



Going Beyond: Charting a Sustainable Future for Veterinary Medicine in Southeast Asia

Foreword

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The health and wellbeing of animals is inextricably linked to the health and wellbeing of our communities. From the family pet that brings joy and companionship to the livestock that sustains livelihoods and ensures food security, animals play a vital role in Southeast Asia (SEA). At the heart of this vital connection are our veterinarians. They are the guardians of animal health, the protectors of public health, and the champions of responsible animal ownership.

However, the veterinary profession across SEA faces a growing number of complex challenges. From dealing with the under-recognition of the profession and public knowledge gaps surrounding animal care, to grappling with alarming rates of burnout and staff shortages, our veterinary professionals are under immense pressure. These challenges not only impact the wellbeing of our veterinarians but also have consequences on animal health.

Addressing these issues requires a collaborative and comprehensive approach. We must work together — governments, veterinary associations, educational institutions, and industry partners — to foster a supportive environment where veterinarians can thrive and continue to provide the critical services our communities depend on. This includes investing in education and training to promote the sustainability of the profession, promoting public awareness, and prioritizing the mental health and wellbeing of our veterinary professionals.

Our hope is that this whitepaper will serve as a catalyst for meaningful dialogue and collaborative action. By understanding the challenges faced by our veterinarians, we can work together to develop and implement strategies that support the industry, improve animal health and welfare, and ultimately, strengthen the health and wellbeing of our communities across SEA. Let us commit to building a brighter future for the veterinary profession and the animals they so diligently serve.

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Introduction

Veterinary medicine plays a crucial role in ensuring animal health, food security, and safety, helping to protect public health.¹ Veterinarians are essential not only for companion animal care but also for livestock management, wildlife conservation, and the prevention of zoonotic diseases—aligning with the One Health approach, a concept introduced by the World Animal Health Organization, which recognizes the interconnectedness of human, animal, and environmental health.^{2,3} This concept is particularly relevant in SEA, a region characterized by diverse ecosystems, climate change, rapid population growth, and a growing human-to-animal interface.⁴

Despite their importance, the profession faces numerous challenges that impact their ability to effectively fulfil their critical roles. Barriers, including economic constraints, mental health concerns among veterinarians, and a lack of understanding and recognition of their profession by clients and the public, contribute to a complex landscape, hindering the growth and sustainability of the profession in the region. There is a pressing need to recognize and celebrate the often-unseen contributions of veterinarians, which can go unappreciated by pet owners and livestock producers. Raising awareness of the acute challenges veterinarians face can foster greater understanding and appreciation of the profession among the public.

In response to this need, Boehringer Ingelheim, in partnership with TAGR, an independent strategic consultancy, conducted a survey among 335 veterinarians and veterinary staff in six SEA countries — Indonesia, Malaysia, Singapore, Thailand, the Philippines and Vietnam — to assess the current state and the perception of the profession and seek to identify actionable strategies to support the industry. This whitepaper has also been informed by qualitative interviews with 8 veterinarians across Malaysia, Singapore, Indonesia, Philippines and Vietnam.

This whitepaper will cover:

- An assessment of the current landscape of the veterinary profession in SEA
- A summary of the findings and insights from the survey and interviews, as well as public perception on the veterinary profession
- Identification of key challenges affecting veterinarians, including economic constraints, mental health concerns, and disparities in education and training
- Exploration of opportunities for strengthening the profession through policy recommendations, stakeholder collaboration, and resource allocation
- Proposal of actionable strategies for industry stakeholders to support and advance the veterinary profession in the region



The pet and livestock landscape across Southeast Asia

The pet and livestock landscape across the region is incredibly diverse and growing, fueled by rising incomes, population growth, increased urbanization, and shifting societal trends. These factors have driven an increased demand in livestock products such as poultry, pork and beef, as well as a growing interest in pet ownership and care.

