

2023

The State of Emergency & Specialty Veterinary Care

Survey results from more than 250
professionals in emergency, specialty,
and urgent care practices.

WHAT'S INSIDE

Workload Trends

Morale & Employee
Happiness

Compensation

Brought to you by





Introduction & Methodology

In our first-ever State of ER and Specialty Veterinary Care report, we surveyed 277 emergency and specialty veterinary professionals between May 31 and June 21, 2023, to better understand how they're addressing the industry's biggest challenges, enhancing productivity, evolving their hiring and team structure, and advancing technology in 2023.

Around the time of our survey, we estimated approximately 1,500 total emergency, specialty, and urgent care centers in the US in 2023. We're factoring in the average number of employees per veterinary hospital (82), from our own active ER and specialty customer data to estimate a representative population size for the specific segment targeted by this research.

With an estimated population size of 123,000 ER and specialty professionals in 2023, the following results maintain a **95%** confidence level and a 6% margin of error. Statistical significance was calculated using [Survey Monkey's power calculator](#).





A message from Dr. Caleb Frankel



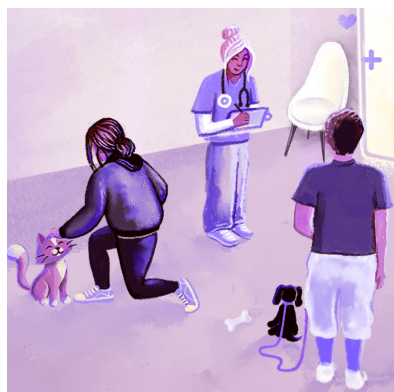
At Instinct, we're grateful to work with some of the world's top emergency and specialty veterinary hospitals—so we know how challenging it can be to get a clear picture of the trends in this important corner of our industry. We constantly hear that the bulk of historic veterinary surveys have brought valuable perspectives over the years, but they don't quite hit the mark for our emergency and specialty community. So, for our inaugural 'State of Emergency & Specialty Veterinary Care' report, we're aiming to share what we're learning and shed light on how hospitals like yours are evolving amid cascading challenges.

In this report, we're combining years working in the trenches of emergency and specialty veterinary centers with real data. Here's to embracing change, sparking innovation, and nurturing our unparalleled commitment to patient care and team workflow. We hope it helps!

With thanks,
Dr. Caleb Frankel, VMD
Founder and CEO, [Instinct](#)

Table of Contents

PAGE 05



**Survey
Demographics**

PAGE 08



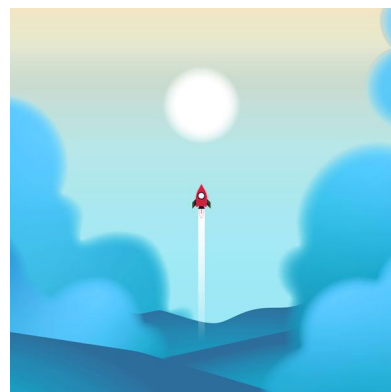
Workload Trends

PAGE 26



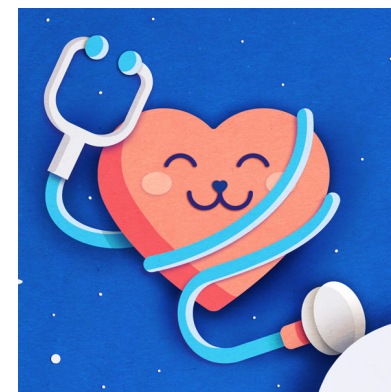
**Productivity,
Efficiency, &
Technology**

PAGE 35



Hiring & Retention
New role, tenure

PAGE 52



**Morale &
Employee
Happiness**

PAGE 65



**Compensation &
Revenue**



Hospital Categorization in Our Reporting

Respondent Answer	Type
Large group with multiple locations	Large Specialty/Emergency
Large specialty/emergency practice with more than 20 full-time vets (FTVs)	Large Specialty/Emergency
Emergency-only practice with more than 5 vets	Emergency Only
Emergency-only practice with 5 vets or fewer	Emergency Only
Specialty practice with more than 5 vets	Specialty
Specialty practice with 5 vets or fewer	Specialty
Urgent care center with more than 2 vets	Urgent Care
Urgent care center with 1-2 vets	Urgent Care
University/teaching hospital	University/Teaching Hospital
General practice with one location	GP
Other	Other



Survey Demographics



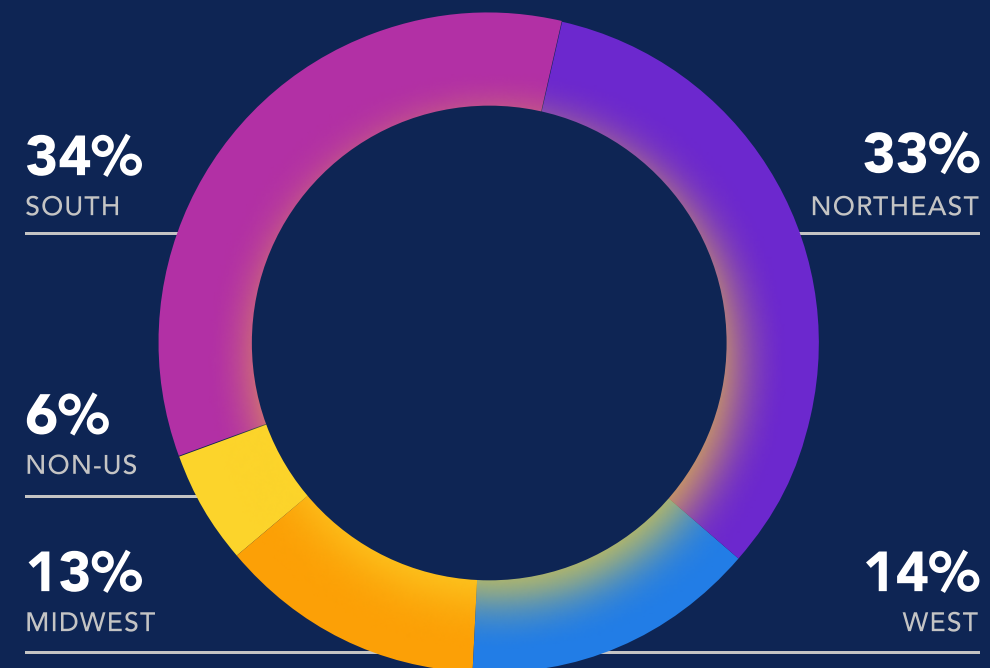
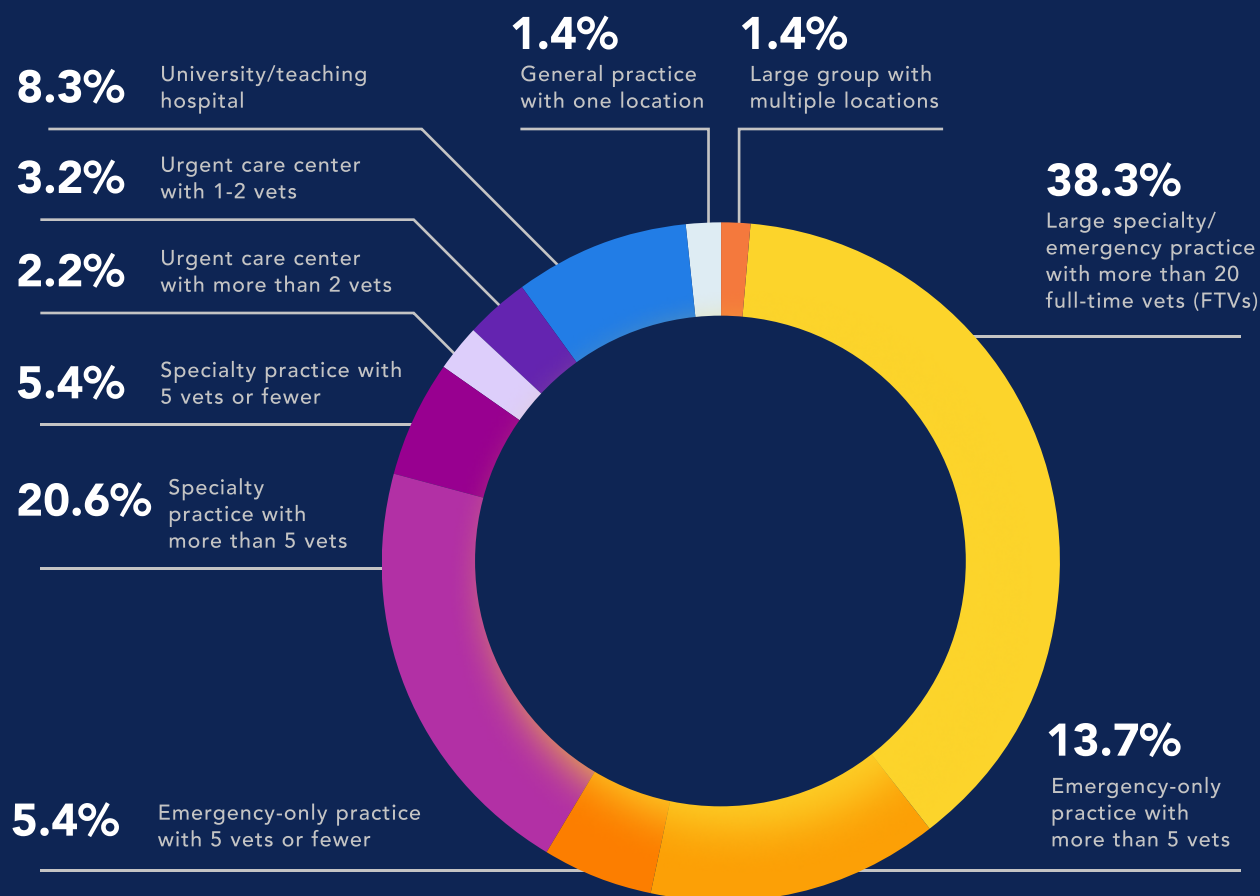


Which of the following best describes your practice?

38% of survey respondents identified as belonging to a large specialty/emergency practice, with specialty, emergency, university/teaching, and urgent care making up the remainder.

Where is your practice located?

~70% of respondents are primarily based in the Northeast or Southern United States. This corresponds with the concentrations of employed veterinarians in these regions as well as some of the highest paying states for veterinary professionals.





Hospital Business Hours

Most survey respondents reported being open 24/7/365, aligning with the primary hospital types surveyed (large emergency and specialty organizations).

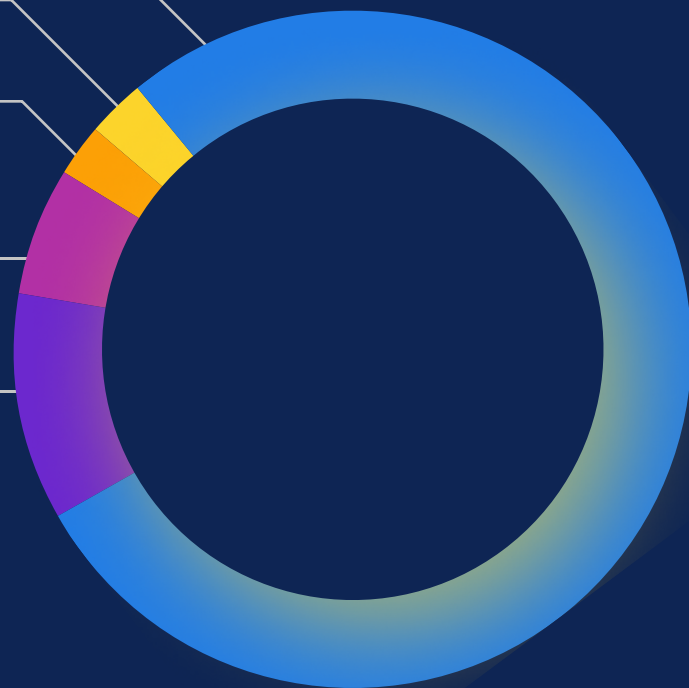
24/7/365
78%

3%
8 AM - 7 PM

3%
8 AM - 5:30 PM

6%
OVERNIGHT/
WEEKENDS ONLY

10%
OTHER



Role in Practice

About **50%** of survey respondents were full-time vets or nurses/technicians. The other **50%** were administrators, practice managers, or practice owners.

26% I'm an administrator

0.5% I'm a locum/relief technician

0.5% I'm a locum/relief veterinarian

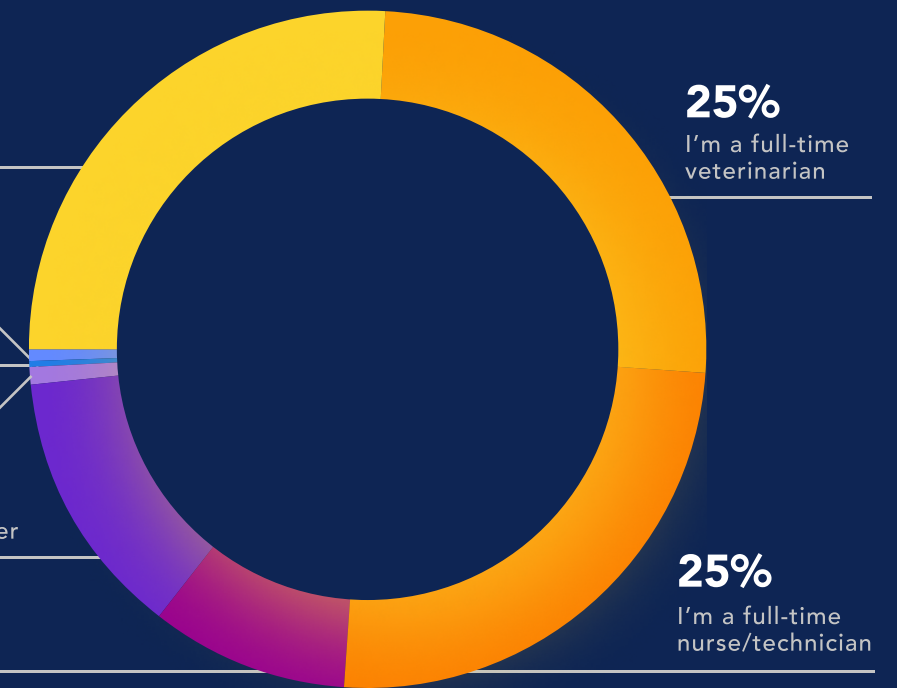
1% I'm a part-time veterinarian

13% I'm a practice manager

9% I'm an owner of the practice

25%
I'm a full-time veterinarian

25%
I'm a full-time nurse/technician





Workload in ER & Specialty Hospitals

Patient volume has been on the rise across emergency and specialty veterinary medicine, corresponding with global trends in pet ownership, increasing primary care backlogs, and staffing challenges ([the great veterinary shortage](#)). In this section, we break down the challenges ER and specialty hospitals are seeing, how they're responding, and how these challenges impact hiring, retention, morale, and productivity.





Section Highlights

Naturally, we're seeing the surge in pet ownership impacting workload in emergency and specialty hospitals: **54%** of survey respondents reported higher patient volumes compared to last year, and **59%** identified increased patient volumes as their hospital's primary challenge.

Intensifying increased workloads, **86%** of respondents reported staffing shortages in their hospital, and with so much busyness, **43%** reported missing treatment charges.

High patient volumes and surging workloads have widespread impacts on staff hours, overtime, mental health, and client wait times:

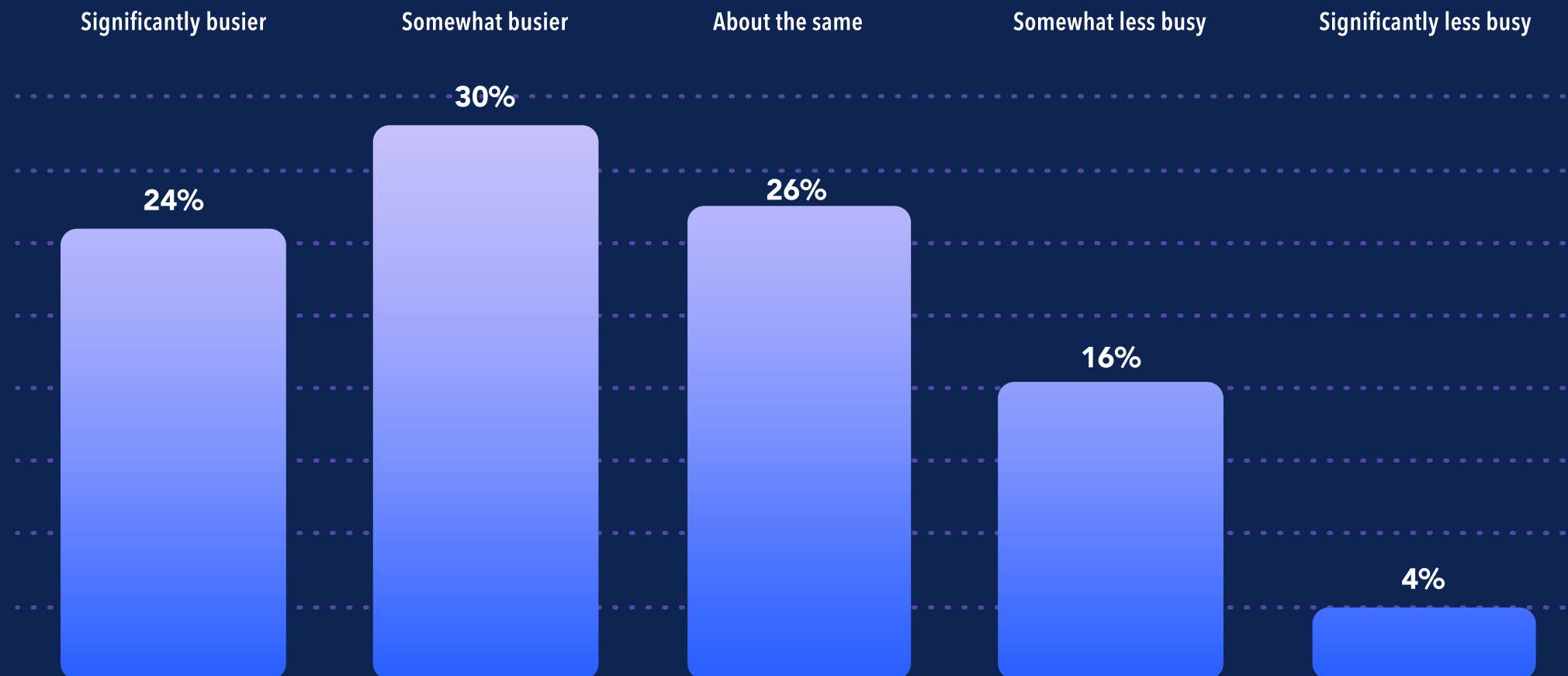
- **33%** of respondents have increased their working hours in 2023, and **50%** of respondents reported that their hospital's average wait time exceeds an hour.
- **83%** of survey respondents report experiencing stress and mental health challenges. Note: Later in this report, we break down hours worked by level of morale, discovering that employees working more hours were more likely to report high morale, likely due to their role and compensation.
- ER and specialty hospitals are addressing workloads as best as they can: **67%** of respondents increased overtime hours to accommodate more cases, while **52%** reported their hospital hired relief workers in the past year.





PATIENT VOLUME

Compared to this time last year, how has your patient volume changed?



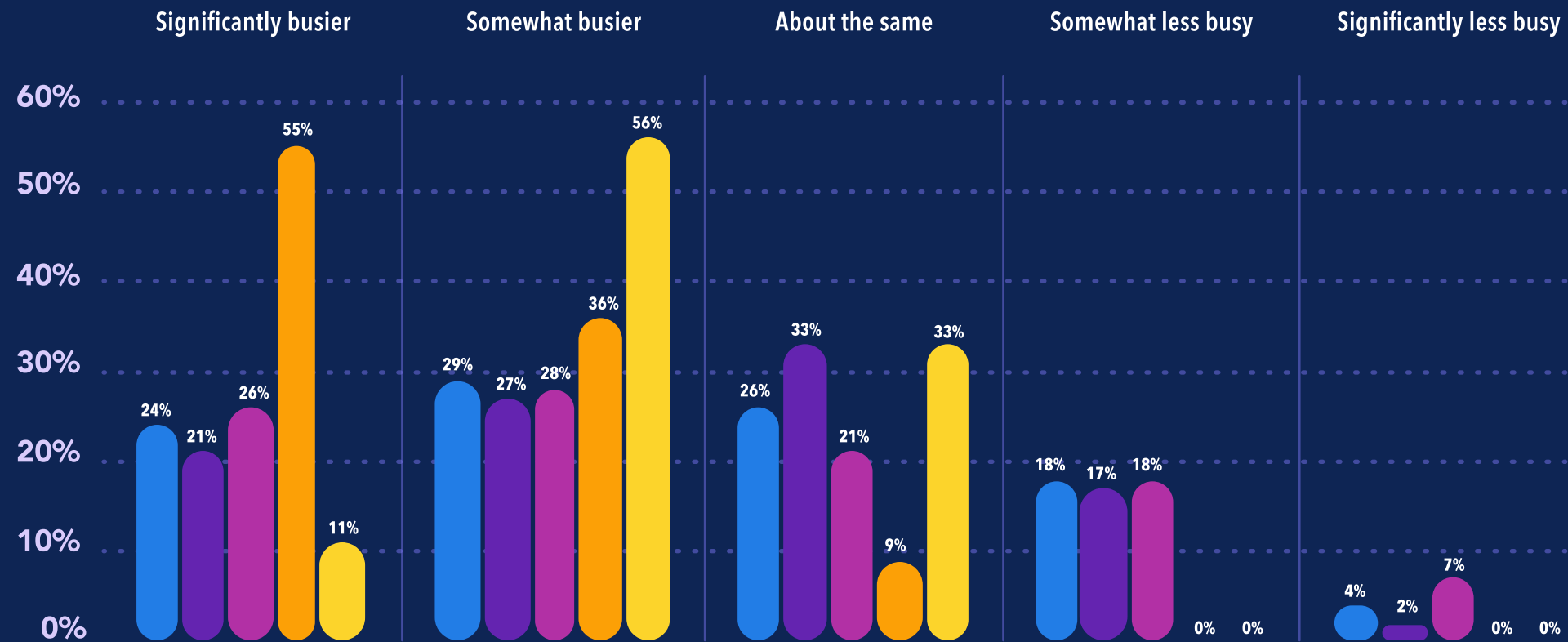
54% of respondents self-reported busier patient volumes than last year, while only **26%** and **20%** of respondents reported the same or lower patient volumes, respectively.





PATIENT VOLUME BY HOSPITAL TYPE

Compared to this time last year, how has your patient volume changed?



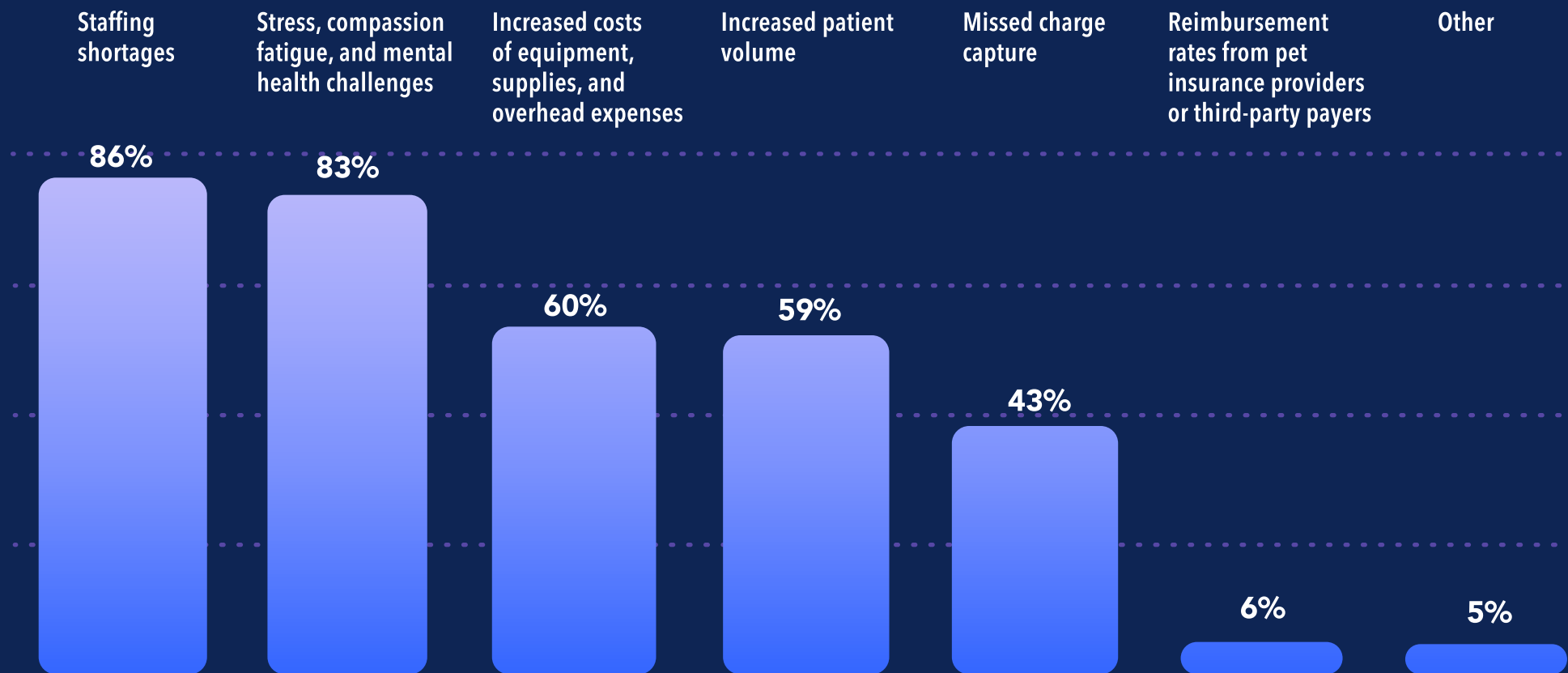
More than 90% of urgent care facilities responded that they are busier now than at this time last year; **55%** of urgent care respondents said they are significantly busier. Over the last 5-10 years, urgent cares and ERs have seen significant growth, largely caused by the overflow from overwhelmed general practices. With recruiting challenges and rising demands for services, clients with more immediate needs are often choosing urgent cares over general practices.

