<td>Refuse</td>
<td>% $120k+</td>
</tr>
<tr>
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<td>-------------</td>
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</tr>
<tr>
<td>Overall</td>
<td>17%</td>
<td>36%</td>
<td>22%</td>
<td>22%</td>
<td>4%</td>
<td>45%</td>
</tr>
<tr>
<td>Male Owner (13%)</td>
<td>11%</td>
<td>18%</td>
<td>12%</td>
<td>50%</td>
<td>8%</td>
<td>68%</td>
</tr>
<tr>
<td>Female Owner (15%)</td>
<td>23%</td>
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<td>19%</td>
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<td>7%</td>
<td>52%</td>
</tr>
<tr>
<td>Male Associate (10%)</td>
<td>11%</td>
<td>34%</td>
<td>30%</td>
<td>22%</td>
<td>11%</td>
<td>33%</td>
</tr>
<tr>
<td>Female Associate (44%)</td>
<td>16%</td>
<td>50%</td>
<td></td>
<td>22%</td>
<td>4%</td>
<td>36%</td>
</tr>
<tr>
<td>Male Full-time (25%)</td>
<td>6%</td>
<td>24%</td>
<td>25%</td>
<td>41%</td>
<td>4%</td>
<td>68%</td>
</tr>
<tr>
<td>Female Full-time (58%)</td>
<td>12%</td>
<td>43%</td>
<td>24%</td>
<td>16%</td>
<td>2%</td>
<td>43%</td>
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<tr>
<td>Male Part-time (4%)</td>
<td>12%</td>
<td>45%</td>
<td>24%</td>
<td>9%</td>
<td>16%</td>
<td>27%</td>
</tr>
<tr>
<td>Female Part-time (12%)</td>
<td>58%</td>
<td></td>
<td>27%</td>
<td>7%</td>
<td>3%</td>
<td>11%</td>
</tr>
<tr>
<td>Male Full-time Associate (8%)</td>
<td>5%</td>
<td>36%</td>
<td>34%</td>
<td>25%</td>
<td>1%</td>
<td>59%</td>
</tr>
<tr>
<td>Female Full-time Associate (37%)</td>
<td>8%</td>
<td>54%</td>
<td>24%</td>
<td>13%</td>
<td>1%</td>
<td>37%</td>
</tr>
<tr>
<td>Male Parent of Child 18 or Under (9%)</td>
<td>9%</td>
<td>21%</td>
<td>22%</td>
<td>42%</td>
<td>6%</td>
<td>69%</td>
</tr>
<tr>
<td>Female Parent of Child 18 or Under (24%)</td>
<td>21%</td>
<td>38%</td>
<td>21%</td>
<td>18%</td>
<td>3%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Half of male owners report making over $160,000 per year. Among female owners, 29% earn more than $160,000 per year.
Associate Pay Type Among DVMs

The proportion of DVMs receiving only a flat salary has been decreasing, while DVMs receiving a combination of pay types has been increasing.

Among non-practice owners only, n=1,064

Q35. Which of the following best describes how you are paid?

- Flat salary only (including hourly or daily wage)
- Production based pay
- Combination of base salary and production
- Other

![Bar Chart]

- 2013: 49%
- 2016: 44%
- 2019: 40%
- 2013: 10%
- 2016: 9%
- 2019: 10%
- 2013: 36%
- 2016: 44%
- 2019: 49%
- 2013: 5%
- 2016: 3%
- 2019: 1%
## Benefits Among DVMs – Associates

Associates report a range of benefits, and almost 8-in-10 (78%) receive continuing education registration fees.

