

Modelling the future supply of vets and vet nurses

A report for the Royal College of Veterinary
Surgeons

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Institute for Employment Studies

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Executive summary

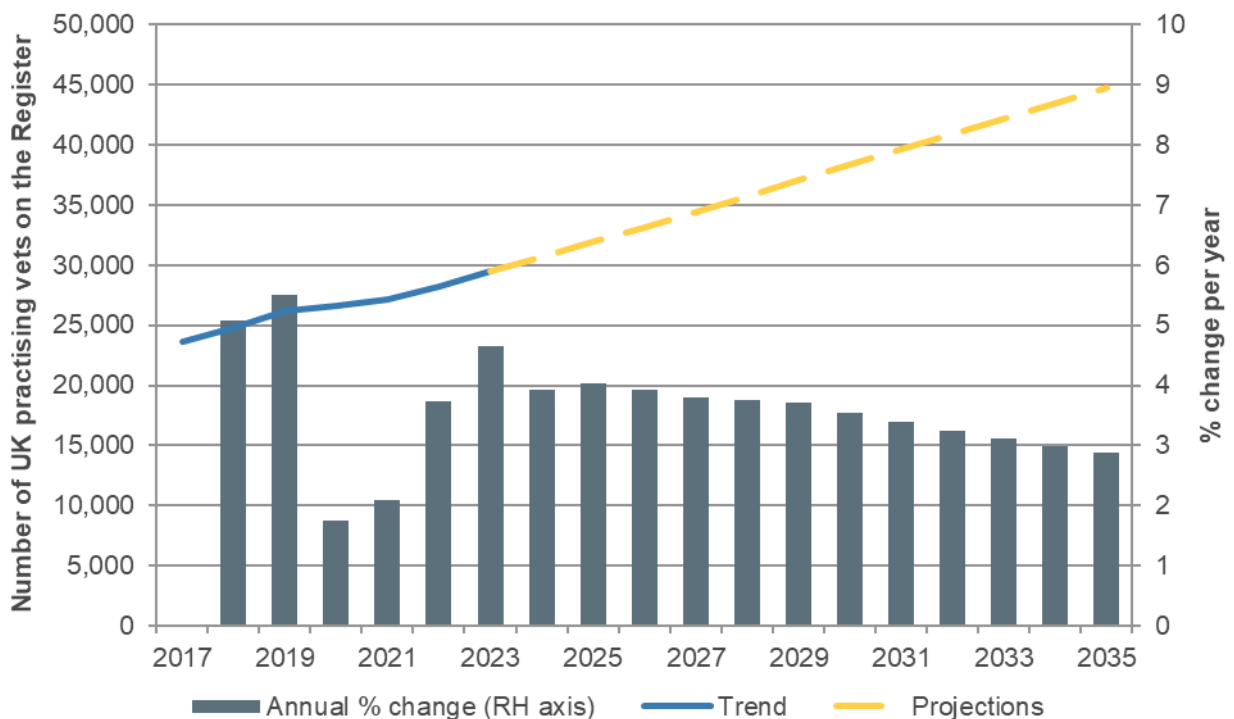
The workforce model

The workforce model developed by the Institute for Employment Studies (IES) on behalf of the Royal College of Veterinary Surgeons (RCVS) forecasts future number of veterinary surgeons (vets) and veterinary nurses (vet nurses) up to 2035. It uses personal and sector characteristics and is based on recent trends in numbers and the latest forecasts of new entrants from veterinary schools. The model allows for assumptions to be adjusted, so that alternative future scenarios can be developed.

Results: vets

The number of UK practising vets is projected to increase to 44,800 by 2035 (see Figure 1). This rate of growth (around 3.5% per year) continues the trend over recent years, and takes into account output from the new vet schools.

Figure 1 Projections in number of UK practising vets on Register, 2017-35



Source: IES model based on RCVS Register data 2017-23

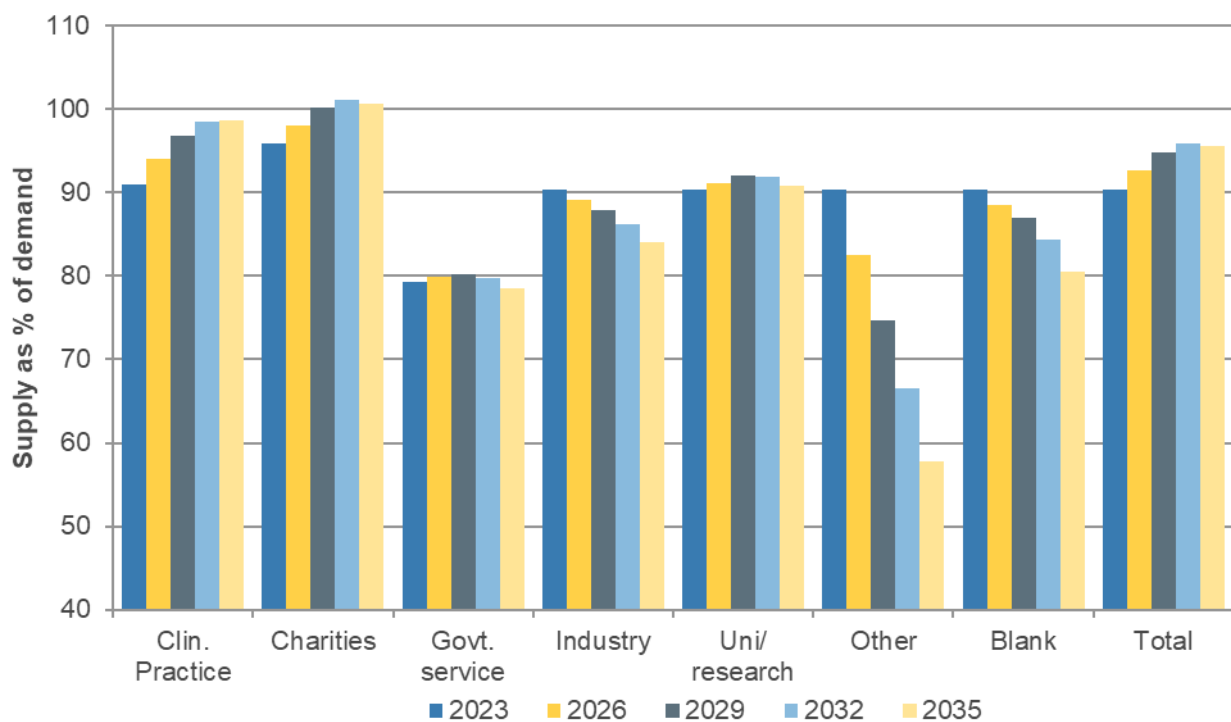
Key findings are:

- The number of vets in clinical practice is projected to grow at a faster rate (56%) than vets overall (52%); in 2035, vets in clinical practice are forecast to make up 83% of all vets, compared with 80% in 2023.
- Within clinical practice, the number of small animal vets is projected to increase by 62%, to 27,920.
- The number of FTE vets is projected to increase by 42% between 2023 and 2035 (compared with the growth in headcount numbers of 52%), with the average FTE falling from 0.85 in 2023 to 0.79 in 2035.

Figure 2 shows the balance between the supply of FTE vets and the total demand for vets by field of work and for the profession as a whole, up to 2035.

- Overall, the supply of vets equated to 90% of total demand in 2023, and this is projected to increase to 96% in 2032, before dropping off very slightly to 2035.
- In clinical practice, where vets have been under pressure in recent years due in part to workforce shortages, supply is projected to increase from 91% of total demand in 2023 to nearly 99% in 2035.

Figure 2 Balance of supply and demand by field of work, vets, 2023-35



Source: IES model based on RCVS Register data 2017-23 and employer vacancy data

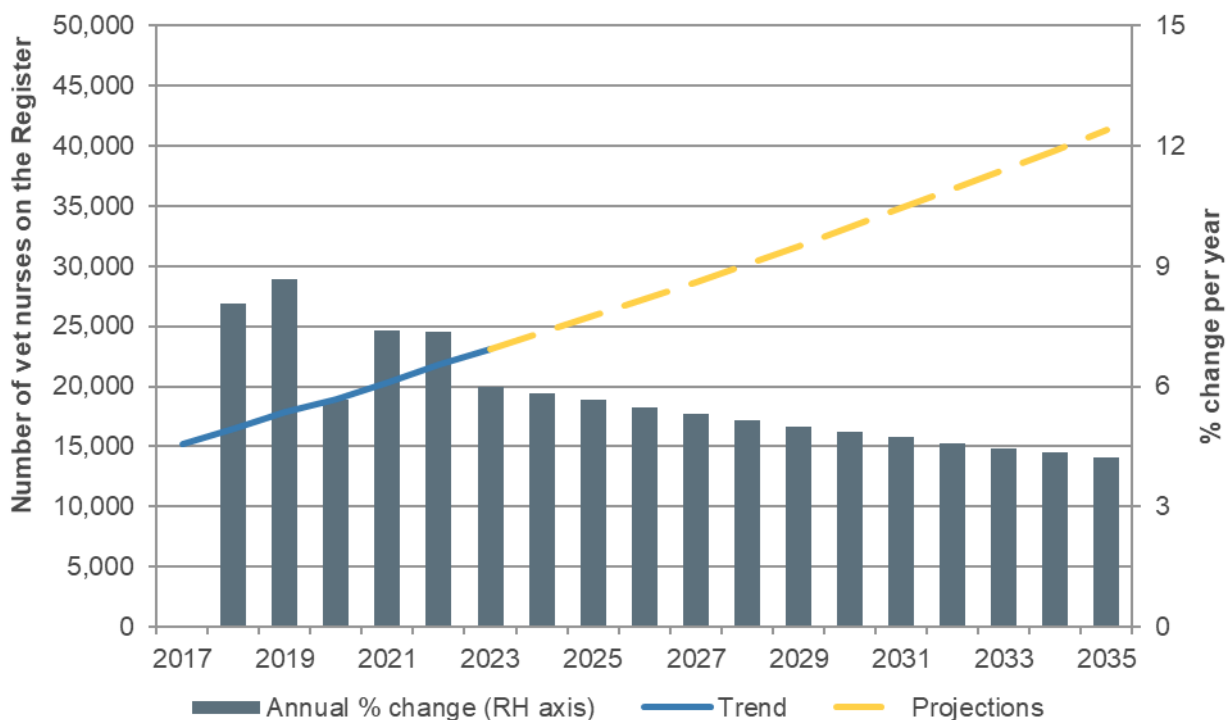
Results: vet nurses

The number of vet nurses on the Register is projected to increase by 78% between 2023 and 2035, reaching 41,200 (see Figure 3). This rate of growth (around 4.9% per year) is lower than the average growth between 2017 and 2023 (7.2%).