Livestock farming is the main source of livelihood for most countries in the region (except Singapore and Brunei), employing more than 50% of households and providing food security, employment, as well as side income to many.⁵ While organized farming is increasingly common, backyard farming practices remain widespread.⁵ These small-scale farms often lack appropriate biosecurity measures, allowing animals of various species to interact — a known key factor in the emergence of diseases.⁵ In fact, SEA is highlighted as one of the regions with a high concentration of poor livestock keepers where intervention at the human-livestock interface could have a positive influence on zoonoses control.⁵ Concerns around animal welfare are also prevalent in these systems, as animals are often poorly housed or, in many instances, not housed at all, leaving them susceptible to extreme heat, humidity, and floods.⁶



The pet landscape faces similar challenges. Pet ownership — especially of cats and dogs — surged during the COVID-19 pandemic, with the regional pet care market set to maintain its position as the third largest market among major regions globally by 2029. This is driven by increased demand for animal wellness services and other non-traditional offerings.⁷ However, the rise in pet ownership has also highlighted significant gaps in responsible ownership. For example, pet abandonment has contributed to the region's large stray populations. In the Philippines, there are over 13 million stray dogs and cats,⁸ while Bali, Indonesia, alone counts around 500,000 stray dogs.⁹ Stray animals not only pose animal welfare challenges but also risk human and public safety, as they are a common cause of traffic accidents. Strays can transmit zoonotic diseases like rabies, potentially resulting in significant morbidity and costs to the society.^{6,10}

Given the staggering scale of both livestock and pets across the region, veterinarians are at the forefront of addressing these challenges. However, despite their indispensable contributions, the veterinary profession faces a host of challenges that hinder their ability to meet the demands of this dynamic and complex landscape, potentially leading to a trickle-down effect on human health and local economies. While the extent of these challenges varies across the region, three main challenges are consistently cited by vets across the region: operational challenges, a lack of awareness and appreciation among clients about the realities of veterinary care, and high rates of stress and burnout in the profession. Understanding and addressing these challenges is vital, not only for the future of the profession, but also for the broader societal and economic wellbeing of the region.

The challenges facing the veterinary profession in Southeast Asia



3.1 Operational challenges

Having clients understand the value of services being offered is the main challenge faced by veterinary professionals in Malaysia, Singapore, Thailand, and the Philippines.¹¹ This is followed by staffing issues, mainly in Malaysia and Singapore, as well as a decline in client base being an additional challenge in Indonesia, Thailand, and Vietnam.¹¹

Public understanding of the value of services being offered

Rising operational costs and financial pressures due to various reasons such as inflation, have influenced the way clients view veterinary costs. For example, while the veterinary industry has made significant advancements with the availability of more technologically advanced diagnostic tools and high-precision lab testing, these innovations come at a cost in terms of initial investment, ongoing maintenance, and staff training.¹⁵

The need to adopt these advancements to remain competitive has driven up costs, yet is increasingly met with a lack of understanding, trust, and even stigma around why veterinarians charge what they do.

“Public perception often focuses on why there is a need to pay so much for veterinary services, especially since we are in the business of care.”

— Dr Tan Check Nam, President, Malaysian Small Animal Veterinary Association (MSAVA)

Dr Salehatul Khuzaimah, President of the Malaysian Association of Companion Animal Medicine Industry (MACAMI) has faced similar situations.

“The financial realities of veterinary practice, including the cost of equipment, labor and facilities, are often overlooked by clients, creating a disconnect between their expectations and the cost of providing quality care.”

— Dr Salehatul Khuzaimah, President of the Malaysian Association of Companion Animal Medicine Industry (MACAMI)

The view on pricing also stems from the perception that veterinary care is expensive relative to average incomes in the region.^{12,13} With veterinary costs being top of mind, and pet insurance not always available, many animal owners may choose to delay or forgo essential preventative care such as vaccinations, parasite control, dental hygiene and sterilization,¹⁴ which can contribute to the spread of preventable diseases among animals and from animals to humans.



“Reduced client spending of late is creating a challenging cycle for veterinary practices, where we see that attempts to attract clients through cost reductions ultimately lead to increased stress and unsustainable workloads.”

— Dr Chee Liung Wun, Vice President, Malaysian Veterinary Medical Association (MAVMA)

“In Malaysia, stagnant wages coupled with inflation and the absence of pet insurance create significant financial barriers to comprehensive veterinary care. This often can lead to owners having to make difficult choices regarding animal care, especially in an emergency.”