Among non-practice owners only, n=1,064

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continuing education registration fees</td>
<td>78%</td>
</tr>
<tr>
<td>Vacation</td>
<td>70%</td>
</tr>
<tr>
<td>Health insurance</td>
<td>68%</td>
</tr>
<tr>
<td>Association membership dues</td>
<td>60%</td>
</tr>
<tr>
<td>401 (k)</td>
<td>59%</td>
</tr>
<tr>
<td>Paid time off for continuing education</td>
<td>56%</td>
</tr>
<tr>
<td>Dental insurance</td>
<td>51%</td>
</tr>
<tr>
<td>Vision insurance</td>
<td>44%</td>
</tr>
<tr>
<td>Disability insurance</td>
<td>34%</td>
</tr>
<tr>
<td>Life insurance</td>
<td>30%</td>
</tr>
<tr>
<td>Other retirement plan</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
<tr>
<td>None of the above</td>
<td>11%</td>
</tr>
</tbody>
</table>

Q36. What employee benefits do you receive? Select all that apply. (MULTIPLE RESPONSES ACCEPTED)
Among practice owners only, n=424

Q50. What additional forms of compensation and benefits do you receive through your practice? Select all that apply. (MULTIPLE RESPONSES ACCEPTED)
Salary Among RVTs

Pay has remained fairly consistent among RVTs, with small increases in higher salary brackets.

Q32. What is your current pre-tax annual salary, including bonuses but not including benefits?

- 10% $0-$20k
- 44% $21k-$40k
- 38% $41k-$60k
- 36% $61k-$80k
- 7% $80k+

2016

2019
Full-time RVTs are more likely to make over $40,000 per year, while most part-time RVTs make less than $40,000.

Q32. What is your current pre-tax annual salary, including bonuses but not including benefits?
Salary Among RVTs

A higher proportion of RVTs in the Bay Area and public/non-profit practices earn over $40,000 a year.

% with salary $40k+

<table>
<thead>
<tr>
<th>Category</th>
<th>% with salary $40k+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>52%</td>
</tr>
<tr>
<td>Age under 30 (18%)</td>
<td>29%</td>
</tr>
<tr>
<td>Age 30-39 (39%)</td>
<td>55%</td>
</tr>
<tr>
<td>Age 40-49 (20%)</td>
<td>55%</td>
</tr>
<tr>
<td>Age 50+ (22%)</td>
<td>64%</td>
</tr>
<tr>
<td>LA (15%)</td>
<td>52%</td>
</tr>
<tr>
<td>LA Area (19%)</td>
<td>51%</td>
</tr>
<tr>
<td>Bay Area (26%)</td>
<td>66%</td>
</tr>
<tr>
<td>San Diego (11%)</td>
<td>51%</td>
</tr>
<tr>
<td>Central Coast (5%)</td>
<td>43%</td>
</tr>
<tr>
<td>Central Valley (6%)</td>
<td>42%</td>
</tr>
<tr>
<td>Sacramento &amp; North (18%)</td>
<td>42%</td>
</tr>
<tr>
<td>Male (7%)</td>
<td>50%</td>
</tr>
<tr>
<td>Female (92%)</td>
<td>69%</td>
</tr>
<tr>
<td>Single owner practice (37%)</td>
<td>43%</td>
</tr>
<tr>
<td>Multiple owner practice (17%)</td>
<td>51%</td>
</tr>
<tr>
<td>Corporate owned practice (31%)</td>
<td>49%</td>
</tr>
<tr>
<td>Public/Non-profit (11%)</td>
<td>78%</td>
</tr>
</tbody>
</table>
Benefits Among RVTs

A large majority of RVT respondents receive vacation, health insurance, and continuing education registration fees.

Q33. What employee benefits do you receive? Select all that apply. (MULTIPLE RESPONSES ACCEPTED)

- Vacation (79%)
- Health insurance (73%)
- Continuing education registration fees (71%)
- Uniform allowance (60%)
- Dental insurance (59%)
- License Fees (58%)
- 401 (k) (56%)
- Vision insurance (52%)
- Life insurance (35%)
- Paid time off for continuing education (32%)
- Disability insurance (30%)
- Association membership dues (26%)
- Other retirement plan (14%)
- Other (7%)
- None of the above (4%)
Key Findings

- Two-thirds of DVMs under age 40 say they are burdened by student loans.
- There is less of a perceived burden among RVTs, with less than a third of RVTs feeling burdened by student loan debt.
- The burden of student loans decreases with age for both DVMs and RVTs.
- A majority of practicing DVMs and RVTs have no remaining student loan debt today.
The perceived burden of student loans among DVMs is similar to what was reported in 2016.