Key findings are:

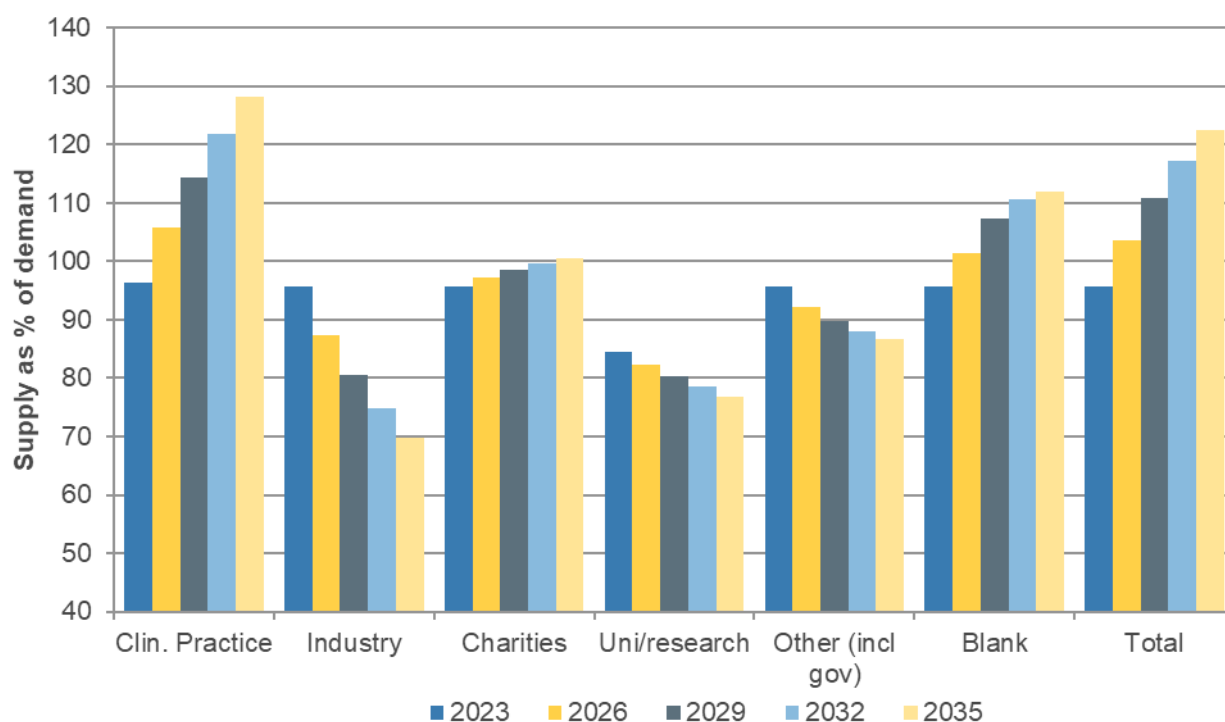
- Growth is faster among the older age groups, with the proportion of vet nurses aged 40 and over projected to increase from 30% of the total in 2023 to 38% in 2035.
- The number of vet nurses in clinical practice (where the majority of vet nurses work) is expected to increase by more than the overall average (86% compared with 78%).
- The number of FTE vet nurses is projected to increase by 72% between 2023 and 2035 (compared to the increase in headcount of 78%) and the average FTE across all vet nurses is projected to fall from 0.84 in 2023 to 0.81 in 2035.

Figure 3 Projections in number of vet nurses on Register, 2017-35



Source: RCVS Register data 2017-23

Figure 4 shows the balance between the supply of FTE vet nurses and the total demand for vet nurses by field of work and for the workforce as a whole, up to 2035. Overall, the supply of vet nurses equated to 96% of total demand in 2023, and will exceed total demand by 2025, and reaching a surplus of 22% over total demand by 2035. In clinical practice, by 2035 there is a predicted surplus of 28% over the total demand level.

Figure 4 Balance of supply and demand by field of work, vet nurses, 2023-35

Source: IES model based on RCVS Register data 2017-23

A brief overview of methodology

Vets modelling

RCVS provided IES with individual level data on vets who were on the RCVS Register at some point between 2017 and 2023 – a total of 43,933 vets – plus data on status changes (moves on and off the Register) and on changes in category (moving between UK practising and other statuses). IES then carried out an analysis of trends over 2017 to 2023, which was used as the basis for the modelling.

The vet model uses a year-by-year inflow-outflow approach, broadly taking account of those who leave the Register or move out of practising status, and those who join or rejoin the Register or move into UK practising status; there are also flows between age groups as the vet population ages over time. Modelling was undertaken in three iterative steps:

- The initial demographic modelling used gender, age, ethnicity and nationality/country of residence to estimate future vet numbers for all 252 combinations of these variables.
- Secondly, the model was used to estimate future vet numbers by field of work (e.g. clinical practice, research, Government).
- Thirdly, the model estimated future vet numbers within species type (e.g. small animal, mixed, equine).

Vet nurse modelling

RCVS provided IES with a dataset of individual level data on vet nurses who were on the Register at some point between 2017 and 2023 – a total of 25,772 vet nurses – plus details of moves off and onto the Register.

The vet nurse model uses a similar year-by-year inflow-outflow approach to the vet model, but is simpler, using age and field of work only. Estimates of vet nurses in the future by age group and field of work were calculated using 42 combinations of these variables.

Modelling balance between future supply and demand

To allow for working hours (rather than headcount alone), full time equivalent (FTE) calculations were incorporated into the vet and vet nurse models; these were based on findings from the 2019 and 2024 Surveys of the Professions carried out by IES for the RCVS. The future supply of FTE vets and vet nurses were then compared with estimates of future total demand. Data on vacancies from major employers was used as a proxy for current unmet demand, while future demand was forecast to increase at 2.5% per year, based on the rate of the long-term increase in the pet dog population.

1 Introduction

This report presents the results of the workforce modelling exercise for veterinary surgeons and veterinary nurses, undertaken by the Institute for Employment Studies for the Royal College of Veterinary Surgeons.

The aim of the work was to forecast the likely number of vets and vet nurses in the future, by a range of personal and sector characteristics, out to 2035. The forecasts were derived on the basis of a continuation of recent trends in numbers, and using latest forecasts of new entrants from vet schools. The model also allows for assumptions to be adjusted, so that alternative future scenarios can be developed.

1.1 Methodology overview

1.1.1 Vet surgeons modelling

RCVS provided IES with individual level data on vet surgeons who were on the Register at some point between 2017 and 2023 – a total of 43,933 vets. Separate datasets provided details of status changes (moves on and off the Register) and on changes in category (moving between UK practising and other statuses e.g. non-practising, overseas practising etc.). These datasets could include multiple entries for each vet, depending upon their career trajectory.

IES undertook a cleaning and merging process to prepare the dataset for analysis of trends over 2017 to 2023, to be used as the basis for the modelling. Details of status and category changes were used to define vets' statuses as at 31 July 2017 (for those whose initial registration date was before then), and then these status and category changes were tracked forward to define vets' statuses as at 31 July in each subsequent year. So vets might leave the Register or change category out of UK practising between 31 July 2017 and 31 July 2018, while others might be restored to the Register, change category into UK practising, and join the Register as newly qualified vets between the two timepoints.

The modelling exercise was then undertaken using an inflow/outflow approach, where the number of vets in each year is calculated as the number in the previous year, minus those who were removed from the Register or who moved out of UK practising status, plus those who joined the Register, were restored to the Register following a break in registration, and those who moved in to UK practising. There are also flows between age groups as the vet population ages over time. While the flow rates are relatively high (on average over the last 6 years, 5% of vets leave each year while in-flows represent 9% of the previous year's total number), a large proportion of the future supply will be those who

are already in the profession – more than half of UK national vets aged under 60 in 10 years' time are those currently on the Register as UK practising.

Modelling was undertaken in three iterative steps:

- The initial demographic modelling was undertaken using four characteristics – gender, age, ethnicity and nationality/country of residence. This produced estimates of future vet numbers for all combinations of these variables (252 combinations);
- A second modelling exercise was undertaken to model vet numbers by field of work – this took the estimates from the demographic model by age and nationality/country of residence, and estimated the proportion of vets working across the different fields of work, with these proportions being adjusted over time on the basis of past trends; and
- A third modelling exercise was undertaken to model species type, using the estimates by age, nationality/residence and field of work from the previous step and applying these to proportions by species type based on past trends, and again adjusting proportions in the future.

1.1.2 Vet nurses modelling

For the vet nurses modelling, RCVS provided IES with a dataset containing details of vet nurses who were on the Register at some point between 2017 and 2023 – a total of 25,772 vet nurses. A separate dataset provided details of moves off and onto the Register.

The vet nurses dataset went through a similar cleaning process as the vet surgeons data to identify vet nurses on the Register each year, flows from and onto the Register.

The modelling approach used age and field of work only, as data were not available for nationality, there are too few male and ethnic minority vet nurses to provide meaningful breakdowns, and data on species type was missing for 98% of vet nurses.

Estimates of vet nurses in the future by age group and field of work were calculated using the inflow/outflow approach for 42 combinations of variables (7 age bands x 6 fields of work).

1.1.3 Modelling balance between supply and demand in the future

The modelling approaches described above modelled the future number of headcount vets and vet nurses, but the supply to the profession will also be affected by average working hours.

Data on average FTE for vets and vet nurses were taken from the Surveys of the Professions, carried out by IES for RCVS. Average FTE¹ by age and nationality for vets,

¹ Based on a 40 hour week, that is vets and nurses working 40 hours or more were assigned a FTE figure of 1, while those working fewer than 40 hours were assigned a value based on dividing their working hours by 40.

and by age for vet nurses, were taken from the 2019 and 2024 surveys, so that future changes could be based on the continuation of recent trends.

FTE calculations were incorporated into each model, to calculate the future supply of FTE vets and vet nurses. These were then compared with estimates of total demand, which were estimated using data on vacancies from major employers as a proxy for current unmet demand. Future demand was forecast to increase at the rate of the long-term increase in the pet dog population², of 2.5% per year³.

1.2 Report structure

The report is structured as follows:

- Chapter 2 describes the RCVS Register data that forms the basis of the forecasting, and presents results for vets by demographic and work characteristics for the period 2017-23;
- Chapter 3 provides a brief explanation of the modelling methodology;
- Chapter 4 presents the results of the modelling exercise on the future supply of vets;
- Chapter 5 compares the estimates of future supply with estimates of future demand for vets to explore the size and nature of future shortfalls in vet numbers by field of work; and
- Chapter 6 presents the results of the modelling exercise on the supply of vet nurses including comparison with likely future demand.

² The PDSA Animal Wellbeing (PAW) Report 2023 reported that although there have been some year-on-year fluctuations, the estimated dog population has risen overall from 8.3 million in 2011 to 11.0 million in 2023. The consistent methodology of the PAW Report provides a long-term picture that is less affected by the impact of the COVID-19 pandemic on pet ownership.

³ An alternative approach to estimating growth in demand, using ONS consumer data on expenditure on vet and other pet services (adjusted for inflation) produces a broadly similar level of annual growth in demand of 3.0% per year.

2 Register data 2017-2023

This chapter presents the analysis of UK practising vet surgeons on the Register between 2017 and 2023, from the RCVS Register data. The patterns and trends over these years provide the basis for the modelling of future vet numbers.

2.1 Trends in vet surgeon numbers and demographic characteristics

In 2017 there were around 23,600 veterinary surgeons on the Register and UK practising. By 2023 the number had increased by 25%, to around 29,500. This represents an annual growth rate of 3.8% per year.

