

## Future Veterinary Workforce Needs

Estimating future veterinary workforce needs requires thoughtful consideration of the unique challenges faced by different practice types; the impacts of full engagement of the veterinarian-led team; closing of efficiency gaps, including through improved operational processes and the use of technology; and careful attention to workplace culture, professional wellbeing, and retention within practices, sectors, and the profession overall.

Events over the past several years have presented no shortage of challenges for the veterinary profession. Unfortunately, claims of crisis-level shortages, based largely on questionable math, have precipitated broad-reaching proposals for changes in how veterinary medicine is regulated and delivered. These proposals pose substantial risks to animal health and welfare, as well as to public health.

While any conversation regarding future workforce needs must be broader than simply estimating the number of veterinarians required, it is important to critically evaluate predictions regarding how many veterinarians are needed to meet the demand for veterinary services, because such predictions are likely to form part of any proposals for change.

**Demand.** In general terms, there are five key drivers of demand: the income of buyers, the prices of related goods and services, the tastes and preferences of consumers, consumer expectations, and the number of consumers. There is a complex interaction of macroeconomic factors and those specific to each practice type that combine to create the demand for veterinary services for each sector of the profession.

Large-scale, disruptive macroeconomic events can significantly, but temporarily, alter demand for veterinary services. Two recent global events are notable examples. Demand for veterinary services fell away and remained depressed for several years following the Great Recession of 2007-2009. Conversely, a confluence of events during the pandemic significantly, but temporarily, increased demand for companion animal veterinary services. Recent data and analyses show pandemic tailwinds falling away, continuing macroeconomic uncertainty, and increasing value-seeking behavior on the part of consumers, suggesting a medium to longer term moderation of demand for companion animal veterinary services.<sup>1,2</sup>

Veterinary economists consider there to be four distinct, but interrelated veterinary markets.<sup>3</sup> When thinking about future workforce needs, a key question is how demand for veterinary services is translated into demand for veterinarians. The extent to which the veterinarian-led team is leveraged, operational system and process efficiency, and how technology is utilized can materially impact the number of veterinarians needed to meet the demand for veterinary services.<sup>4</sup>

To simplify mathematical calculations, some circulating analyses have used the compound annual growth rate of a single variable to estimate demand. However, such proxy variables are blunt tools, do not fully capture the complexity of the multimarket model (particularly how demand for veterinary services translates into demand for veterinarians), and risk erroneously inflating future demand.

**Supply.** New veterinarians enter the US veterinary profession through three routes: US citizens graduating from US veterinary colleges, US citizens graduating from foreign AVMA-COE accredited veterinary colleges and returning home, and ECFVG/PAVE certificate holders. The next several years

<sup>1</sup> [Economic headwinds could impact veterinary practices, says economic futurist | American Veterinary Medical Association \(avma.org\)](#)

<sup>2</sup> [Facing economic uncertainty, clients delay veterinary visits | American Veterinary Medical Association \(avma.org\)](#)

<sup>3</sup> [The multimarket model of the veterinary industry in: Journal of the American Veterinary Medical Association Volume 260 Issue 12 \(2022\) \(avma.org\)](#)

<sup>4</sup> [Increased efficiency could lessen the need for more staff in companion animal practice in: Journal of the American Veterinary Medical Association Volume 261 Issue 9 \(2023\) \(avma.org\)](#)

will see an inflection point in the growth rate of new veterinarians entering the profession.<sup>5</sup> In addition to recent unprecedented growth in the number of seats at existing colleges of veterinary medicine, three new colleges have been added to the roster, two veterinary colleges have doubled their cohorts to produce additional graduates this decade, and at least 12 new veterinary colleges are in various stages of development.<sup>6</sup> The cumulative effect of these changes will be a significant increase in the number of veterinarians entering the workforce into the 2030s.

Which practice type new veterinarians entering the profession choose is relevant to workforce analyses. Some sectors of the profession have unique and long-standing barriers to attracting and retaining veterinary professionals, including emergency practice; specialty practice; shelter practice; academia; rural practice, particularly food animal and equine; and public health. Workforce challenges in these sectors have persisted despite periods of excess capacity. As such, they require tailored solutions to address identified recruitment and retention barriers. Analyses that assume these barriers will be overcome by simply adding more veterinarians to the profession are not supported by historical data and risk steering the veterinary profession in an unsustainable direction.<sup>7</sup>

In addition to new veterinarians entering the profession, analyses of supply must consider the behavior of veterinarians already in the profession. It is reasonable to consider how veterinarians' preferences for work and working hours may change into the future. However, to date, data on hours worked from the AVMA Census of Veterinarians do not support change at a professional level; to the contrary, the number of hours currently worked by veterinarians remains elevated compared to the number of hours worked prior to the pandemic.<sup>8</sup> Analyses that assume a substantive change in working hours risk a substantive underestimate of the future supply of veterinarians in the labor market.

**Assumptions.** Assumptions are a feature of every workforce analysis. A good analysis will make these assumptions clear, allowing the reader to consider the reasonableness of the assumptions. In addition to paying attention to any assumptions made regarding demand for veterinary services, how demand for veterinary services is translated into demand for veterinarians, and the supply of veterinarians in the labor market, it is important to consider how optimistic, realistic, or pessimistic the analysis is and its time horizon. Each of these factors can substantively impact the analysis' results.

**Solutions.** When critiquing workforce analyses, particularly those that are used as a basis for recommending substantive service delivery and regulatory changes with long-term impacts, a key question to answer is "If not this, then what?" There are tangible actions that can be taken today that will have immediate and long-term positive impacts on the veterinary workforce. These include fully leveraging the veterinarian-led team, focusing on improvements to workplace culture, increasing staff retention to create operational continuity, closing system and process efficiency gaps, and the responsible adoption of technology. For sectors with long-standing challenges, collaborative efforts designed to address sector-specific needs are key.

<sup>5</sup> [US veterinary colleges increase seats at accelerating rate | American Veterinary Medical Association \(avma.org\)](#)

<sup>6</sup> [A proliferation of newly proposed veterinary colleges | American Veterinary Medical Association \(avma.org\)](#)

<sup>7</sup> [A short history of veterinary workforce analyses in: Journal of the American Veterinary Medical Association Volume 242 Issue 8 \(\) \(avma.org\)](#)

<sup>8</sup> [Veterinarian salaries struggle to keep up with inflation | American Veterinary Medical Association \(avma.org\)](#)