— Dr Tan Check Nam, Malaysia

A systemic problem of veterinary workforce shortage

Rising costs are not solely driven by equipment expenses or inflation. Manpower costs, along with a chronic shortage of veterinarians in the region, are making it increasingly difficult to meet staff demands. In Malaysia, for example, an estimated 6,000 additional vets are needed on top of the existing 2,300 vets to meet the current demands of the industry.¹⁶ Similarly, in Singapore, there is a vet-to-pet ratio of around 1:1700 (compared to a HCP-to-patient ratio of 1:385), with a growing trend of many vets moving overseas due to a perceived lack of respect from clients and limited career growth opportunities.^{17,18} This shortage stems from both a limited influx of new veterinarians and a high rate of attrition, which not only necessitate higher salaries to attract new vets — costs that are passed down to the animal owner — but also result in increased workloads and stress for those who remain in the field.

In addition, many countries only have a limited number of veterinary schools available, which are often unable to cope with the demand of those wishing to enter veterinary medicine. While studying abroad is an alternative, it may not be accessible to many due to financial or logistical constraints. Pursuing a veterinary degree takes around six years and is an expensive endeavor, with tuition fees ranging from around 150,000 Baht (approximately USD 4,400) per year in Thailand³³ to between 20,000 and 50,000 Ringgit (around USD 4,000 to USD 11,000) per year³⁴ in Malaysia. Fees for studying abroad, for example in Australia or the UK, can range anywhere between USD 32,000 and USD 38,000³⁴ excluding living costs and other amenities. For low-income families or those living in rural areas, this is a massive barrier to entering the veterinary profession.

“Currently, there are only two universities who produce around 150 vets per year, but there are no colleges producing vet nurses, so they need to be trained on the job. They also receive a low salary for the work that they do, so unless they have a strong passion for the profession, they will leave the industry.”

— Dr Tan Check Nam, Malaysia

This scarcity of veterinary professionals is also an ongoing concern in rural areas, where livestock is the main source of livelihood and plays a critical role in local economies.¹⁹ Limited access to veterinary care not only impacts animal health and wellbeing but also hinders the growth of the livestock sector, ultimately impacting food production and economic stability.¹⁹ The low prioritization of animal health across all sectors further contributes to this problem, impacting policy as well as funding of the veterinary sector.²¹ As animal production systems expand in size and intensity, the veterinary health systems in place to monitor animal health, detect and diagnose diseases, and treat livestock are lacking in capacity and resources.²² This poses significant threats to human health, as poorly resourced and inadequately staffed veterinary services can easily lead to high livestock losses and uncontrolled epidemics.²³ Additionally, the deprioritization of animal health hampers the development of robust disease surveillance systems, making it difficult for veterinarians to detect and respond effectively to emerging diseases. For instance, Vietnam continuously faces challenges in maintaining consistent surveillance due to insufficient funding at the provincial level.²⁴

“The veterinary industry in Thailand faces challenges related to practitioner availability. While a significant number of veterinary graduates enter the workforce annually, only a smaller proportion pursue careers as practitioners. Furthermore, a limited number of practitioners specialize. This can contribute to a perceived shortage of veterinarians, particularly in larger hospitals.”

— Inst. Dr. M.L. Narudee Kashemsant, The Veterinary Practitioner Association of Thailand (VPAT)



56%

of veterinarians and 49% of clinic staff see client price acceptance as the most pressing issue



57%

of veterinarians say that the biggest challenge is the increase in operating costs



70%

For 70% of vets in Singapore, staff shortage has the biggest impact



63%

Staff shortage has the biggest impact in Malaysia

While there is no quick solution to boost the number of new veterinarians, most veterinarians surveyed agree that initiatives supporting their daily work are the most effective way to retain new — and experienced — talent. Veterinarians with over 10 years of experience are particularly strong advocates for partnering with educational institutes to offer financial aid (76%), promoting work-life balance initiatives (75%), and training managers and leaders in empathetic communication and leadership skills (65%) to ensure the long-term sustainability of the profession.¹¹ Other key suggestions include fostering educational partnerships to strengthen industry connections with veterinary schools, providing training and mentorship to ensure ongoing professional development, and enhancing recognition and public awareness to elevate the profession's visibility.