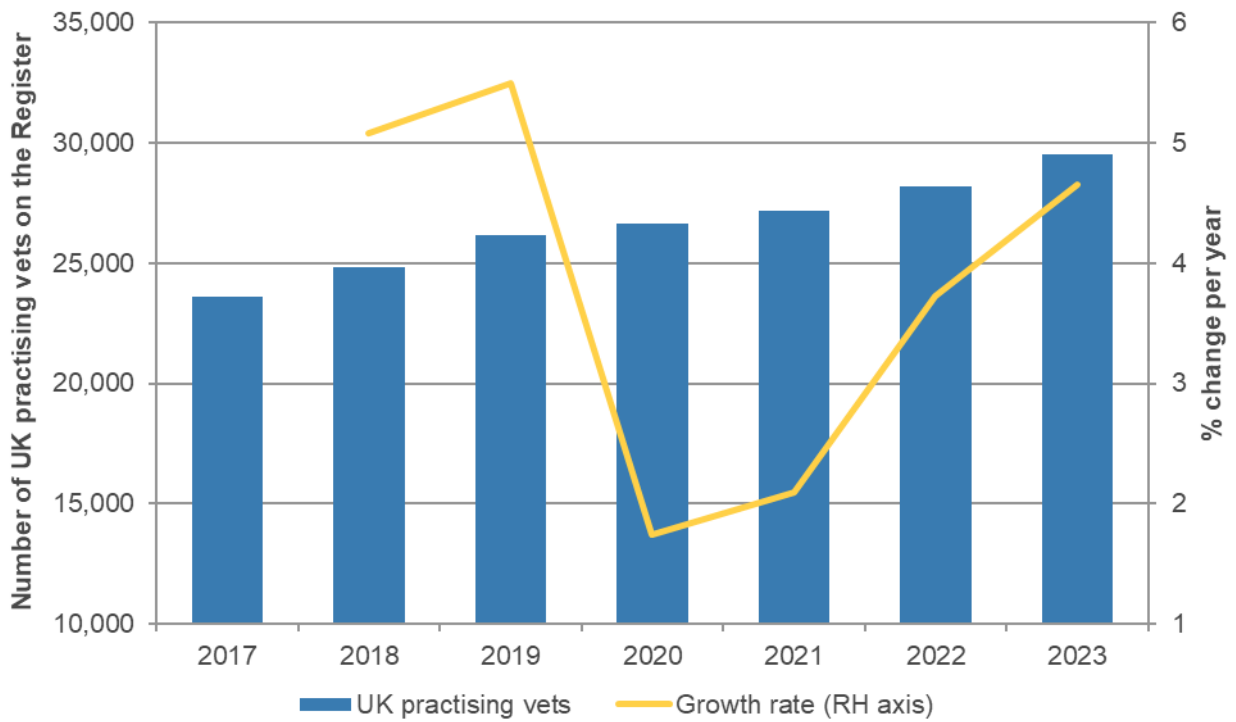
Figure 2.1 shows the trend over this period. The annual growth rate was highest in 2018 and 2019 at just over 5%, and then was much lower in 2020 and 2021, during the pandemic period, at around 2%, before increasing to around 4% in 2022 and 2023.

The rate of increase has not been uniform across the vet population (Figure 2.2). The number of male vets has increased by only 5% in this period, compared with an increase of 37% among female vets. There has been substantial variation by age group, with the number of vets aged under 30, and between 50 and 59, increasing by 15%, compared with increases of 35% among those aged 30 to 34, and around 30% for those aged 40 to 49, and 60 or over.

There have also been differences by ethnicity, and by nationality/residence, although for these characteristics there are high proportions of vets with missing data among those who first joined the Register before 2017. Looking at ethnicity, one in three vets (34%) who joined the Register before 2017 did not provide details of their ethnicity, while among those who have joined since 2017, around 4-5% do not have ethnicity details.

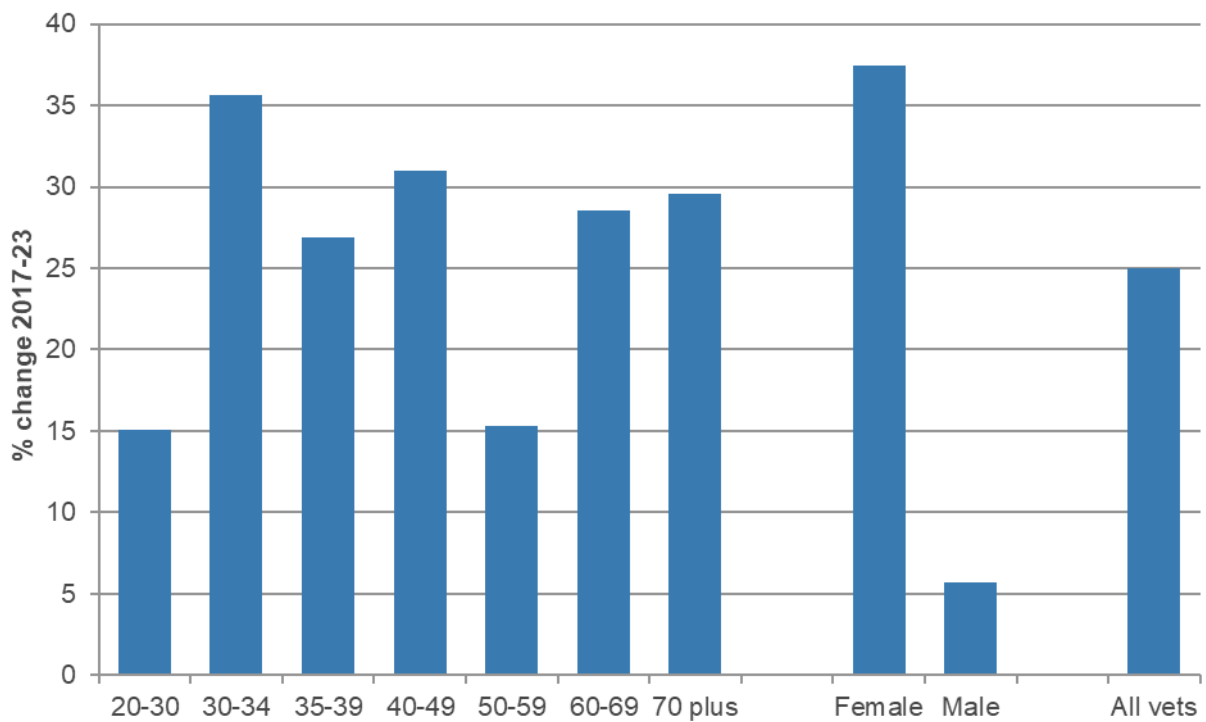
The number of vets from ethnic minority backgrounds increased by 125% between 2017 and 2023 compared with an increase of 37% among white vets, and a fall of 9% among those with missing ethnicity data.

Figure 2.1 Change in number of UK practising veterinary surgeons on Register, 2017-23



Source: RCVS Register data 2017-23

Figure 2.2 Change in number of UK practising vets on Register by age and gender, 2017-23



Source: RCVS Register data 2017-23

Figure 2.1 above shows growth in vet numbers but does not provide any insight into the size of the flows into and out of the profession. Table 2.1 shows the size of the flows in and out, both in numerical terms and as a proportion of the total number of vets in the previous year.

Looking first at out-flows, these averaged 5% of the total number of UK practising vets on the Register across the period 2018 to 2023, with an average of 1,300 vets leaving each year; this was higher in 2020 and 2021 than in the other years, likely influenced by the pandemic.

In-flows come from two sources – those vets returning to the Register, or moving back into UK practising from other categories are termed ‘Restored’, and there also new, first-time ‘Joiners’ to the Register from education either domestic or overseas. Looking first at the Restored in-flow, this averaged just under 2% over the period, around 480 vets each year, and was lower in 2020 than in other years. The flow of new Joiners is much larger, averaging 7% over the period, or 1,800 new vets, but was markedly lower after 2019 as a result of Brexit impacting the number of new joiners from overseas, and was also impacted by the pandemic in 2021. The total number of in-flows averaged 2,300 per year, just under 9% of the total number of vets.

Combining the out-flow and in-flow figures gives the net in-flow each year, i.e. the growth in the number of UK practising vets on the Register. Across the period 2018-23 there was an average increase of 1,000 vets per year, or 3.8% of the total number in the previous year.

Table 2.1 Flows into and out of UK practising vets on the Register, 2018 to 2023

		2018	2019	2020	2021	2022	2023
Out-flows	Number	1,210	1,270	1,660	1,410	1,260	1,040
	% of total vets	5.1	5.1	6.3	5.3	4.6	3.7
Restored	Number	450	450	370	510	590	510
	% of total vets	1.9	1.8	1.4	1.9	2.2	1.8
Joiners	Number	1,960	2,190	1,740	1,460	1,680	1,840
	% of total vets	8.3	8.8	6.7	5.5	6.2	6.5
Total in-flows	Number	2,410	2,640	2,110	1,970	2,270	2,350
	% of total vets	10.2	10.6	8.1	7.4	8.3	8.3
Net in-flows	Number	1,200	1,370	460	560	1,010	1,310
	% of total vets	5.1	5.5	1.7	2.1	3.7	4.7

Source: RCVS Register data 2017-23

Turning to nationality/residence, all vets on the Register have details for country of residence, while 18% of vets who joined the Register before 2017 did not have nationality details and missing data among those joining since then is very low at less than 1%. The analysis and modelling used a combined nationality and residence variable, based on the Nationality and Country fields in the Register, using a 3-way split on nationality (UK, EU and Rest of World) and a 2-way split for country of residence (UK vs overseas) for EU

and RoW nationals. The change in vet numbers by these categories between 2017 and 2023 were:

- UK national – increase of 30%
- EU national/UK resident – increase of 46%
- Rest of World national/UK resident – increase of 56%
- EU national/resident overseas – decrease of 18%
- Rest of World national/resident overseas – increase of 7%
- Nationality unknown – decrease of 26%

Table 2.2 presents the data in a different way, looking at the proportion of all UK practising vets on the Register with particular characteristics, in 2017 and 2023. The proportion of vets who were female increased from 61% to 67%, while the proportion of vets aged 30 to 49 increased from 55% to 58%.

Table 2.2 Breakdown of UK practising vets by demographic characteristics, 2017 and 2023 (%)

	2017	2023
20-30	24.2	22.3
30-34	18.3	19.9
35-39	15.3	15.5
40-49	21.1	22.1
50-59	14.1	13.0
60-69	5.7	5.9
70 plus	1.4	1.4
Female	60.9	67.0
Male	39.1	33.0
White	66.9	73.3
Other eth	2.5	4.5
Missing eth	30.6	22.2
UK national	56.7	58.8
EU national/UK resident	20.3	23.8
RoW national/UK resident	5.0	6.2
EU national/resident o/s	4.1	2.7
RoW national/resident o/s	1.1	1.0
Nationality unknown	12.7	7.5
Total vets	23,620	29,530

Source: RCVS Register data 2017-23

2.2 Trends in vets by field of work and species type

The Register also contains data on field of work – that is, the type of organisation the vet is working for – and on species type. As with ethnicity and nationality, there are high proportions of missing data for these variables on the Register, but there appears to be somewhat of a lag in data completion for newly registered vets, so for these variables the likelihood of missing data is highest for those who registered before 2017 and after 2021. Around half of vets who joined the Register in 2022 had missing data for field of work and species type, as did 90% of those who joined in 2023.

To combat the high proportion of missing data for field of work among newly registered vets, the modelling exercise has calculated the likely distribution of vets by field of work, and by species type, in 2022 and 2023 on the basis of the distribution in 2020 and 2021 combined, and tracking forwards the trajectory observed between 2017 and 2020/21. Thus data for 2022 and 2023 are modelled numbers rather than raw data from the Register⁴.

Table 2.3 shows that just over three quarters (76%) of UK practising vets in 2017 were in private clinical practice, and that their numbers grew by 31% to 2023, at which point they comprised four fifths (80%) of all vets. In all other fields of work the change between 2017 and 2023 was below the overall average increase of 25%, and thus their proportions of all vets fell over this period. Universities, research and vet schools was the second largest field of work, accounting for 6% of all vets.

