

Are we in a veterinary workforce crisis?

Understanding our reality can guide us to a solution

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While the delta and lambda variants of SARS-CoV-2 continue to challenge us, we also see hints of post-pandemic normalcy with the return of some in-person meetings, reopened retail establishments, and get-togethers with extended family and friends. Despite these positive signs of recovery, many of us in the veterinary profession are still reeling, professionally and personally, from the pandemic's effects on our practices, patients, and clients. Stress continues to run high, and our teams are feeling overworked and overwhelmed.

Our practices aren't running in quite the same way as before the pandemic. New workflows, operating procedures, and safety protocols have been implemented. Many hospitals are operating with fewer team members and dealing with higher turnover. Emergency clinics appear to be having an especially difficult time remaining fully staffed as they are inundated with a continuous stream of patients—both urgent and nonurgent cases. Pet owners, too, are feeling the crunch. They're having to wait longer to get appointments and to be seen for emergencies.

To determine where we go from here, it's crucial to let the data inform us. Where is this busyness coming from? Is it an aftereffect of the pet adoption boom suggested to have occurred during the pandemic? Are our teams truly seeing more patients than ever before? Or are other things happening that make it feel this way?

WAS THERE REALLY A 'PANDEMIC PET' ADOPTION BOOM?

One prevailing view is that veterinary practices are particularly busy because they're managing an influx of new patients stemming from the pet adoptions that “skyrocketed” during the pandemic. The belief that pet adoptions soared in 2020 needs to be further explored.

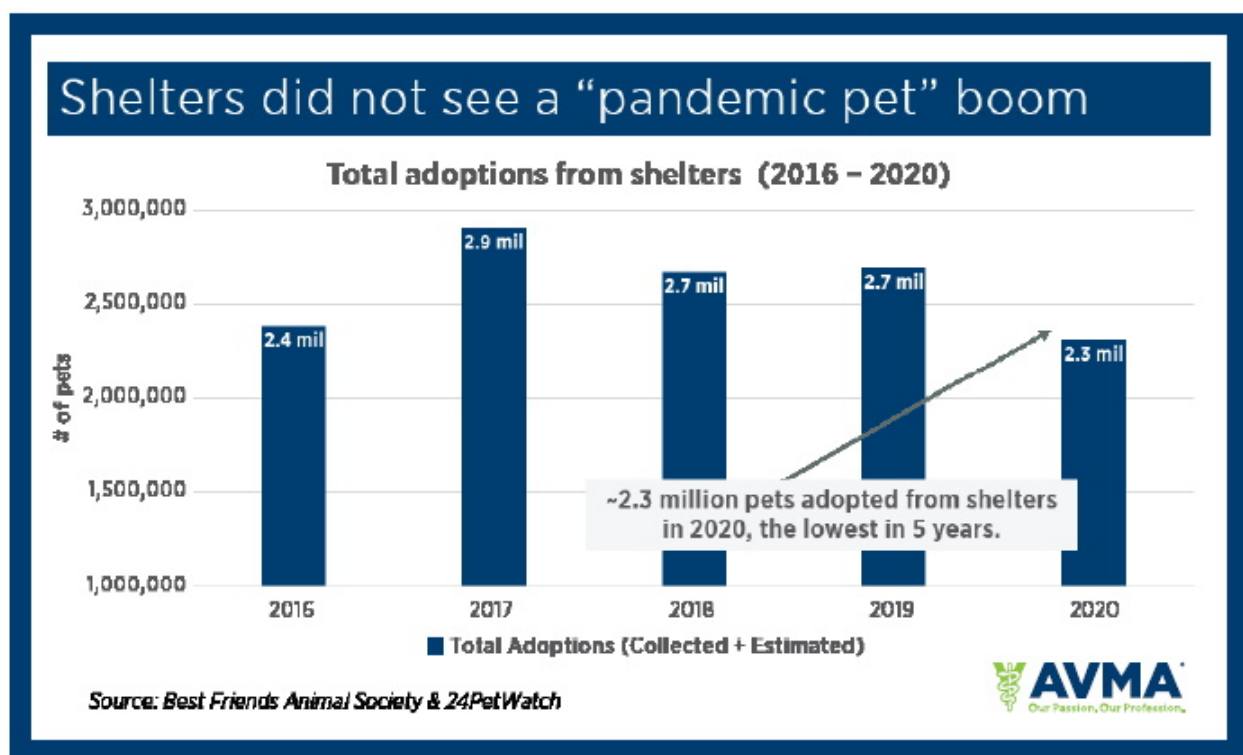
What the data show

While shelters aren't the only source of new pet adoptions, they're the primary source, according to the 2017-2018 AVMA Pet Ownership and Demographics Sourcebook.¹ Second is receiving a pet from a friend or relative, followed by a breeder (dogs) or taking in a stray (cats). With this in mind—and recognizing that data on pet acquisition from nonshelter sources are difficult to obtain and in some cases are nonexistent—it makes sense to consider shelter data as a harbinger for what may have happened to the pet population during the pandemic.