“As someone who graduated more than 30 years ago, I support that completely. We are now welcoming a new generation of vets prioritizing work-life balance and flexible work arrangements. Recognizing these needs is essential to attract and retain talent.”

— Dr Tan Check Nam, Malaysia

A decline in clients is a significant issue in multiple SEA markets:

↓ **49%**
Indonesia

↓ **42%**
Thailand

↓ **34%**
Vietnam



The challenges facing the veterinary profession in Southeast Asia



3.2 Gaps in public understanding of veterinary services and the importance of preventative care for animal health

Public perception of the veterinary profession

Veterinarians today are, in essence, the only medical doctors that protect both the health of animals and humans and play vital roles in food safety, public health, and research. However, across SEA, opinions within the veterinary community are mixed regarding the full extent of the public's understanding of veterinarians' role. Only 19% of veterinarians and staff across all the countries surveyed feel that their contributions are well understood; and looking closer, 26% of veterinarians and clinic staff in Indonesia and Singapore feel misunderstood by the public, as well as 20% of vets and staff in Malaysia.¹¹

“While vets play a major role in food inspection safety and epidemiology, the general public often sees them as pet doctors only, which can often result in veterinarians feeling underrecognized and underappreciated by the public.”

— Dr Russell Tianzon, Philippine Veterinary Medicine Association (PVMA) National Officer

“The role of veterinarians in ensuring the safety of animal products or preventing the spread of zoonotic diseases is often less recognized by the public. This lack of understanding can have a negative impact on veterinarians, both professionally and psychologically. In addition, the lack of public awareness can also have an impact on policy and funding, limiting the resources available to veterinarians to carry out their duties optimally.”

— Dr drh. Muhammad Munawaroh, M.M., Chairman of Perhimpunan Dokter Hewan Indonesia (PDHI)

Gaps in responsible pet ownership and preventative care

This lack of prioritization and appreciation for veterinary efforts creates a vicious cycle where increasing expenses lead to higher client expectations and potential complaints if unmet. Oftentimes, a veterinarian is only called when the animal's health or situation is critical, leading to lose-lose scenarios in which the veterinarian may be unable to save the animal, and the owners are faced with high treatment costs. This situation places additional pressure on veterinarians, straining their relationships with animal owners and contributing to emotional burnout and compassion fatigue.

"A lack of awareness around pet ownership responsibilities often leads to owners seeking veterinary care only when their animal is critically ill, making treatment more difficult. Animal owners need to know that there are other ownership responsibilities, for example, preventative solutions and vaccinations, to ensure better animal health outcomes."

— **Dr Salehatul Khuzaimah, Malaysia**

A Hong Kong study identified expectations and communication with the animal-health enthusiast (AHE) community (including clients, pet owners, and animal lovers) as a primary source of stress for veterinarians.²⁵ Discrepant expectations, miscommunication, convenience in clinic switching, and negative online reviews all contribute to this stress, highlighting that client-related stress extends beyond the health of animal patients, and underscores the importance of expectation management and improved communication to foster healthy relationships among animals, the AHE community, and veterinary professionals.²⁵

"It's usually the lack of public appreciation and understanding, compounded by limited government and industry support and constant questioning of pricing and medical decisions that significantly contributes to stress and burnout."

— **Dr Salehatul Khuzaimah, Malaysia**



41%

of veterinarians feel only somewhat understood by the public



55%

of staff feel only somewhat understood by the public



8%

feel very much understood in Singapore, the lowest rate in the countries surveyed



32%

feel very much understood in Vietnam, the highest rate in the countries surveyed



8%

Singaporean veterinarians and staff feel most misunderstood

“The fact that vets are often busy and unable to immediately respond often leads to complaints. In the companion animal industry in particular, vets have become increasingly vulnerable to online criticism and cyberbullying, with perceived or real mistakes quickly amplified on social media.”