Table 2.3 Breakdown of UK practising vets by field of work, 2017 and 2023

	Vet numbers		% change	% in	% in
	2017	2023	2017-23	2017	2023
Clinical practice (private)	18,030	23,700	31.4	76.3	80.3
Charities (inc clin prac)	700	800	15.2	2.9	2.7
Government service	1,070	1,220	13.9	4.5	4.1
Industry and commerce	980	1,010	2.5	4.2	3.4
Uni/research	1,420	1,660	17.2	6.0	5.6
Other	1,110	860	-22.5	4.7	2.9
Missing field	310	270	-11.5	1.3	0.9
Total vets	23,620	29,530	25.0	-	-

Note: data for 2023 are imputed using the 2020/21 data and applying a continuation of the trend from 2017.

Source: RCVS Register data 2017-23

The proportion of vets working in clinical practice decreases with age – in 2017 83% of vets aged under 30 were in clinical practice, compared with 60% of those aged 60 and over – although younger vets (those under 40) were most likely to be working in the

⁴ Of course, these data on field of work can be updated in future versions of the modelling as more vet joiners complete their field of work information on the register.

university/research field. The proportion of vets working in government service was highest among those in their 40s and 50s at just over 6%. Male vets were less likely than female vets to be working in clinical practice (74% and 78% respectively), and were more likely to be working in government service (5.5% vs 3.9%) or industry and commerce (5.1% vs 3.6%). Vets from ethnic minority backgrounds were more likely than white vets to be working in clinical practice (85% vs 77%).

Table 2.4 shows the patterns of field of work by nationality and residence. The proportions working in clinical practice are generally lower among non-UK nationals than among UK nationals (79%), with the exception of vets from outside the UK and EU who are resident in the UK (83%). EU vets resident in the UK are most likely to be working in government service (12%), while non-UK nationals resident overseas are most likely to be working in the university/research field (9-10%).

Table 2.4 Breakdown of UK practising vets by field of work and nationality/residence, 2017

	Clinical practice	Govt service	Industry & commerce	Charities	Uni/ research	Other	Blank
UK national	79.4	2.0	4.0	3.4	6.1	4.4	0.7
EU nat/UK res	71.5	12.2	4.3	1.9	5.4	3.1	1.6
RoW nat/UK res	82.6	1.3	3.5	2.5	5.9	2.5	1.8
EU nat/res o/s	69.4	4.7	5.4	1.6	9.9	5.6	3.4
RoW nat/res o/s	69.9	2.6	5.6	2.3	9.0	6.4	4.1
Nat unknown	70.7	4.9	4.3	3.2	5.1	9.2	2.6
All vets	76.3	4.5	4.2	2.9	6.0	4.7	1.3

Source: RCVS Register data 2017

Table 2.5 shows the breakdown of UK practising vets by species type in 2017 and 2023. The majority of vets work with small animals (including exotic animals), while the numbers working in farm/aquatic, equine and mixed species types are broadly similar. Between 2017 and 2023 the increase was largest for mixed species type, with the number of vets increasing by 57%.

Table 2.5 Breakdown of UK practising vets by species type, 2017 and 2023

	Vet numbers		% change	% in	% in
	2017	2023	2017-23	2017	2023
Small animal/exotic	12,450	17,200	38.1	52.7	58.2
Farm/aquatic	1,400	1,840	31.0	5.9	6.2
Equine	1,460	1,980	36.0	6.2	6.7
Mixed	1,090	1,710	56.8	4.6	5.8
Missing species	7,220	6,800	-5.8	30.6	23.0
Total vets	23,620	29,530	25.0	-	-

Source: RCVS Register data 2017-23

There are some patterns in the species type data by demographic characteristics (excluding those for whom the species data is missing). Looking at the 2017 data, vets aged 60 and over were much more likely to be working in farm/aquatic, equine and mixed species types, as were male vets, while very few vets from ethnic minority backgrounds were working with these species types (only 8% across all 3 types). EU and RoW nationals were more likely than UK nationals to be working in small animal/exotic practice, although among EU and RoW nationals who are resident outside the UK, high proportions were working in equine practice (11%).

The proportion of vets for whom the species data are missing varies substantially by field of work, from 22% of those in clinical practice up to 84% of those in government service, which suggests that there are systematic factors in data collection related to field and species type. Nevertheless, and again excluding those vets where species type is missing, 71% of vets in government service, and 33% of those in industry and commerce, were working in farm/aquatic practice in 2017, while 14% of those in the university/research field were working in equine practice. Nearly all vets working in charities (92%) were working with small/exotic animals.

3 Modelling methodology

This chapter briefly describes the modelling methodology to forecast the future numbers of vets up to 2035 by demographic characteristics, field of work and species type.

The starting point in the modelling process was to confirm the variables to be used. These are as follows:

- Age band – 7 categories as shown above in Chapter 2
- Gender – 2 categories – the categories in the Register data of ‘Prefer not to say’, ‘non-binary’ and ‘unspecified’ have been combined with female as numbers are too small to be used for modelling (38 cases out of 43,933)
- Ethnicity – 3 categories – white, other ethnicities, and blank/ethnicity not given
- Country/residence – 6 categories – UK nationals, EU nationals/resident in UK, RoW nationals/resident in UK, EU nationals/resident overseas, RoW nationals/resident overseas, blank/missing

This gives 252 unique combinations of these variables. Given 29,500 UK Practising vets on the Register in 2023, there is an average of 117 vets per combination; however 21 combinations had no vets at all over the whole period 2017 to 2023, while a further 11 had only one or two vets over the 2017-23 period. However it is necessary to have these empty or very small categories to allow for any and all combinations of variables to be extracted.

The starting point is the RCVS Register data on UK practising vets on the Register for the period 2017 to 2023. Forecasts for future years are based on the 2023 data, then using a flows model to calculate the out-flows, in-flows and flows between age groups to forecast the number of vets each year. The flows are as follows:

- Outflows – those leaving the Register, or moving into other categories outside of UK practising;
- Age band outflows – those vets who have not left the Register or changed category from UK practising, who move from one age band to the next older one;
- New joiners – vets joining the Register for the first time; these have been separated out by university country between England, Scotland, and Rest of World including Ireland. These use forecasts of numbers from the vet schools including the new vet schools coming on line in the next few years, but assumes graduate numbers are carried forwards from the latest forecast given for each vet school;
- Restored to Register, or category change to UK Practising – vets who were not on the Register/UK practising the previous year but have been restored or moved into UK practising from other categories; and

- Age band inflows – those vets who have not left the Register or changed category from UK practising, who move from the previous younger age band (these will match the outflow from the previous age band).

The forecast for the number of vets in the following year is calculated as follows:

Number of vets in the previous year

Minus the number of outflows

Minus the number of age band outflows (i.e. moving to the next age band up)

Plus the number of new joiners

Plus the number of restored/category changes to UK Practising

Plus the number of age band inflows (i.e. up from the age band below)

The main demographic model undertakes these calculations for all 252 combinations of the four variables.

Separate models are then undertaken for field of work, and for species type.

- The field of work model uses age and nationality/residence as inputs, and then applies the proportions across the different fields of work to the future numbers of vets by age and nationality/residence. Changes in these proportions over time, based on trends between 2017 and 2023 but at slower rates, are also implemented in the model.
- The species type model uses age, nationality/residence and field of work as inputs, and then applies the proportions across the different species types to the future numbers of vets by these three variables. Change in these proportions over time, based on trends between 2017 and 2023 but at slower rates, are also implemented in the model.

4 Modelling results on the future supply of vets

This chapter presents the results from the vets model forecasting the number of vets to 2035, by demographic characteristics, field of work and species type.

4.1 Forecasts by demographic characteristics

The number of UK practising vets on the Register is projected to increase by 52% between 2023 and 2035, reaching almost 44,800. This continues the trend over recent years, and is largely due to the number of joiners and re-joiners being greater than the number of leavers each year. Furthermore, the number of joiners in the future will be boosted by the new vet schools coming on line in the next few years (although graduate numbers are projected to be steady from 2029 onwards). However, the future rate of growth (around 3.5% per year) is forecast to be slightly lower than that experienced between 2017 and 2023 (3.8%).

Table 4.1 shows the forecast flow rates into and out of the profession for the forecast period. Out-flows will increase from around 1,500 per year at the start of the period to around 1,800 by the end, but as a proportion of the total profession they fall from 4.8% to 4.4%. Vets restored to the Register are forecast to be 2% per year, with the number rising from 600 per year at the start to more than 800 per year at the end. Joiners increase somewhat up to 2029 and then plateau, but fall as a proportion of total vet numbers.

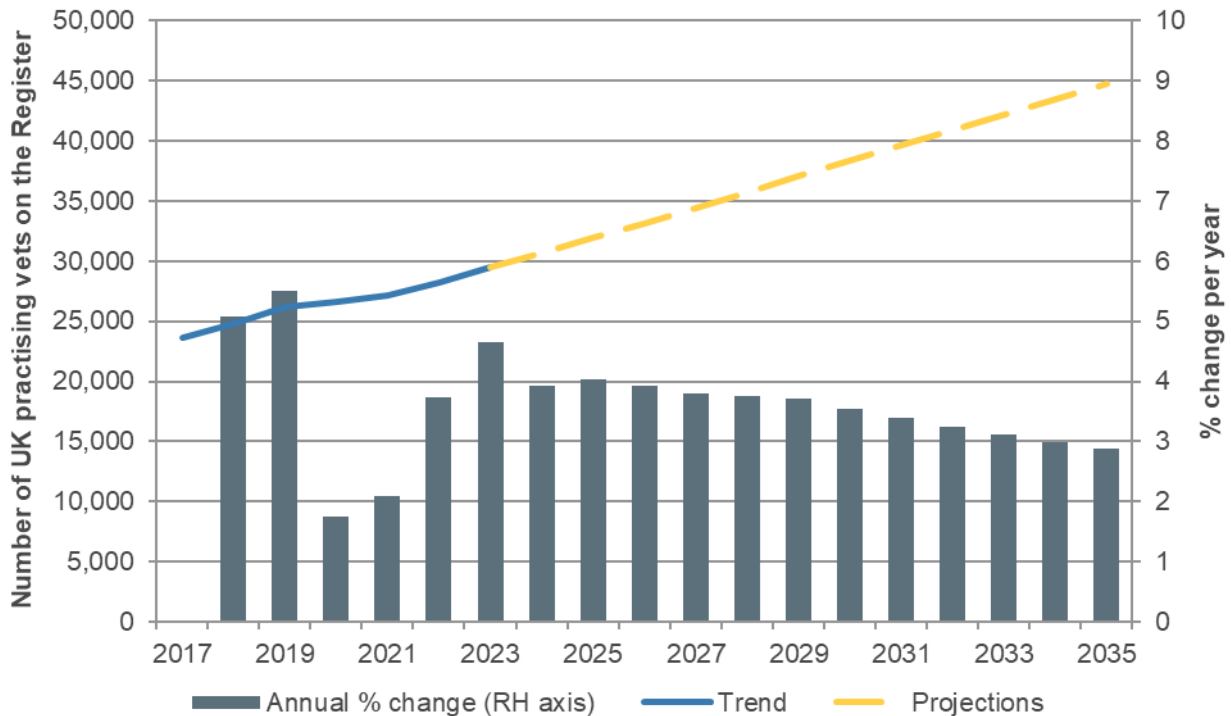
Table 4.1 Forecast flows into and out of UK practising vets on the Register, 2024 to 2035

		Average 2024-26	Average 2027-29	Average 2030-32	Average 2033-35
Out-flows	Number	1,470	1,590	1,710	1,840
	% of total vets	4.8	4.6	4.5	4.4
Restored	Number	590	670	750	840
	% of total vets	1.9	1.9	2.0	2.0
Joiners	Number	2,100	2,220	2,260	2,260
	% of total vets	6.8	6.4	5.9	5.4
Total in-flows	Number	2,690	2,890	3,020	3,100
	% of total vets	8.8	8.4	7.9	7.3
Net in-flows	Number	1,210	1,300	1,300	1,260
	% of total vets	4.0	3.8	3.4	3.0

Source: IES model based on RCVS Register data 2017-23

Figure 4.1 shows the forecast numbers (line) and forecast annual rates of growth (bars). In the first few years of the forecast period the annual growth rate is around 4%, and this falls steadily over the forecast period to reach a level of just below 3% by 2035.