When we look at transactional data from animal shelters, pandemic pet adoptions may not have been as dramatic as the media portrayed. The number of pets adopted from shelters in 2020 was the lowest in five years, based on data from over 4,000 shelters across the country. According to 24PetWatch² and Best Friends Animal Society,³ there were an estimated 2.3 million adoptions (46% dogs and 54% cats) in 2020, compared with approximately 2.8 million (49.5% dogs and 50.5% cats) in 2019. That's nearly 450,000 fewer animals adopted in 2020 than in 2019.

The reason for this decrease is simply there was a smaller pool of animals available. Shelters saw 32% fewer dog intakes and 23% fewer cat intakes. Fewer people were relinquishing their pets, and animal control was less active in picking up strays. Finally, spay-neuter programs have been effective in keeping populations down.

It also took longer to adopt a pet during the pandemic. Shifting adoption visits to virtual appointments and later only allowing a limited number of physical visits meant that fewer potential pet adopters could be accommodated.



The result: The adoption rate—or percentage of available pets that were adopted—was up, but the actual number of pets adopted was down substantially.

According to early 2020 Packaged Facts data, from before COVID-19 restrictions, most dogs were acquired from a shelter or welfare organization (32% of respondents), followed closely by obtaining dogs from a family member or friend (31%) and then from a breeder (19%).⁴ In 2021, these numbers have shifted to 26%, 23%, and 23%, respectively. While new dog owners obtained more of their pets from breeders in 2021 than in prior years, given the time it takes to breed new litters, it is unlikely that breeders were able to increase the supply of new puppies

substantively during the peak demand period of March through July 2020. Importantly, this is national-level data, and local experiences may vary.

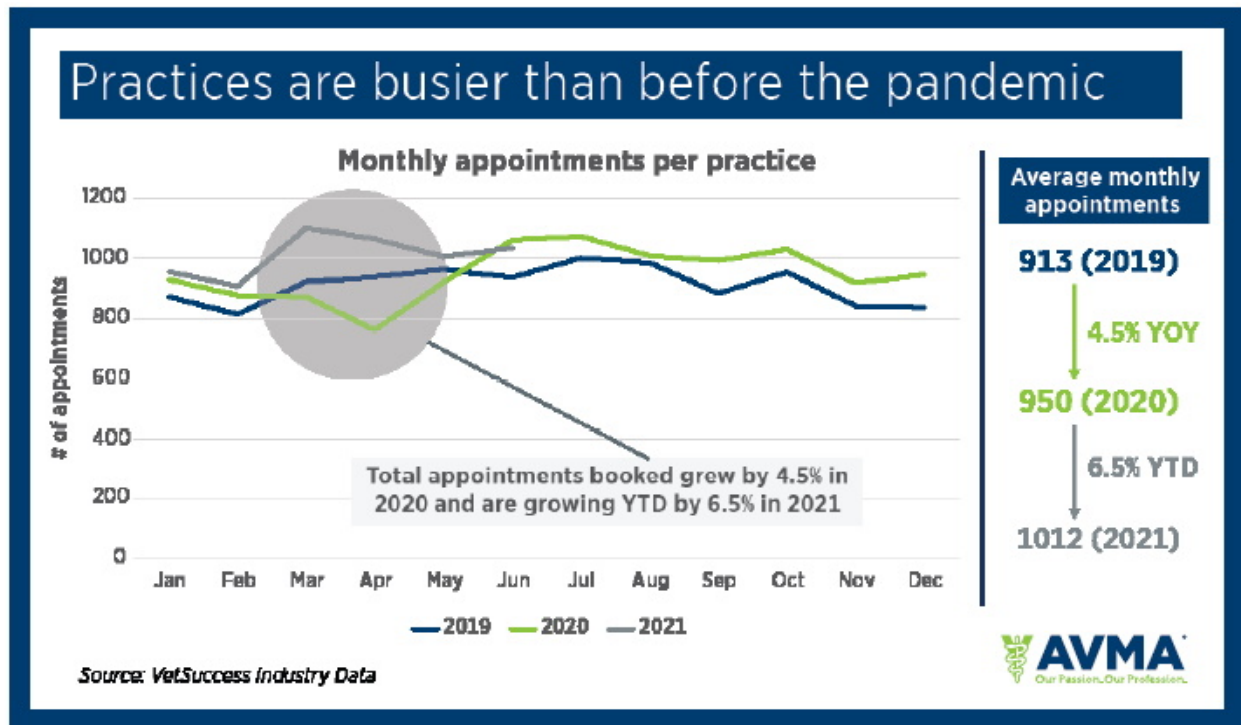
The data from Packaged Facts are also consistent with information presented during the Animalytix 2021 Mid-Year Market Update.⁵ A market research survey conducted by M/A/R/C Research indicated that 32% of pet owners welcomed a new pet during the pandemic. The top three sources of new pets were shelters or rescues (29%), family or friends (24%), and pet stores (22%). The experts at Animalytix also noted that pets obtained from family or friends are generally not new pets but are re-homed pets. Many (perhaps most) pets adopted from shelters are re-homed pets as well. All of this is consistent with the general idea that there was not an epic rise in the total population of dogs and cats in 2020 in the U.S.