— Dr Tan Check Nam, Malaysia

There is a widespread consensus among veterinarians in the region that not enough is being done to raise awareness about the veterinary profession and its broader significance. Public understanding of the deeper role veterinarians play — and the crucial links between veterinary services, animal health and welfare, farmer livelihoods, national economies, and food safety²⁰ — remains low.

“Veterinary contributions to society are not widely promoted in mass media or education. In many countries, veterinary medicine is not included in school curricula as a critical component of public health or food security, which contributes to limited understanding and awareness around the role of veterinary medicine. This is worse in Singapore, as we do not have a significant agriculture industry, nor do we have a veterinary school.”

— Dr Teo Boon Han, President, Singapore Veterinary Association, and Managing Partner, VetTrust, Singapore

“There is an opportunity to enhance public understanding of veterinarians’ multi-faceted role in society, especially in developing and low-income countries. Current public awareness in these regions often focuses primarily on the treatment of animal illnesses. Improved communication could highlight the broader contributions of veterinarians, alongside medical doctors, to public health, food safety and food security.”

— Lê Quang Thông, Dean of the Faculty of Animal Science and Veterinary Medicine at Nong Lam University, Ho Chi Minh City; President of VSAVA (Vietnam Small Animal Veterinary Association)



Enhancing public awareness and understanding of veterinary services

While a few campaigns aimed at improving understanding of the veterinary profession have been launched in recent years, such as the North American Veterinary Community’s ‘Trust Your Vet Technician’ campaign,²⁶ these efforts remain limited in providing genuine insight into the profession, especially across the region.

More needs to be done to foster a greater understanding of the essential role that veterinarians play — not only in animal health but also in ensuring food security, preventing disease outbreaks, and safeguarding human health as a whole. An improved understanding of the veterinary profession and the roles and responsibilities of animal owners can improve the client-veterinary relationship and lead to increased empathy and understanding for the veterinary profession. This can significantly reduce veterinarians' stress, improve animal health and help veterinarians receive the appreciation they deserve.

“The role of vets beyond treating animals and ensuring food safety needs to be stressed, particularly in Malaysia, where veterinarians are often undervalued compared to other healthcare professions. This needs to change if we want to enhance the recognition of the profession.”

— Dr Chee Liung Wun, Malaysia

“For a lot of zoonotic diseases, prevention is better than curing. Emphasizing the importance of preventative care to owners leads to earlier intervention, improved animal health outcomes and a client-vet relationship based on mutual trust which is especially important in critical situations.”

— Dr Tan Check Nam, Malaysia



8%

Indonesian veterinarians and staff feel most misunderstood



6%

Malaysian veterinarians and staff feel most misunderstood



The challenges facing the veterinary profession in Southeast Asia



3.3 Stress, burnout, and compassion fatigue in veterinary practice

Despite their dedication, veterinarians continue to face significant challenges related to remuneration and stress levels, which remain the least satisfying aspects of their profession. For many, work-life balance is nearly impossible due to long hours, night shifts, and weekend work, along with emergency surgeries, financial strain, potential harassment from animal owners, and frequent exposure to trauma and euthanasia. These factors contribute to emotional strain, compassion fatigue, burnout, depression, and even suicide.²⁷

Data from the US CDC National Center for Health Statistics showed that nearly 400 veterinarians died by suicide between 1979 and 2015, and close to 60% of veterinarians have experienced work-related stress, anxiety, or depression that was so severe that professional help became necessary.²⁷ Some veterinarians seek better work-life balance by moving overseas, while others leave the profession entirely, exacerbating the existing staff shortage. According to a 2024 survey by the American Animal Hospital Association on employee retention, 30% of veterinary practice team members planned on leaving their current role, and of these, an additional 30% planned on leaving the clinical practice altogether, with 90% of them not planning on returning.^{28,29}

“As the veterinary profession continues to seek greater recognition, attracting and retaining talent remains an ongoing opportunity. Strategic human resource management can strengthen the value of the profession while supporting both the emotional and material wellbeing of veterinary professionals.”