- LARGE SPECIALTY/ EMERGENCY
- EMERGENCY ONLY
- SPECIALTY
- URGENT CARE
- UNIVERSITY/ TEACHING HOSPITAL



WORKLOAD TRENDS: HOSPITAL CHALLENGES

Which of the following challenges has your practice experienced in the last year?



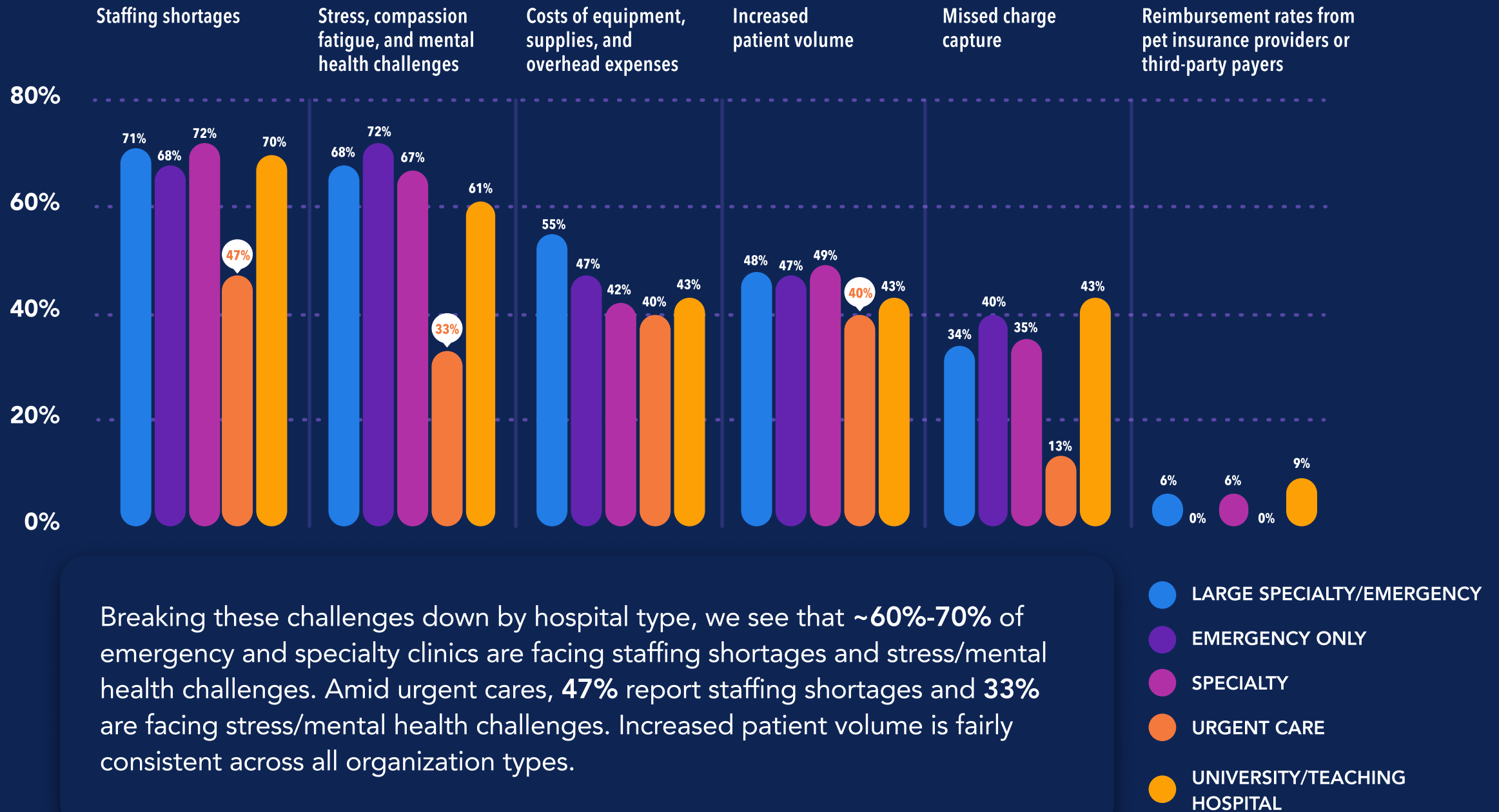
The overwhelming majority of ER and specialty hospitals are facing staffing shortages (86%), employee mental health challenges (83%), and increased patient volumes (59%).

Nearly half (43%) of ER and specialty hospitals report missed charges from cases.



WORKLOAD TRENDS: HOSPITAL CHALLENGES

Which of the following challenges has your practice experienced in the last year?



Breaking these challenges down by hospital type, we see that ~60%-70% of emergency and specialty clinics are facing staffing shortages and stress/mental health challenges. Amid urgent cares, 47% report staffing shortages and 33% are facing stress/mental health challenges. Increased patient volume is fairly consistent across all organization types.

- LARGE SPECIALTY/EMERGENCY
- EMERGENCY ONLY
- SPECIALTY
- URGENT CARE
- UNIVERSITY/TEACHING HOSPITAL





WORKLOAD TRENDS: HOSPITAL CHALLENGES

Which of the following actions has your practice taken in the last year?

Increased staff overtime hours to handle workload

Hired more relief veterinarians to work in the practice

Expanded by adding one or more services

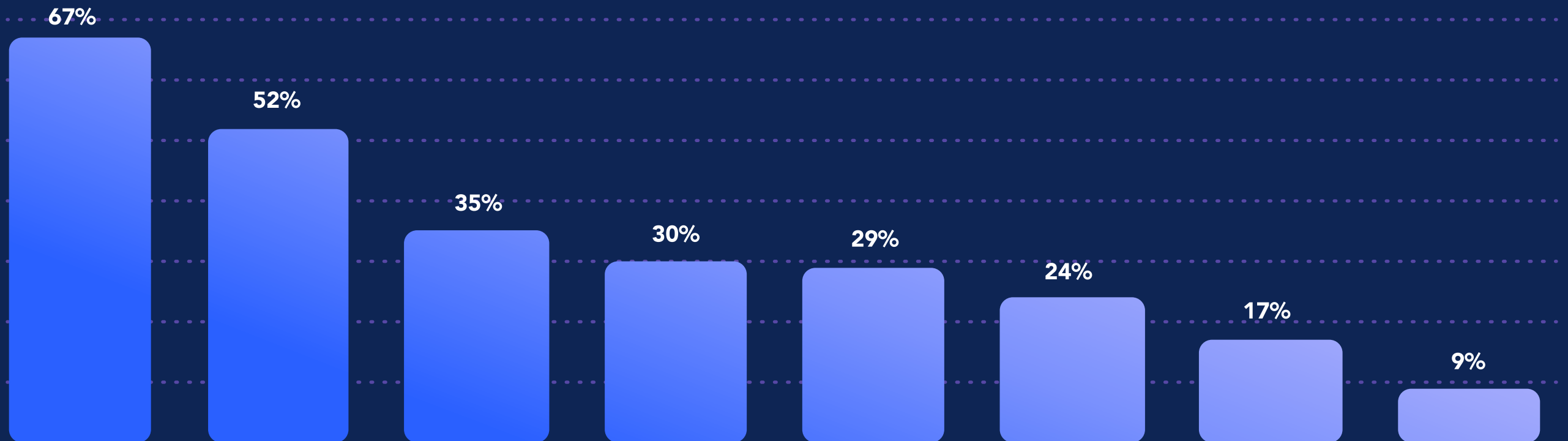
Taking more work home via remote access

Referred more cases to other specialty practices

Shut down one or more services

Reduced clinic hours due to shortage of staff

Expanded clinic hours to meet increased demand

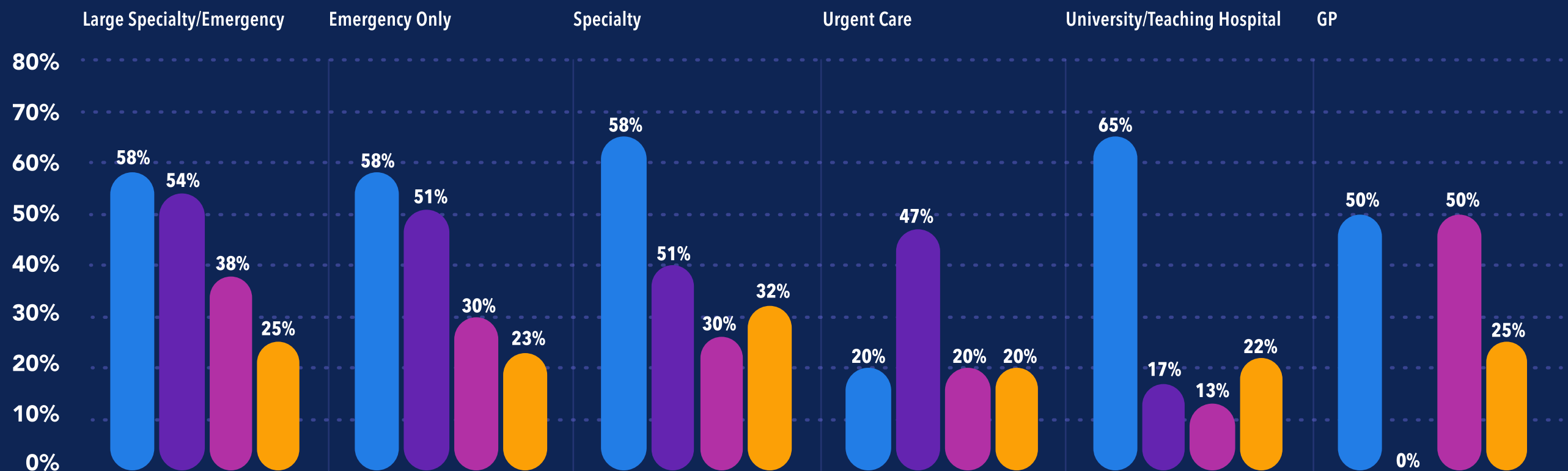


More than half (52%) of respondents reported their hospitals hired relief veterinarians to work in the practice, and 67% of hospitals increased overtime to handle workload.



WORKLOAD TRENDS: HOSPITAL CHALLENGES

Which of the following has your practice experienced within the past year?



A lower percentage of urgent care respondents reported increasing staff overtime compared to other organization types; approximately the same percentage (**47%**) of urgent cares reported hiring relief workers as other organizations.

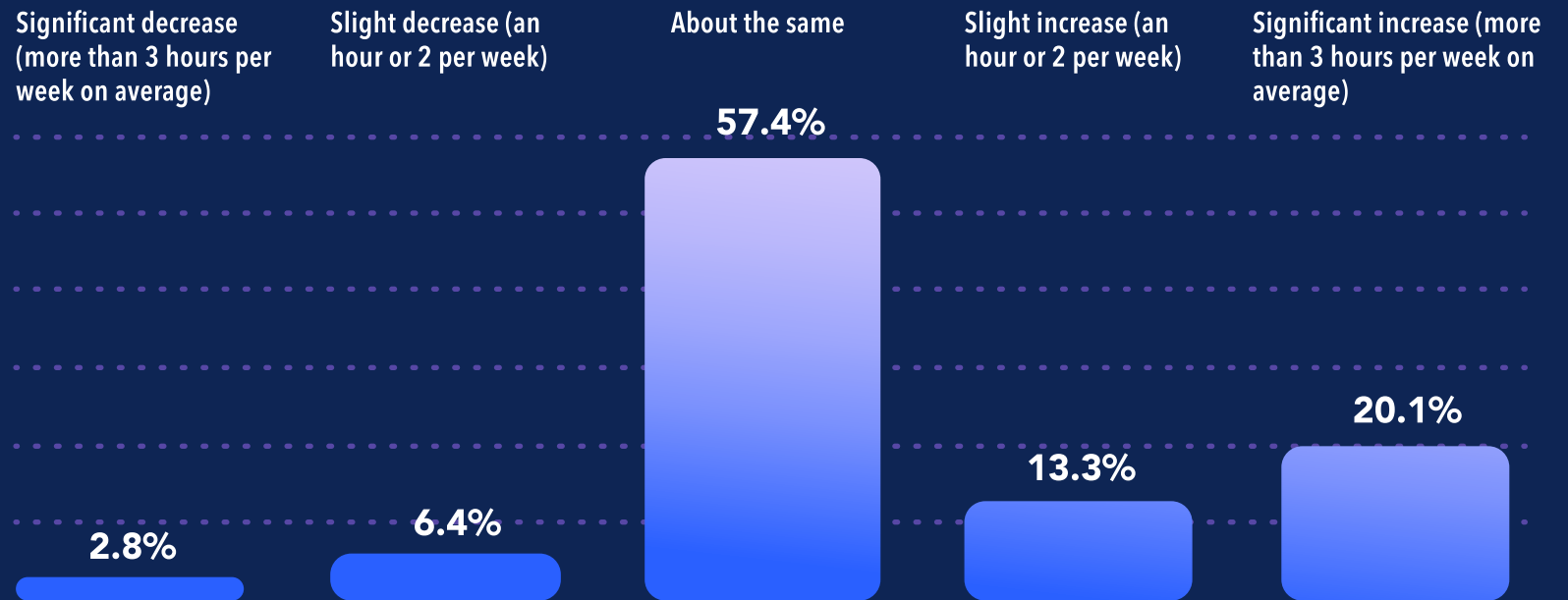
- INCREASED STAFF OVERTIME HOURS TO HANDLE WORKLOAD
- HIRED MORE RELIEF VETERINARIANS TO WORK IN THE PRACTICE
- EXPANDED BY ADDING ONE OR MORE SERVICES
- TAKING MORE WORK HOME VIA REMOTE ACCESS



WORKLOAD TRENDS: HOSPITAL CHALLENGES

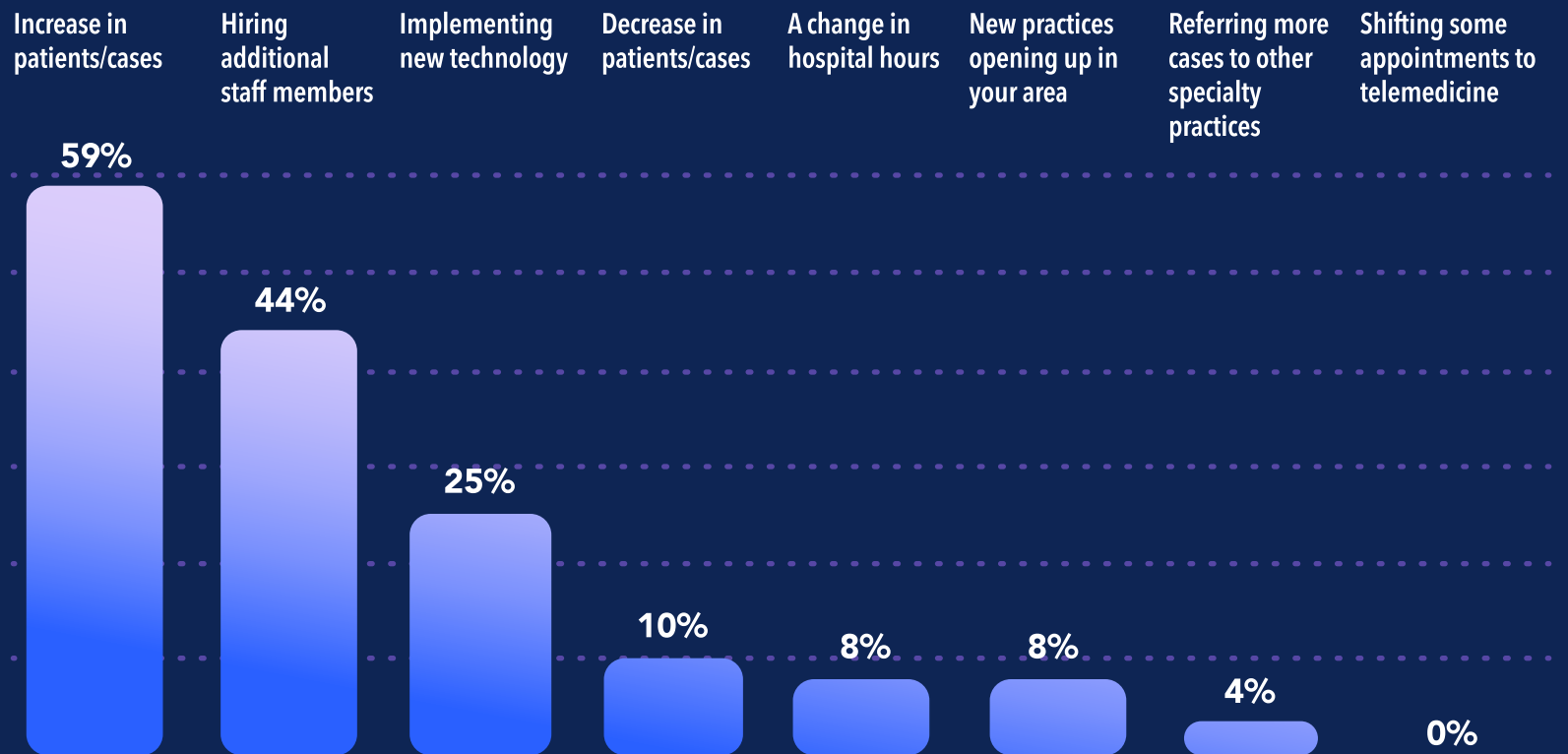
How have your hours changed over the last year?

Correlating with a general increase in patient volume, **~33% of respondents have increased their working hours in 2023.**



What elements are driving a change in your hours worked?

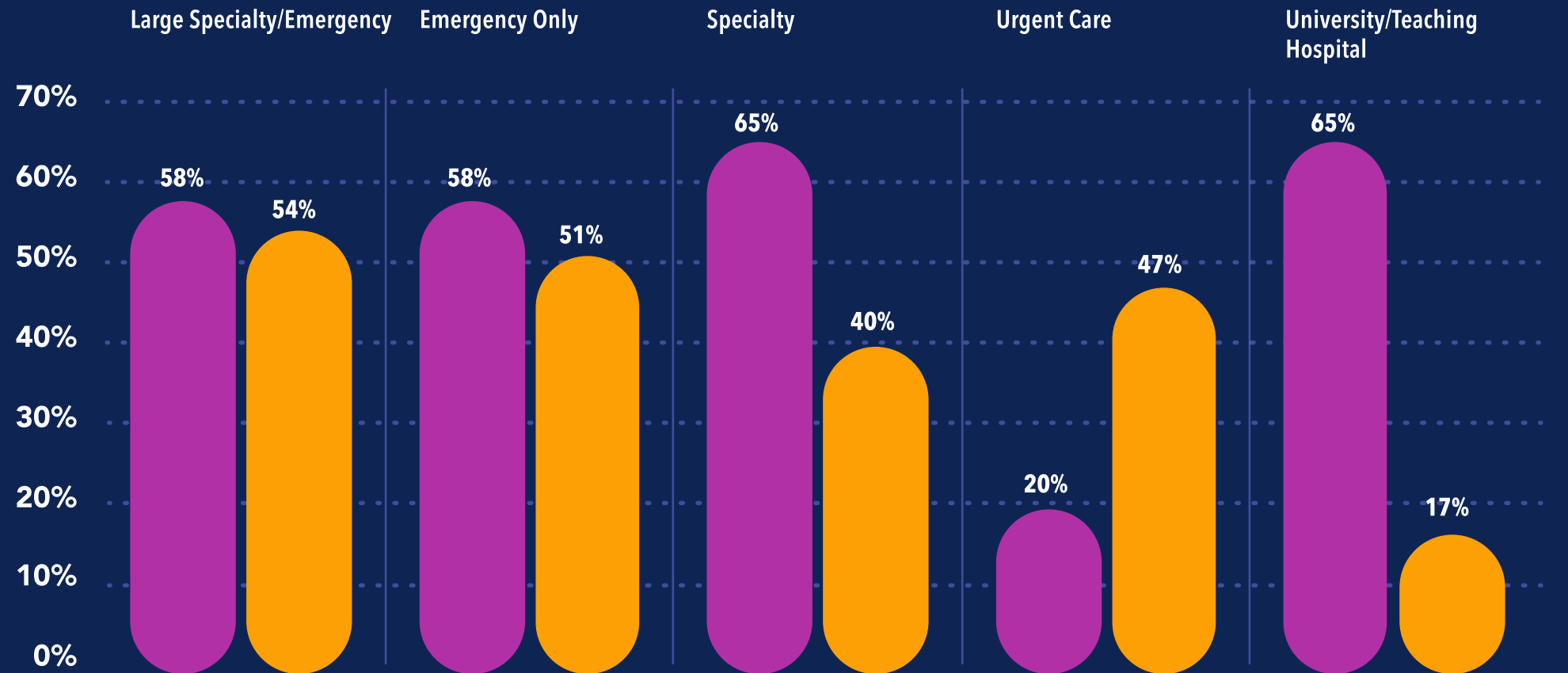
The two most cited drivers for changes in hours worked are increased workload (driving an increase in working hours) and **hiring additional staff** (in an attempt to decrease hours worked).





WORKLOAD RELIEF

How did different hospital organization types respond to workload increases?



Across all organization types surveyed, a high percentage of respondents hired more relief vets AND increased staff overtime to handle the increased workload. A much higher percentage of university hospitals instead relied on increasing staff overtime alone.

- INCREASED STAFF OVERTIME HOURS TO HANDLE WORKLOAD
- HIRED MORE RELIEF VETERINARIANS TO WORK IN THE PRACTICE



Workload Impact on Hours Worked

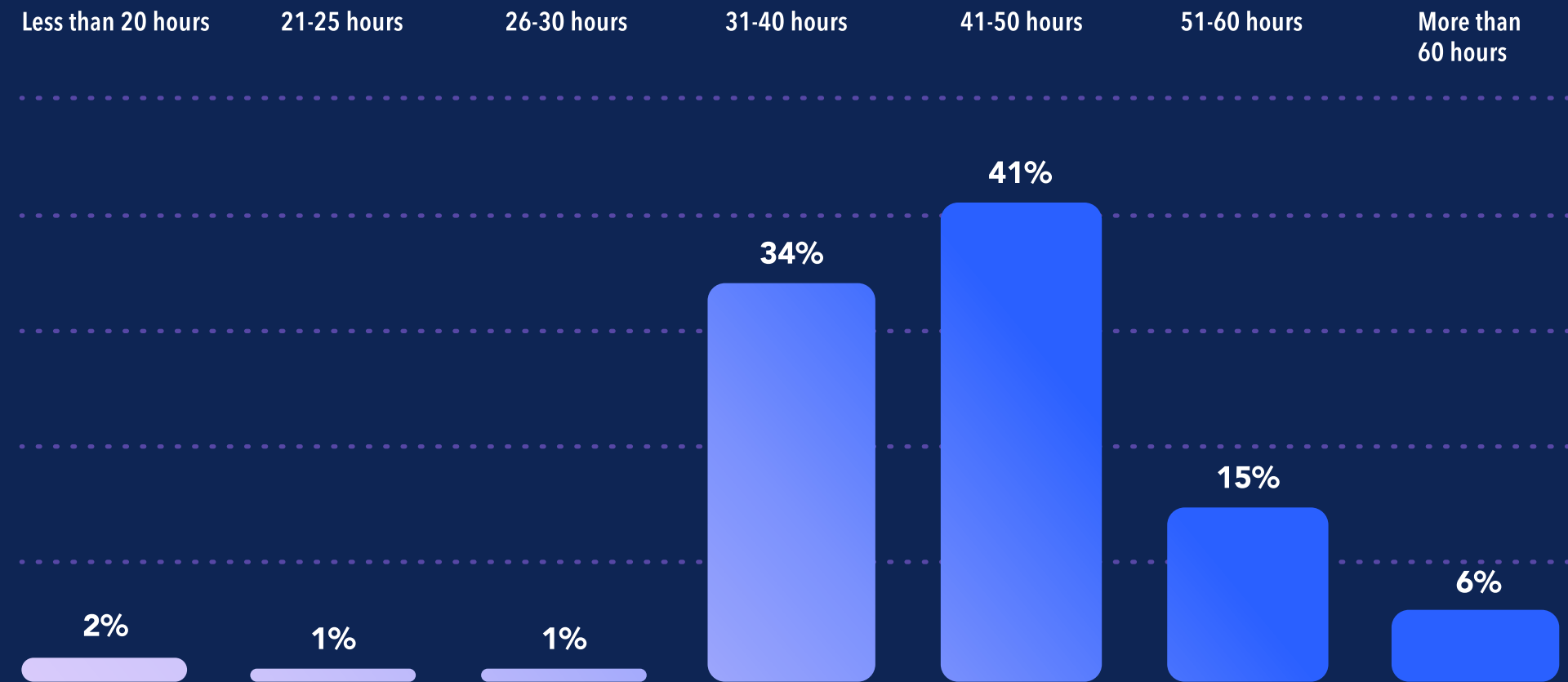
How many hours on average are emergency and specialty staff working, and how do role and tenure correlate with the number of hours staff are working?