VETERINARY DEMAND: IS IT SKYROCKETING?

Various media outlets have reported a substantial increase in demand for veterinary services, hypothesizing that it is because of the suggested adoption boom of pandemic pets. This has led to concerns voiced about a shortage of veterinary personnel and a workforce crisis. While it's true that demand for veterinary services has increased since the pandemic, transactional data, once again, show a more balanced picture.

What the data show

According to national data on 4,000-plus veterinary practices from analytics company VetSuccess,⁶ the average number of appointments booked increased 4.5% from 2019 to 2020. Appointments increased 6.5% between January and June 2021, compared with the same period in 2020.



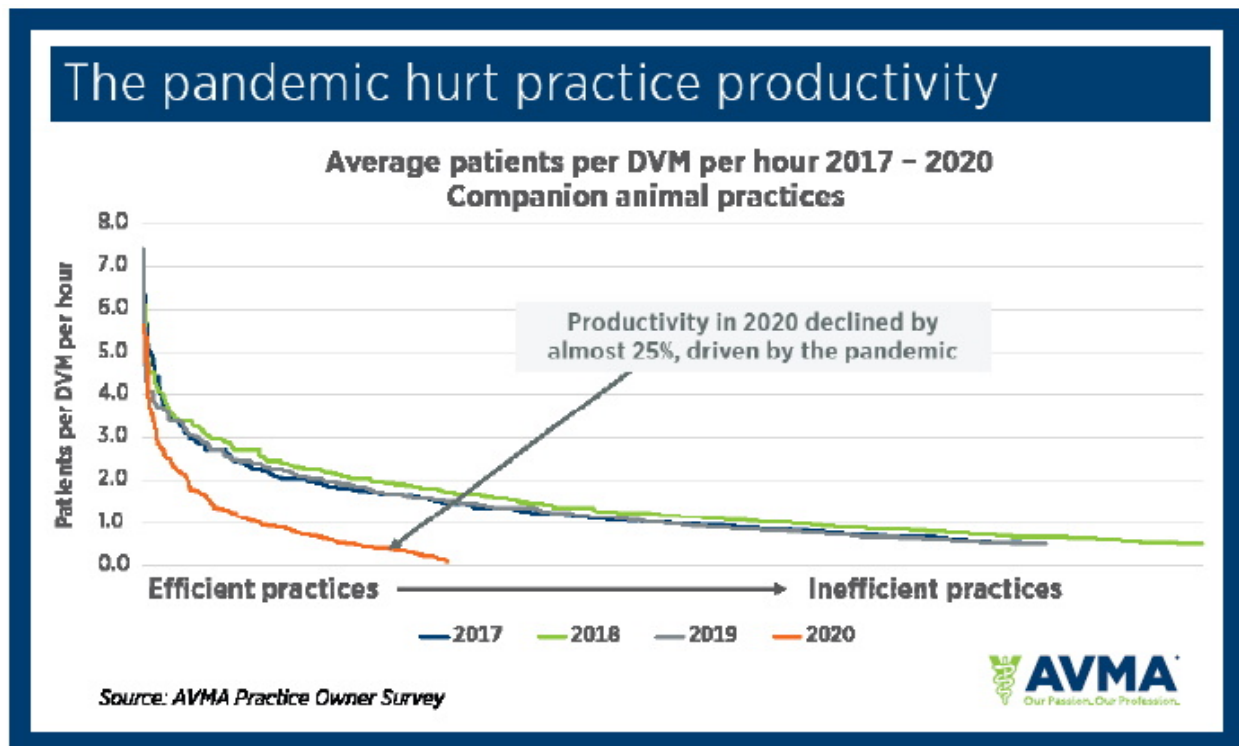
These numbers demonstrate healthy and encouraging growth but aren't consistent with what is being reported in the media. Recognizing that emergency and urgent care clinics appear to have taken on substantial additional demands from clients and patients, the AVMA is conducting a deeper analysis of the data for this practice segment. However, looking at the summary data currently available, which includes emergency and urgent care clinics, it's difficult to conclude that an increase in visits—albeit strong—is the only reason for the stress the veterinary workforce is currently experiencing.