Student loan payments are a major burden for me

<table>
<thead>
<tr>
<th>Year</th>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Total Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>28%</td>
<td>11%</td>
<td>39%</td>
</tr>
<tr>
<td>2016</td>
<td>27%</td>
<td>13%</td>
<td>41%</td>
</tr>
<tr>
<td>2013</td>
<td>24%</td>
<td>11%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Q51. Please indicate whether you agree or disagree with each of the following statements...Student loan payments are a major burden for me.
A majority of DVMs under age 40 are burdened by student loan payments.

Student loan payments are a major burden for me

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Total Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>28%</td>
<td>11%</td>
<td>39%</td>
</tr>
<tr>
<td>18-29 (7%)</td>
<td>52%</td>
<td>15%</td>
<td>67%</td>
</tr>
<tr>
<td>30-39 (30%)</td>
<td>52%</td>
<td>14%</td>
<td>66%</td>
</tr>
<tr>
<td>40-49 (24%)</td>
<td>27%</td>
<td>16%</td>
<td>44%</td>
</tr>
<tr>
<td>50-64 (27%)</td>
<td>6%</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>65+ (10%)</td>
<td>3%</td>
<td>3%</td>
<td>6%</td>
</tr>
</tbody>
</table>
What was your total educational debt (including debt from undergraduate school) upon completing veterinary school?

- None: 19%, 18%, 20%
- $1-$29,999: 24%, 19%, 14%
- $30,000-$79,999: 22%, 19%, 18%
- $80,000-$149,999: 17%, 18%, 16%
- $150,000-$249,999: 13%, 16%, 17%
- $250,000+: 5%, 10%, 14%

The percentage of DVMs reporting initial student debt greater than $150,000 has been increasing since 2013.
What is your total remaining balance of educational debt (including debt from undergraduate school) today?

- **None**: 58% (2019) vs 44% (2016) vs 56% (2013)
- **$1-$29,999**: 7% (2019) vs 5% (2016) vs 5% (2013)
- **$30,000-$79,999**: 11% (2019) vs 13% (2016) vs 10% (2013)
- **$80,000-$149,999**: 11% (2019) vs 13% (2016) vs 9% (2013)
- **$150,000-$249,999**: 9% (2019) vs 13% (2016) vs 10% (2013)
- **$250,000 or more**: 4% (2019) vs 11% (2016) vs 11% (2013)
Student Loan Burden Among RVTs

Less than a third (29%) of RVT respondents feel burdened by student loan payments.

Student loan payments are a major burden for me

<table>
<thead>
<tr>
<th>Year</th>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Total Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>20%</td>
<td>9%</td>
<td>29%</td>
</tr>
<tr>
<td>2016</td>
<td>20%</td>
<td>12%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Q39. Please indicate whether you agree or disagree with each of the following statements...Student loan payments are a major burden for me
Student Loan Burden by Age Among RVTs

Student loan burden decreases with age among RVT respondents.

Student loan payments are a major burden for me

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Total Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>20%</td>
<td>9%</td>
<td>29%</td>
</tr>
<tr>
<td>18-29</td>
<td>33%</td>
<td>15%</td>
<td>48%</td>
</tr>
<tr>
<td>30-39</td>
<td>23%</td>
<td>11%</td>
<td>34%</td>
</tr>
<tr>
<td>40-49</td>
<td>17%</td>
<td>5%</td>
<td>22%</td>
</tr>
<tr>
<td>50+</td>
<td>7%</td>
<td>5%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Q39. Please indicate whether you agree or disagree with each of the following statements...Student loan payments are a major burden for me
Student Debt Among RVTs

Total debt upon completion of training has remained fairly constant, and a plurality of RVTs complete veterinary technician school with no debt.

What was your total educational debt (including debt from undergraduate school) upon completing veterinary technician school?

- None: 38% (2016), 41% (2019)
- $1-$19,999: 38% (2016), 30% (2019)
- $20,000+: 24% (2016), 29% (2019)

Q34. What was your total educational debt (including debt from undergraduate school) upon completing veterinary technician school?
Q35. What is your total remaining balance of educational debt (including debt from undergraduate school) today?