Figure 4.1 Projections in number of UK practising veterinary surgeons on Register, 2017-35



Source: IES model based on RCVS Register data 2017-23

Table 4.2 shows forecast numbers of vets in 2035 by the four demographic variables in the model. Key points to note are:

- By age, growth is fastest among the 35-49 group, who will comprise 42% of all vets in 2035 compared with 38% in 2023. The slowest growth is among vets in their 60s (25%), followed by those aged 30 to 34, and those aged 70 and over (both 39%).
- The number of female vets will grow at three times the rate of growth among male vets, and in 2035 female vets will make up nearly three quarters of the total (74%), compared with two thirds (67%) in 2023.
- The number of vets from ethnic minority backgrounds will grow twice as fast as the number of white vets (131% and 66% respectively).
- Growth will be fastest among UK nationals, and vets from the Rest of the World who are resident in the UK (69%), while there will be fewer EU nationals resident overseas in 2035 than in 2023 (fall of 9%).

Table 4.2 Forecasts of UK practising vets by demographic characteristics, 2023-35

	Vet numbers		% change	% in	% in
	2023	2035	2023-35	2023	2035
20-30	6,570	9,330	42.0	22.2	20.8
30-34	5,870	8,130	38.5	19.9	18.2
35-39	4,580	7,870	71.6	15.5	17.6
40-49	6,520	10,720	64.5	22.1	23.9
50-59	3,840	5,980	55.6	13.0	13.4
60-69	1,740	2,160	24.6	5.9	4.8
70 plus	420	580	39.4	1.4	1.3
Female	19,770	33,070	67.3	66.9	73.9
Male	9,760	11,690	19.8	33.0	26.1
White	21,650	35,950	66.1	73.3	80.3
Other eth	1,320	3,060	130.9	4.5	6.8
Missing eth	6,560	5,750	-12.3	22.2	12.8
UK national	17,360	29,350	69.1	58.8	65.6
EU national/UK resident	7,020	10,180	45.1	23.8	22.7
RoW national/UK resident	1,840	3,110	69.2	6.2	6.9
EU national/resident o/s	810	740	-8.6	2.7	1.7
RoW national/resident o/s	280	310	9.1	1.0	0.7
Nationality unknown	2,230	1,070	-51.7	7.5	2.4
Total vets	29,530	44,760	51.6		

Source: IES model based on RCVS Register data 2017-23

4.2 Forecasts by field of work and species type

Table 4.3 shows the forecasts by field of work. The number of vets in private clinical practice is projected to grow at a slightly faster rate than vets overall (56% and 52% respectively), and the number of vets in charities is projected to grow at the same rate as vets overall, while among all other fields there is projected to be slower than average growth. In 2035, vets in clinical practice are forecast to make up 83% of all vets, compared with 80% in 2023.

Table 4.4 shows the forecasts by species type, and shows that the fastest rate of growth is projected to be in mixed practice (78%) followed by equine (63%) and small animal (62%).

Table 4.3 Forecasts of UK practising vets by field of work, 2023-35

	Vet numbers		% change	% in	% in
	2023	2035	2023-35	2023	2035
Clinical practice (private)	23,700	36,910	55.8	80.3	82.5
Charities (inc clin prac)	800	1,220	51.7	2.7	2.7
Government service	1,220	1,720	41.2	4.1	3.8
Industry and commerce	1,010	1,370	36.0	3.4	3.1
Uni/research	1,660	2,430	45.8	5.6	5.4
Other	860	780	-9.0	2.9	1.7
Missing field	270	320	19.1	0.9	0.7
Total vets	29,530	44,760	51.6	-	-

Source: IES model based on RCVS Register data 2017-23

Table 4.4 Forecasts of UK practising vets by species type, 2023-35

	Vet numbers		% change	% in	% in
	2023	2035	2023-35	2023	2035
Small animal/exotic	17,200	27,920	62.4	58.2	62.4
Farm/aquatic	1,840	2,910	58.1	6.2	6.5
Equine	1,980	3,220	62.8	6.7	7.2
Mixed	1,710	3,040	77.7	5.8	6.8
Missing species	6,800	7,660	12.7	23.0	17.1
Total vets	29,530	44,760	51.6	-	-

Source: IES model based on RCVS Register data 2017-23

4.3 Projections in FTE numbers

In addition to forecasting the numbers of vets to 2035, the model also forecasts the Full-time Equivalent (FTE) numbers, assuming a FTE week of 40 hours⁵. Data on working hours by age, gender and nationality (UK/other) were taken from the Surveys of the Profession in 2019 and 2024, and future changes in FTE were assumed to take place at half the rate of change between 2019 and 2024⁶.

The number of FTE vets is projected to increase by 42% between 2023 and 2035, compared with the growth in headcount numbers of 52%, with the average FTE falling

⁵ Vets working more than 40 hours are assumed to have a FTE of 1 regardless of how many hours above 40 they worked.

⁶ Note that for the field and species modelling, the projections are not differentiated by gender, and so the FTE calculations use age and nationality only. Therefore forecast totals will not exactly match the demographic model results.

from 0.85 in 2023 to 0.79 in 2035 (Table 4.5). There are projected to be particularly large falls in the average FTE for vets aged 50 to 59, and for male vets.

Table 4.5 Forecasts of UK practising FTE vets by demographic characteristics, 2023-35

	Vet FTE numbers		% change	% HC change	FTE in	FTE in
	2023	2035	2023-35	2023-35	2023	2035
20-30	6,190	8,470	37.0	42.0	0.94	0.91
30-34	5,240	6,850	30.6	38.5	0.89	0.84
35-39	3,800	6,060	59.4	71.6	0.83	0.77
40-49	5,340	8,210	53.7	64.5	0.82	0.77
50-59	3,060	4,230	38.2	55.6	0.80	0.71
60-69	1,190	1,410	18.0	24.6	0.68	0.65
70 plus	220	310	38.0	39.4	0.52	0.53
Female	16,560	26,060	57.4	67.3	0.84	0.79
Male	8,490	9,470	11.6	19.8	0.87	0.81
White	18,730	28,800	53.7	66.1	0.87	0.80
Other eth	1,190	2,590	117.4	130.9	0.90	0.85
Missing eth	5,130	4,150	-19.1	-12.3	0.78	0.72
UK national	14,470	22,480	55.4	69.1	0.83	0.77
EU national/UK resident	6,340	8,780	38.5	45.1	0.90	0.86
RoW national/UK resident	1,650	2,680	62.1	69.2	0.90	0.86
EU national/resident o/s	740	660	-10.9	-8.6	0.91	0.89
RoW national/resident o/s	260	270	4.8	9.1	0.93	0.87
Nationality unknown	1,590	670	-57.9	-51.7	0.71	0.63
Total vets	25,050	35,580	41.9	51.6	0.85	0.79

Source: IES model based on RCVS Register data 2017-23

Table 4.6 shows the forecasts for FTE vets by field of work, and shows that the largest fall in average FTE is projected to be for vets working in industry and commerce, and while the fall for vets in clinical practice is projected to be slightly below average.

Table 4.7 shows the forecasts for FTE vets by species type, and shows that the falls in average FTE vets in mixed and equine practice are projected to be smaller than across vets overall.

Table 4.6 Forecasts of UK practising FTE vets by field of work, 2023-35

	Vet FTE numbers		% change	% HC change	FTE in	FTE in
	2023	2035	2023-35	2023-35	2023	2035
Clinical practice (private)	20,190	29,460	45.9	55.8	0.85	0.80
Charities (inc clin prac)	670	950	41.2	51.7	0.84	0.78
Government service	1,030	1,380	33.1	41.2	0.85	0.80
Industry and commerce	830	1,030	25.0	36.0	0.82	0.75
Uni/research	1,410	1,900	35.1	45.8	0.84	0.78
Other	680	580	-13.9	-9.0	0.79	0.75
Missing field	230	280	19.7	19.1	0.85	0.86
Total vets	25,050	35,580	41.9	51.6	0.85	0.79

Source: IES model based on RCVS Register data 2017-23

Table 4.7 Forecasts of UK practising FTE vets by species type, 2023-35

	Vet FTE numbers		% change	% HC change	FTE in	FTE in
	2023	2035	2023-35	2023-35	2023	2035
Small animal/exotic	14,510	21,700	49.6	62.4	0.84	0.78
Farm/aquatic	1,560	2,280	46.0	58.1	0.85	0.78
Equine	1,680	2,540	51.0	62.8	0.85	0.79
Mixed	1,480	2,480	67.7	77.7	0.86	0.81
Missing species	5,600	5,700	1.8	12.7	0.82	0.74
Total vets	24,830	34,700	39.7	51.6	0.84	0.78

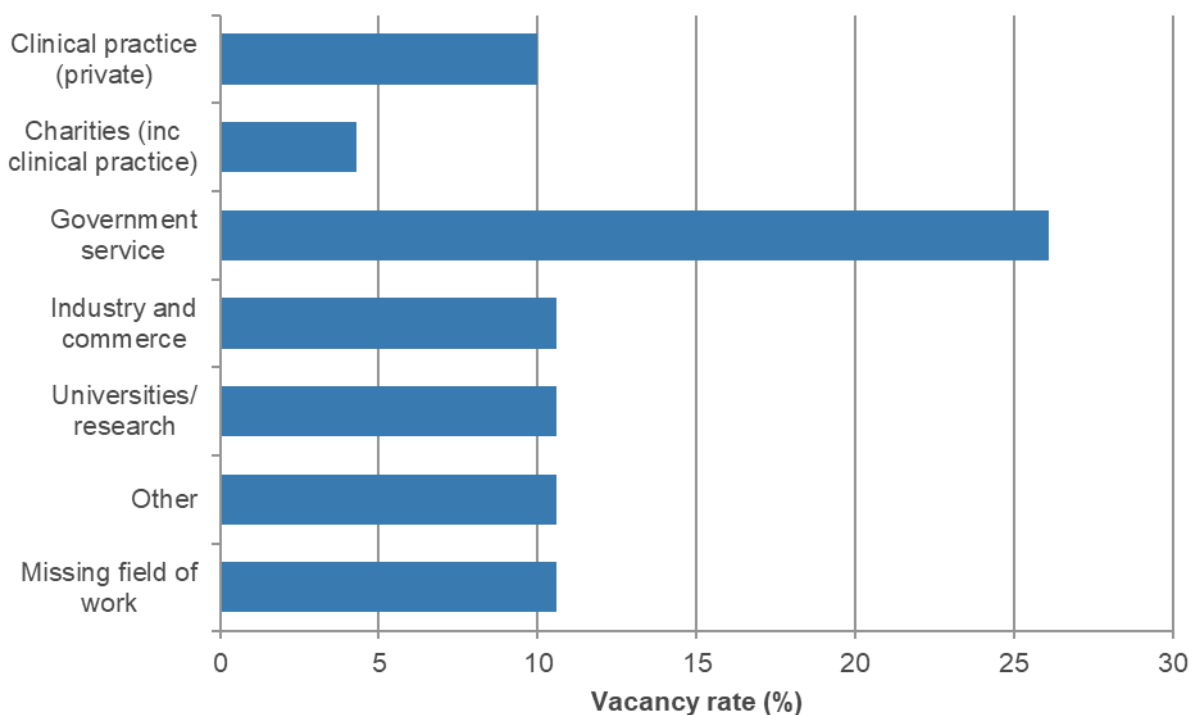
Source: IES model based on RCVS Register data 2017-23

5 Forecasts of supply vs likely future demand

The final step of the modelling process was to forecast future demand for vets, so that the likely balance of supply and demand could be assessed. For this, estimates of current unmet demand were needed, as well as an assumption about future growth in demand.