HOURS WORKED

Hours Worked per Week on Average (Full & Part Time)

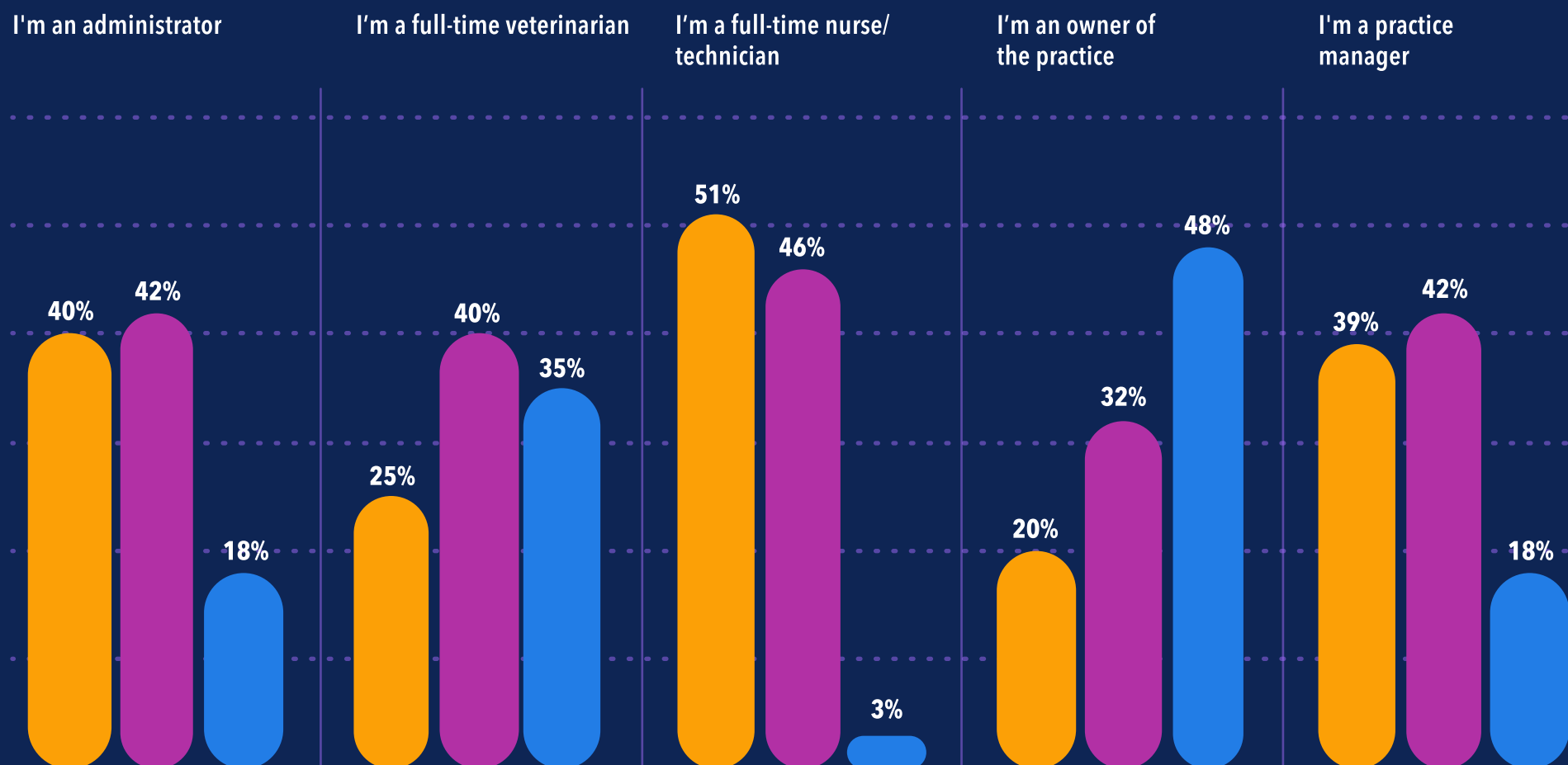


The majority (**75%**) of respondents work between 31-50 hours a week. **62%** of respondents work more than 40 hours a week on average.

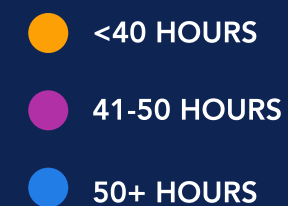


HOURS WORKED

Hours Worked by Full-Time Role



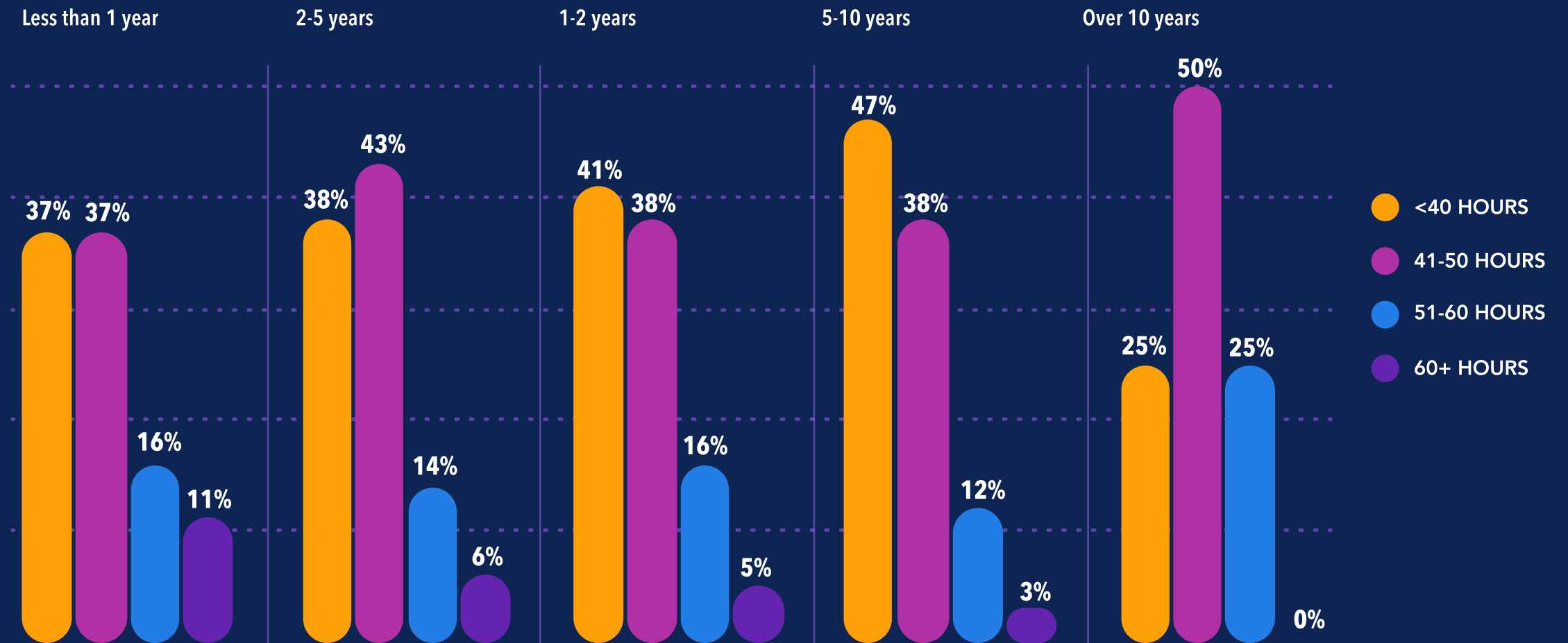
Owners are most likely to work 50+ hours a week: **48%** of owners responded that they are likely to work 50+ hours a week vs **35%** of full-time vets and **18%** of practice managers.





WORKLOAD & MORALE

Hours Worked by Staff Tenure



Staff with less than 1 year of tenure reported the most instances of working 60+ hours a week. 11% of respondents with an average tenure of less than 1 year work 60+ hours a week, compared to 0% of respondents with an average tenure of 10+ years.



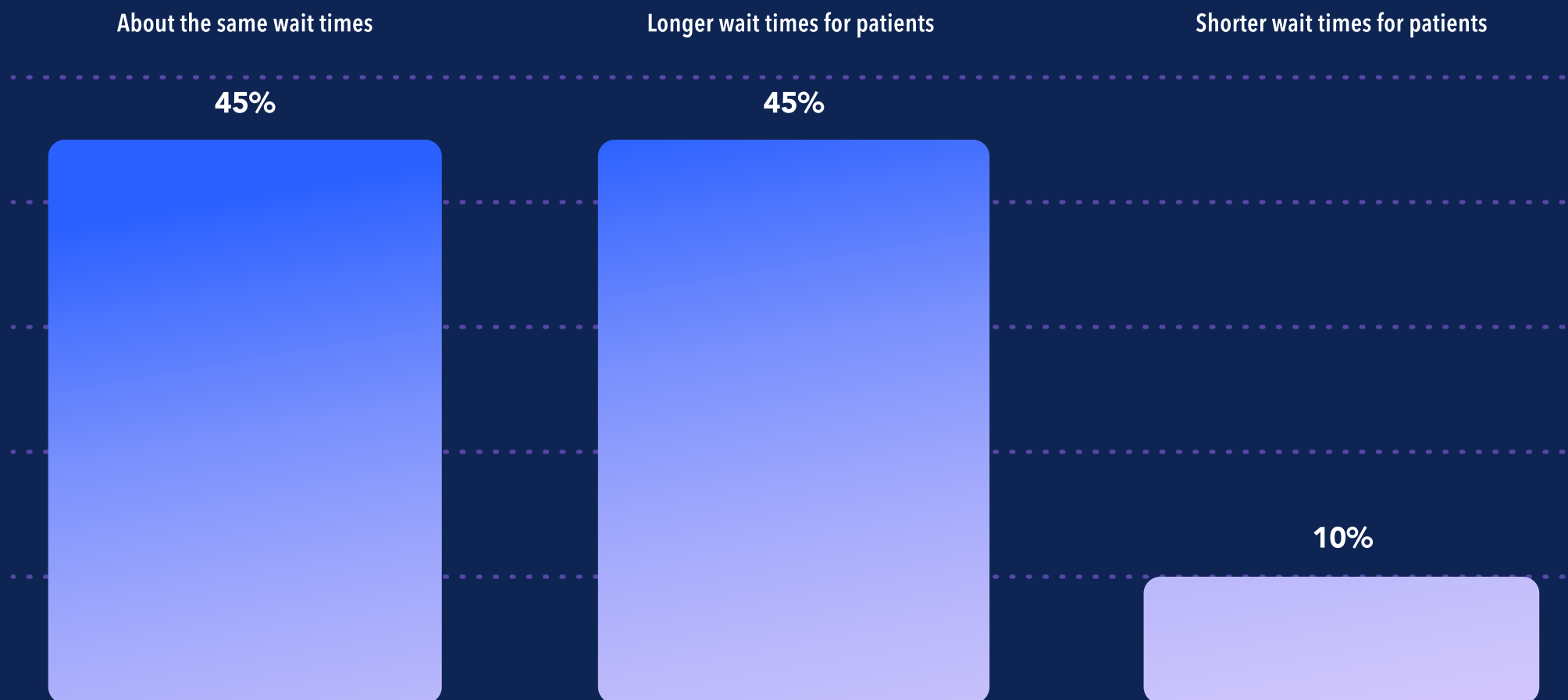
Impact on Wait Times

How is workload impacting client wait times at emergency and specialty veterinary practices in 2023?



WAIT TIMES

Compared to prior years, in the past year, did your practice experience...



90% of respondents reported the same or longer patient wait times in 2023, compared with prior years, pointing to an overall increase in wait times across emergency and specialty care.





WAIT TIMES

What is the average wait time for patients at your practice?



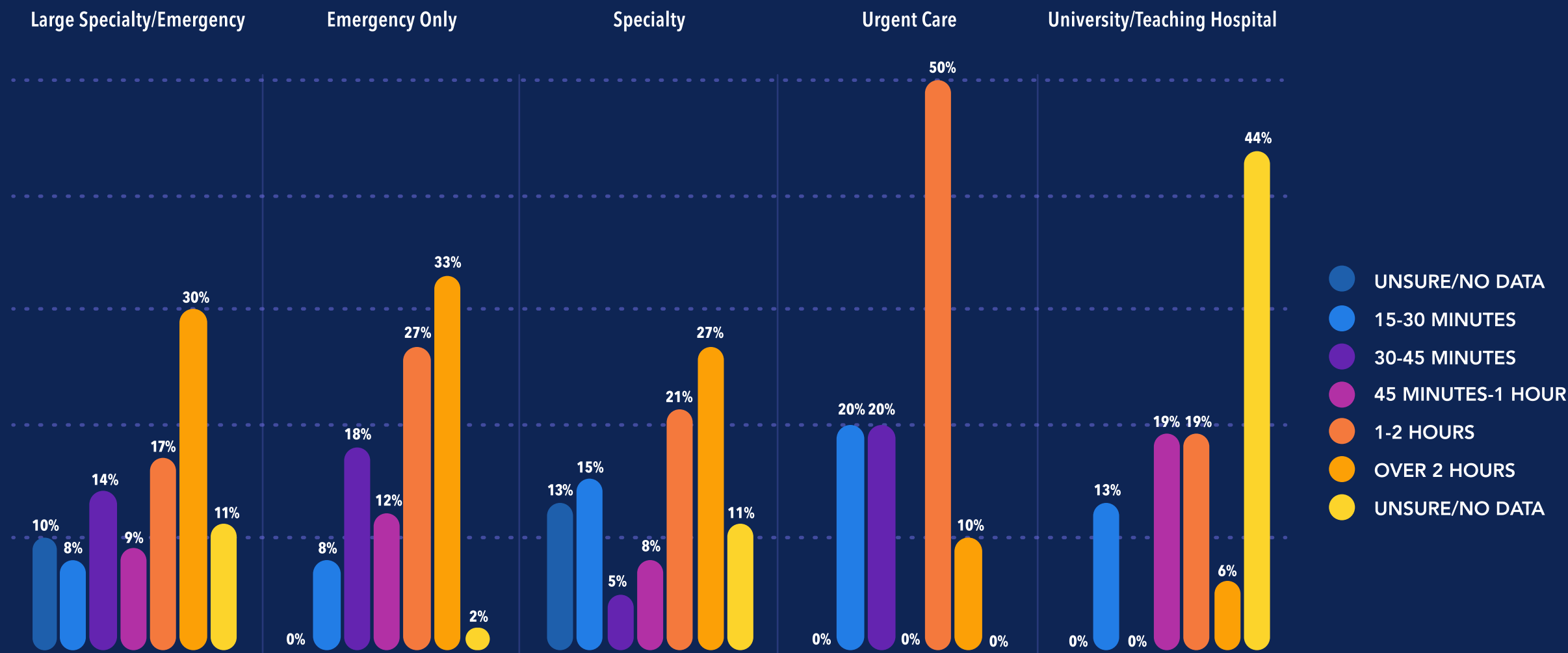
~49% of respondents reported their hospital's wait times are over 1 hour, with an average wait time of **1 hour 22 minutes**.





WAIT TIMES

Wait Times by Hospital Type



Of those surveyed, **54%** of emergency, specialty, and urgent care centers are seeing wait times over an hour.





Productivity, Efficiency & Technology

This section explores opportunities to enhance productivity and efficiency at emergency and specialty hospitals with new and existing resources, and looks at the impact of technology adoption.



Section Highlights

Of all veterinary technology, cloud-based PIMs and digital treatment sheets have the biggest impact on employee retention. In hospitals *without* turnover, **30% more** respondents reported using PIMs than respondents from hospitals *with* turnover. In addition, **20% more** respondents reported using digital treatment sheets at hospitals without turnover. (**See page 32.**)

In light of rising patient volumes, workloads, and wait times we're seeing across the entire industry, there has never been a more essential moment for hospitals to assess ways they can improve productivity with the resources they already have and evaluate where they can invest for the most significant improvements in staff efficiency, revenue, staff retention, and quality of care.

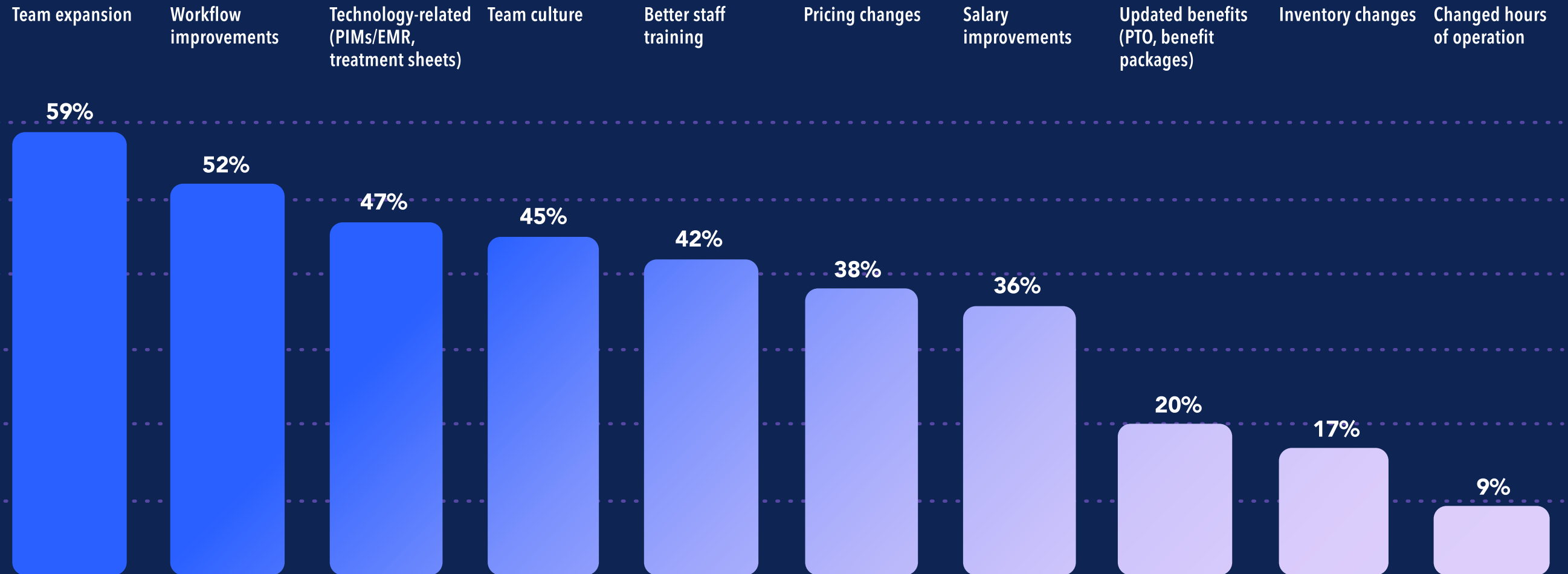
On the innovation front, many emergency and specialty hospitals have adopted or upgraded to digital treatment sheets (**38%**), cloud-based PIMs/EMR (**36%**), or client communications platforms (**32%**) in the last year. We're seeing urgent cares and smaller emergency hospitals leading the way in implementing workflow improvements, technology, staff training, and pricing changes, as well as new diagnostic and imaging technology and wearable devices.





PRODUCTIVITY & TECHNOLOGY

What improvements, if any, has your practice made that have impacted your productivity in the last year?

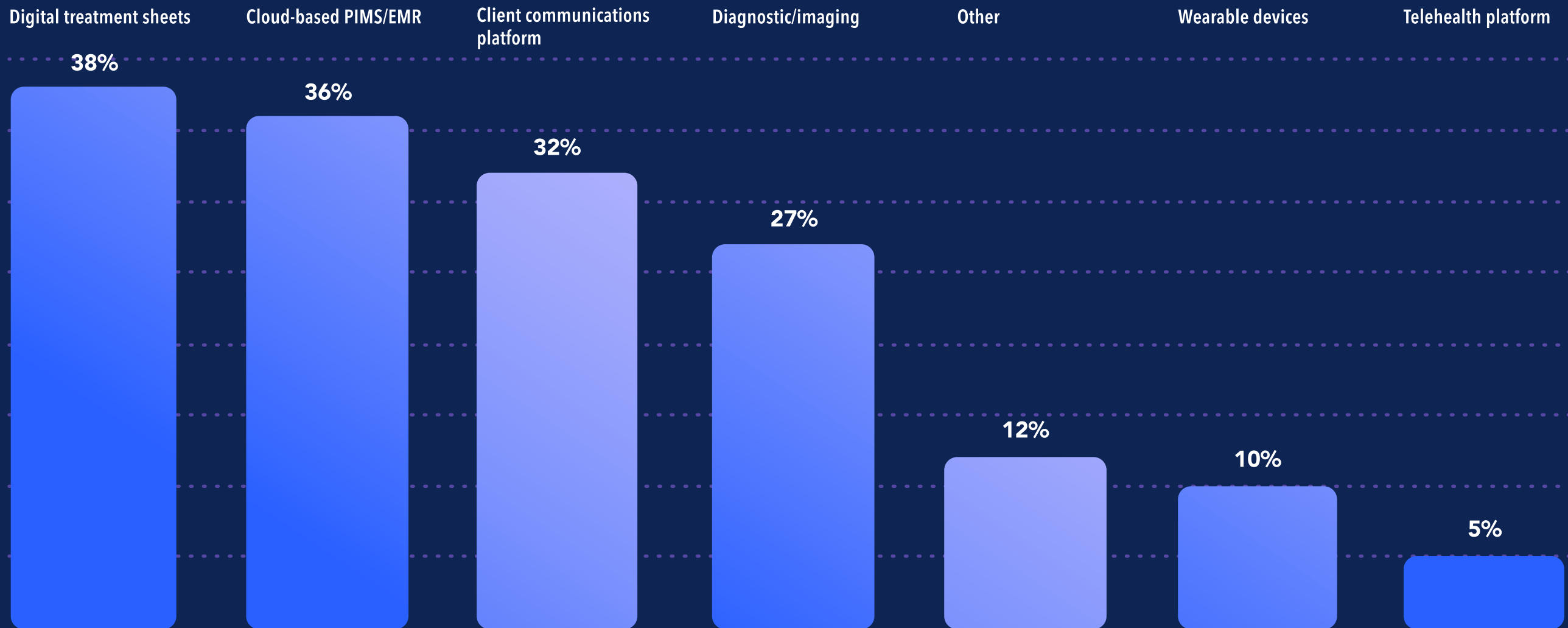


The top 3 productivity improvements reported by respondents in 2023 were **team expansion**, **workflow improvements**, and **technology (PIMs/EMR, treatment sheets)**.



PRODUCTIVITY & TECHNOLOGY

What new technology did your practice adopt or change in the last year?