Data from VetSuccess also demonstrate that the majority of revenue growth is coming from existing clients, not new clients or new pets. Specifically, clients are spending more per veterinary visit in 2020 than in prior years, with three key factors behind this trend.⁷ The first is that the number of line items per visit has expanded, indicating that clients are asking for more veterinary products and services. The second is that clients are opting for higher-value products and services. And lastly, average prices have continued to increase as well. While new clients are certainly a factor—and there has been a notable increase in the volume of new patients compared with last year or even the year prior—the data clearly show that existing clients contribute the bulk of practice revenue growth. This is also consistent with data presented in the Animalytix 2021 Mid-Year Market Update, which showed that the impact of new pets on revenue growth has been declining over time since the summer of 2020.⁵

PRACTICE PRODUCTIVITY AND STAFF ATTRITION

The uptick in veterinary appointments described above is just one factor contributing to veterinary teams' increased busyness. Taken alone, it doesn't seem to be enough to explain why practices are facing such difficulty serving clients and meeting demand for services. While more

business does create more busyness, there are other factors related to the pandemic and the economy that appear to be contributing to our current reality.



What the data show

According to data from the AVMA Census of Veterinarians and Veterinary Practice Owners, veterinarians saw fewer patients per hour and average productivity declined by almost 25% in 2020, compared with 2019.⁸ While there are many ways to define productivity, a commonly used metric is total output per hour of work. Within the context of veterinary care, the average number of patients per veterinarian per hour is a good indicator of productivity within the practice.

That means, if a typical veterinarian saw four patients per hour before COVID-19, that same veterinarian could only see three patients per hour during the pandemic. When we look at this decrease in productivity, combined with the increase in appointments discussed above, we can better understand the source and scope of our workforce challenges. They aren't just the result of an uptick in business. What the data suggest is that the apparent increased work effort experienced in our practices is also largely tied to productivity gaps.

Here's an illustration: Let's say a practice typically sees 100 patients a week. If the practice sees a 5% increase in business, it's now seeing 105 patients per week. However, concurrent with business demand, efficiency has dropped by 25%, so the practice can only effectively see about 78 patients a week. Healthy growth coupled with substantial declines in productivity can generate client backlogs.

A decrease in productivity can also mean that more resources are needed to effectively see the same number of patients per hour. For example, by extending the number of working hours by staff members or leveraging more staff members to meet demand for veterinary care by clients.

COVID-19 has created a challenging 18-plus months for our practices, and many are still wrestling with the tangible changes it triggered. During the pandemic's earliest months, veterinary practices operated as essential businesses, seeing only urgent cases. This created a substantial backlog in wellness visits. As restrictions loosened, patients started returning for routine examinations and preventive care. Meanwhile, clients were spending more time at home with their pets, which gave them the opportunity to spot health issues more readily and to think about veterinary care more generally. Many also had more disposable income—from stimulus payments and reduced spending in other areas—that they could now allocate to pet care.

All the while, practices quickly adapted with new COVID-19 safety protocols to ensure the continued provision of quality patient care. But these same changes also limited team efficiency and productivity. Transitioning to curbside care, splitting staff members into rotating teams, and sanitizing examination rooms and other surfaces throughout the clinic between visits are just a few of the changes that impacted how practices delivered veterinary services.

Many practices also have struggled with losses of staff members. Whether a team member became sick, had to quarantine, or needed to stay home for child care or other personal reasons, operating with a suboptimal number of employees only made a challenging situation worse.

Although data show that veterinary appointments are growing in 2021, it's important to remember that many practices are still playing catch-up with patients that haven't been seen in over a year, and teams still aren't working at peak productivity because of lingering effects of COVID-19.