RCVS requested vacancy data from large employers in the private and public sector to gain an insight into current demand, assuming that the level of vacancies corresponded to unmet demands employers had before they could be said to be operating at full capacity. Responses were received from eight employers across the clinical practice, government service, charity, and universities fields of work. The aggregate rate of unmet demand across these employers was then applied to the remaining fields of work to cover the whole market. Vacancy rates by field of work are shown in Figure 5.1.

Figure 5.1 Vacancy rate (%) by field of work, 2023/24



Source: Vet employers' responses to RCVS employment and vacancy requests

The assumption of future growth in demand was taken from the long-term trend in the dog population in the UK over the period 2011 to 2023 (PDSA Animal Wellbeing (PAW) Report 2023). This showed an estimated dog population of 8.2 million in 2011, rising to

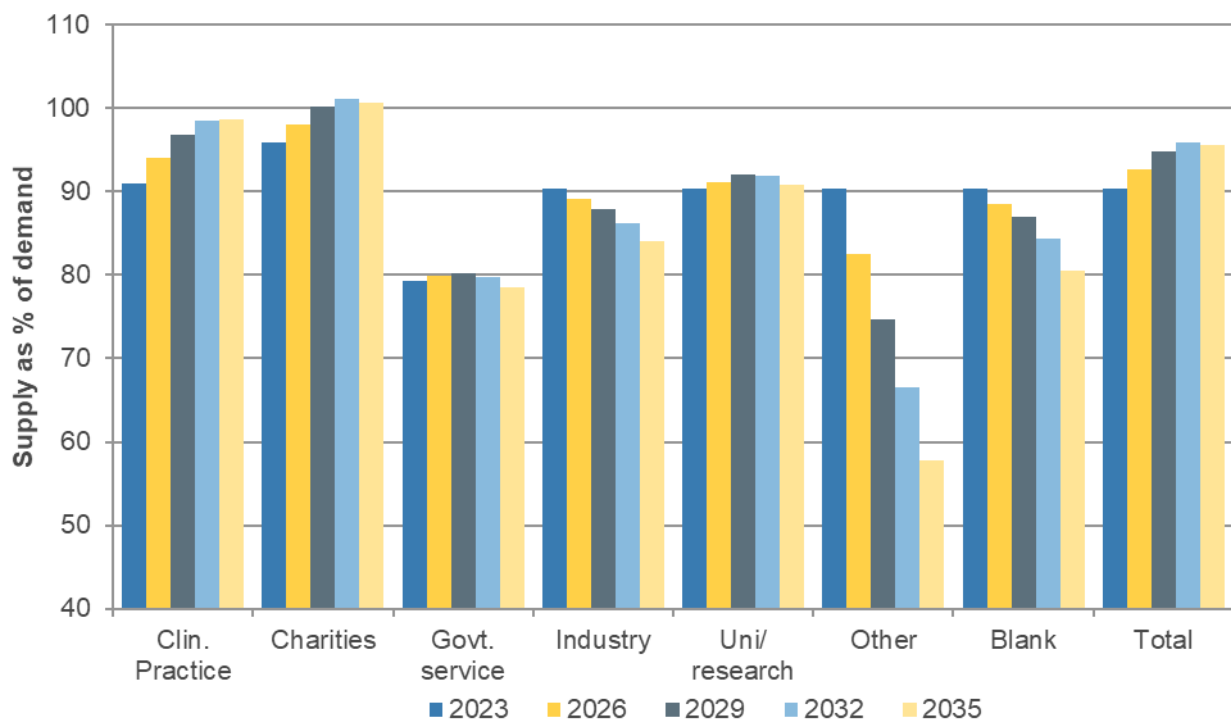
11.0 million in 2023, with some fluctuations in the intervening years. This represents an increase of 34% over this period, equivalent to an average annual increase of 2.5%. This figure of annual long-term average growth in demand of 2.5% has been used as the assumption for future growth for the forecast period.

An alternative measure of future growth could be based on the ONS consumer expenditure data for vets and other services for pets⁷, which increased from £4.21 billion in 2013 (adjusted for inflation) to £5.64 billion in 2013; this represents an average annual increase of 3.0% per year. Using this measure for future growth in demand would result in slightly larger shortfalls than those presented here.

Figure 5.2 shows the balance between the supply of FTE vets and the total demand for vets by field of work and for the profession as a whole, up to 2035. Overall, the supply of vets equated to 90% of total demand in 2023, and this is projected to increase to 96% in 2032, before dropping off very slightly to 2035. There are markedly different forecasts by field of work:

- In private clinical practice, supply will increase from 91% of total demand in 2023 to nearly 99% in 2035, while among charities, supply will match demand by 2029;

Figure 5.2 Balance of supply and demand by field of work, 2023-35



Source: IES model based on RCVS Register data 2017-23 and employer vacancy data

⁷ <https://www.beta.ons.gov.uk/economy/nationalaccounts/satelliteaccounts/timeseries/adxc/>

- In government service, supply was 79% of total demand in 2023, and although this will increase slightly to 2029, it will then fall so that in 2035 it is likely to be 78% of total demand;
- In 2023, supply represented 90% of demand in industry and commerce, but this is projected to fall steadily to reach 84% by 2035;
- Supply as a proportion of demand in the universities/vet schools/research field is projected to remain at just over 90% for the whole forecast period; and
- In the 'other' field of work (which includes military), the balance of supply and demand is projected to fall rapidly over the forecast period, from 90% in 2023 to 58% in 2035. This field of work had the oldest age profile of vets, with 44% of vets aged 60 and over in 2023 compared with 15% across all fields of work.

Table 5.1 shows the shortfalls in percentage terms, and as the number of FTE vets. For the profession overall, the shortfall is estimated to be 2,650 FTE vets in 2023, and this is projected to fall to 1,670 FTE vets in 2035.

Table 5.1 Balance of supply and demand by field of work, 2023-35

		2023	2026	2029	2032	2035
Supply as % of demand	Clinical practice (private)	90.9	94.0	96.8	98.4	98.6
	Charities (inc clin prac)	95.9	98.0	100.2	101.1	100.7
	Government service	79.3	79.9	80.2	79.7	78.5
	Industry and commerce	90.4	89.1	87.9	86.3	84.0
	Uni/research	90.4	91.2	92.0	91.9	90.8
	Other	90.4	82.5	74.7	66.5	57.9
	Missing field	90.4	88.6	86.9	84.3	80.5
	Total vets	90.4	92.7	94.9	95.9	95.5
Shortfall in FTE numbers	Clinical practice (private)	-2,020	-1,440	-810	-430	-420
	Charities (inc clin prac)	-30	-10	0	10	10
	Government service	-270	-280	-300	-330	-380
	Industry and commerce	-90	-110	-130	-160	-200
	Uni/research	-150	-150	-140	-160	-190
	Other	-70	-140	-220	-310	-430
	Missing field	-20	-30	-40	-50	-70
	Total vets	-2,650	-2,170	-1,640	-1,430	-1,670

Source: IES model based on RCVS Register data 2017-23 and employer vacancy data

5.1 Adjusting the model

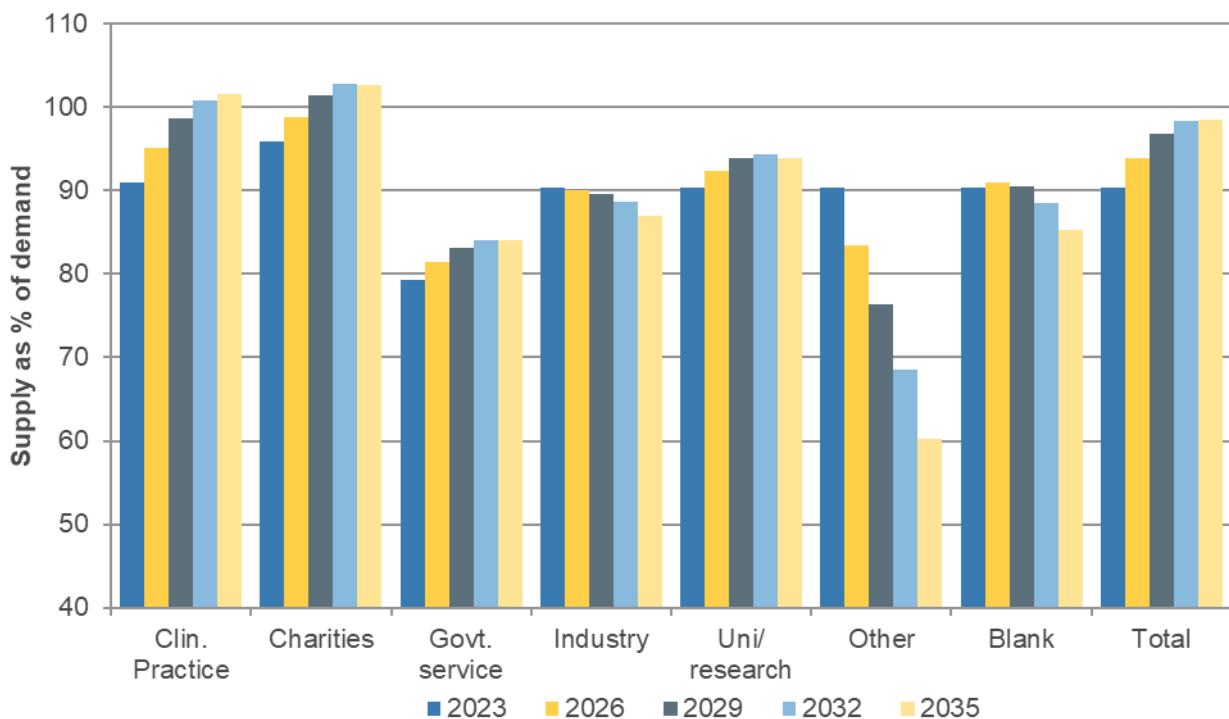
The model spreadsheet allows the user to adjust many of the parameters in the model to see how that would affect the future supply of vets, and the future balance of supply and demand.

The user can increase or decrease the out-flow rates for each category of the demographic variables, the 'restored' in-flow rates for each category, and the 'joiner' rates separately for English/Welsh, Scottish, and overseas universities. New rates can be set to 90%, 95%, 105% and 110% of the default rates.

Table 2.4 above showed that EU nationals resident in the UK were most likely to be working in government service, and as an example of the adjustable model, the out-flow rate for this category was set to 90% of the default rate (i.e. lower numbers leaving), the 'restored' rate was set to 110% of the default rate (i.e. more returning), and the 'joiners' rate for overseas universities was set to 110% of the default rate (i.e. more overseas vets joining). Figure 5.3 shows the impact of these adjustments on the balance between supply and demand by field of work.

Looking first at the overall balance, this has increased in comparison with the default model, to reach 99% in 2035 compared with 96% in the default model. The shortfall in government service is likely to be 84% with these adjustments, rather than the 79% in the default model, while supply is likely to equal the level of demand in clinical practice by 2032.

