

The veterinary activities industry primarily includes Veterinary Surgeons (VSs) and Veterinary Nurses (VNs). In addition there are a relatively small number of paraprofessionals, such as equine dental technicians and those undertaking equine barefoot care.

Overview

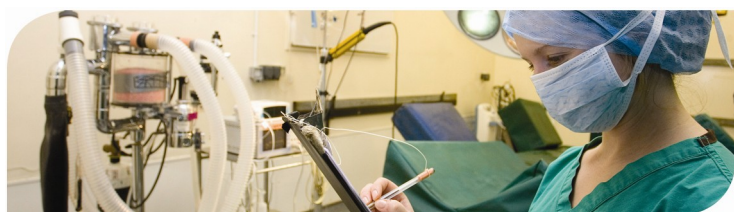
Industries are often classified (or defined) by Standard Industrial Classification (SIC) codes. Data specific to veterinary activities has been sourced from the Office of National Statistics based on the SIC code 7500. This code includes veterinary practices/surgeries, veterinary laboratories, diagnostic activities relating to animals and the activities of animal hospitals. These businesses employ veterinary surgeons along with veterinary nurses, nursing assistants and other occupations.

It should be noted that animal hospitals, for example, may be run by a veterinary surgeon or an organisation like the RSPCA, Blue Cross or PDSA. This means there is an overlap between data presented here and in our animal care factsheet because the data for the SIC code 7500 cannot be separated in a more detailed way. Given that around 90% of businesses in veterinary activities are veterinary practices, the degree of overlap will be small.

Business figures:

- Official statistics estimate that there are 4,760 businesses that fall within the veterinary activities SIC code in the UK¹
- The RCVS register indicates there are actually 4,986 practices in the UK².

	Veterinary activities UK	All sectors UK
0-4 employees	41%	68%
5-9 employees	28%	15%
10-19 employees	20%	8%
20-49 employees	9%	6%
50-99 employees	1%	2%
100+ employees	0%	1%



Businesses by size¹:

Businesses that fall within the veterinary activities SIC code have a slightly larger than average business size; 69% have fewer than ten members of staff, and 29% have between 10 and 49 employees compared with 83% and 14% across all businesses in the UK¹.

Employment figures:

- Official statistics estimate that there are 47,500 people employed within veterinary activities in the UK³
- The RCVS register indicates there are actually 24,223 veterinary surgeons and 9,378 veterinary nurses in the UK²
- In addition there are approximately 200 equine dental technicians and 100 equine barefoot carers in the UK⁴⁻⁹.

Size and scope

Nation/Region	Businesses ¹		Employment ³	
	Count	%	Count	%
UK ^{10,11}	4,760	100%	47,500	100%
Northern Ireland	140	3%	500	1%
Scotland	420	9%	3,500	7%
Wales	260	5%	2,700	6%
England	3,940	83%	40,850	86%
East of England	500	11%	2,200	5%
East Midlands	300	6%	3,500	8%
London	380	8%	3,050	6%
North East	180	4%	1,000	2%
North West	440	9%	4,950	10%
South East	820	17%	10,950	23%
South West	600	13%	6,800	14%
West Midlands	380	8%	2,900	6%
Yorkshire and the Humber	340	7%	5,400	11%

Workforce demographics

Gender ³			
Male	20%	Female	80%
Age band ³			
16-24	15%	45-54	17%
25-34	27%	55-64	16%
35-44	23%	65+	3%
Employment ³			
Full-time	62%	Part-time	38%
Ethnicity ³			
White	98%	Non-white	2%

A recent survey undertaken by the RCVS has shown that the gender split of VS respondents was equal, however, when comparing the gender split to previous years there has become an increasing feminisation in the VS profession. Some 62% of VSs work full-time, their average age is 45.5, 2% are from an ethnic minority group and 8% have a disability or medical condition.

In contrast, 98% of VN respondents were female, three quarters work full-time, their average age is 31, 1% are from an ethnic minority group and 4% have a disability or medical condition¹².