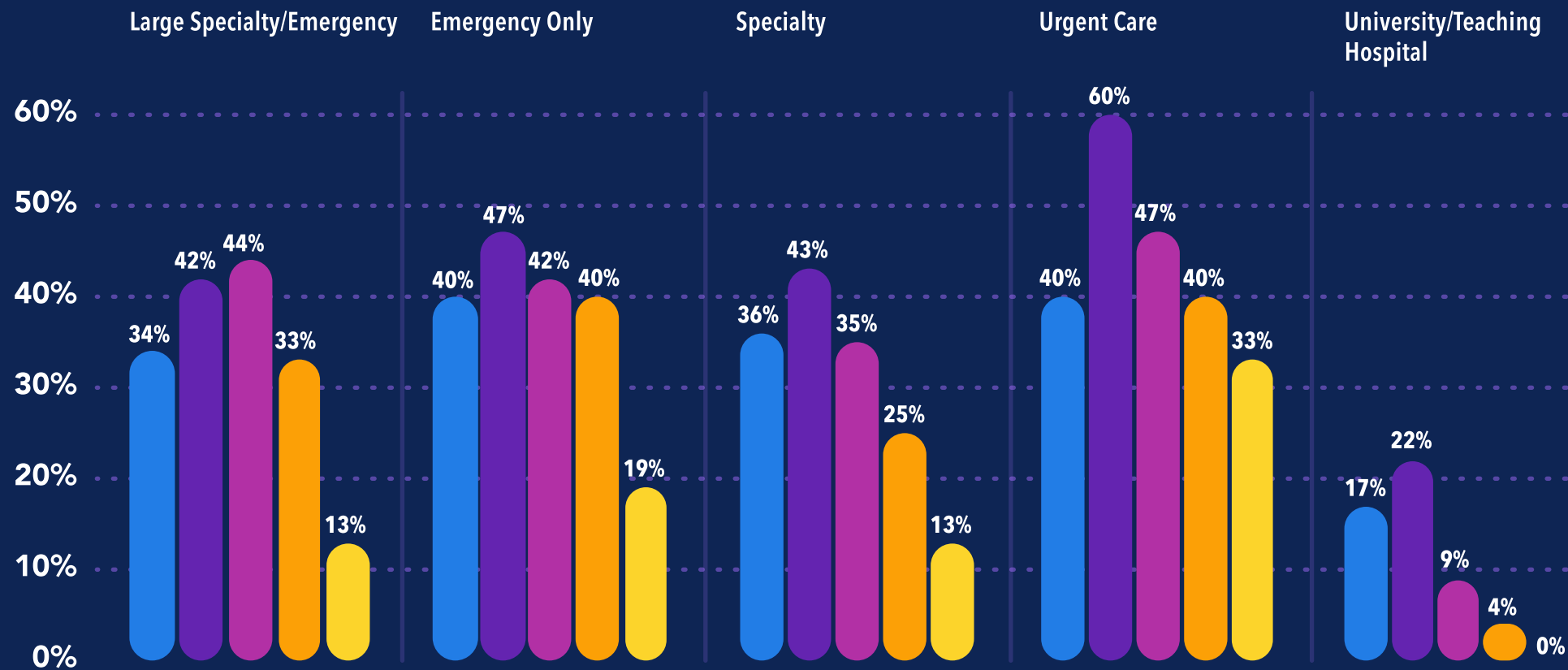


~40% of respondents implemented either digital treatment sheets or cloud-based PIMs/EMR in the last year. **One third (32%)** of respondents adopted a client communications platform in the last year.



PRODUCTIVITY & TECHNOLOGY

How are different hospital types adopting methods to improve efficiency?



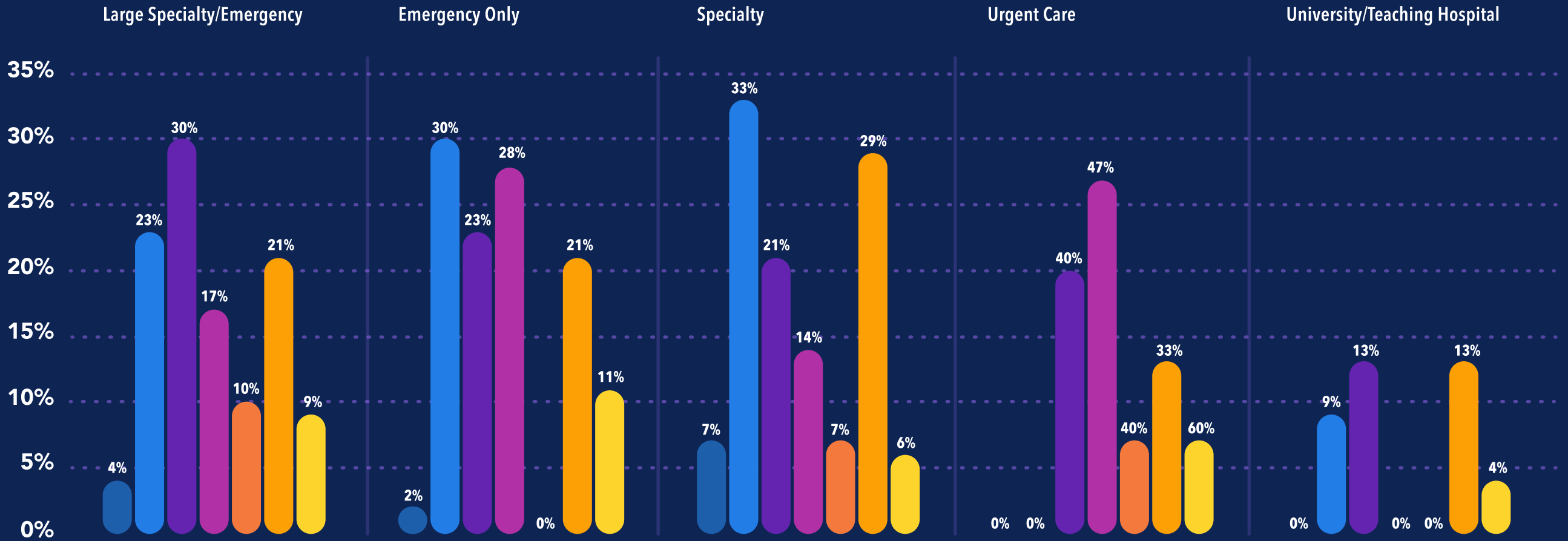
Universities and teaching hospitals are by far the lowest adopters of new methods to improve productivity, while urgent care and smaller emergency hospitals had the highest rates of implementing workflow improvements, new technology, staff training, and service pricing changes.

- BETTER STAFF TRAINING
- WORKFLOW IMPROVEMENTS
- TECHNOLOGY-RELATED (PIMS/EMR, TREATMENT SHEETS)
- PRICING CHANGES
- INVENTORY CHANGES



PRODUCTIVITY & TECHNOLOGY

How are different hospital types adopting technology?



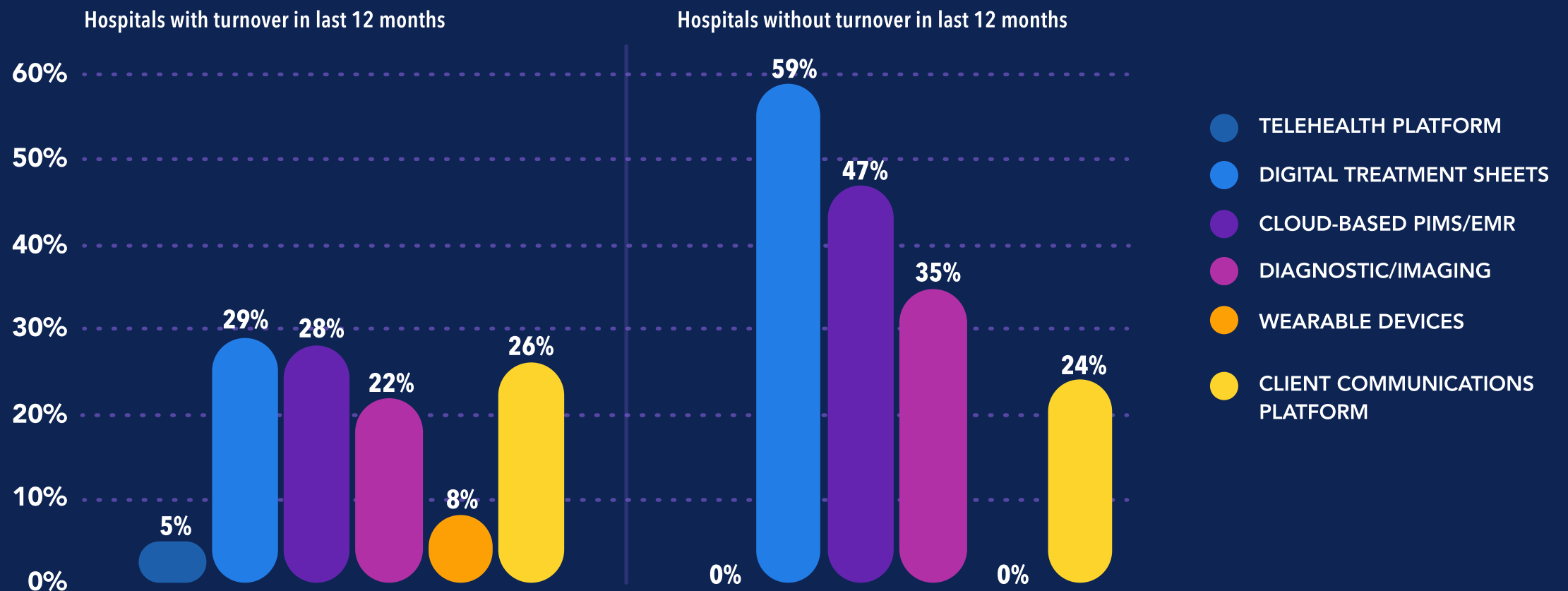
Urgent care and emergency-only hospitals are investing in new diagnostic and imaging technology at a higher rate than other organization types. Specialty practices are investing in client communications tools more than any other hospital type. **30% of large emergency/specialty hospitals are adopting cloud-based PIMS.**

- TELEHEALTH PLATFORM
- DIGITAL TREATMENT SHEETS
- CLOUD-BASED PIMS/EMR
- DIAGNOSTIC/IMAGING
- WEARABLE DEVICES
- CLIENT COMMUNICATIONS PLATFORM
- OTHER



PRODUCTIVITY & TECHNOLOGY

What types of technology impact retention?

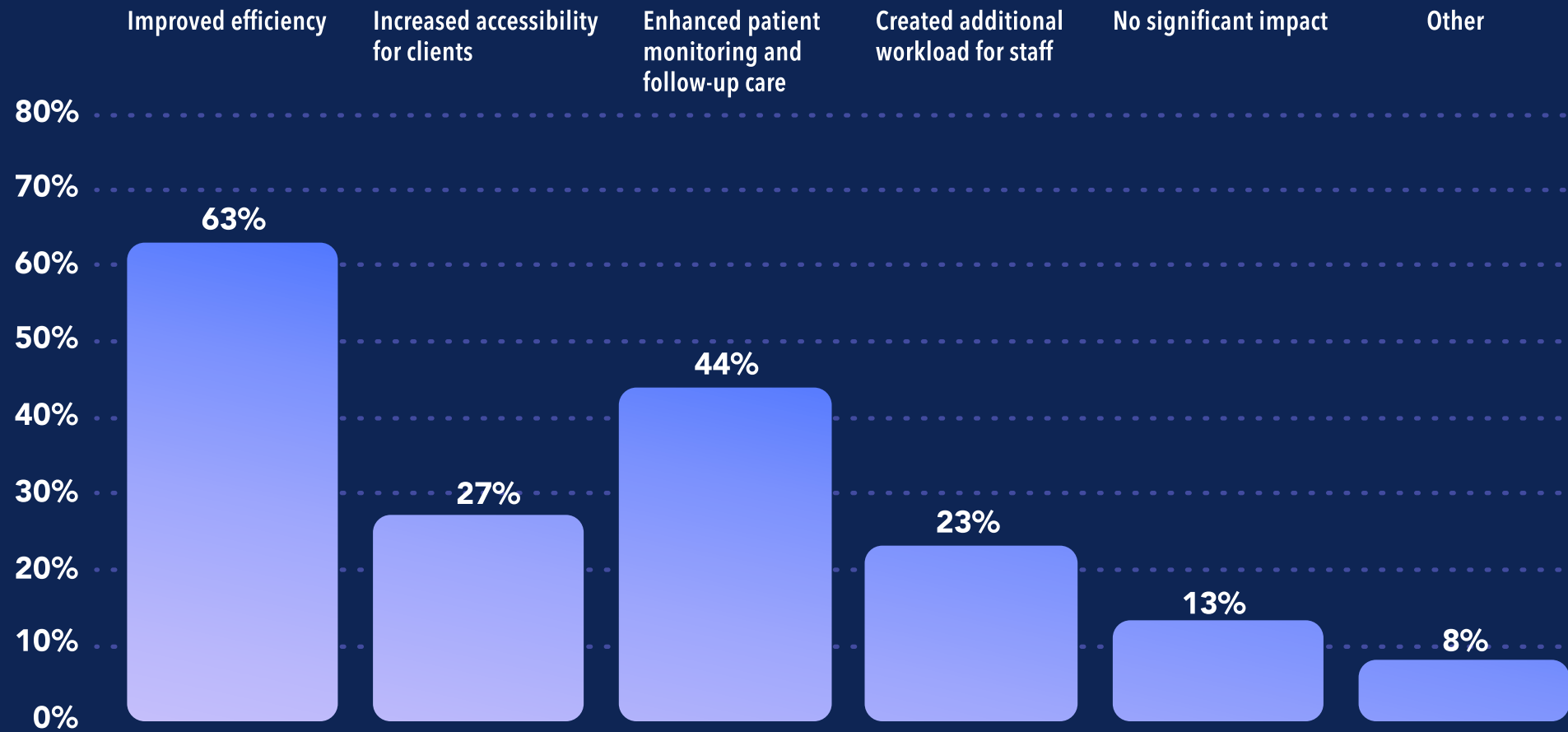


Of all veterinary technology, cloud-based PIMs and digital treatment sheets have the biggest impact on employee retention. In hospitals without turnover, 30% more respondents reported using PIMs than respondents from hospitals with turnover. Additionally, 20% more respondents reported using digital treatment sheets at hospitals with no turnover.



PRODUCTIVITY & TECHNOLOGY

How has the adoption of new technology affected your practice's workflow and patient care?

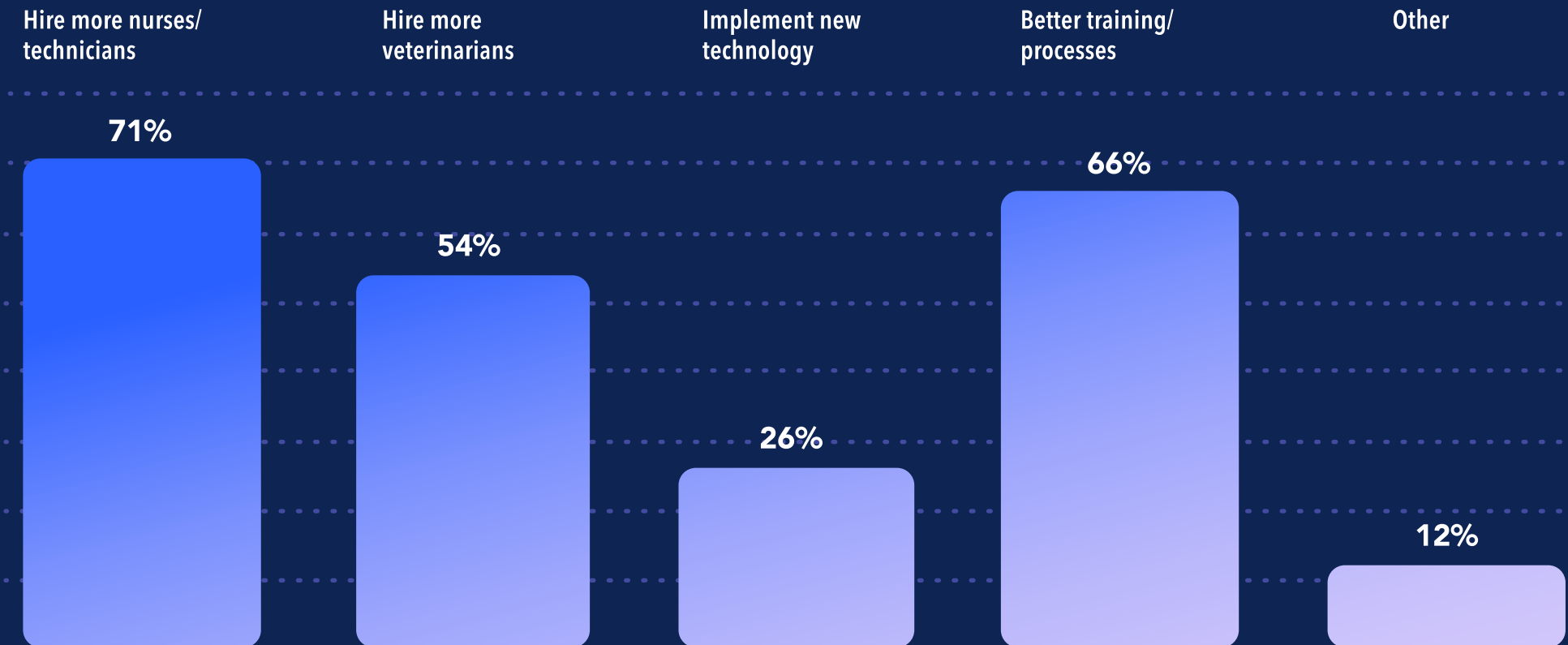


The majority of respondents (75%) saw positive improvements from adopting new technology, including improved efficiency, increased accessibility, and/or enhanced patient monitoring. Meanwhile, 13% saw no improvements, indicating a need for better training, implementation, and technology selection.



PRODUCTIVITY & TECHNOLOGY

In your opinion, what could be done to further improve your practice productivity + efficiency?



With many hospitals already adopting new technology, the majority of respondents cited more in-depth training/processes and hiring more veterinary technicians as the most impactful actions to improve productivity today. "Other" responses included expanding their physical hospital's space, implementing wait-time calculator tech for clients, revamping change management and team culture, and designating staff to own certain technologies.



Hiring & Retention in Emergency & Specialty Care

In an industry grappling with staffing shortages and overtime work, this section explores staffing changes, hiring trends, incentive programs, and turnover reasons seen across emergency and specialty hospitals in 2023.





Section Highlights

With increasing demand (as seen by workload trends) and widespread shortages of veterinary talent (as seen [in this survey](#) by **83%** of respondents reporting a shortage in qualified candidates), it's no surprise that it's an employee's market across veterinary care. Veterinary professionals are changing jobs more frequently, knowing that salaries and benefits are climbing, relief work is offering competitive compensation and lifestyle, and better work–life balance is possible.

Emergency and specialty hospitals are hiring technicians, veterinarians, and administrative staff **5x** more than they are reducing staff, pointing to the growth trends in ER/specialty care.

In our results, respondents reported that technicians/nurses have been the most challenging roles to hire and retain. The majority of respondents (**83%**) reported that veterinary technicians/nurses were impacted by employee turnover at their hospital, while **68%** of hospitals hired additional technicians/nurses in the last year.

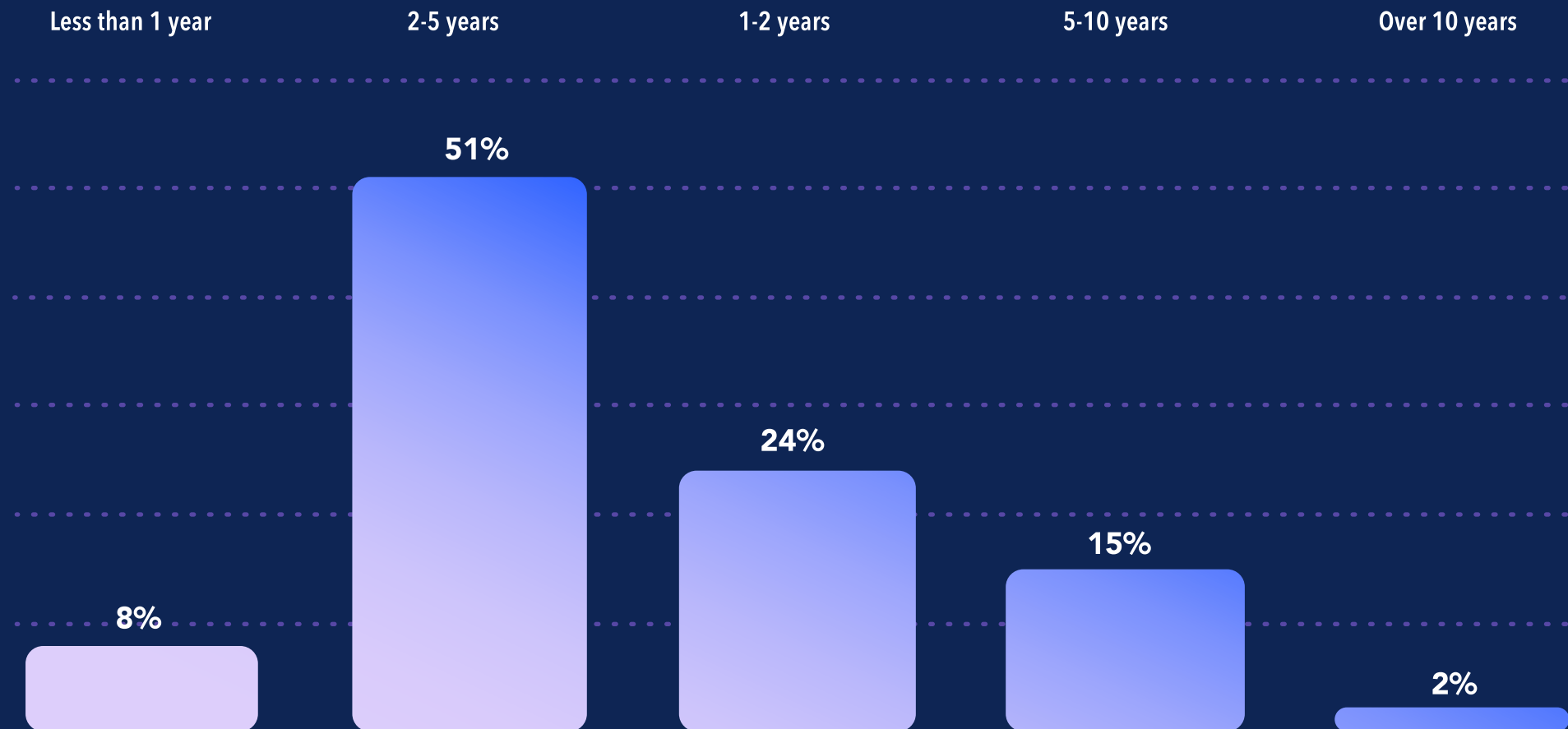
Of all veterinary staff, full-time nurses/technicians were most likely to cite burnout/mental health challenges as primary reasons for seeking a new role. With half (**51%**) of nurses/technicians experiencing mental health challenges and work–life balance concerns, we're witnessing a need for employers to go beyond recommendations for individual self-care strategies and consider initiatives that target work schedule, time off, and wellness.





STAFF TENURE

What would you say is the average tenure of your current staff members?

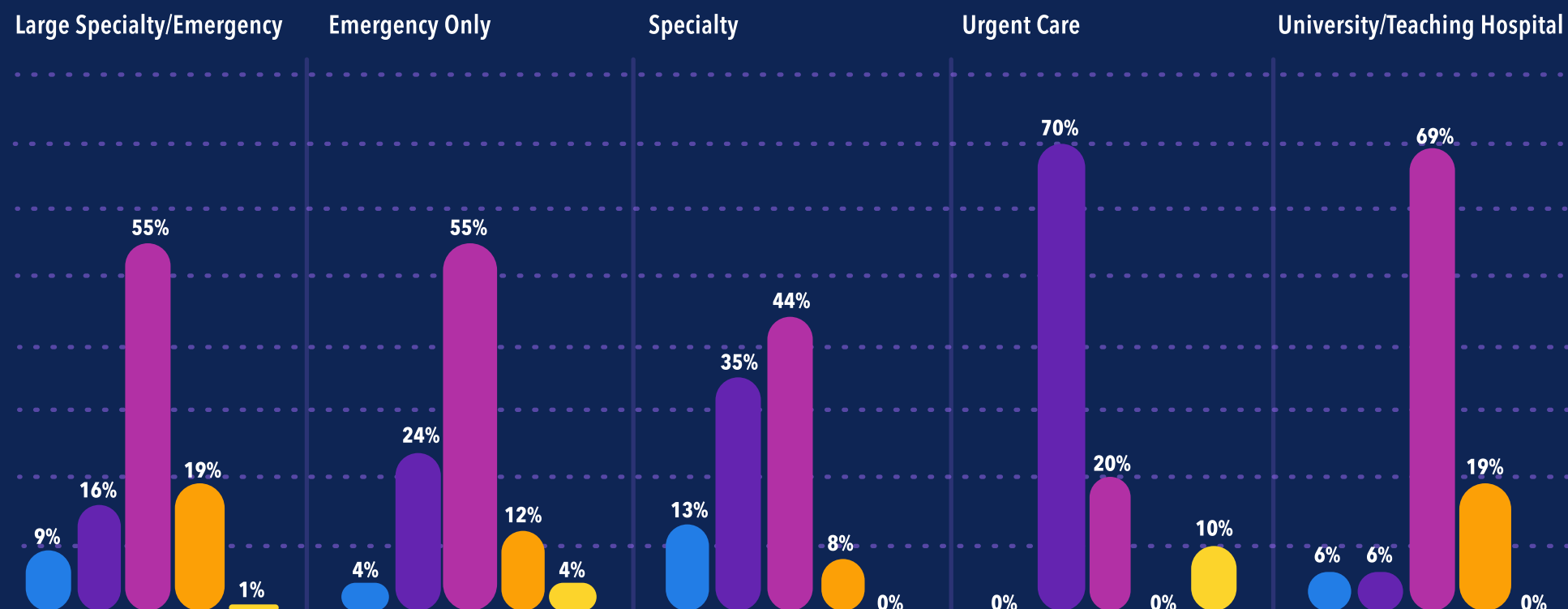


Half of respondents reported their practice's average tenure is between 2-5 years.



STAFF TENURE

What would you say is the average tenure of your current staff members?



Urgent care had the lowest average tenures: **70%** of urgent cares had an average tenure less than 2 years vs **48%** of specialty hospitals (the next highest percentage). Meanwhile, only **13%** of university/teaching hospitals had an average tenure of less than 2 years. Many of the supporting staff at university settings are students practicing in teaching hospitals, whereas urgent care is an emerging practice type.