— Diệp Ngọc Trúc, MSc, Veterinarian, Founder of TrustVet Animal Hospital, Vietnam

“Many veterinary hospitals in Thailand operate on a two-shift system, typically with morning and evening shifts of 12 hours each. This scheduling system can result in standard working hours of at least 12 hours per day, which can contribute to physical and mental strain, especially when done over an extended period of time.”

— Inst. Dr. M.L. Narudee Kashemsant, Thailand

Veterinary wellbeing in Southeast Asia

While similar data for SEA is lacking, veterinary associations across the region have pinpointed a rising trend of mental strain and clinical depression among their veterinarians, with the main causes being attributed to stress as well as guilt and trauma

associated with performing euthanasia on the very animals they are dedicated to save.³⁰ Many veterinary professionals believe that greater public understanding and appreciation of their role, as well as flexible working hours and increased staffing would help alleviate workplace pressures. Notably, clinic staff report feeling higher levels of workplace stress (81%) compared to veterinarians (74%), which is linked to a lower confidence in job security and career advancement opportunities.¹¹

Interestingly, there is a slightly more positive outlook in the livestock sector. About 50% of veterinarians and 65% of clinic staff in this field feel highly appreciated,¹¹ likely because farmers recognize veterinarians as essential partners in supporting the health, welfare, and productivity of their animals, which are directly tied to their livelihoods.³¹ In general, veterinarians and clinic staff feel valued for their level of expertise and the variety of care they can offer, but they often feel underappreciated for their resilience under pressure, consistency of service, and the overall value they bring to their clients.

Gaps in industry wellbeing initiatives

Although the wellbeing of veterinary professionals is a growing concern, the adoption of structured initiatives remains inconsistent across the industry. Approximately half (45%) of the surveyed veterinary practices reported having some form of wellbeing program, but most efforts focus on professional development and medical technology upgrades due to their direct operational impact.¹¹ In contrast, initiatives aimed at improving work-life balance, employee recognition, and mental health support, are far less common. The most cited barriers to implementing such initiatives include time constraints due to a high workload making it difficult to dedicate resources to these efforts (48%), apathy (46%), and financial limitations (35%)¹¹ — for those without existing wellbeing practices, the cost of setting them up is a concern.

“The fundamental challenge for many vets is insufficient financial resources to implement wellbeing support. Encouraging days off, overtime pay and counseling services are not commonly adopted as many clinics are still struggling with their daily business.”

— **Dr Tan Check Nam, Malaysia**



28%

of clinics surveyed have mental wellbeing programs in place



48%

of the clinics do not have enough time to implement formal wellbeing initiatives



49%

of vets and 48% of clinic staff believe a better understanding of their job would help alleviate stress at work

Paving the path to veterinary wellbeing

Even though the pressures faced by the profession are slowly coming to light, there is still much to be done, especially in SEA, where mental health support remains a rare subject.

“In addition to work-life balance, partnerships and public recognition, fair compensation, competitive salaries, decent benefits and a clear career development path will make the profession more attractive and increase the motivation to persist.”

— **Dr drh. Muhammad Munawaroh, Indonesia**

Approaches to alleviating work-related stress may differ throughout the region, but improving client understanding — particularly regarding the importance of preventative care — along with measures to alleviate workload and providing mental health support, are key starting points to reduce attrition and ensure veterinarians can continue their profession with the passion they started out with.

“Staff recognition plays an underestimate role for boosting morale, especially when paired with an incentive. Regular bonding sessions such as outings, lunches together or engaging in sports as a team can be a great starting point.”

— **Dr Russell Tianzon, Philippines**

“Happy vets lead to happy clients, which in turn makes vets happy. The main priority should be to create a supportive environment and implement mentorship programs so vets don’t face challenges alone and stay in the profession.”

— **Dr Tan Check Nam, Malaysia**

Percentage of veterinary practices with wellbeing initiatives in place



53%

Indonesia



50%

Malaysia



48%

Singapore



44%

Vietnam



36%

Philippines



34%

Thailand

Case Study

Enhancing mental wellbeing of veterinary students in HK

Recognizing the mental health challenges faced by veterinary students due to the demanding nature of their education and the pressures of their future profession, a veterinary school in Hong Kong has implemented an Animal-Assisted Mental Health (AAE-MH) program. The program leverages mental health professionals, animal-assisted therapies, and school faculty to enhance students’ mental health literacy, raise awareness of mental health topics, and improve their help-seeking behavior and overall wellbeing. By blending course-based and experiential learning activities, the AAE-MH program tackles the often-taboo topic of mental health in the veterinary field.