It's well known that high turnover also hurts productivity and efficiency. Employee turnover and attrition remain high in veterinary medicine, especially when compared with other health care professions. The average turnover for veterinarians is twice as high as it is for physicians in medical practice.^{9,10} And veterinary technicians have one of the highest turnovers of all health care positions compared.^{9,11}

HOW TO SOLVE TEAM BURNOUT: ADDRESSING THE ROOT CAUSE

The irregular flow of patients and clients from the height of the pandemic to now, combined with the disruption of COVID-19 to practice operations, declining productivity, and higher turnover, are causing many team members to feel overworked and overstretched. Veterinary health care teams are burnt out—and understandably so.

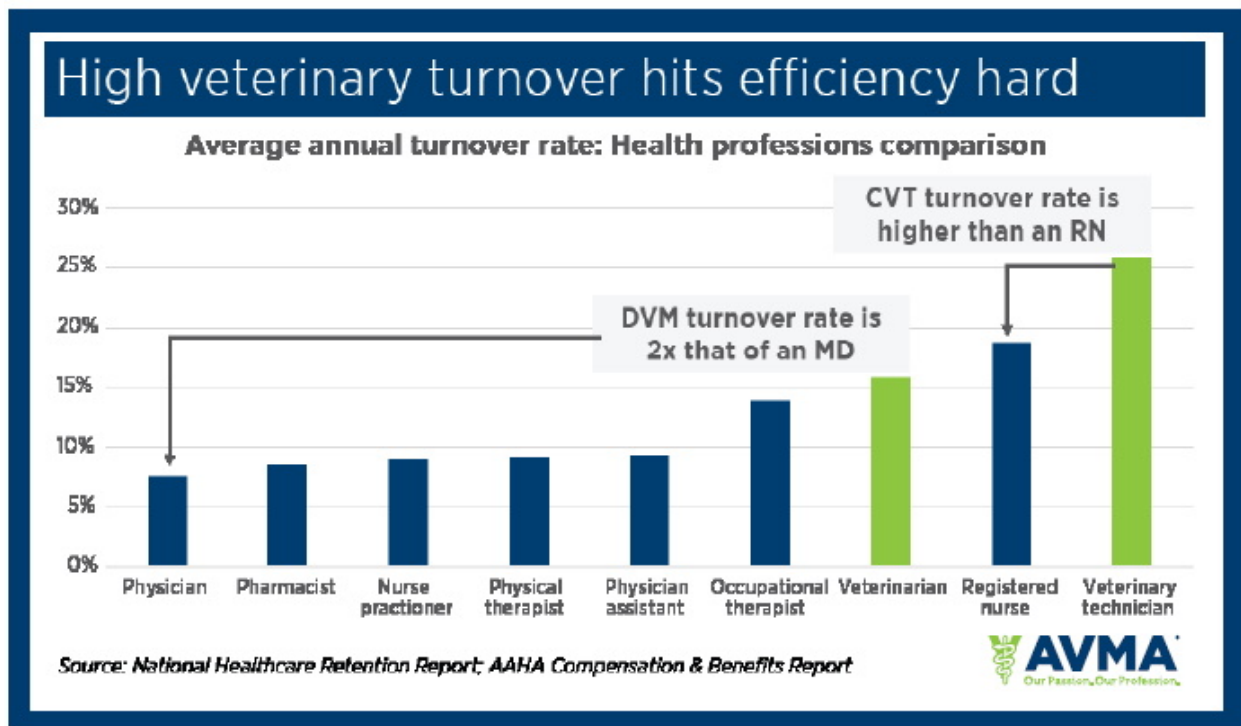
If we want a successful remedy, we need to address root causes. A knee-jerk reaction to today's busyness might be to hire more people. In reality, improving team productivity, employee engagement, opportunities for professional development, and employee longevity are far more effective approaches. A study of human medical practices demonstrated that when efficiency is

enhanced through improved work processes and engaged employees, burnout is reduced and job satisfaction improves.¹²

If we don't address the primary sources of burnout, we'll never fix the problem itself—no matter how many new veterinarians or veterinary technicians we add to the workforce. Instead, we need to implement innovative and lasting approaches that harness technology, better utilize staff members, and engage our teams.

One way to do this is to make sure we're using our existing employees—especially veterinary technicians—to full capacity and paying them accordingly. This means familiarizing ourselves with the duties veterinary technicians are legally allowed to perform in each state and identifying opportunities to use more of our veterinary technicians' considerable skills. This can help us free up veterinarians for more of the work that fully uses their advanced veterinary medical education. The whole practice operates more efficiently.