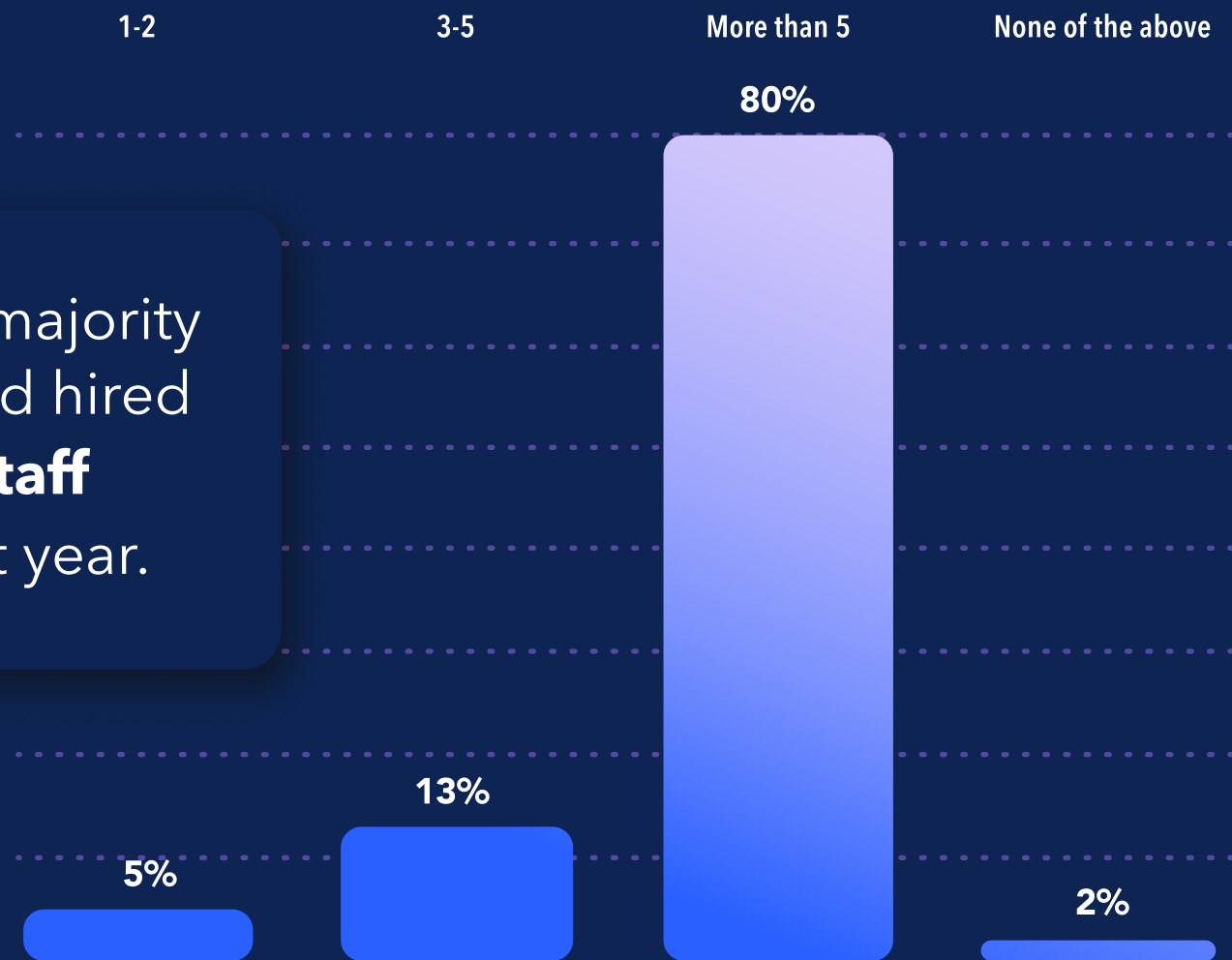




HIRING TRENDS

In the last year, how many new staff were hired?

The overwhelming majority of hospitals surveyed hired **more than 5 new staff members** in the last year.

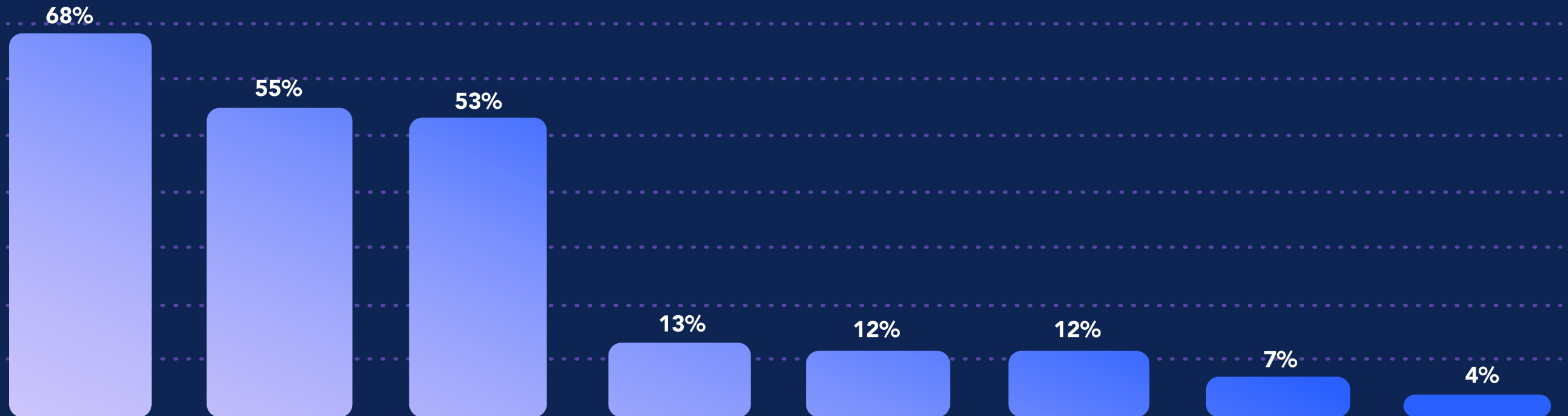




HIRING TRENDS

How has your staff changed over the last year?

Hired additional technicians/nurses Hired additional veterinarians Hired additional administrative/support staff Reduced the number of veterinarians Reduced administrative/support staff Reduced the number of technicians/nurses Other No changes

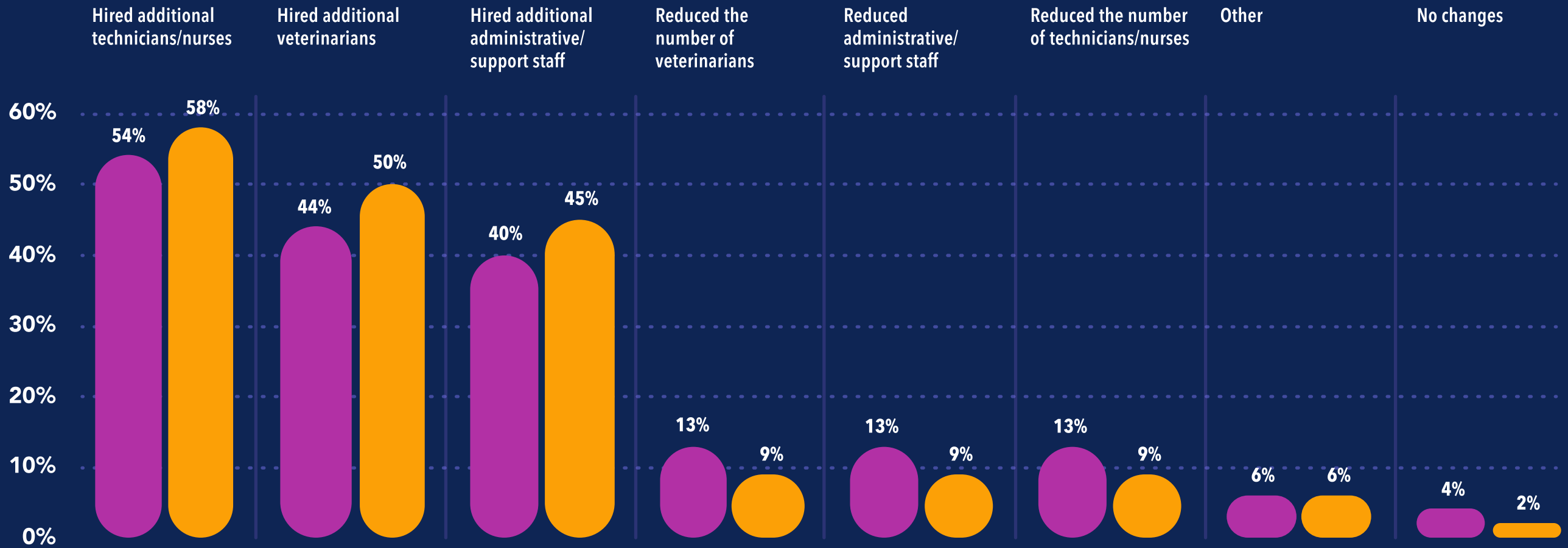


Technicians/nurses have been the most in-demand hires of any role across emergency, specialty, urgent care, and universities, followed by veterinarians and administrative staff.



HIRING TRENDS

How has staff changed in the last year? (Specialty vs emergency)



When breaking staff changes down by organization type, emergency hospitals have made slightly more hires for nurses/technicians and veterinarians than specialty hospitals in the last year.

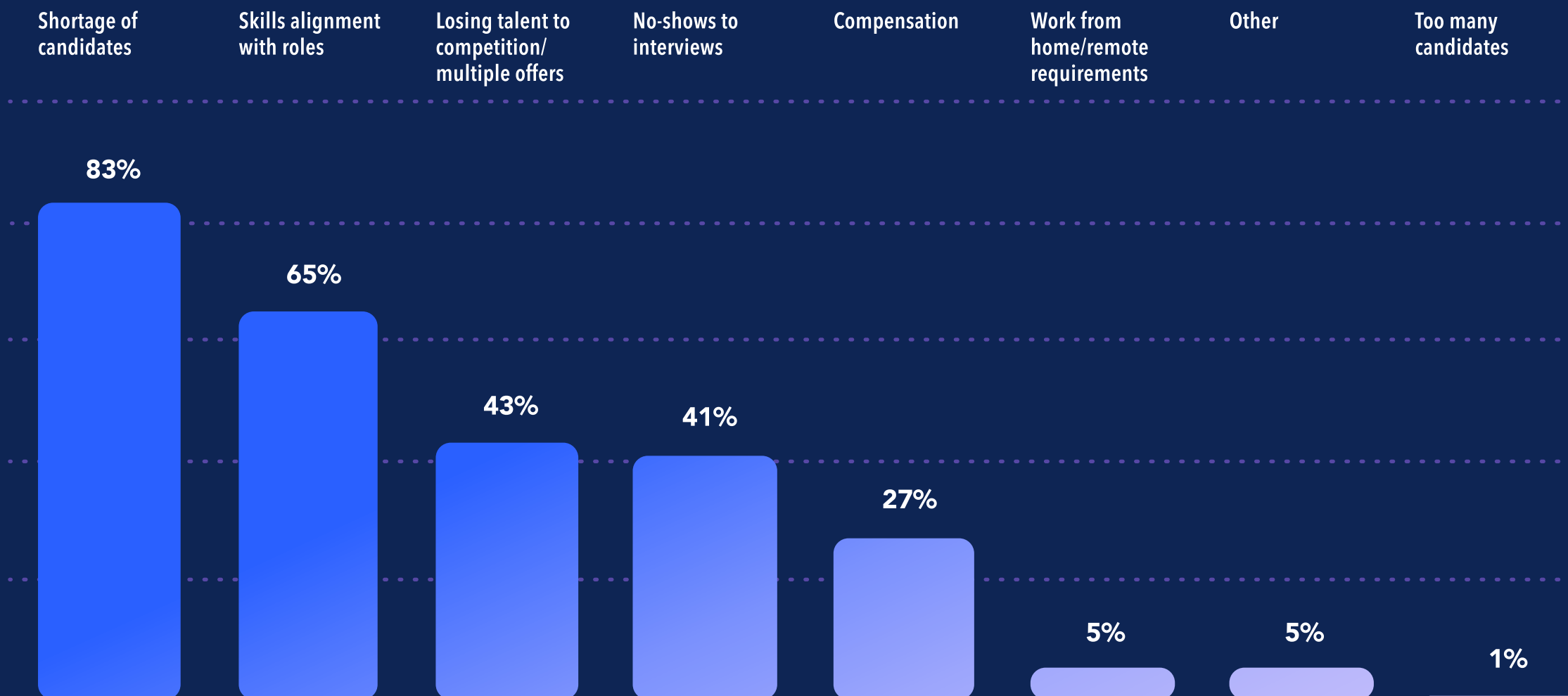
- SPECIALTY HOSPITALS
- EMERGENCY HOSPITALS





HIRING TRENDS

What were your top challenges related to hiring this past year?



The majority of respondents (**83%**) reported a shortage of qualified candidates or skills alignment with roles (**65%**). Nearly half of respondents noted no-shows to interviews and losing talent to competition.



Employee Turnover

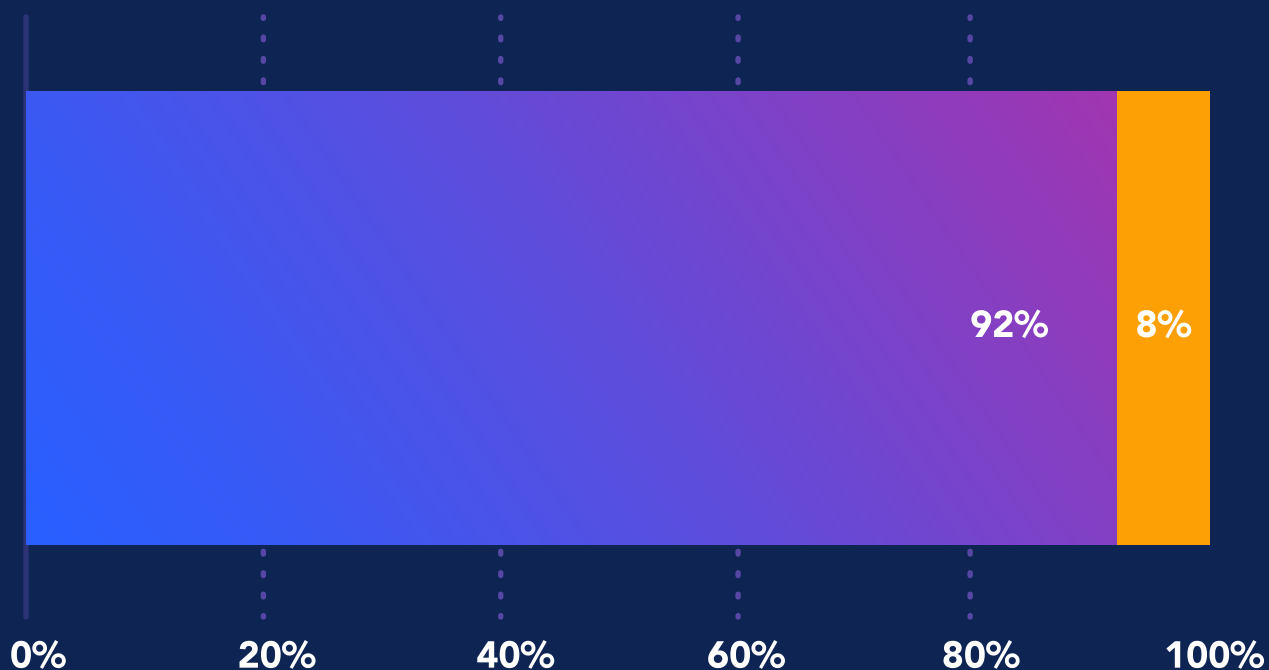
What roles are seeing the most turnover in 2023, and why are staff starting new positions?





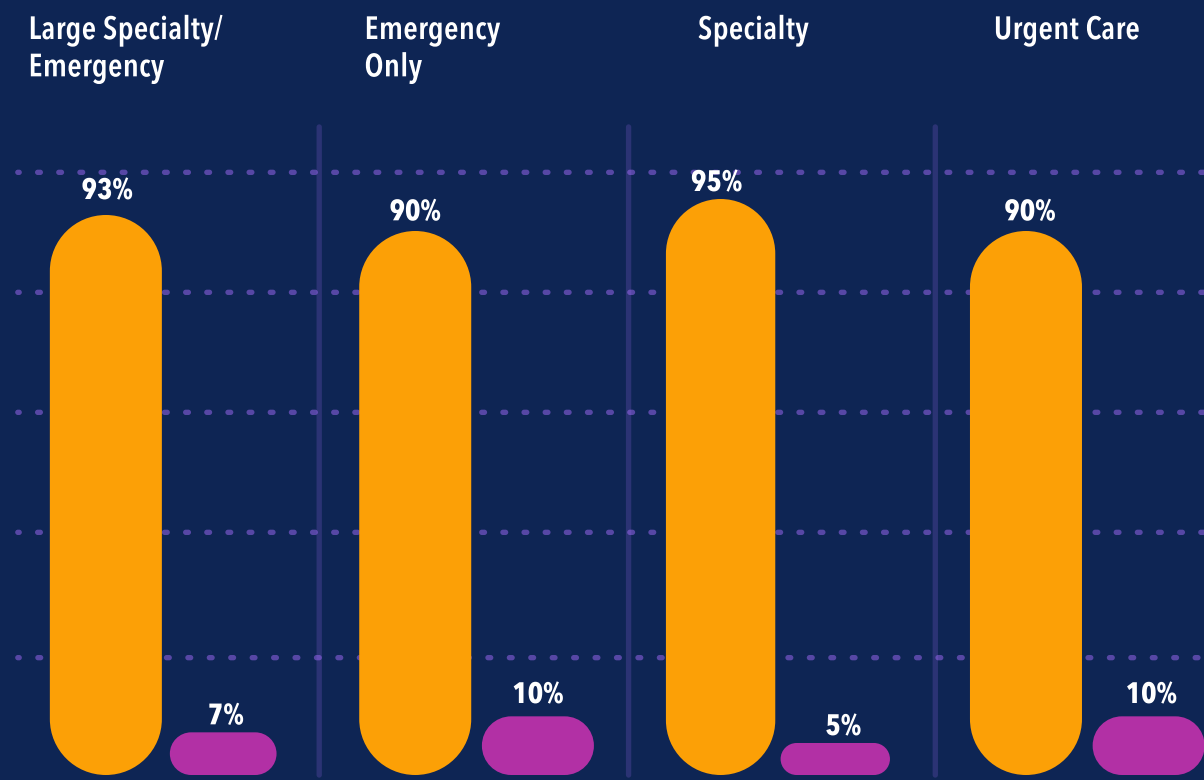
TURNOVER TRENDS

In the past 12 months, have you experienced any employee turnover in your practice?



● YES ● NO

Employee Turnover by Hospital Organization Type



● HAD TURNOVER IN LAST 12 MONTHS ● NO TURNOVER IN LAST 12 MONTHS

The overwhelming majority of practices have experienced turnover in the last year.

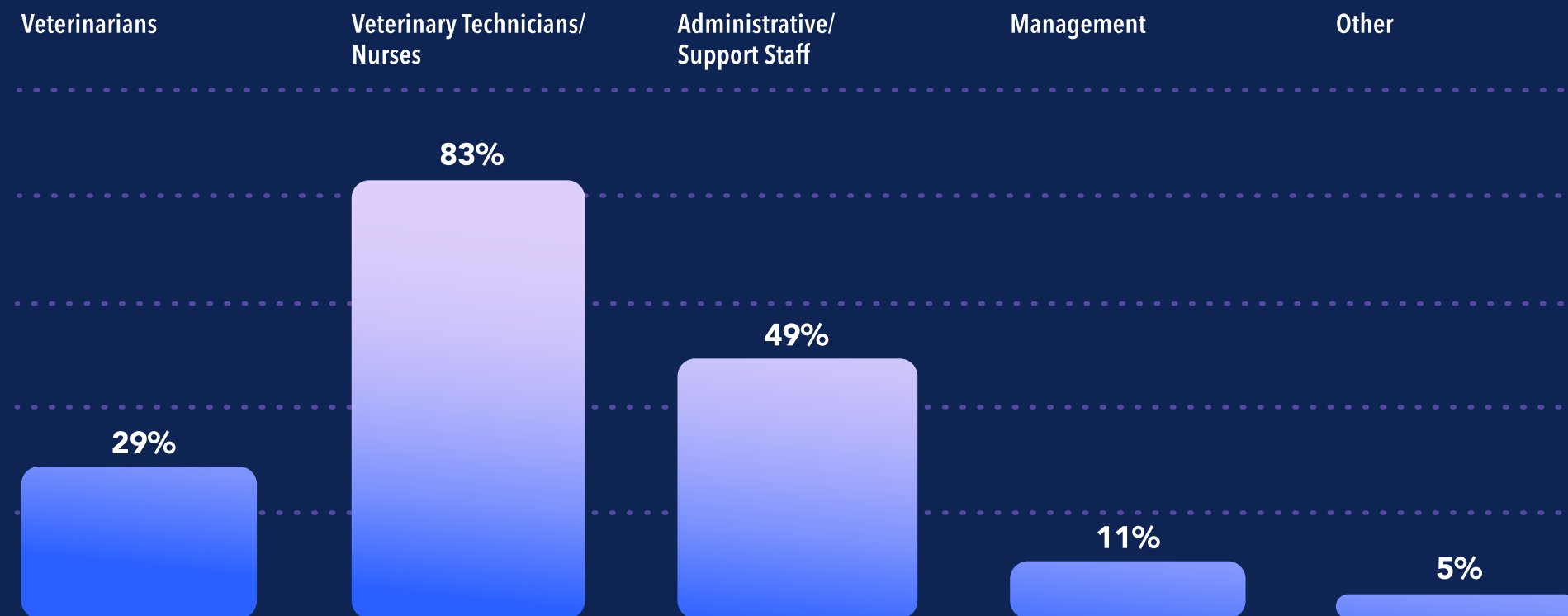
Organizations experienced turnover at consistent rates across different practice types.





TURNOVER TRENDS

If yes, which positions were most affected by employee turnover?

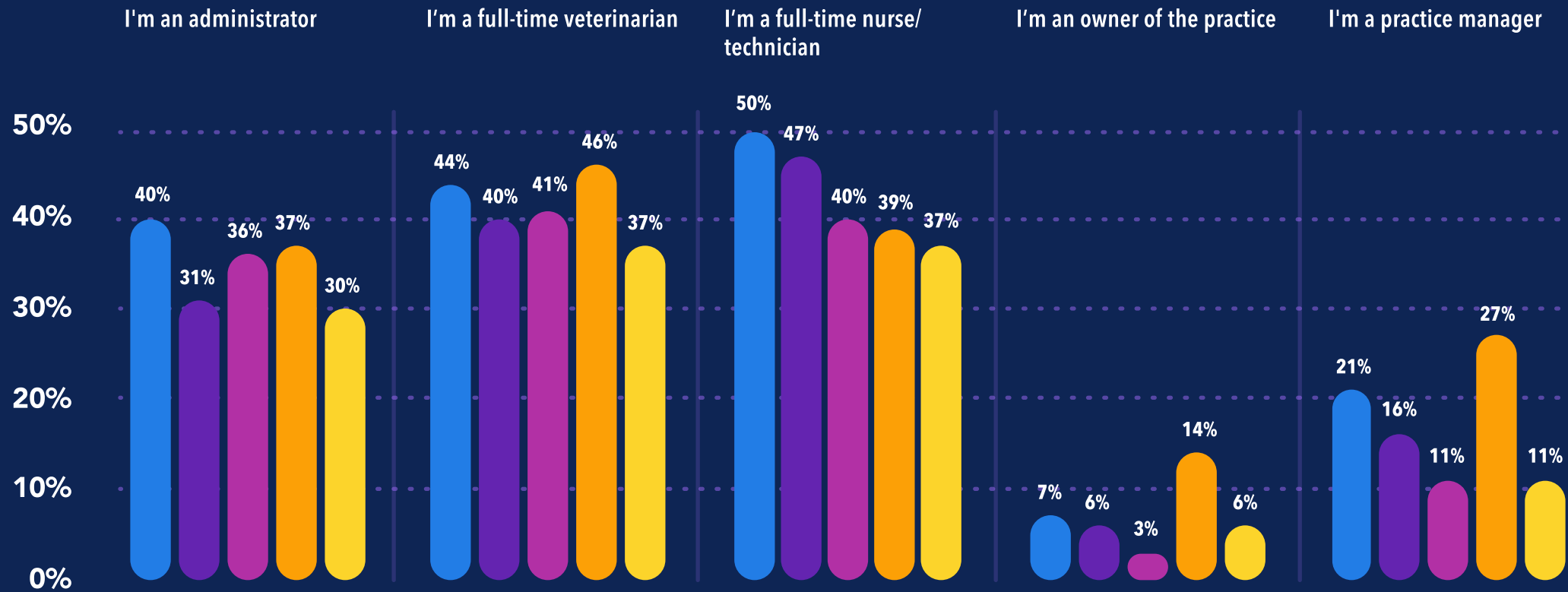


83% of respondents reported that veterinary technicians/nurses were most impacted by employee turnover.