Recommendations

Realistic, region-wide solutions to improve promotion, recognition, wellbeing and capacity building in Southeast Asia's veterinary profession.

KEY



Veterinary associations



Veterinary professionals and clinics



Animal health industry



Government and policymakers



Educational institutions



Training institutions



Other industry associations



External training partners (e.g., mental healthcare partners)

1. Address workforce participation via capacity building, training and recognition

A sector-wide approach is required to address the chronic shortage of veterinarians in the region.

- Promotion of the veterinary profession to high school-aged students is needed to achieve greater participation rates through tertiary veterinary studies. This includes the need for innovative, industry-backed student funding models, such as scholarships, fellowships or on-the-job experience via internships.
- Industry-wide upskilling and performance recognition programs are required to reduce attrition rates, support retention and development pathways, and encourage higher standards of care and expertise. Clinic-level incentive programs may support participation in the industry-level award programs.
- Greater facilitation of vet industry networking opportunities to foster community and knowledge sharing.



2. Sector-wide collaboration needed to promote the value of vet care

Foster sector-wide (industry, government and training institutions) collaboration opportunities for co-developed consumer education campaigns that demystify veterinary procedures and costs, educate pet and livestock owners on the link between quality veterinary care and animal health, highlight the social contribution of vets, and their role in broader population health and food safety.



3. Empower vets' own community outreach on owner-related issues

Animal health industry, peak bodies, government and training institutions should develop generic resources and messaging collaterals that empower vets to conduct their own community (social media) outreach on key matters of animal ownership. This may include messaging on the importance of preventative care, animal wellbeing and quality of life, routine checkups or innovations in care.





4. Improve communication lines between industry and government

Establish advocacy platforms that bring together stakeholders across the Southeast Asia animal health sector. By leveraging scale and a collective voice, the industry can strengthen dialogue with policymakers on matters of investment in and access to innovative treatments, development of veterinary guidelines and standards of care, clinical upskilling, training and education.



5. Form partnerships to strengthen appreciation of vets' contribution

Through industry partnerships, training opportunities and dialogue opportunities, help the veterinary profession inform the broader animal health sector of the vital role they play in delivering preventative health strategies and treatments to pet and livestock sectors.



6. Peak bodies must act to address the workforce wellbeing challenge

Industry associations should proactively address the mental wellbeing deficit affecting vets across Southeast Asia. By engaging animal health and mental healthcare partners, peak bodies can fund and develop wellbeing management campaigns, guidelines and programs for clinics to access at no cost. Such programs may include online/print resources for managing stress, protecting staff wellbeing, step-by-step guides and warning sign checklists, or awareness-raising events. Mental health and self-care should also be included in existing veterinary medicine curricula at relevant training institutions.