Figure 5.3 Balance of supply and demand by field of work with reduced outflows and increased restored in-flows for EU national/UK resident vets, and increased joiners from overseas universities, 2023-35



Source: IES model based on RCVS Register data 2017-23 and employer vacancy data

Table 5.2 shows the 2035 figures for balance between supply and demand, and FTE shortfall, for the default model and the adjusted model. The overall shortfall is likely to be 540 in the adjusted model, compared with 1,670 in the default model, and the shortfall in

government service is likely to be 100 FTE vets lower (280 compared with 380 in the default model).

Table 5.2 Balance of supply and demand by field of work with reduced outflows and increased restored in-flows for EU national/UK resident vets and increased joiners from overseas universities, 2035

	Default model		Adjusted model	
	% balance	FTE shortfall	% balance	FTE shortfall
Clinical practice (private)	98.6	-420	101.5	460
Charities (inc clin prac)	100.7	10	102.7	30
Government service	78.5	-380	84.1	-280
Industry and commerce	84.0	-200	87.0	-160
Uni/research	90.8	-190	93.8	-130
Other	57.9	-430	60.3	-400
Missing field	80.5	-70	85.3	-50
Total vets	95.5	-1,670	98.6	-540

Source: IES model based on RCVS Register data 2017-23 and employer vacancy data

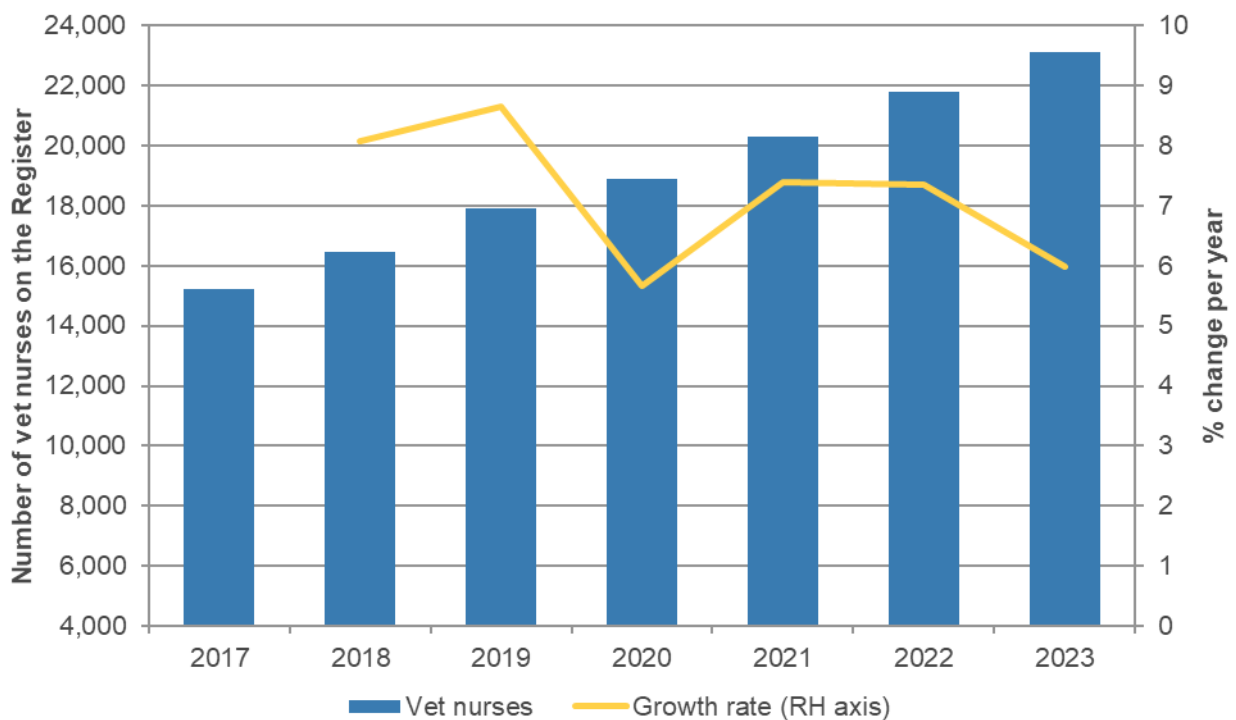
6 Modelling the supply of vet nurses

This chapter presents the findings for vet nurses – the recent data from the Register, and the forecasts from the modelling exercise. For vet nurses, the only characteristics used in the modelling were age and field of work, as there are too few male vet nurses, vet nurses from ethnic minority groups, or vet nurses outside the UK to use these variables in the modelling.

6.1 Register data

In 2017 there were around 15,200 veterinary nurses on the Register. By 2023 the number had increased by 52%, to around 23,100. This represents an annual growth rate of 7.2% per year. Figure 6.1 shows the trend over this period. The annual growth rate was highest in 2019 at nearly 9% and was lowest in 2020 at just under 6%.

Figure 6.1 Change in number of veterinary nurses on Register, 2017-23

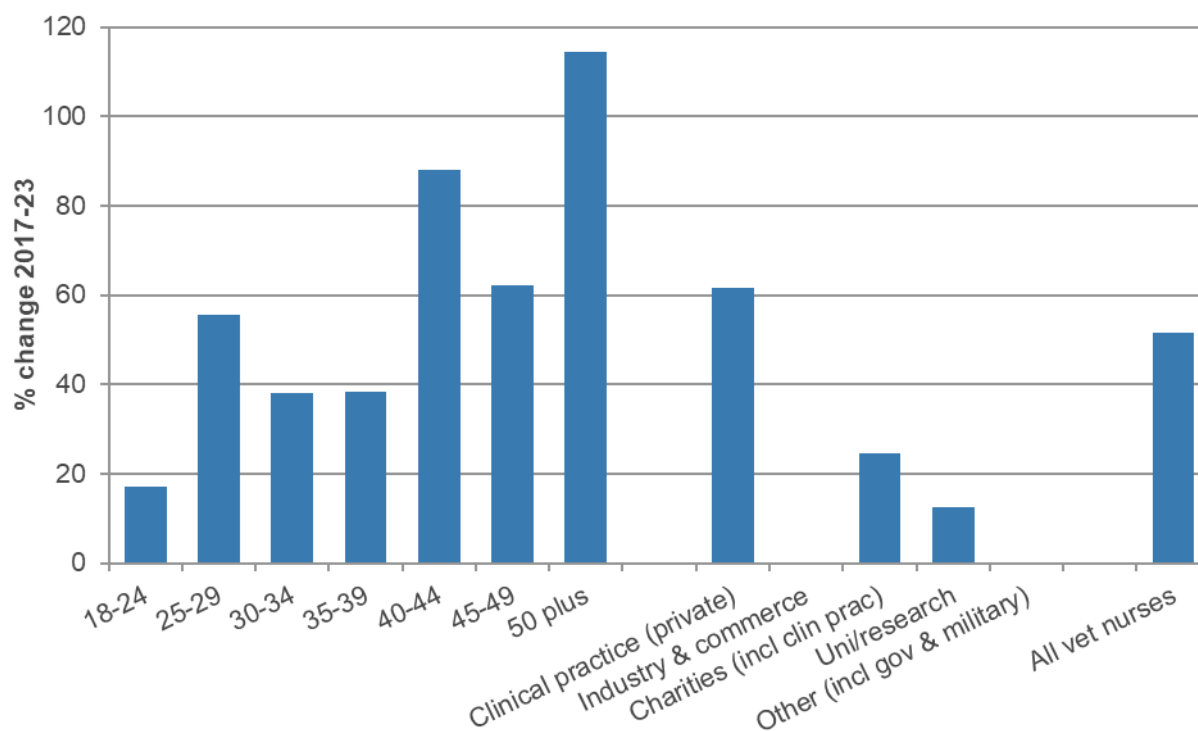


Source: RCVS Register data 2017-23

Figure 6.2 shows the variation in the increase between 2017 and 2023 by age and by field of work. The increase was greater among older vet nurses (40 and older) than among younger vet nurses, with number of vet nurses aged 50 plus doubling over this period. By contrast, the number of vet nurses aged under 25 increased by only 17%. Looking at field

of work, the rate of increase was above average for vet nurses in private clinical practice (62%), and below average in all other fields of work, with no change in numbers in industry and commerce, or in the 'other' field of work group which includes government and military. (The number of vet nurses with missing field of work fell by 30% over this period; these have not been included in the figure.)

Figure 6.2 Change in number of vet nurse on Register by age and field of work, 2017-23



Source: RCVS Register data 2017-23

In terms of gender, ethnicity and country of residence:

- Female vet nurses made up 97.7% of the total in 2017, and in 2023 this had fallen very slightly to 97.1%;
- Vet nurses from ethnic minority backgrounds accounted for 0.9% of the total in 2017 (78% white and 20% missing ethnicity), and in 2023 this had increased slightly to 1.6% (85% white and 13% missing ethnicity); and
- In 2017, 2.0% of vet nurses were resident outside of the UK, and in 2023 this had fallen slightly to 1.4%.

Table 6.1 presents the data in a different way, looking at the proportion of all vet nurses on the Register with particular characteristics, in 2017 and 2023. The proportion of vet nurses aged 40 and over increased from 24% in 2017 to 30% in 2023. Vet nurses working outside of private clinical practice (or with missing field of work) fell from 19% of the total in 2017 to 13% in 2023.

Table 6.1 Breakdown of vet nurses by demographic characteristics, 2017 and 2023 (%)

	2017	2023
18-24	10.4	8.0
25-29	22.0	22.5
30-34	24.5	22.3
35-39	19.1	17.5
40-44	10.8	13.4
45-49	7.1	7.6
50 plus	6.2	8.7
Clinical practice (private)	81.4	86.7
Industry & commerce	2.7	1.8
Charities (incl clin prac)	4.4	3.7
Uni/research	5.7	4.2
Other (incl gov & military)	4.9	3.2
Missing field of work	0.9	0.4
Total vet nurses	15,240	23,100

Source: RCVS Register data 2017-23

6.2 Modelling methodology

The modelling methodology for vet nurses was very similar to that for vets (described in Chapter 3 above), although was more limited as the only variables used were age group and field of work – 7 age groups were used (the same number as for vets, although different group boundaries reflecting the younger average age profile of vet nurses), and 6 fields of work (government was incorporated into the ‘other’ group for vet nurses while it was a separate category for vets). This gave 42 unique combinations of age group and field of work, whereas in the main demographic model for vets there were 252 unique combinations of variables. Although there are fewer vet nurses than vets, the smaller number of combinations in the model gives more vet nurses per category on average, and so the model for vet nurses will be as robust as that for vets.

The modelling used a flows model to calculate the out-flows, in-flows and flows between age groups to forecast the number of vet nurses each year. Out-flows referred only to leaving the Register, whereas for vets there were also changes of category out of UK practising.