TURNOVER TRENDS

Reasons for Turnover by Role



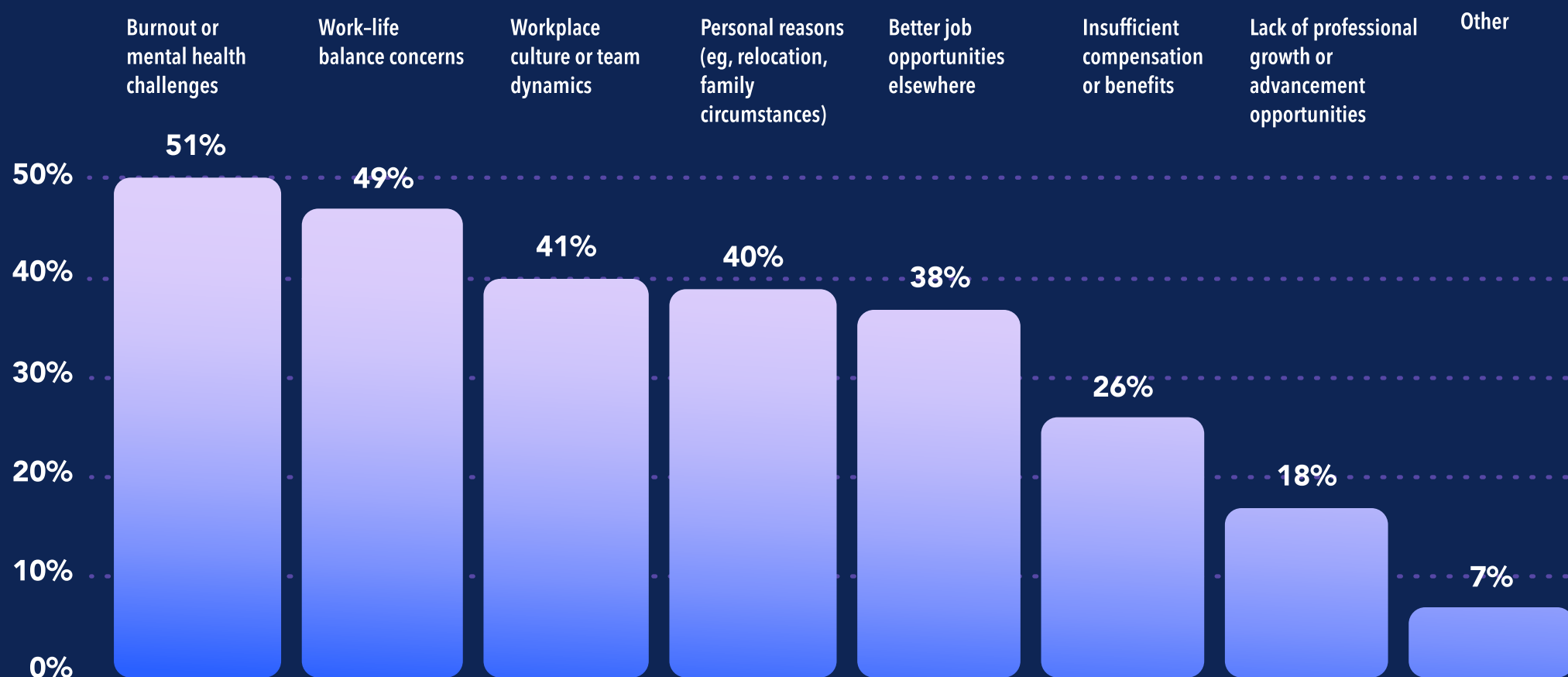
- BURNOUT OR MENTAL HEALTH CHALLENGES
- WORK-LIFE BALANCE CONCERNS
- WORKPLACE CULTURE OR TEAM DYNAMICS
- PERSONAL REASONS (EG, RELOCATION, FAMILY CIRCUMSTANCES)
- BETTER JOB OPPORTUNITIES ELSEWHERE

Full-time nurses/technicians were most likely to cite burnout or mental health challenges as reasons for seeking new roles.



TURNOVER TRENDS

What were the primary reasons for turnover for full-time technicians and nurses?

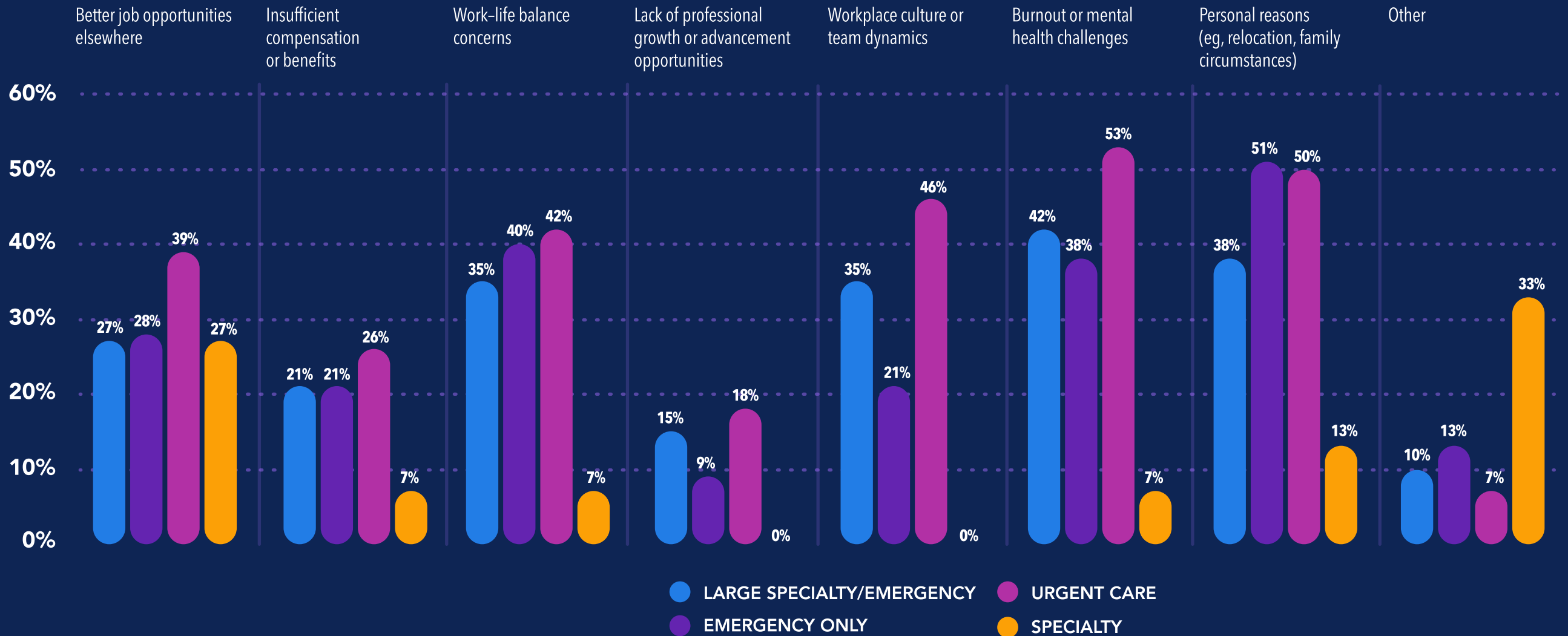


About half of full-time veterinary technicians and nurses cite burnout/mental health challenges (**51%**) and work-life balance concerns (**49%**) as primary reasons for seeking a new role.



TURNOVER TRENDS

Reasons for Employee Turnover by Organization Type

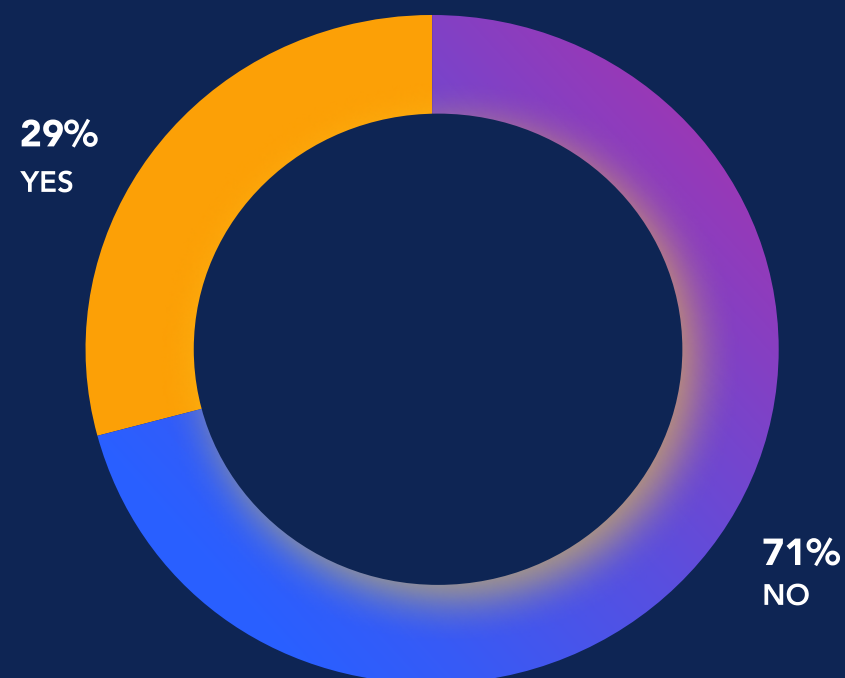


Burnout, workplace culture/dynamics, work-life balance, and personal reasons drove the majority of employee turnover in emergency and specialty hospitals in 2023. The majority of "other" responses reported involuntary terminations due to performance issues.

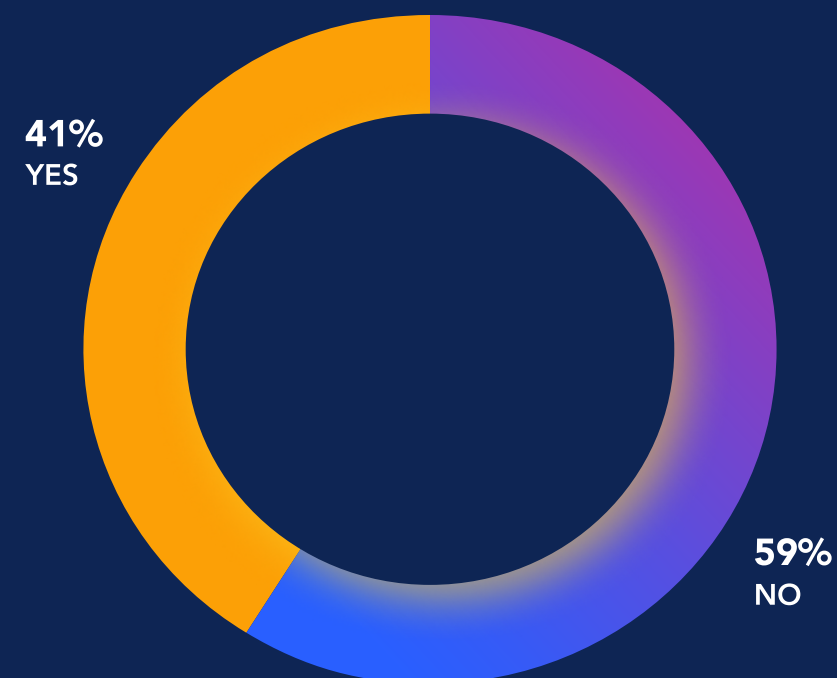


**CHANGING ROLES**

In the last 12 months, have you started a new role?



If you started a new role in the last 12 months, did your offer include a sign-on bonus or any other incentive?

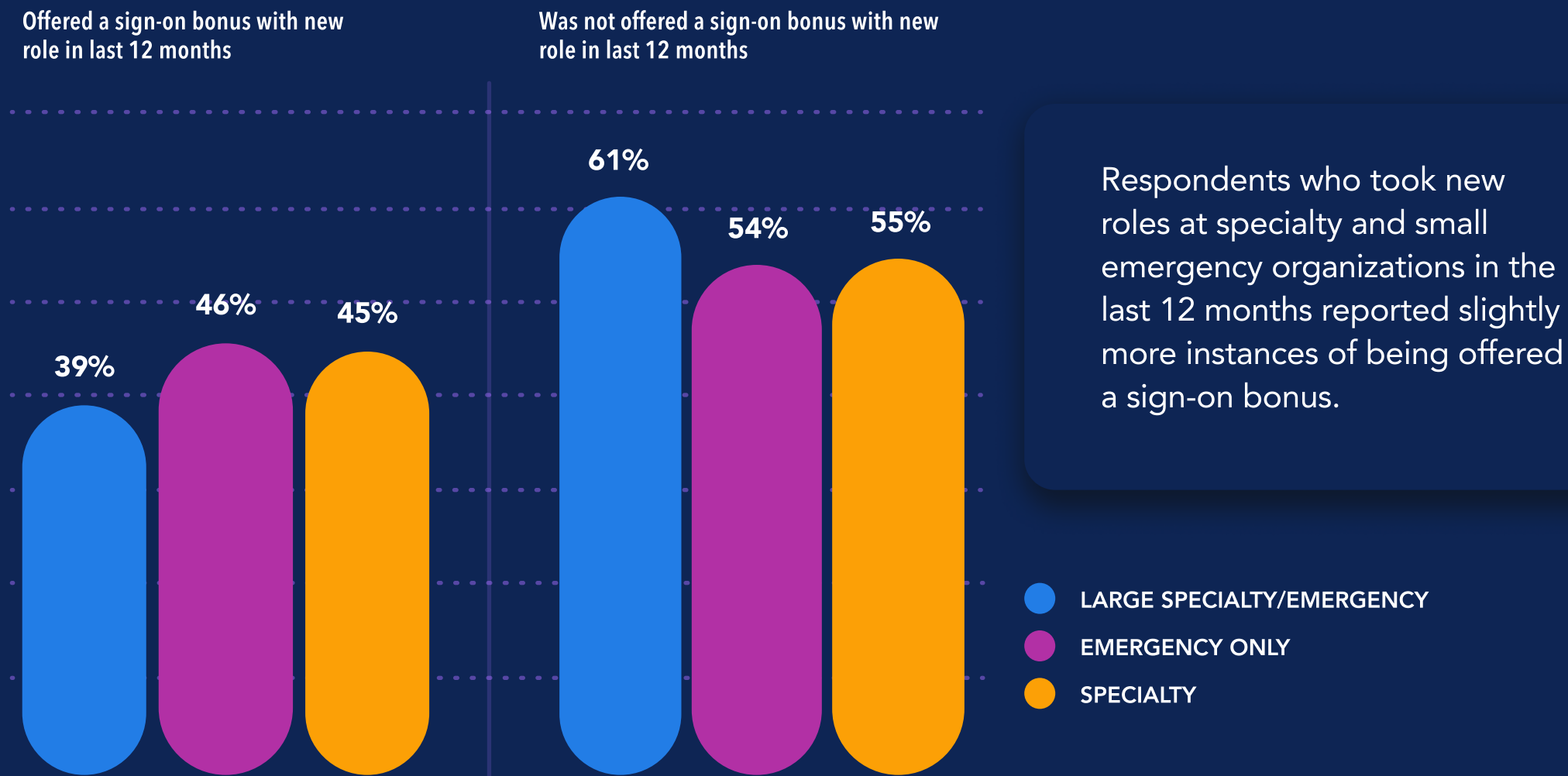


Of the **29%** of respondents who took new jobs in the last 12 months, **41%** were offered some sort of sign-on incentive. [As reported by VIN](#), sign-on bonuses are most commonly offered to veterinarians over other staff positions.



CHANGING ROLES

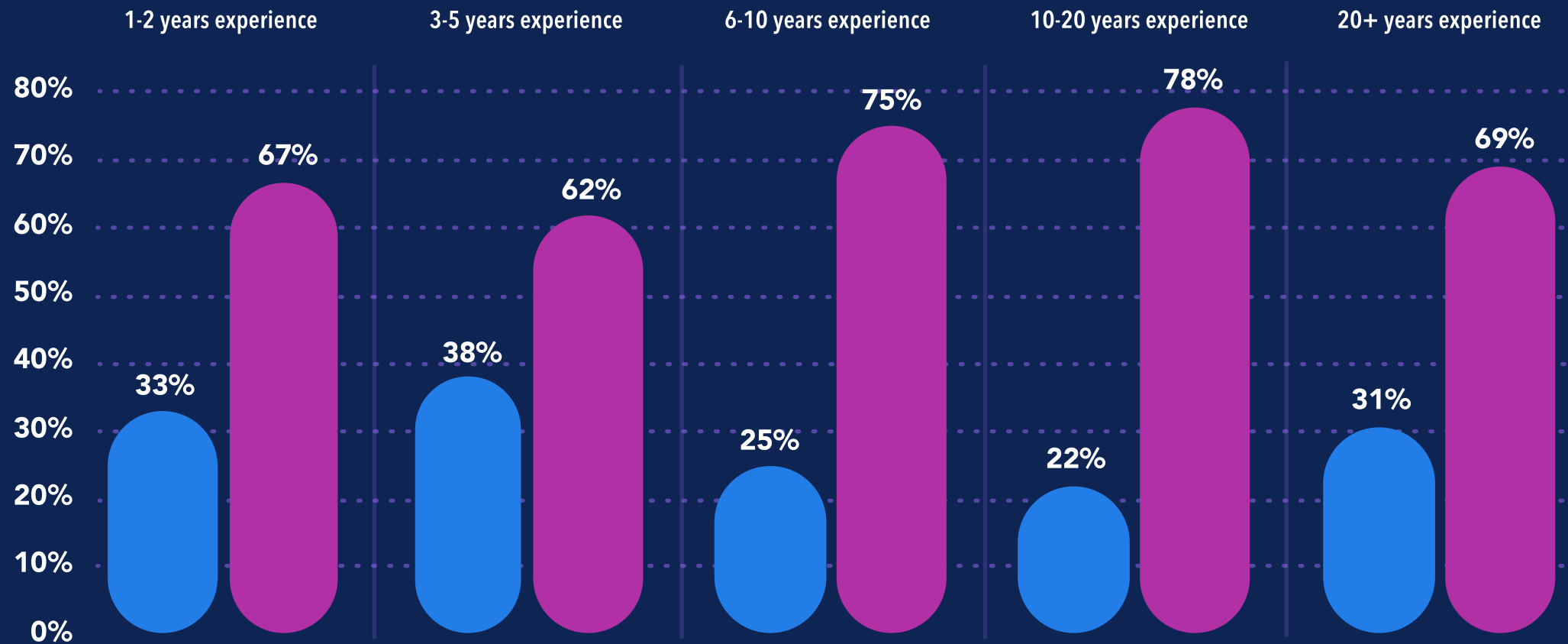
If you started a new role in the last 12 months, did your offer include a sign-on bonus or any other incentive?





CHANGING ROLES

In the last 12 months, have you started a new role?



Respondents with 5 years of experience or less were slightly more likely to have changed roles recently. Of those with less than 5 years of experience, **38%** have taken a new role in the past 12 months, compared to **27%** of those with more than 5 years of experience.

● YES
● NO



Morale & Employee Happiness

In this section, we explore what hospitals can do to improve staff morale, as well as ongoing trends in employee benefits and team culture programs being offered today.





Section Highlights

We're seeing a huge disconnect between how owners perceive morale and the actual morale of the staff: Only **5%** of owners reported that staff have low morale, while the rest of staff reported **4x** that number.

With neutral morale so common in employees with 1-2 years of experience, owners can take action by ensuring their employees have excellent onboarding and training programs and avenues for giving management direct feedback. Addressing morale early on in employees' careers can increase retention past this period. **Invest in your employees early, and they'll reward you by staying longer.**

In our analysis, we're seeing urgent care employees rate their morale higher than any other hospital type surveyed. Notably, urgent cares are leading the way in offering mental health and wellness days, while larger hospitals primarily offer EAPs (Employee Assistance Programs).

Best Practice

More than any other factors, we're seeing team expansion, technology-related investments, and time off for mental health and wellness having the strongest correlation with higher employee morale and retention.

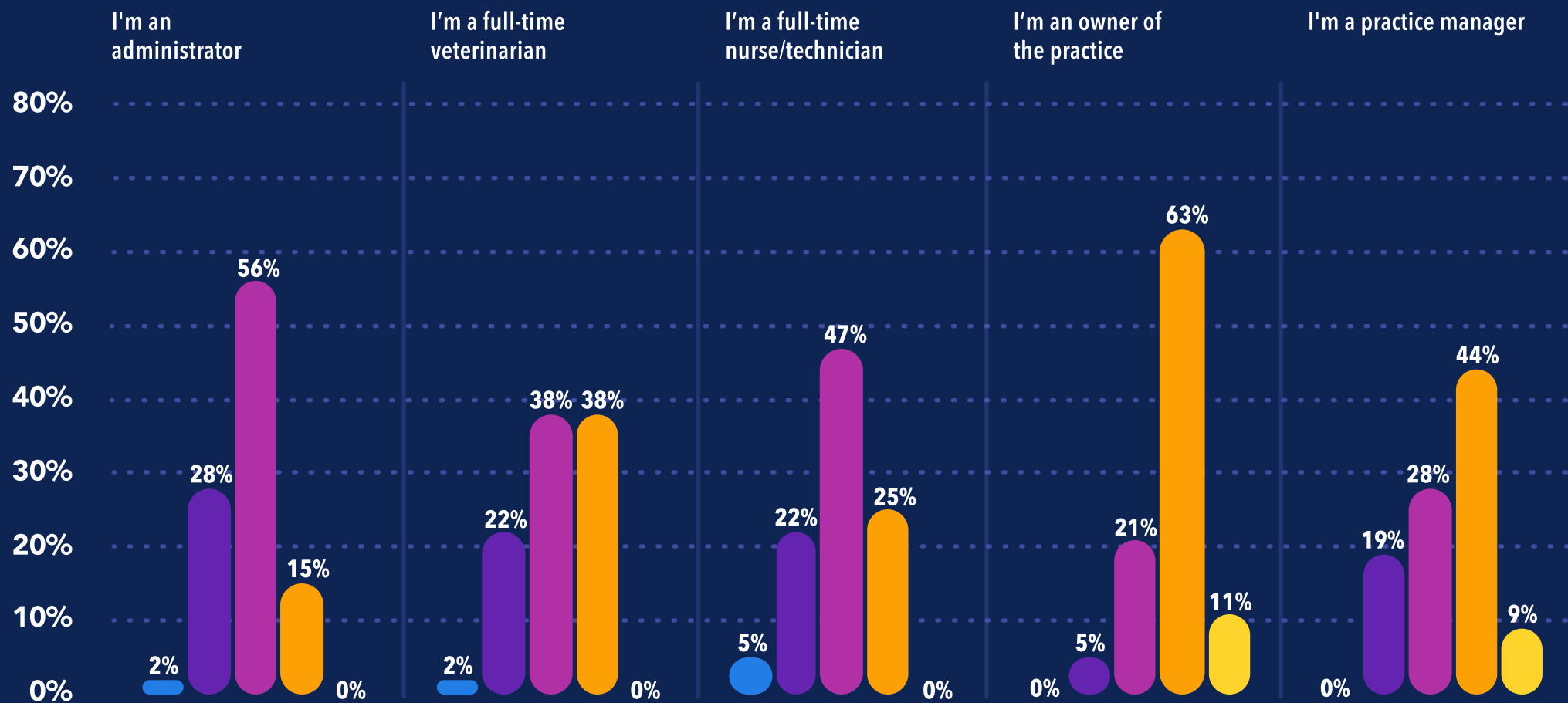
Consider making these part of your plan in 2024.