Inefficient staff utilization hurts our practices in other ways, too. It's well known that when credentialed veterinary technicians are not efficiently utilized, they're likely to feel less engaged. And while productivity certainly plays a role in employee burnout, the environment in which we work is just as—if not more—important. Devoting more attention to engaging employees, building teams, honing leadership skills, and paying staff members appropriately for the services they deliver have proven to be effective at reducing job dissatisfaction and lowering staff turnover.



AVOIDING KNEE-JERK REACTIONS

Some approaches have been proposed that may seem to make sense, especially in the short term, but the reality is that we still don't have a complete picture of what is happening in our economy and how that influences our labor force needs. We know, for example, that lingering concerns from COVID-19 continue to influence decisions to return to work—putting pressure on the labor supply—and we don't know how long that will last. Moreover, positive upward momentum in demand may be temporary, which could also impact our future labor force needs. Lastly, none of the proposed approaches is likely to address the root causes of our challenges around productivity and turnover. Let's take a deeper dive.

Adding more veterinarians

It's important to be clear: There is a need for more food animal and public health veterinarians, especially in underserved rural areas. This very real problem requires its own set of solutions, including expanding the Veterinary Medicine Loan Repayment Program to remove the federal withholding tax on service awards and to make more funds available to recruit veterinarians to states experiencing shortages.

However, adding veterinarians to the companion animal sector is unlikely to address the profession's current workforce issues for a variety of reasons. First, while there were more veterinary visits in 2021, it's critical to note that we don't yet know if these increases are permanent. It's possible that temporary, cyclical economic factors are influencing demand—factors such as increased disposable income and owners spending more time at home with their pets. Additionally, the backlog caused by delayed veterinary services adds to the current demand for veterinary care. All of this takes time to work through.

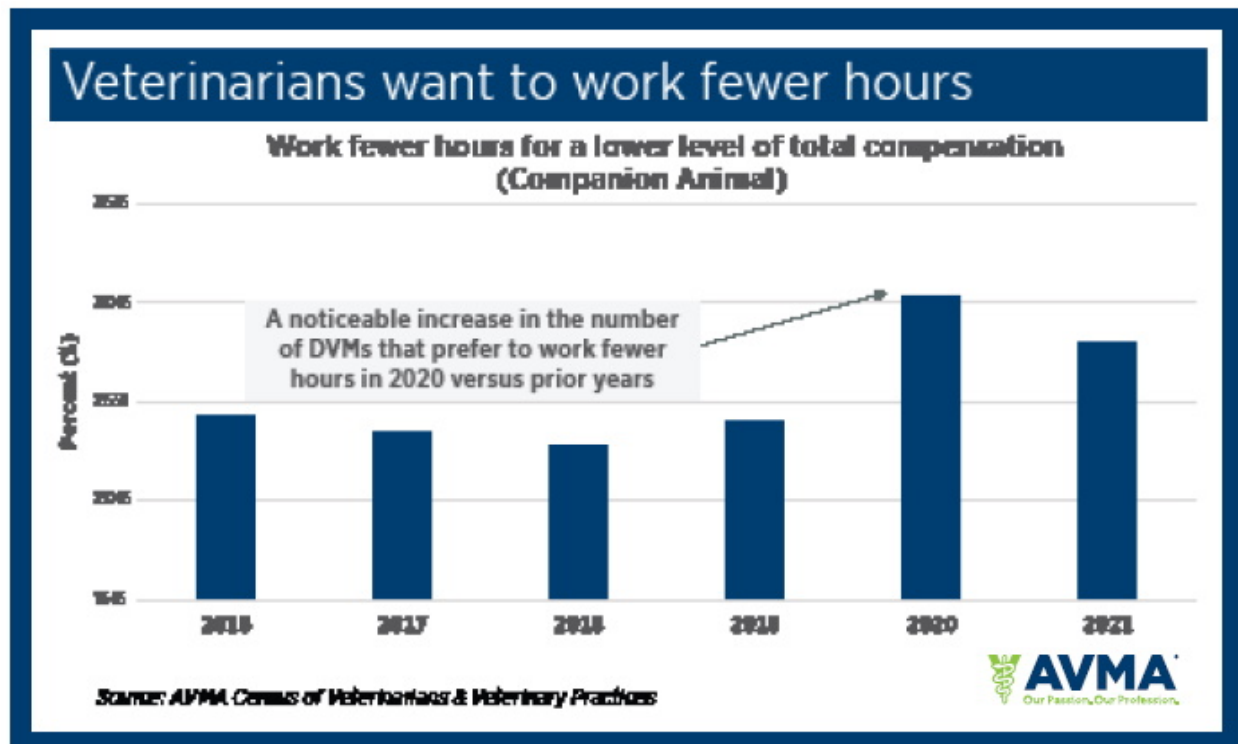
The post-pandemic economic recovery is not going to be a smooth process. Markets and consumer reactions to business conditions are expected to remain volatile—at least for the next several months.¹³ This means we cannot expect business conditions today to be the same a year from now or even a few months from now.