Occupations

Managers and senior officials	5%
Professional occupations	31%
Associate professional and technical	4%
Personal service occupations	40%
Administrative, clerical and secretarial occupations	19%

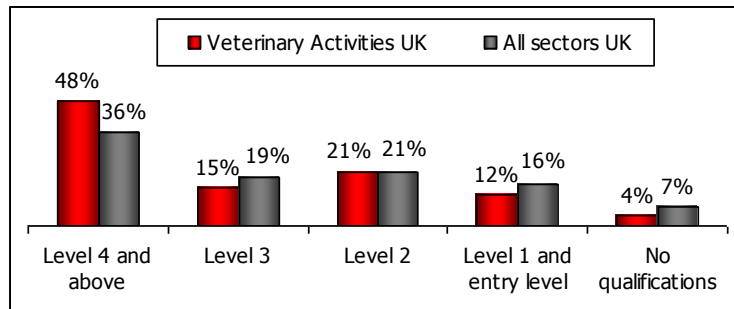
A minority of people employed within the industry fall within the sales and customer service occupations, transport and machine operative occupations and elementary occupations.

VS and VN salaries differ depending on whether they work within or outside of the profession:^{12, 13}

VSs working outside the profession	£51,000
VSs working within the profession	£48,951
VNs working outside clinical veterinary practice	£23,260
VNs working within clinical veterinary practice	£16,378

Qualifications

The veterinary activities workforce is highly skilled. Official statistics show 48% of the workforce are qualified to Level 4 and above (compared to 36% across all sectors in the UK) and just 4% have no qualifications (compared to 7% across all sectors in the UK).



The RCVS survey has identified that the highest educational level generally reached before embarking on a VN qualification is A Level or equivalent (31.5%), GCSE / O level or equivalent (29.5%). Just over one fifth (21.5%) hold a Diploma or Level 2 NVQ/SVQ (non-VN). 78.5% of VS respondents and 99% of VN respondents qualified in the UK¹².

Learning supply

- Around 650 Apprenticeship frameworks were undertaken in 2007-08 in the UK¹⁴
- An estimated 3,700 learners enrolled on qualifications or courses delivered by FE colleges/work-based learning in veterinary activities in the UK in 2008-09¹⁵; popular qualifications include the Certificate in Veterinary Nursing Theory and the NVQ in Veterinary Nursing
- The industry had an estimated 8,600 learners undertaking related qualifications at Higher Education Institutions in the UK in 2008-09¹⁶.

Employment projections 2010-20⁸

- Between 2010 to 2020 the veterinary activities industry will need a minimum of 17,000 more people¹⁷
- The largest need for people is expected to be for managerial occupations (3,000), skilled trades occupations (3,000), sales and customer service occupations (3,000) and elementary occupations (3,000)
- Over the period 2010–20, the following amount of people will be needed:
 - 1,000 at qualification Level 5 (postgraduate)
 - 3,000 people at Level 4 (graduate)
 - 4,000 people at Level 3 (A Level)
 - 4,000 people at Level 2 (GCSE A-C)
 - 3,000 people at Level 1 (GCSE D-G)
- Forecasts suggest that 2,000 people without qualifications will be needed.

Incidence of skills shortage vacancies¹⁸

Of the employers in the veterinary activities industry, 11% had a vacancy at the time they were surveyed. This is compared with 7% across the whole sector in England.

	Veterinary activities industry	Lantra sector
% with a vacancy	11%	7%
% with a hard-to-fill vacancy (HtFV)	5%	3%
% with a skills shortage vacancy (SSV)	4%	2%
HtFVs as a % of vacancies	40%	43%
SSVs as a % of vacancies	34%	32%

Incidence of skill gaps¹⁸

Almost one quarter of veterinary activities businesses (24%) reported a skills gap (i.e. the extent to which employers perceive current employees to be less than fully proficient for their current job) compared to 15% across the whole sector in England.

	Veterinary activities industry	Lantra sector
% of establishments reporting skill gaps	24%	15%
Number of employees with a skill gap	5,162	26,500
Skill gaps as % of employment	7%	6%

A survey conducted by RCVS found that in general, VSs and VNs think that newly-qualified VSs need more support now than in the past and show most disagreement with the views that newly-qualified VSs have the necessary skills. In contrast, both VNs and VSs are in agreement that newly qualified VNs do have the necessary skills¹².



Economic conditions

- Impact of the recession/pet owners feeling the pinch from the credit crunch (e.g. costly routine veterinary expenses, licences, pet insurance)
- Additional business costs e.g. fuel/energy and equipment
- Competition from other retailers including online, supermarkets and pet stores (e.g. diets, linked sales and medication)
- Competition from neighbouring practices and development of specialised practices
- Out of hours (OOH) services being shared between premises challenges client loyalty and return custom.

Impact on skills

- Business advice, guidance and support
- Business management skills
- Business planning
- Sales and marketing
- ICT and commerce
- Customer care
- Website design
- Suitably qualified person for dispensing of medication.