Over two-thirds of RVTs currently have no educational debt in 2019, similar to 2016.
Industry Outlook
Key Findings

- Perceptions about the future of the veterinary profession are mixed among DVMs and RVTs, but trends in profitability and hiring are strong.
- Over half of all DVM owners said their practice’s profitability has increased in the past two years, an increase since 2013 and 2016.
- A majority of DVMs and RVTs report hiring in the last 12 months, as well as planning to hire in the next year.
- Importance of internship and residency training in new hires is increasing, though it is not too important overall.
Outlook Attitudes Among DVMs

Most DVMs are confident in their ability to make a good living as a veterinarian. Respondents are split when it comes to the future of the veterinary profession.

- I am confident I will be able to make a good living in the veterinary profession: Agree 71%, (Don't Know) 3%, Disagree 26%
- I am optimistic about the future of the veterinary profession: Agree 51%, (Don't Know) 2%, Disagree 46%
- I would recommend a veterinary career to a friend or family member: Agree 42%, (Don't Know) 3%, Disagree 55%
- The growth of corporate veterinary practices is good for the veterinary industry: Agree 18%, (Don't Know) 11%, Disagree 70%
Outlook Attitudes Among RVTs

Just over half (54%) of RVT respondents are optimistic about the future of the veterinary profession. Only 29% are confident they will be able to make a good living in the industry.

- I am optimistic about the future of the veterinary profession: 54% Agree, 4% Don't Know, 42% Disagree
- I would recommend a veterinary career to a friend or family member: 41% Agree, 4% Don't Know, 55% Disagree
- I am confident I will be able to make a good living in the veterinary profession: 29% Agree, 1% Don't Know, 70% Disagree
- The growth of corporate veterinary practices is good for the veterinary industry: 23% Agree, 13% Don't Know, 64% Disagree

Q39-47. Please indicate whether you agree or disagree with each of the following statements.
Over a quarter (26%) of practice owners reported revenue of over $2 million for 2018, an increase from 22% in 2013 and 2016.

Among practice owners only, n=424
A majority of practice owners say their practice’s profitability has increased in the past two years.

Among practice owners only, n=424

Q48. How has your practice’s profitability changed over the past 2 years?

- 2019: 57%
- 2016: 50%
- 2013: 36%
The amount of competition among veterinary practices in my area has increased in the past 2 years.

**Over half (55%) of DVMs agree that competition among veterinary practices has increased in the past two years in their area.**

<table>
<thead>
<tr>
<th>Year</th>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>(Don’t Know)</th>
<th>Somewhat Disagree</th>
<th>Strongly Disagree</th>
<th>Total Agree</th>
<th>Total Disagree</th>
<th>Net Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>20%</td>
<td>35%</td>
<td>22%</td>
<td>16%</td>
<td>6%</td>
<td>55%</td>
<td>23%</td>
<td>+33</td>
</tr>
<tr>
<td>2016</td>
<td>19%</td>
<td>31%</td>
<td>32%</td>
<td>13%</td>
<td>5%</td>
<td>50%</td>
<td>18%</td>
<td>+32</td>
</tr>
<tr>
<td>2013</td>
<td>26%</td>
<td>34%</td>
<td>19%</td>
<td>14%</td>
<td>7%</td>
<td>60%</td>
<td>21%</td>
<td>+39</td>
</tr>
</tbody>
</table>

Q53. Please indicate whether you agree or disagree with each of the following statements... The amount of competition among veterinary practices in my area has increased in the past 2 years.
Q41. Has your practice hired a veterinarian within the past 12 months?
Q42. Is your practice likely to hire a veterinarian in the next 12 months?

A plurality of DVMs work for practices that have both hired a veterinarian in the past year and plan to hire a veterinarian in the next year.
Has your practice hired a registered veterinary technician or veterinary assistant within the past 12 months?  

- 2016: 74%  
- 2019: 77%

Is your practice likely to hire a registered veterinary technician or veterinary assistant in the next 12 months?  

- 2016: 66%  
- 2019: 69%

Over three-quarters (77%) of RVTs report that their practice has hired an RVT or veterinary assistant in the past year.
Almost three-quarters (73%) of DVMs agree that their practice has had difficulty finding qualified candidates, an increase from 46% in 2013.

In recent hiring decisions, our practice has had difficulty finding an adequate number of qualified candidates interested in our open positions.