Aside from the pandemic recovery, there are several other factors impacting the veterinary market. We know that some veterinarians want to reduce the number of hours they work each week. This could be contributing to increased feelings of effort and exertion at work. According to a 2020 AVMA survey,¹⁴ about 30% of companion animal veterinarians said they wanted to work fewer hours, compared with 23%-24% from 2017-19. The top two reasons were work-life balance and mental health, including stress, anxiety, and burnout.

Adding veterinarians to the market may seem like a logical way to address the challenges we're feeling right now, but such an approach is aimed more at symptoms than root causes. Becoming more efficient or reducing turnover won't be achieved simply by adding more people to the profession. Better work-life balance and improved mental health require a critical assessment of team engagement, work culture, and practice leadership.

The question of additional roles

Adding a new type of veterinary professional who operates between credentialed veterinary technicians and veterinarians has been suggested as a way to reduce workforce stress and improve efficiency. One version of this midlevel veterinary professional—described as a veterinary professional associate or advanced practice registered veterinary nurse¹⁵—would be able to diagnose, prognose, prescribe, and perform surgery at some limited level, all under the supervision of a veterinarian. A second version—described as a veterinary extender—would have duties that stop short of extending into the scope of practice for a licensed veterinarian. The scope of practice for this individual is not well defined, but appears to be related to management of the clinical aspects of the practice.



Unfortunately, no comprehensive, quantitative analysis has looked at the extent to which such professionals are needed and whether they would be utilized appropriately. Furthermore, it is unclear how their skills might differ from the competencies already provided by veterinarians and other team members, particularly credentialed veterinary technicians, veterinary technician specialists, and practice managers.

Despite these informational gaps, there are efforts to move ahead with this concept, with some in the industry crafting a curriculum for use in midlevel veterinary professional programs at AVMA Council on Education–accredited veterinary colleges that would lead to a master's degree. While the proposed roles differ, as currently shared, the curriculum includes coursework that would seem to support the graduate being able to diagnose, prescribe, and perform certain types of surgery, as well as limited management and leadership training. Some basic science and math prerequisites must be completed for matriculation, but it has been said that an associate's or bachelor's degree may not be required for the veterinary extender model. What would be

required for the veterinary professional associate or advanced practice registered veterinary nurse model is not clear.

Beyond not having a firm indication that this additional professional is needed, other risks are the lack of programmatic accreditation pathways to evaluate such a degree (programmatic accreditation is different from institutional [regional] accreditation at the university level), and the absence of statutory or regulatory frameworks—at both the state and federal levels—that would allow this midlevel professional to legally practice and provide clear expectations for type and amount of oversight. Until these issues are addressed, veterinarians, practices, patients, and clients will face questions around quality of care and accountability, and graduates of midlevel professional educational programs will be faced with uncertain futures.

The AVMA is conducting research to determine whether there is a need for additional types of team members. This research entails economic modeling on the distribution of veterinarians by region to determine whether and where shortages may exist and what the impact of adding a midlevel professional might be. At the same time, the AVMA is conducting a study to better understand what approaches and actions are needed to improve the utilization of veterinary technicians, team engagement, and practice productivity. A thorough assessment of the overall market is necessary before making any efforts to develop any new position within the veterinary profession.

Instead of adding a new veterinary position, it makes sense and is a more efficient use of resources to first be sure all current veterinary positions are being used fully. Work by the AVMA Veterinary Economics Division has demonstrated that practices that are more efficient tend to use veterinary technicians' full skill sets more than practices that are less efficient. Unfortunately, many practices don't appropriately make use of the breadth of skill and education that credentialed veterinary technicians already bring to the table. Instead of creating a new type of staff member, we would serve our clients and patients more effectively and more efficiently by fully utilizing our credentialed veterinary technicians and veterinary technician specialists. At the same time, we would free up veterinarians for the work that uses more of their advanced veterinary and specialty education—things such as diagnosing, prognosing, prescribing medication, and performing surgery.

You can find tips for fully utilizing veterinary technicians at [avma.org/TechnicianUtilization](https://www.avma.org/TechnicianUtilization).