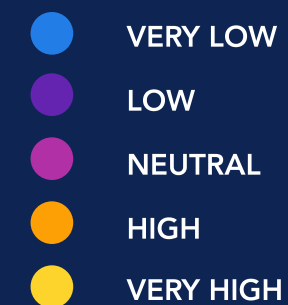


MORALE & EMPLOYEE HAPPINESS

Overall Team Morale by Hospital Role



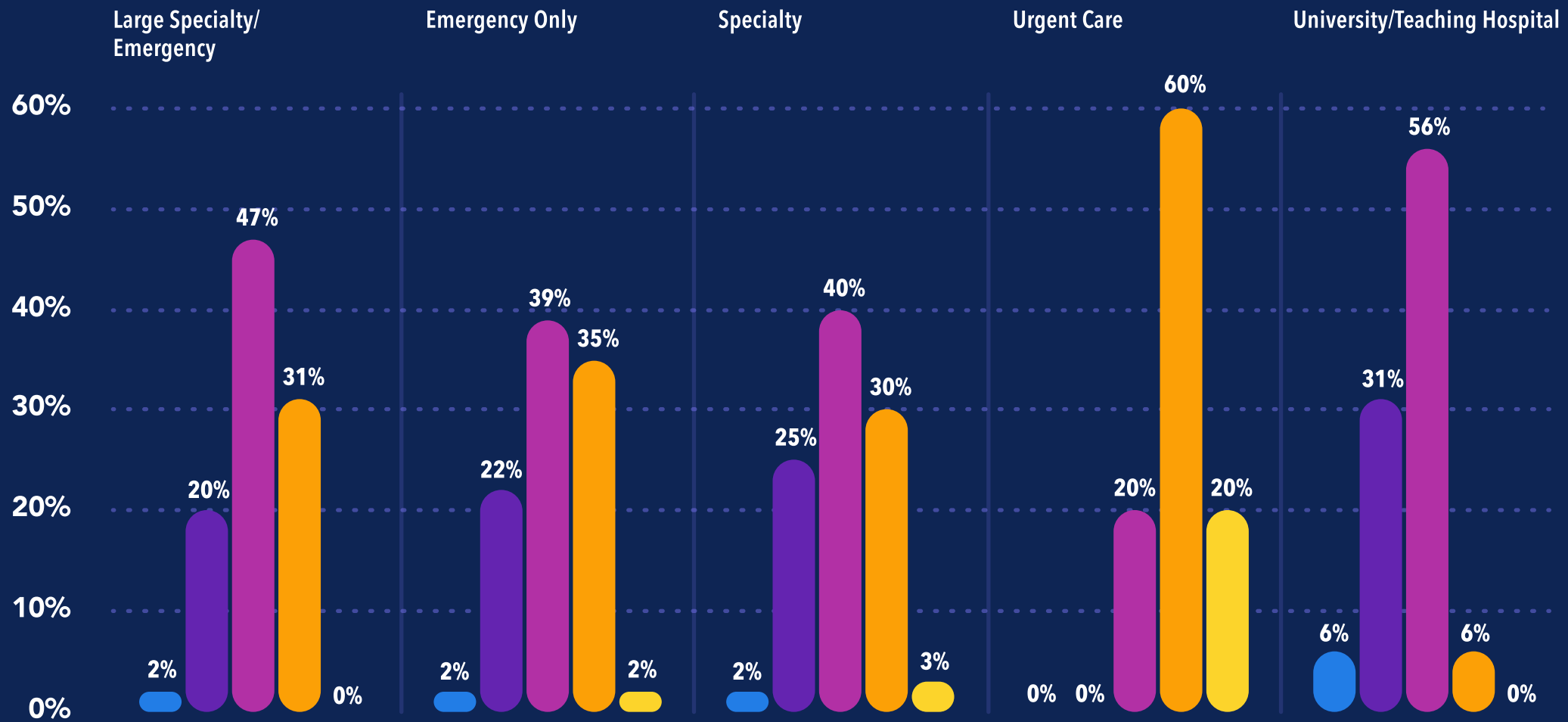
Owners and practice managers are significantly more likely to rate the morale of their team as high or very high compared with other roles (74% vs 53% of practice managers). 86% of administrators and 74% of nurses/technicians rated hospital morale as neutral or low.





MORALE & EMPLOYEE HAPPINESS

Overall Team Morale by Practice Type



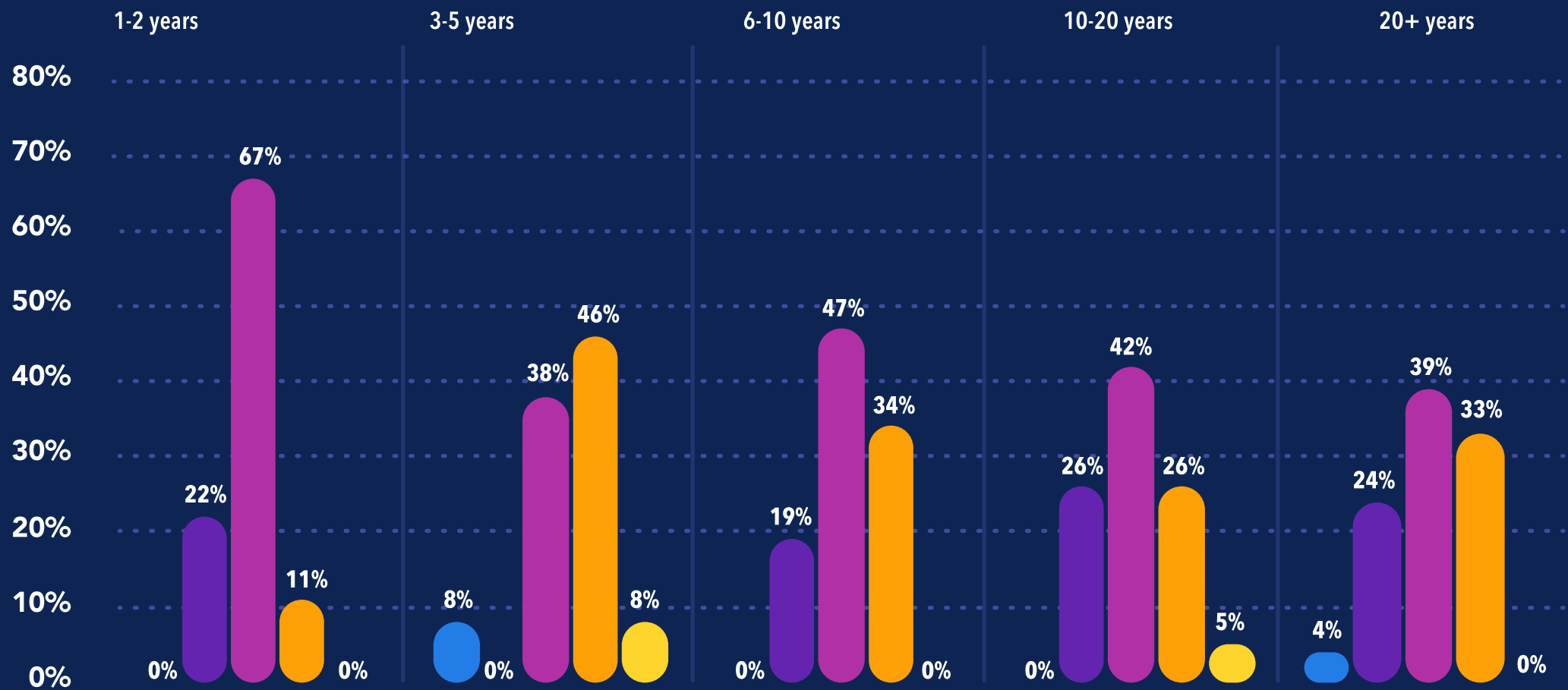
Urgent care respondents rated overall team morale as high or very high at a much higher rate than other practice types (80% high or very high response rate for urgent care vs 37% for emergency-only practices, the next highest respondent type).





MORALE & EMPLOYEE HAPPINESS

Overall Job Morale by Years of Experience



Job morale ratings peaked at 3-5 years of experience (46% reporting high team morale).

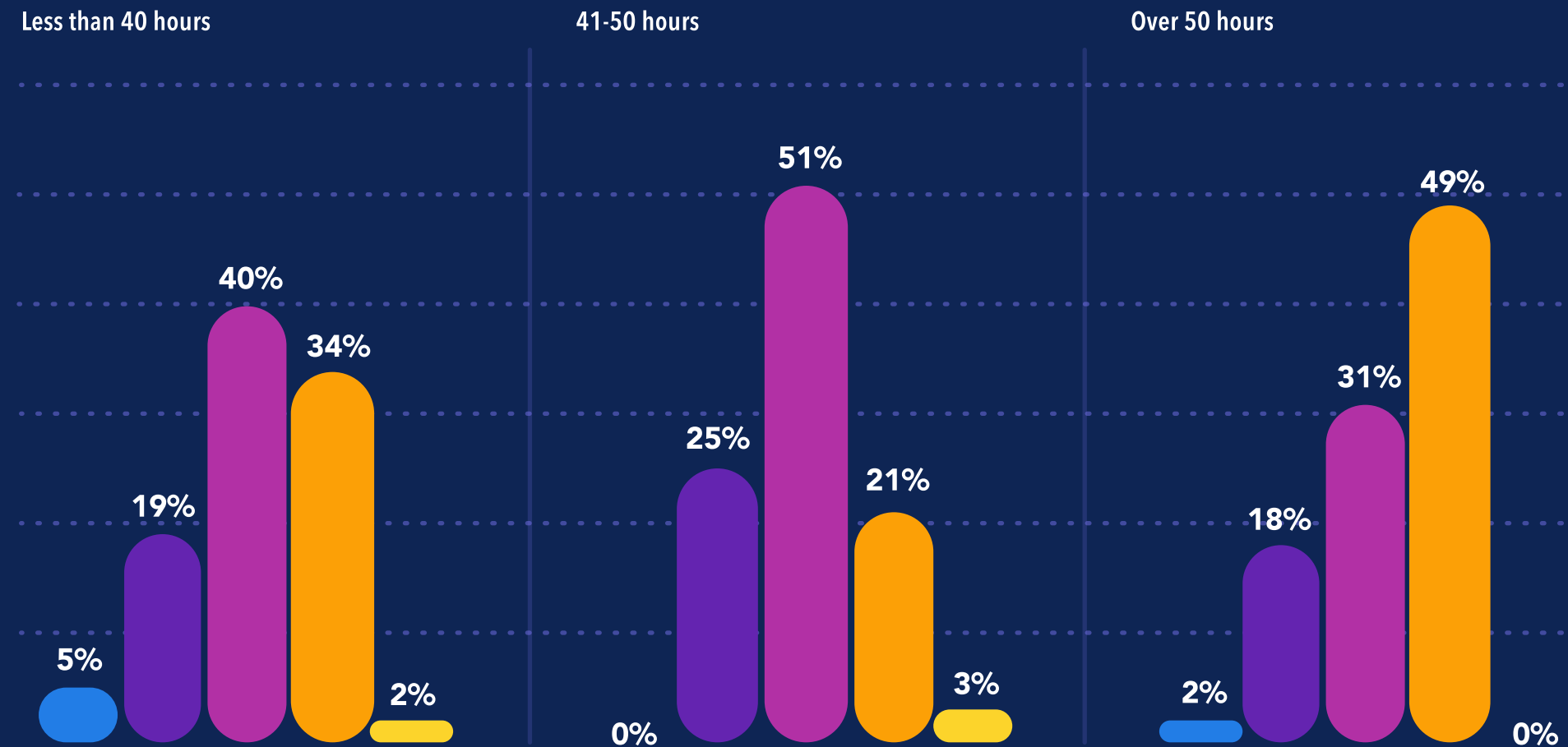
Neutral morale is the highest in the first 1-2 years of employment—an opportunity to engage employees from this early stage.





WORKLOAD IMPACT ON TURNOVER & MORALE

Hours Worked Compared to Staff Morale



There is a positive correlation between hours worked and higher morale, likely because owners and veterinarians are the most likely to work 50+ hours a week.

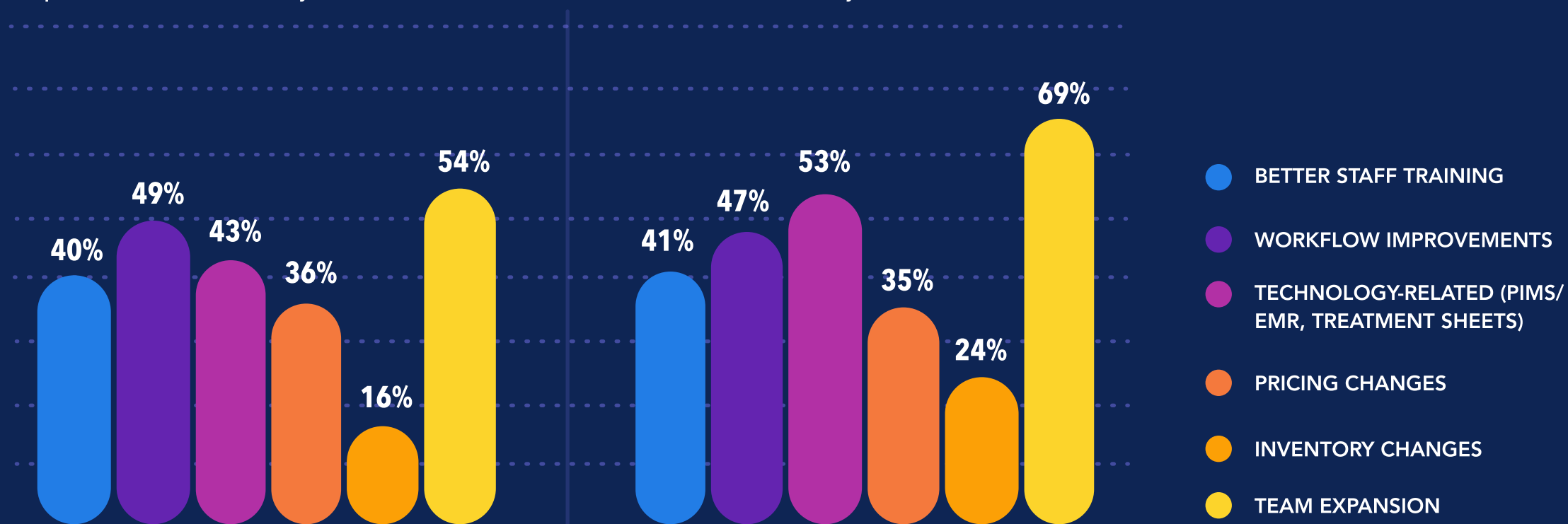


WORKLOAD IMPACT ON TURNOVER & MORALE

Improvements to Productivity Compared to Hospital Turnover

Hospitals with staff turnover last year

No staff turnover last year



More than any other factors, team expansion and technology-related investments appear to be key for preventing turnover. Out of respondents who reported no recent employee turnover, 65% reported team expansion in the last year, and 53% reported technology-related productivity improvements. **Hospitals that implemented new technology in the last year were 10% more likely to retain employees.**

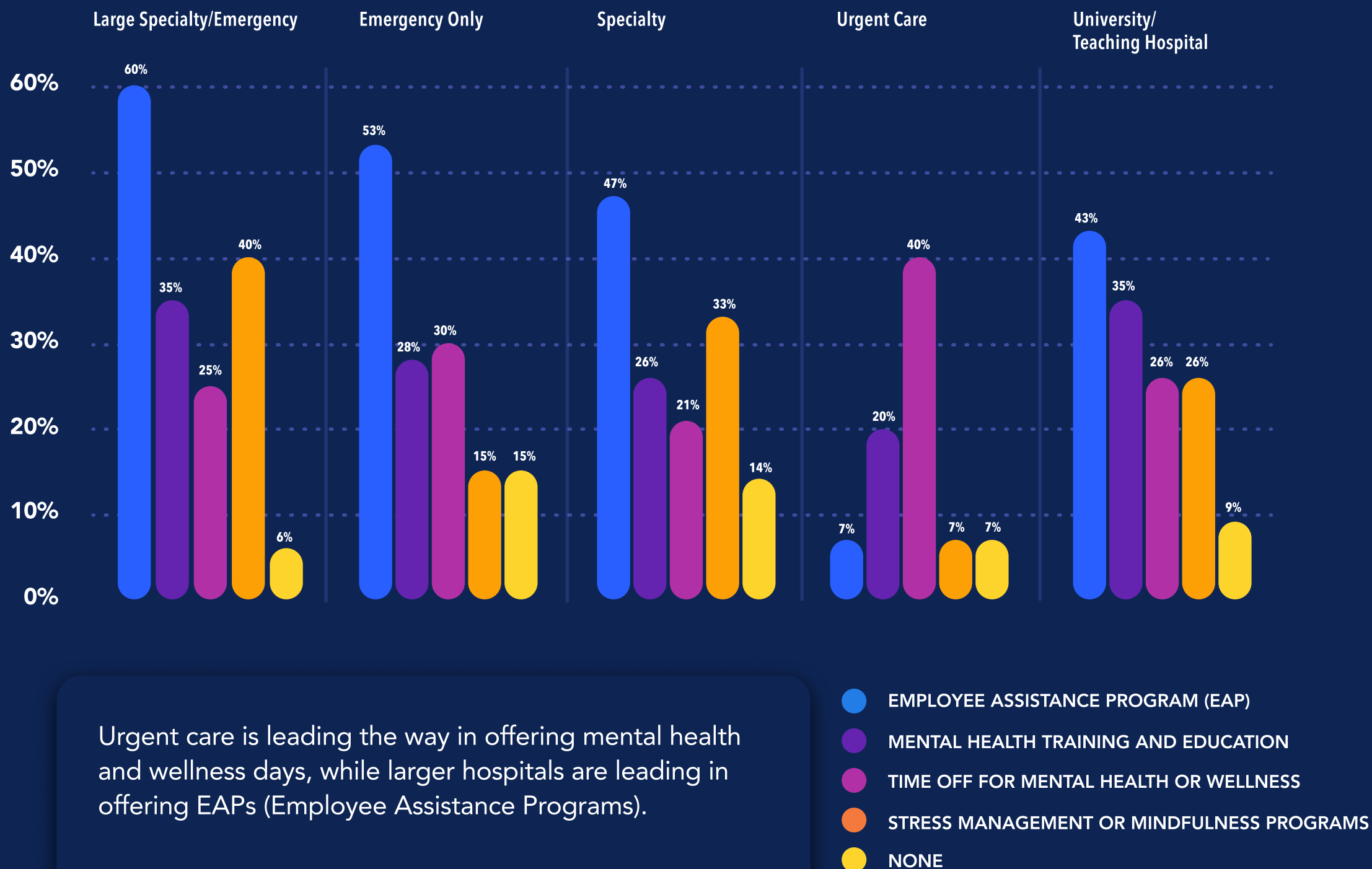


Wellness & Team Culture

How are hospitals responding to burnout and mental health challenges, offering wellness and culture benefits, and addressing employee feedback?

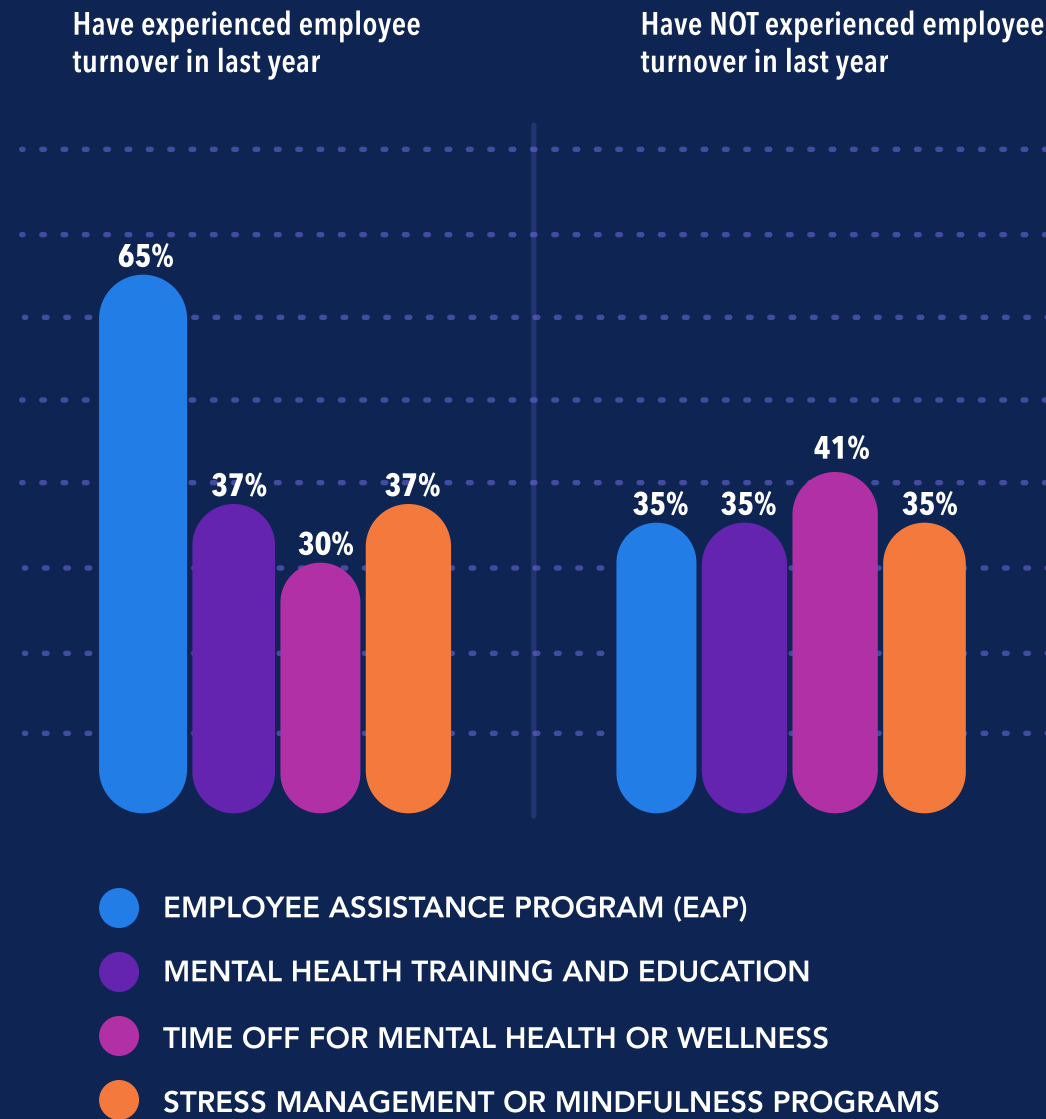


Wellness Offerings by Organization Type





Wellness Offerings in Hospitals That Experienced Employee Turnover

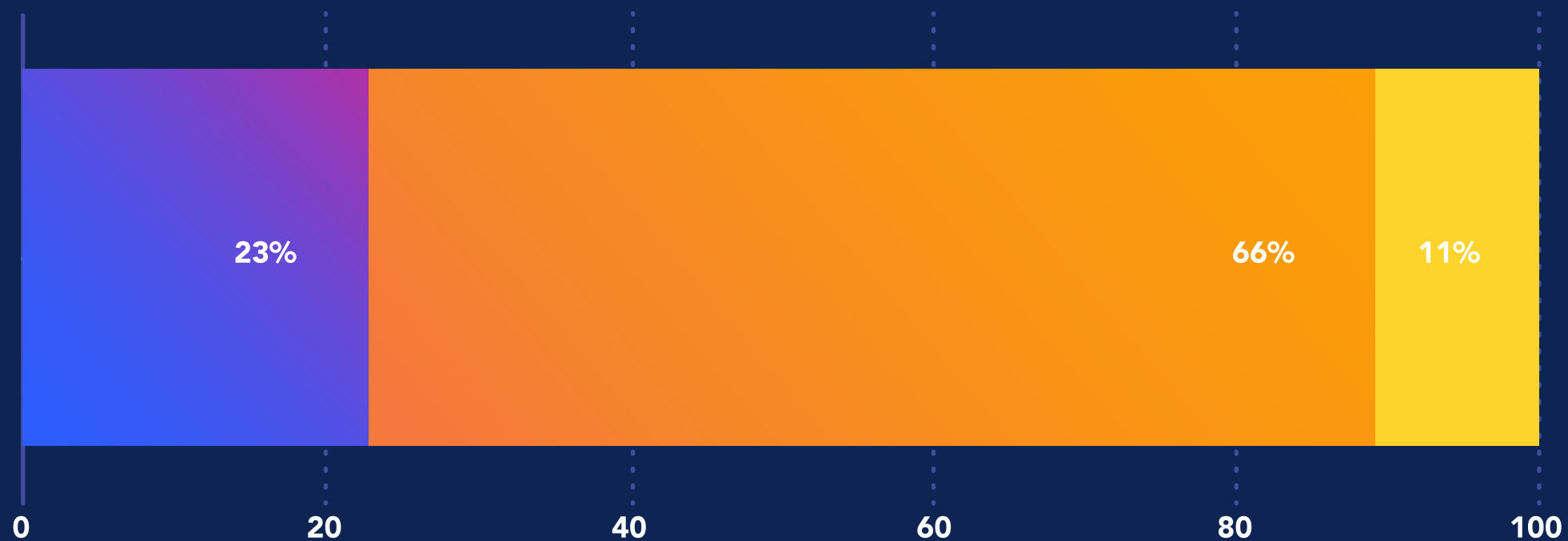


Of hospitals that did NOT experience employee turnover in the last 12 months, an additional **11%** responded that their company provided time off for mental health or wellness days, indicating time off for mental health days has a more positive impact on employee retention than any other wellness program.

Despite their prominence, EAP utilization rates remain incredibly low across industries. [The National Business Group on Health found median utilization of EAPs is roughly 5.5%.](#) There is a burden of education put on employees before an EAP can be used. On the other hand, mental health or wellness days can be easily communicated and adopted, and they require a sacrifice only from organizations: direct encouragement for staff to take time off for their personal well-being.



In the last year, has your practice implemented any Diversity, Equity, and Inclusion (DEI) initiatives or policies?