<table>
<thead>
<tr>
<th>Year</th>
<th>Agree</th>
<th>(Don't Know)</th>
<th>Disagree</th>
<th>Net Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>73%</td>
<td>19%</td>
<td>9%</td>
<td>+64</td>
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<tr>
<td>2016</td>
<td>71%</td>
<td>10%</td>
<td>19%</td>
<td>+51</td>
</tr>
<tr>
<td>2013</td>
<td>46%</td>
<td>17%</td>
<td>37%</td>
<td>+9</td>
</tr>
</tbody>
</table>
The majority of respondents did not place an emphasis on internship training. Residency training was even less important.

### Importance Factors When Hiring

**Internship Training**
- 2019: 14% (10 - Extremely important), 12% (8-9), 35% (4-7/(Don't Know)), 12% (2-3), 27% (1 - Not at all important) [Mean: 4.88]
- 2016: 12% (10 - Extremely important), 10% (8-9), 35% (4-7/(Don't Know)), 16% (2-3), 26% (1 - Not at all important) [Mean: 4.73]
- 2013: 6% (10 - Extremely important), 14% (8-9), 43% (4-7/(Don't Know)), 20% (2-3), 17% (1 - Not at all important) [Mean: 4.75]

**Residency Training**
- 2019: 10% (10 - Extremely important), 4% (8-9), 25% (4-7/(Don't Know)), 12% (2-3), 48% (1 - Not at all important) [Mean: 3.31]
- 2016: 9% (10 - Extremely important), 3% (8-9), 22% (4-7/(Don't Know)), 14% (2-3), 52% (1 - Not at all important) [Mean: 3.17]
- 2013: 4% (10 - Extremely important), 4% (8-9), 36% (4-7/(Don't Know)), 21% (2-3), 36% (1 - Not at all important) [Mean: 3.41]

Q43-44. Thinking about hiring, how much importance do you place on applicants having the following skills or characteristics?
Job Seeking Behavior

Less than a quarter (23%) of RVTs and only 12% of DVMs say they have been actively seeking a new position.

Q21. Have you been actively seeking a new position?

- **DVM**: 12%
  - Yes

- **RVT**: 23%
  - Yes
Ownership
Key Findings

DVM

- More DVMs reported working under a single owner than any other type of ownership, followed by corporate owners and multiple owners.

- A majority of DVMs do not think that the growth of corporate veterinary practices is good for the industry.

- DVMs currently working in corporate practices are more likely to think that they are good for the industry.

RVT

- Fewer RVTs said they work under a single owner, but it is still the most prevalent ownership type, with corporate ownership next.

- Most RVTs disagree that growing corporate practices are good for the industry.
Practice Ownership

A plurality of DVMs and RVTs surveyed reported currently working in a practice with a single owner.

Q11. Is the practice where you work owned by...

**DVMs**
- A single owner: 45%
- A corporate owner: 29%
- Multiple owners: 17%
- Public or non-profit: 7%
- Other: 1%

**RVTs**
- A single owner: 37%
- A corporate owner: 31%
- Multiple owners: 17%
- Public or non-profit: 11%
- Other: 5%
Corporate Ownership Attitudes Among DVMs

A majority of DVMs surveyed do not think that growing corporate practices are good for the veterinary industry.

The growth of corporate veterinary practices is good for the veterinary industry

<table>
<thead>
<tr>
<th>Overall</th>
<th>Agree</th>
<th>(Don't Know)</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18%</td>
<td>11%</td>
<td>70%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>A single owner</th>
<th>Agree</th>
<th>(Don't Know)</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>11%</td>
<td>8%</td>
<td>82%</td>
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<table>
<thead>
<tr>
<th>Multiple owners</th>
<th>Agree</th>
<th>(Don't Know)</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>15%</td>
<td>10%</td>
<td>75%</td>
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<table>
<thead>
<tr>
<th>A corporate owner</th>
<th>Agree</th>
<th>(Don't Know)</th>
<th>Disagree</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>34%</td>
<td>15%</td>
<td>51%</td>
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<tr>
<th>Public or non-profit</th>
<th>Agree</th>
<th>(Don't Know)</th>
<th>Disagree</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>14%</td>
<td>22%</td>
<td>65%</td>
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Q51-59. Please indicate whether you agree or disagree with each of the following statements.
RVTs surveyed have slightly more positive views towards the growth of corporate veterinary practices than DVMs, with RVTs in corporate owned practices having the most favorable views.