Technology change and knowledge transfer

- Advanced veterinary technology e.g. CT/MRI/Endoscopy/ genetic testing
- New vaccines
- Increasing number of equine veterinary paraprofessional disciplines, each of which is bringing new approaches and understanding to animal care and welfare
- Inclusion in training and development programmes.

Impact on skills

- Research into new methods and processes
- Technology transfer
- Business development
- New technologies
- Higher level technical skills for research and development of new vaccines and techniques
- Need to revise training provision.

Litigation/product insurance

- Legislation and consumer rights.

Impact on skills

- Knowledge and understanding of legal obligations and consumer rights
- Risk assessments
- Customer care skills
- Communication skills
- Professional indemnity insurance.

Labour supply and competition

- Attracting new entrants of all ages
- Succession planning by industry
- Providing opportunities for career progression and development
- Influencing migration policy and operation of control mechanisms
- Increased competition between qualified Equine Dental Technicians (EDTs)
- Increase and threat of non-British EDTs working in the UK with no insurance or training
- Recruitment and retention of qualified VNs
- Changes to veterinary nurse training scheme: uncertainty of the new role of assessors employed in practice under the new scheme, and staffing levels due to uncertainty over college attendance for the new training.

Impact on skills

- Effective marketing of careers
- Better careers advice and guidance for all
- Proper recognition of competence for all
- Integrated frameworks to support lifelong learning and Continued Professional Development (CPD)
- Entrepreneurial education
- Targeted CPD units to allow career progression for RVNs
- Continued work to promote the role of the RVN
- Training on the role of a clinical coach (RCVS role).

Animal health and welfare legislation

- Higher standards now required of all people working with animals
- Legislation relating to animal transport
- Lack of understanding of the Animal Welfare Act 2006 (and Animal Health and Welfare Act Scotland) e.g. compliance authorities unaware of Act, therefore incidents of animal cruelty remain undetected
- Lack of legislation for equine dentistry
- Potential changes to the Veterinary Surgeons Act and the opening of procedures/roles currently protected as acts of veterinary surgery to a wider veterinary team.

Impact on skills

- Development of integrated CPD across all practitioners
- Requirement for common European standards and competence checks
- Accessible 'upskilling' training courses for EU workers coming into the UK
- Skills relating to animal handling and care, disease control and disease identification and biosecurity

- Influencing skills (relating to animal welfare and enforcement) for those in advisory positions
- Potential for qualification development related to the role of RVNs and others as paraprofessionals.

Client relationships

- Understanding and responding to changing customer demand - social attitudes in different areas
- Customers expect the same for their pets as they do for their children
- Levels of pet insurance taken out by clients
- Criteria set by insurance companies for exclusions as well as limits or certain key services, e.g. Direct Line limits price/day for hospitalisation.

Impact on skills

- Customer care
- Use of social networking/communication tools
- Marketing.

Sources and information

- 1 Inter-Departmental Business Register (IDBR) 2010
- 2 RCVS Register 2010
- 3 Labour Force Survey (LFS) 2009-10
- 4 British Association of Equine Dental Technicians (BAEDT)
- 5 World Wide Association of Equine Dentistry (WWAED)
- 6 Equine Podiatry Association UK (EPAUK)
- 7 UK Natural Hoof Care Practitioners (UKNHCP)
- 8 Institute of Applied Equine Podiatry (IAEP)
- 9 Association for the Advancement of Natural Horse Care Practices (AANHCP)
- 10 Figures and percentages may not add up due to rounding
- 11 Percentages are calculated from unrounded figures
- 12 The 2010 RCVS Survey of the UK Veterinary and Veterinary Nursing Professions
- 13 The definition of 'working outside the profession' is working in employment in which membership of the RCVS, or an equivalent overseas professional body, is not mandatory or desirable, and which does not require a veterinary qualification or the use of veterinary skills
- 14 Data Service (England), DCELLS (Wales), Skills Development Scotland/Scottish Funding Council (SDS/SFC), DARD/DEL (Northern Ireland)
- 15 Data Service (England), DCELLS (Wales), Skills Development Scotland/Scottish Funding Council (SDS/SFC), DARD/DEL (Northern Ireland)
- 16 Higher Education Statistics Agency (HESA)
- 17 Lantra Model for Employment Forecasting (LMEF) 2010. Figures represent estimates of minimum job openings to satisfy replacement and expansionary demand. This may be higher or lower depending on future conditions
- 18 National Employer Skills Survey 2009.

Lantra website

For further information regarding this factsheet, Lantra and the sector, please visit: www.lantra.co.uk

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