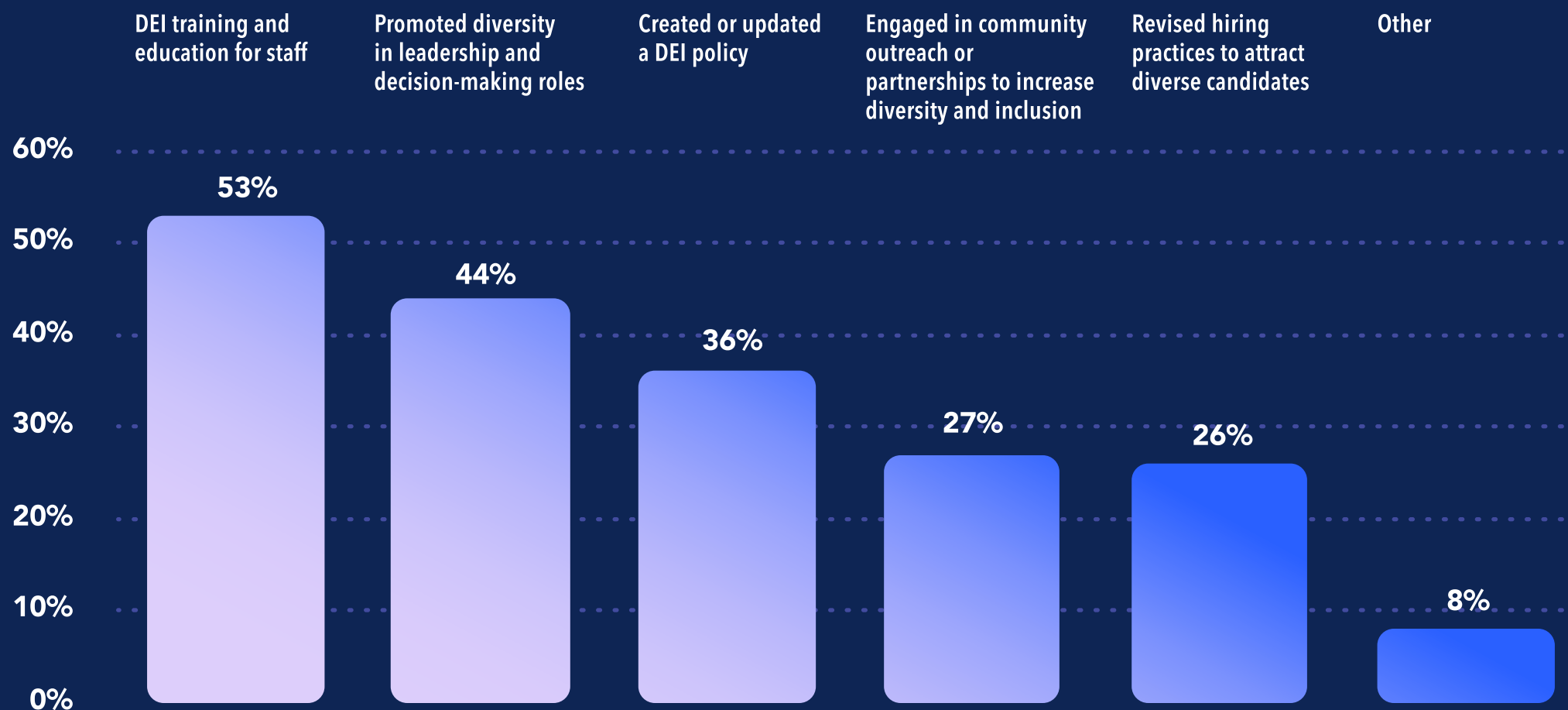
Only **23%** of hospitals were reported to have implemented or begun implementing DEI initiatives.

- YES
- NO
- IN PROGRESS/PLANNING TO IMPLEMENT





If yes, which DEI initiatives or policies have been implemented?

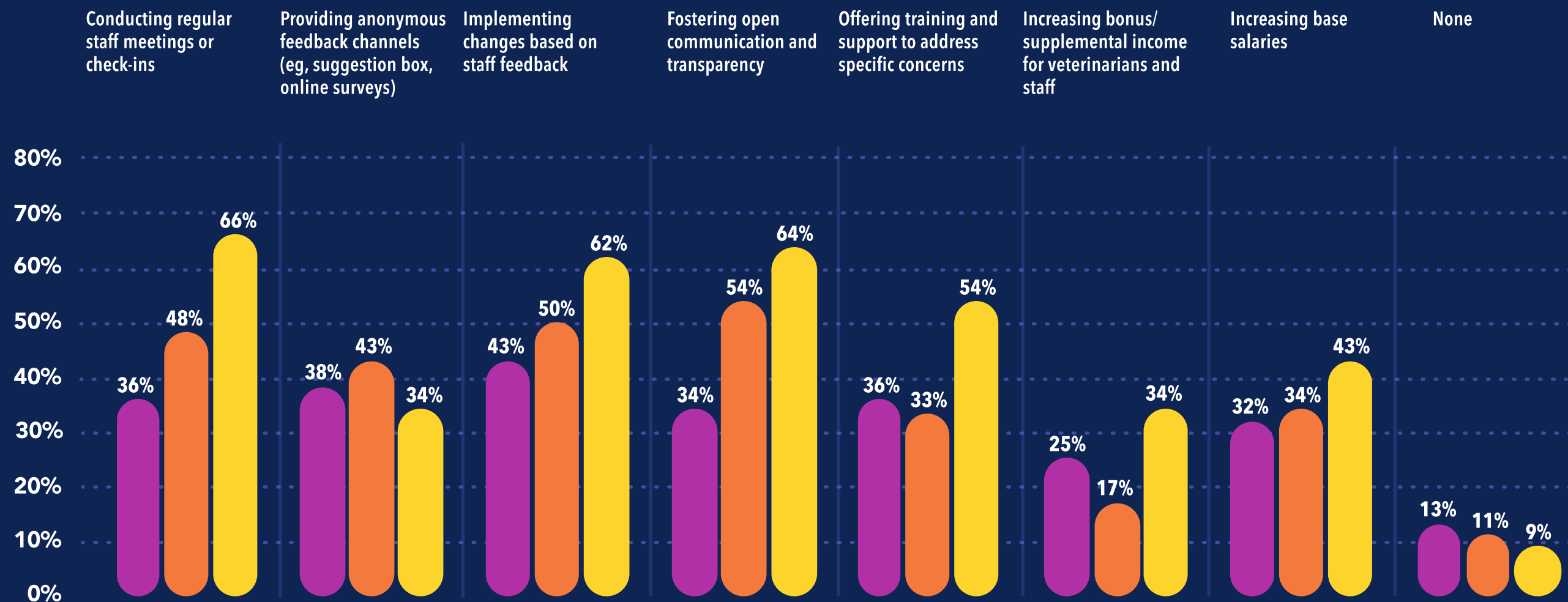


Of the hospitals that implemented DEI initiatives, foundational training for staff was the most common (53% of respondents reported).





Morale vs Methods to Address Employee Feedback



Hospitals with the highest reported morale were more likely to conduct regular staff meetings, implement changes based on staff feedback, and offer training and support for specific concerns.

- LOW OR VERY LOW
- NEUTRAL
- HIGH OR VERY HIGH





Compensation & Revenue

This section aims to provide compensation benchmarks specific to this segment of the veterinary industry, based on roles, years of experience, region, and company revenue.



Methodology for Compensation

We asked respondents to identify their current salary by selecting from a series of salary bands (such as \$40,000-\$49,000). We then used the following calculations:

- Overall Compensation by Role
 - We used direct response rates of salary bands from the survey.
- Average Salaries by Role by Factor (eg, experience, region)
 - We calculated an approximate weighted average across each salary band for each role and factor type (using the equation and example to the right).
 - For each calculation, we took the midpoint for each salary band (for example: the midpoint of the \$30,000-\$39,999 band is \$35,000).
 - We used that midpoint to calculate the weighted average for each role and factor.
 - Each number we show in this section has been rounded to the nearest hundred.
 - Instances of N/A indicate there is not enough data for a weighted average.

Equation for Average Salary by Role & Factor

Avg Salary for Role & Factor Type

=

Total Responses x Sum of Salary Midpoints

Total Responses

Mock Example

(Not Real Data)

\$31,600 Avg Salary of Tech in SE Region

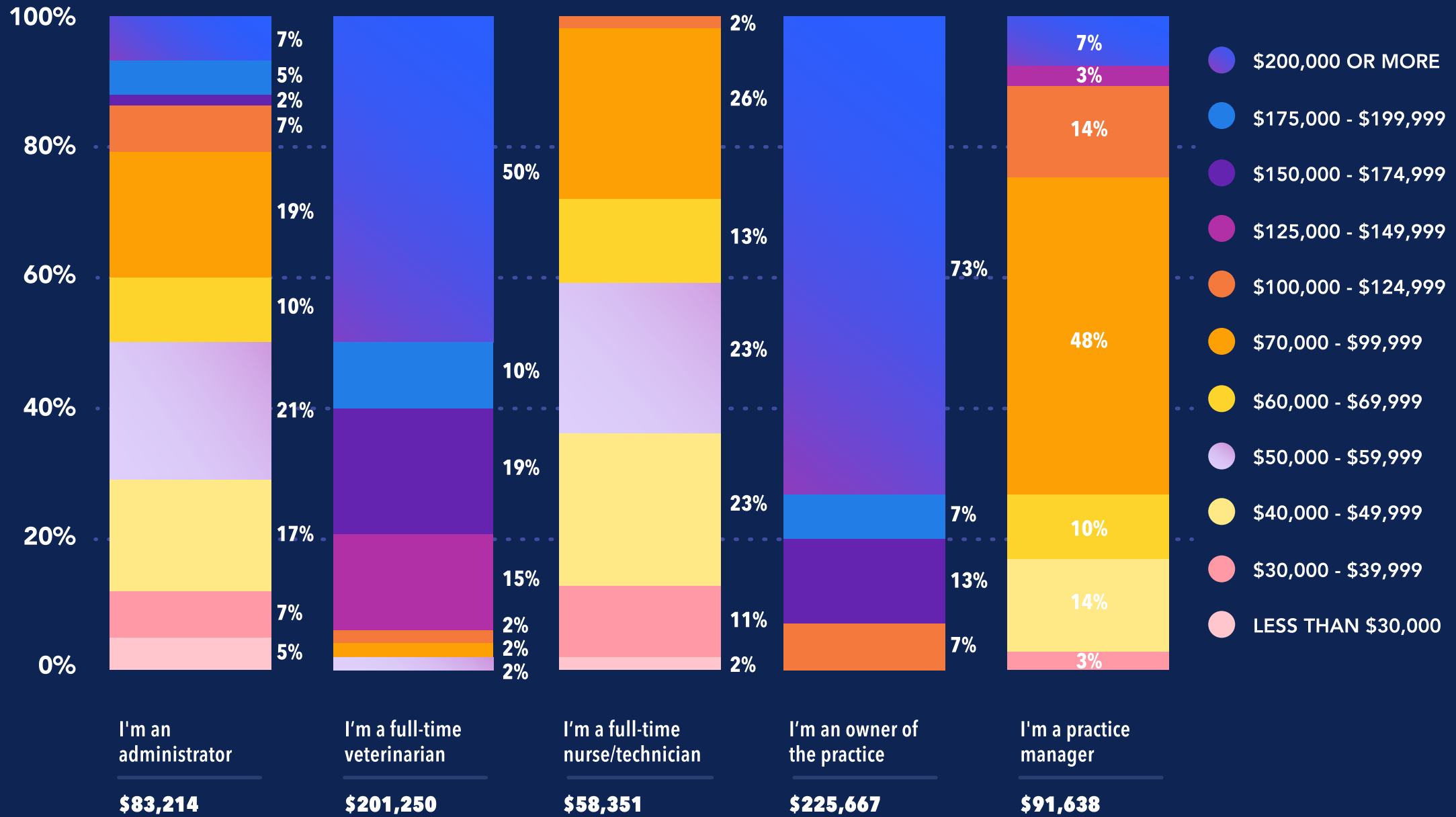
=

SUM (\$25k x 5 techs in SE, \$35k x 10 techs in SE)

SUM (15 total techs in SE)



Compensation by Role



WEIGHTED AVG





Compensation by Region

I'M AN ADMINISTRATOR

I'M A FULL-TIME VETERINARIAN

I'M A FULL-TIME NURSE/TECHNICIAN

I'M AN OWNER OF THE PRACTICE

I'M A PRACTICE MANAGER

NORTHEAST	SOUTH	MIDWEST	WEST	NON-US
\$92,800	\$70,400	\$91,300	\$68,400	N/A
\$233,500	\$198,400	\$193,300	\$204,500	\$176,400
\$62,800	\$50,400	\$50,700	\$65,000	N/A
\$222,500	\$250,000	N/A	\$201,700	N/A
\$100,300	\$94,500	\$80,500	\$79,400	N/A

Compensation by Years of Experience in Vet Industry

I'M AN ADMINISTRATOR

I'M A FULL-TIME VETERINARIAN

I'M A FULL-TIME NURSE/TECHNICIAN

I'M AN OWNER OF THE PRACTICE

I'M A PRACTICE MANAGER

1-2 YEARS	3-5 YEARS	6-10 YEARS	10-20 YEARS	20+ YEARS
\$55,000	N/A	\$58,300	\$78,600	\$102,500
N/A	N/A	\$213,200	\$199,400	\$201,300
N/A	\$55,000	\$51,700	\$61,100	\$61,100
N/A	N/A	\$215,600	\$250,000	\$221,000
N/A	N/A	\$60,000	\$79,400	\$135,600



Does compensation correlate with hospital type?

I'M AN ADMINISTRATOR

I'M A FULL-TIME VETERINARIAN

I'M A FULL-TIME NURSE/TECHNICIAN

I'M AN OWNER OF THE PRACTICE

I'M A PRACTICE MANAGER

LARGE SPECIALTY/EMERGENCY

EMERGENCY ONLY

SPECIALTY

\$92,800

\$90,700

\$55,000

\$213,700

\$162,000

\$243,100

\$65,000

\$50,500

\$62,000

N/A

\$225,800

\$218,600

\$107,500

\$98,600

\$80,400

Does compensation correlate with hospital revenue?

I'M AN ADMINISTRATOR

I'M A FULL-TIME VETERINARIAN

I'M A FULL-TIME NURSE/TECHNICIAN

I'M AN OWNER OF THE PRACTICE

I'M A PRACTICE MANAGER

\$600K-\$800K

\$1M-\$2M

\$2M-\$4M

\$4M-\$6M

\$6M+

N/A

N/A

N/A

\$67,500

\$122,100

N/A

\$151,300

\$229,200

\$180,600

\$214,400

N/A

\$45,000

\$56,700

N/A

\$69,000

N/A

N/A

N/A

\$250,000

\$227,300

N/A

\$59,000

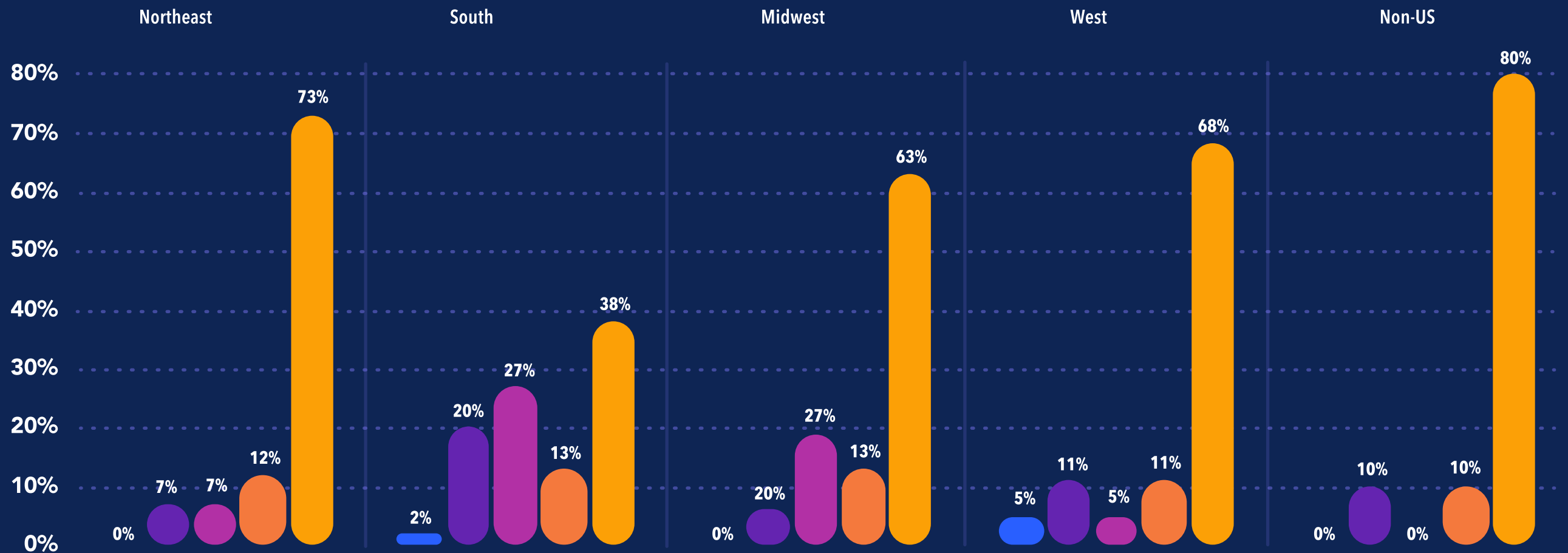
\$75,000

N/A

\$124,400



Revenue by Region

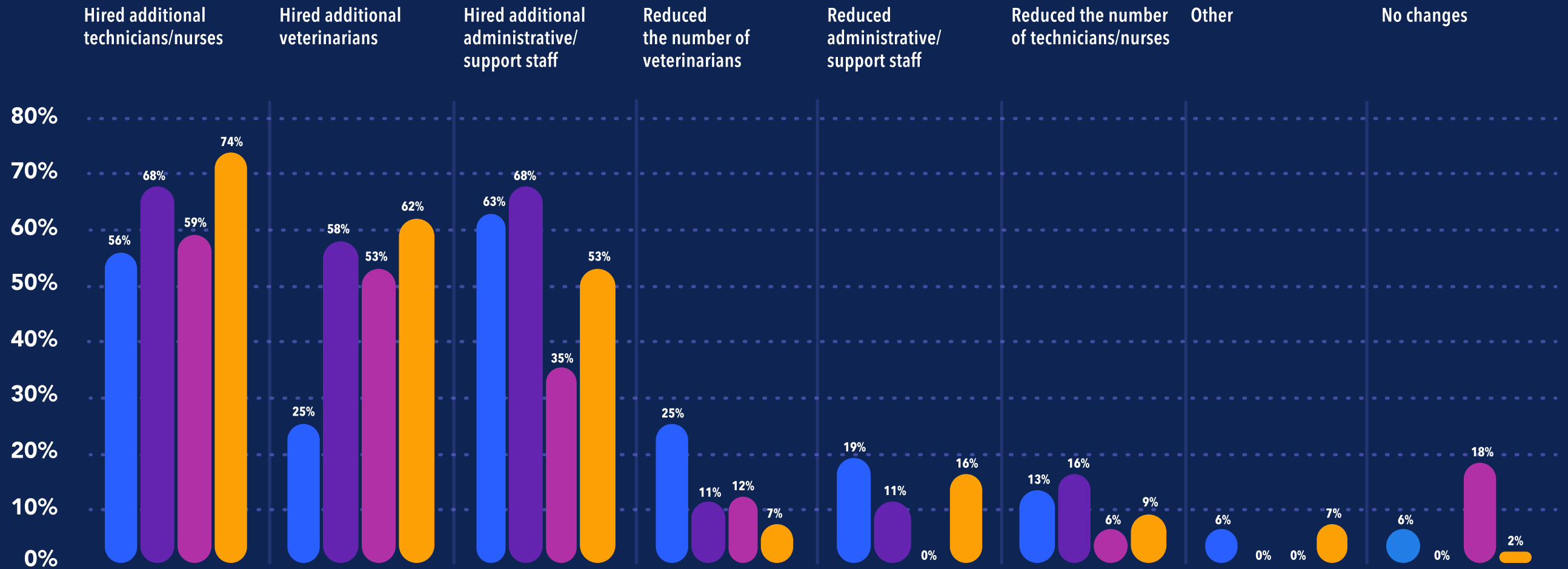


Of our participants who shared their hospital's annual revenue, the northeast region of the U.S. had the highest reported revenue on average.





Hiring Trends by Revenue



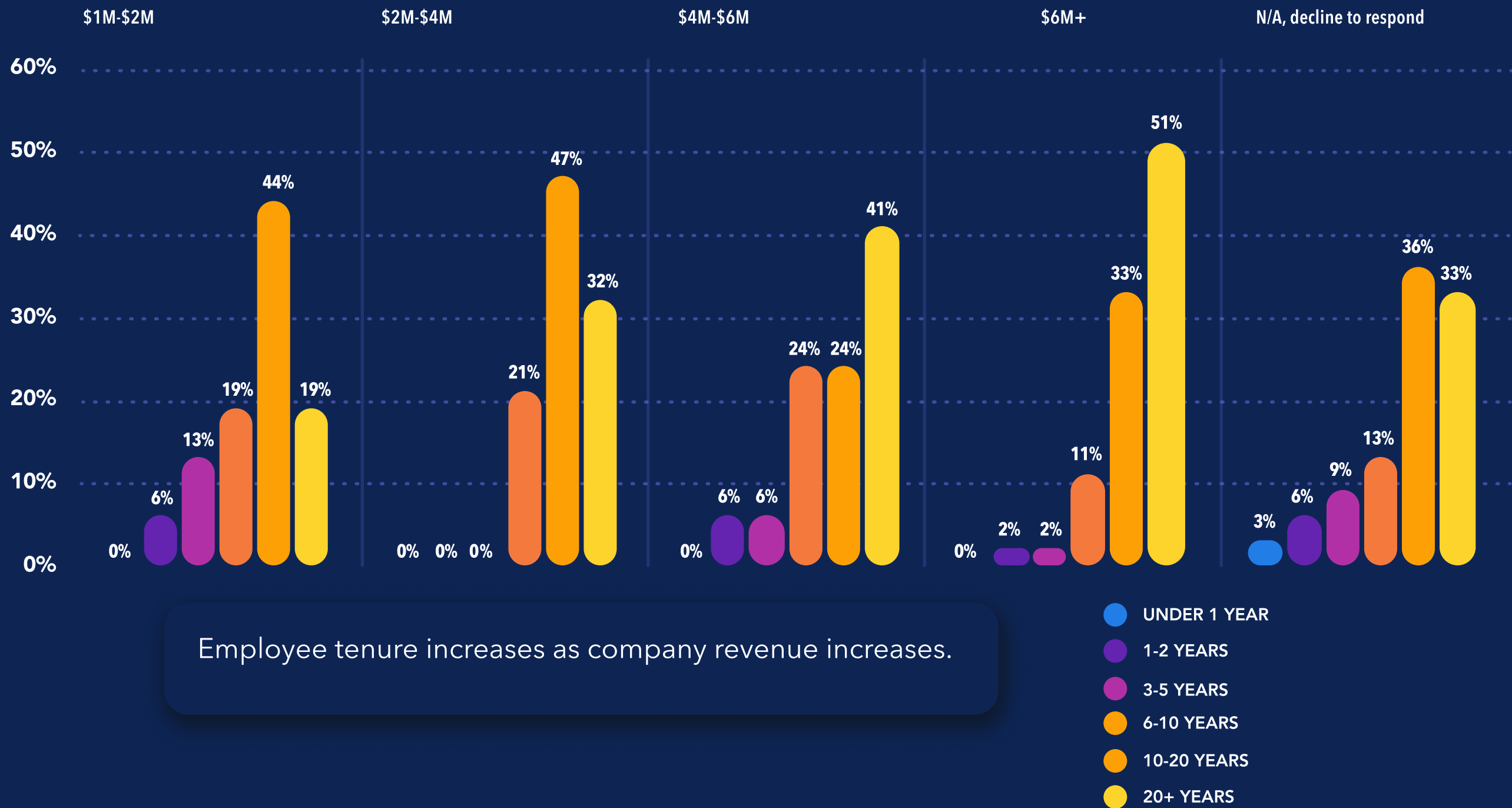
Respondents from companies with high revenue cited hiring more nurses, techs, and vets than those from companies with lower revenues. Additionally, respondents from companies with smaller revenues saw more reduction in vets and admins than those from larger revenue companies.

- \$600K - \$800K
- \$1M - \$2M
- \$2M - \$4M
- \$4M - \$6M
- \$6M+





Average Employee Tenure by Revenue





Conclusion

In summary, the strain on ER and specialty practices is palpable, with some approaches seeming to fall short against the tide of increased demands in these practices. Despite hospitals making more hires across the board, a third of respondents reported being busier than ever.

We're witnessing impacts on vital metrics: from nonstop employee turnover and low morale to the undeniable strain on patient experience, as evidenced by **49%** of respondents citing wait times of over an hour.

In response, proactive leaders are implementing multifaceted strategies that emphasize employee health and well-being, recruiting relief staff, and enhancing efficiency with staff resources they already have through better technology and training.

As caretakers, we have a duty not just to patients and customers but to our staff and ourselves. This snapshot shows how crucial it will be to evolve the way we support our staff—financially, emotionally, and professionally, create more work–life harmony, and leverage advanced technology that clears the way to easier, streamlined daily workflows. All of these will serve to remind us why we came to this deeply challenging yet deeply rewarding industry.

We're in an era that necessitates adaptability, resilience, and new ideas, and as a community, our shared insights can pave the way forward.





instinct.vet

Supercharged Software for Emergency and Specialty Hospitals.

Instinct is the industry's only critical-care focused EMR platform with fully integrated digital treatment sheets.

[REQUEST A PLATFORM DEMO](#)