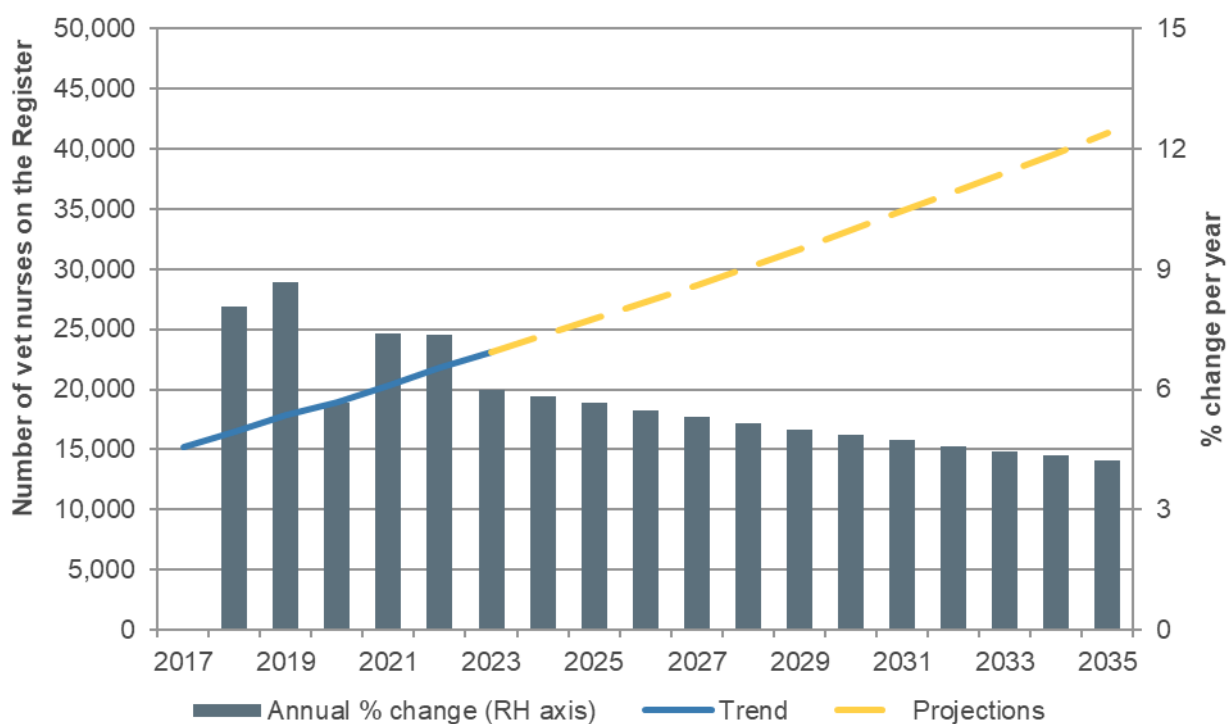
For joiners, data were taken from the Register, whereas for vets data, were taken from vet schools themselves. There had been an average increase in new joiners of 56 per year between 2017 and 2023, and this rate of increase in new joiners was projected forward over the forecast period.

6.3 Modelling results on the future supply of vet nurses

The number of vet nurses on the Register is projected to increase by 78% between 2023 and 2035, reaching 41,200. This rate of growth (around 4.9% per year) is lower than the average growth between 2017 and 2023 (7.2%).

Figure 6.3 shows the forecast numbers and forecast annual rates of growth. The annual growth rate is just under 6% in the first few forecast years and this steadily drops over time to just over 4% by 2035.

Figure 6.3 Projections in number of veterinary nurses on Register, 2017-35



Source: RCVS Register data 2017-23

Growth is faster among the older age groups, with the number of vet nurses aged 40 to 49 doubling, and the number of vet nurses aged 50 and over trebling between 2023 and 2035, while numbers of vet nurses aged under 35 are set to increase by around 50% over the forecast period. The proportion of vet nurses aged 40 and over is projected to increase from 30% of the total in 2023 to 38% in 2035.

The number of vet nurses working in private clinical practice is expected to increase by more than the overall average (86% compared with 78%), while the increases in the other fields are expected to be below the overall average, with the smallest increase in industry and commerce (2% increase).

Table 6.2 Forecasts of vet nurses by age and field of work, 2023-35

	Vet nurse numbers		% change	% in	% in
	2023	2035	2023-35	2023	2035
18-24	1,850	2,720	46.7	8.0	6.6
25-29	5,210	7,730	48.5	22.5	18.8
30-34	5,160	7,930	53.5	22.3	19.2
35-39	4,030	7,030	74.2	17.5	17.1
40-44	3,090	5,810	88.0	13.4	14.1
45-49	1,750	4,030	130.8	7.6	9.8
50 plus	2,020	5,960	195.1	8.7	14.5
Clinical practice (private)	20,030	37,250	85.9	86.7	90.4
Industry & commerce	420	430	2.0	1.8	1.0
Charities (incl clin prac)	840	1,230	45.2	3.7	3.0
Uni/research	970	1,230	26.1	4.2	3.0
Other (incl gov & military)	750	920	23.3	3.2	2.2
Missing field of work	90	150	52.8	0.4	0.4
Total vet nurses	23,110	41,190	78.3		

Source: IES model based on RCVS Register data 2017-23

6.4 Projections in FTE numbers

In addition to forecasting the numbers of vet nurses to 2035, the model also forecasts the Full-time Equivalent (FTE) numbers, assuming a FTE week of 40 hours⁸, based on responses to the Surveys of the Profession in 2019 and 2024.

The number of FTE vet nurses is projected to increase by 72% between 2023 and 2035, lower than the increase in headcount of 78%. The average FTE across all vet nurses is projected to fall from 0.84 in 2023 to 0.81 in 2035, with the largest fall projected among vet nurses aged 25 to 29.

In industry and commerce, the number of FTE vet nurses is projected to fall slightly, as the decrease in average FTE outweighs the small increase in headcount.

⁸ Vet nurses working more than 40 hours are assumed to have a FTE of 1 regardless of how many hours above 40 they worked.

Table 6.3 Forecasts of FTE vet nurses by age and field of work, 2023-35

	Vet nurse FTE numbers		% change	% HC change	FTE in 2023	FTE in 2035
	2023	2035	2023-35	2023-35		
18-24	1,750	2,490	42.7	46.7	0.94	0.92
25-29	4,740	6,710	41.4	48.5	0.91	0.87
30-34	4,370	6,610	51.0	53.5	0.85	0.83
35-39	3,200	5,510	72.2	74.2	0.79	0.78
40-44	2,390	4,520	88.5	88.0	0.78	0.78
45-49	1,370	3,140	129.8	130.8	0.78	0.78
50 plus	1,500	4,280	186.1	195.1	0.74	0.72
Clinical practice (private)	16,820	30,120	79.1	85.9	0.84	0.81
Industry & commerce	340	330	-1.9	2.0	0.81	0.78
Charities (incl clin prac)	690	970	41.3	45.2	0.81	0.79
Uni/research	790	960	22.3	26.1	0.81	0.78
Other (incl gov & military)	620	750	21.7	23.3	0.82	0.81
Missing field of work	80	120	57.3	52.8	0.83	0.85
Total vet nurses	19,320	33,250	72.1	78.3	0.84	0.81

Source: IES model based on RCVS Register data 2017-23

6.5 Forecasts of supply vs likely future demand

The final step of the modelling process was to forecast future demand for vet nurses, so that the likely balance of supply and demand could be assessed. Vacancy data provided by large employers following requests from RCVS provided estimates of current unmet demand. Data on vacancies for vet nurses were received from some employers in the private clinical practice and universities sectors, and the average weighted vacancy rate across these two sectors was applied to the other fields of work; current vacancy levels were calculated as follows:

- Clinical practice (private) – 3.9%
- Universities/research/vet schools – 18.4%
- All other fields – 4.5%

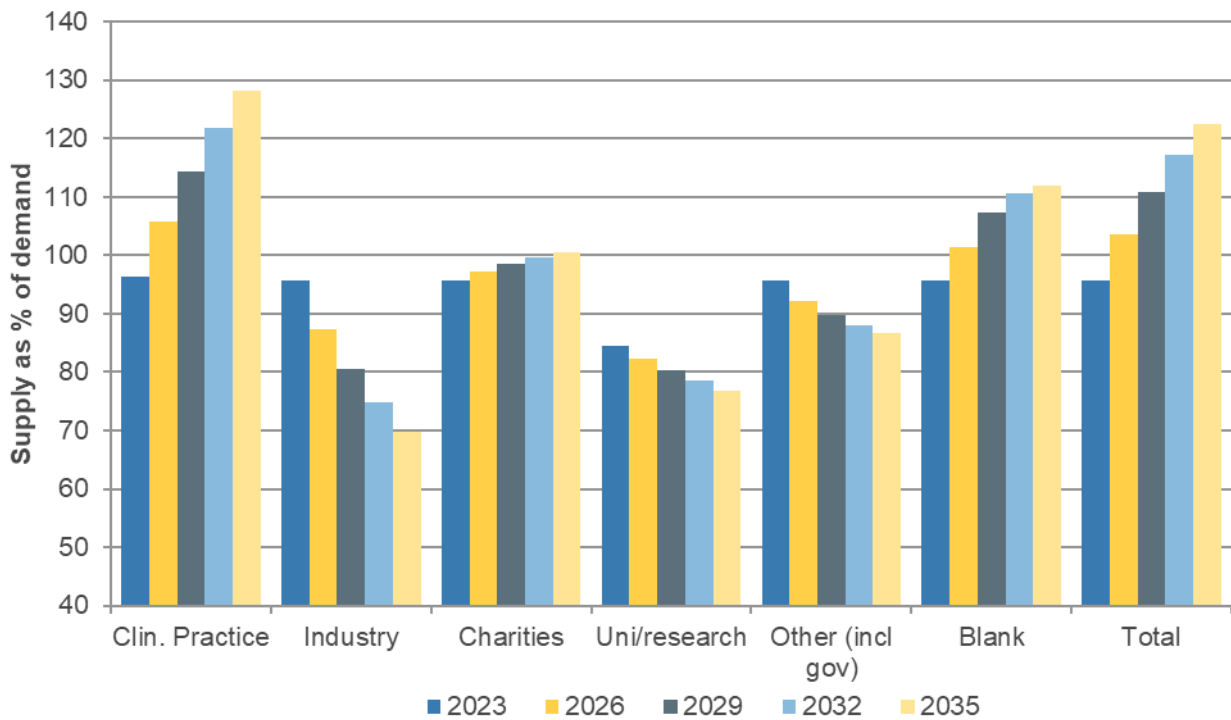
The modelling used the same assumption for future growth in demand as used for vets, namely the long-term (2011 to 2023) growth rate in the dog population, of 2.5% per year.

Figure 6.4 shows the balance between the supply of FTE vet nurses and the total demand for vet nurses by field of work and for the workforce as a whole, up to 2035. Overall, the supply of vet nurses equated to 96% of total demand in 2023, and will exceed total demand by 2025, and reaching a surplus of 22% over total demand by 2035.

In private clinical practice there is a similar pattern to the overall forecasts, with current supply being slightly below the total demand level but with supply increasing faster than demand, so that by 2035 there will be a surplus of 28% over the total demand level. In charities, there will be a very gradual increase in relative supply from the current level of 96% to match the total demand level in 2033.

In the other fields of work, supply as a proportion of total demand is projected to fall over the forecast period, most notably in industry and commerce, which as we saw above has a small projected decrease in FTE numbers.

Figure 6.4 Balance of supply and demand by field of work, 2023-35



Source: IES model based on RCVS Register data 2017-23

Inclusive Terminology

The terminology used to define ethnicity continues to evolve, and greater awareness has arisen about gender, cognitive differences as well as of disability. IES seeks to be a learning organisation; as such we are adapting our practice in line with these shifts. We aim to be specific when referring to each individual's ethnicity and use their own self-descriptor wherever possible. Where this is not feasible, we are aligned with Race Disparity Unit (RDU) which uses the term 'ethnic minorities' to refer to all ethnic groups except white British. RDU does not use the terms BAME (black, Asian, and minority ethnic) or BME (black and minority ethnic) as these terms emphasise certain ethnic groups and exclude others. It also recommends not capitalising ethnic groups, (such as 'black' or 'white') unless that group's name includes a geographic place. More broadly, we understand that while individuals may have impairments it is society that disables them, hence we refer to disabled people. Not all people identify with male or female and we reflect their self-descriptions in our work and use the term non-binary should abbreviation be necessary. We value neurodiversity. Where possible we always use people's self-descriptors rather than impose categories upon them.

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