The growth of corporate veterinary practices is good for the veterinary industry

- **Overall**
  - Agree: 23%
  - Don't Know: 13%
  - Disagree: 64%

- **A single owner**
  - Agree: 14%
  - Don't Know: 10%
  - Disagree: 76%

- **Multiple owners**
  - Agree: 13%
  - Don't Know: 18%
  - Disagree: 69%

- **A corporate owner**
  - Agree: 41%
  - Don't Know: 11%
  - Disagree: 48%

- **Public or non-profit**
  - Agree: 25%
  - Don't Know: 14%
  - Disagree: 62%
Ownership Among DVMs in Private Practice

Just over half of surveyed DVMs in private practice have a single owner in their practice.

Among private practice DVMs only, n=1,308

Number of Practice Owners

- 53% (2016) and 53% (2019) for None
- 19% (2016) and 23% (2019) for 1
- 5% (2016) and 7% (2019) for 2
- 3% (2016) and 3% (2019) for 3
- 4% (2016) and 7% (2019) for 4
- 7% (2016) and 7% (2019) for 5+

Q45. How many of the owners in your practice are women?
Q46. How many of the owners in your practice are men?
Ownership Among DVMs in Private Practice

A growing number of DVMs report having 1 or more female practice owners.

Number of Female Practice Owners

n=984

Number of Male Practice Owners

n=1,021

Q45. How many of the owners in your practice are women?
Q46. How many of the owners in your practice are men?
Key Findings

- When asked what industry issues or concerns the CVMA should focus on, mental health concerns are the top issue for DVMs and the second biggest issue for RVTs.

- Corporate control and buying practices are top concerns for DVMs and only minor concerns for RVTs.

- A large majority of all respondents (89% of DVMs and 93% of RVTs) agree that the veterinary profession should do more to address stress and mental health issues.
DVMs mention mental health-related issues more than any other industry concern. Student loan debt and corporate control are also top-of-mind concerns.

Q61. What industry issues or concerns do you think the California Veterinary Medical Association should focus on? (MULTIPLE RESPONSES ACCEPTED)

*responses with less than 3% of responses omitted
Q49. What industry issues or concerns do you think the California Veterinary Medical Association should focus on? (MULTIPLE RESPONSES ACCEPTED)

Concerns with salaries and better compensation are the top mentions for RVTs. Mental health issues are second.
Over half of DVMs (51%) and RVTs (63%) strongly agree that the profession should do more to address stress and mental health issues.

The veterinary profession should do more to address stress and mental health issues

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<thead>
<tr>
<th></th>
<th>DVMs</th>
<th>RVTs</th>
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</thead>
<tbody>
<tr>
<td>Agree</td>
<td>89%</td>
<td>93%</td>
</tr>
<tr>
<td>Somewhat</td>
<td>37%</td>
<td>30%</td>
</tr>
<tr>
<td>Strongly</td>
<td>51%</td>
<td>63%</td>
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When asked about top issues for public education, many DVMs said costs and preventative care would be the most important.
Preventative care/routine checkups/vaccines are important 16%
Cost of care - is expensive/costs of providing quality care 12%
Spay and neuter/help reduce overpopulation 6%
Vets/techs are trained/educated/knowledgeable 5%
Dental care/health/prophylaxis/cleaning 5%
Vets are motivated by love for animals/not money 5%
Importance of diet/nutrition 4%
Pet insurance/importance of pet insurance 4%
Mental health of Vets/stress/compassion fatigue/high suicide rate 3%
Parasite/flea and tick/disease control 3%
Listen to veterinarian's advice/Pet store owners/groomers not qualified 2%
Low wages/we deserve better pay 2%
Animal safety/welfare 2%
Responsibility/privilege of pet ownership 2%
Research before owning/choose the right breed 2%
Deserving of courtesy/respect/kindness/empathy 2%

Q48. If you could educate the public or animal owners about one topic relating to veterinary care, what would it be?