Solutions you can implement now

Clearly, there are questions that need to be answered before we can successfully understand our true veterinary workforce needs, such as the following:

- Is the increase in demand for veterinary services we experienced between mid-2020 and now here to stay, or do we expect this to soften as we move through economic recovery?
- What are the barriers to effective utilization of veterinary technicians, how do we ensure they are appropriately compensated, and how can we improve engagement of our veterinary health care teams to boost productivity and reduce turnover?

- What would be the economic impact of introducing midlevel professionals, what is the right accreditation pathway to evaluate such a program, and what statutory and regulatory changes may be necessary to allow them to perform their role with the appropriate responsibility and oversight?

Work is ongoing to answer these questions. And yet we also recognize that veterinary practices need approaches they can implement today to address the challenges they face. There are solution-oriented strategies in the short term that can help our practices manage today's turbulence. It comes down to the following three things: technology, talent, and teams.

- **Technology:** You can leverage technology to automate and streamline management and administrative processes within the practice, such as inventory control, vendor management and purchasing, accounting and financial standardization, and more. There are many digital solutions out there that can help make practice workflows more efficient (e.g., VetSuccess, AVMA Direct Connect, VitusVet). And don't forget tools of telehealth. They support workflow and practice efficiency and provide opportunities for better client communication and care continuity.
- **Talent:** By focusing on fostering talent, you can empower employees to perform the full range of work they've been trained and are qualified to do. This means offloading nonmedical tasks—such as entering data, coordinating appointments, answering phones, and record keeping— from clinical staff to nonclinical staff. Credentialed veterinary technicians, for example, should be spending less time answering phones and cleaning examination rooms and more time administering vaccines and assisting with preoperative preparation and surgery. Look at the entire health care team to identify and tap the skills, strengths, capabilities, and passions of each team member.
- **Teams:** We need to support our teams by creating inclusive, healthy workplaces that nurture individual and workplace wellbeing. We can start by honing our individual leadership abilities. A recent study of human medical practices showed a strong relationship between leadership quality and employee wellbeing.¹⁶ Medical practices with leadership that was described as seeking to inform, engage, inspire, develop, and recognize their staffs' efforts and accomplishments had more job satisfaction and less burnout.

Leveraging technology, nurturing talent, and supporting the team are all things we can do right now.

THE BOTTOM LINE: WHERE DO WE GO FROM HERE?

The stress and pressure veterinary professionals are dealing with today are both real and prevalent. While the increase in demand for veterinary care that many practices have experienced is a part of the challenge, impacts to productivity and issues of staff turnover make the situation even more difficult and complex. By taking a data-informed view that evaluates the national veterinary experience, we can be confident that the right steps are taken to successfully navigate the challenges confronting the veterinary profession. While you take steps to leverage technology, foster talent, and support your teams, the AVMA is committed to supporting you and your practice in the best ways possible.

The AVMA is working on several fronts to ensure practices can make strategic and well-thought-out decisions that lead to great results. We are providing the following:

1. Data and transparency. We believe that finding the right solution is more important than adopting an oversimplified solution. That's why we seek to balance the dialogue on these topics by providing a data-informed approach to the challenges that the veterinary profession is facing. We tap the expertise of our Veterinary Economics Strategy Committee and have invested in a Veterinary Economics Division to help us make sure we are collecting the right data and generating the best actionable insights to support veterinary medicine.

2. Tools to help practices increase productivity. The AVMA has developed materials to help support practice management, leverage technology, and simplify workflow— all of which can lead to improved productivity and reduced turnover. Examples include the following:

- Resources on how to improve utilization of veterinary technicians.
- Continuing education on veterinary business issues.
- Veterinary market reports on pet ownership and veterinary economics.
- Financial tools to support practice management, including the market share calculator, profit-loss estimator, and the Veterinary Industry Tracker.
- Guidelines and resources for the use of telehealth in veterinary practice.

3. Resources to support mental health and wellbeing. The wellbeing of veterinary professionals is one of the most important issues facing the profession, with practice teams, business owners, veterinary colleges, organizations, and individuals all having an important role to play. Wellbeing is a key focus of the AVMA, with great effort put into securing information and developing resources to support the veterinary community. These include the following:

- The Workplace Wellbeing Certificate Program.
- QPR suicide prevention training.
- CE webinars and educational videos on workplace wellbeing.
- A full-time AVMA employee, Jen Brandt, PhD, dedicated to supporting wellbeing initiatives in veterinary medicine.

By relying on a variety of sources of leading industry research and data, we can be sure our collective view of the current situation is grounded in facts. This also provides confidence that the recommendations we make are deliberative and comprehensive and will help us all alleviate the stress we and our clients are feeling, better support our teams, deliver great patient care, and return to feeling good about our work—now and well into the future.