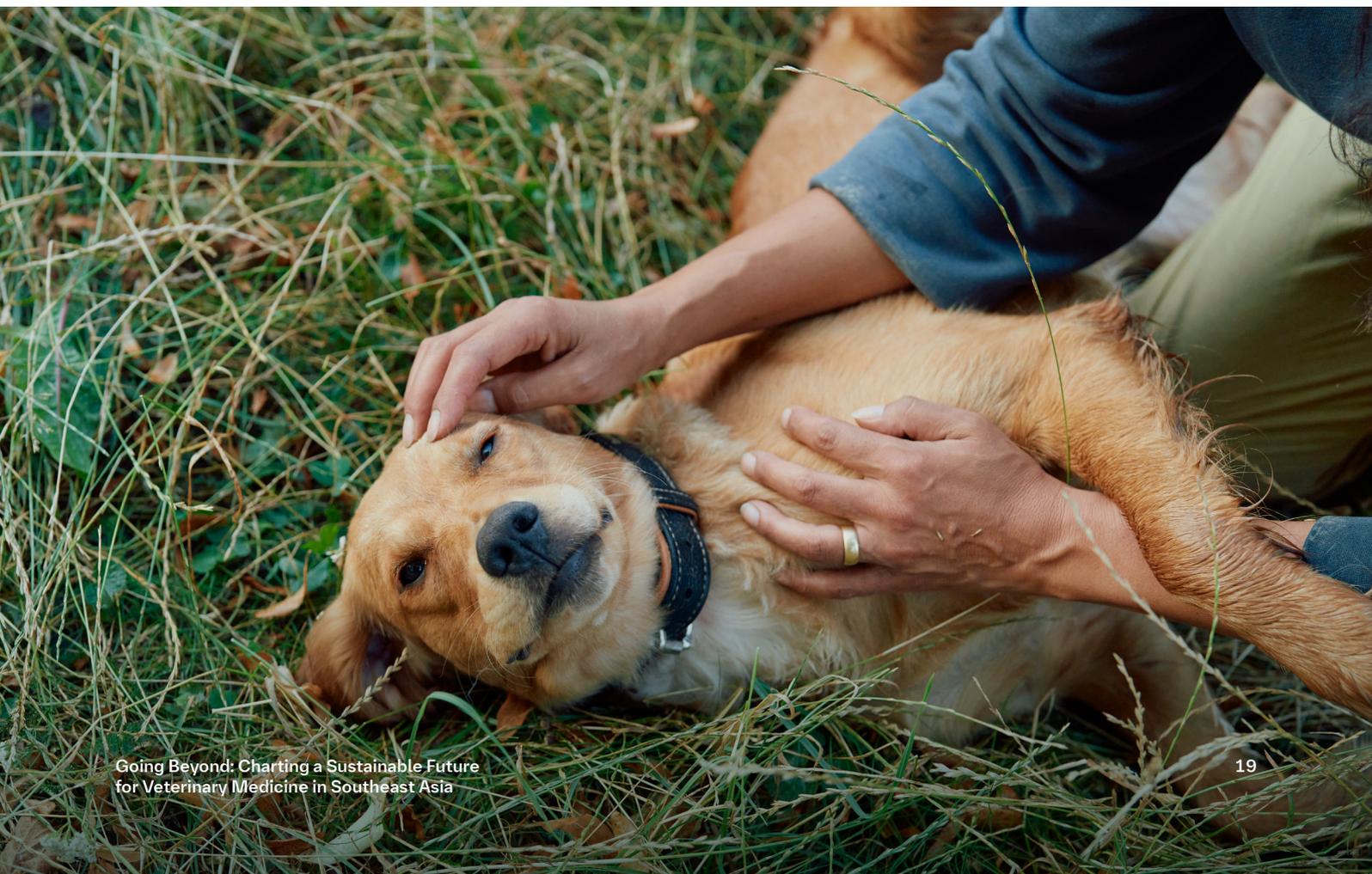
What's next?

Conclusion

The path to improving the current situation for veterinarians is undoubtedly complex, but recognizing these challenges marks a crucial first step. This whitepaper has illuminated the key areas demanding attention, and the voices of veterinarians themselves have provided invaluable insights into possible solutions: There is significant potential to raise awareness and enhance public understanding of the veterinarian profession and the role they play in ensuring animal and human health. Other challenges, such as the shortage of veterinarians, mental health challenges, and client price acceptance are interlinked and must be addressed to help veterinarians see their profession as rewarding.

However, no single veterinary association can tackle all these pressing aspects alone. Solving these challenges requires a multilevel approach, from working together with governments and policymakers to strengthen funding and reshape the perception of veterinarians to working with educational institutes and cross-regional collaboration to exchange best practices. The animal health industry can also step up to play an important role by not only raising awareness, but also supporting veterinarians through offering courses around mental health or soft skills.

While changing the current landscape for veterinarians and veterinary staff across the region will not happen overnight, taking initial steps is crucial. By working together, we can build a future where the veterinary profession is recognized for their dedication, thrives in a sustainable and fulfilling career — and ensures the health and wellbeing of both animals and humans.





Indonesia: Charting a Sustainable Future for Veterinary Medicine



The veterinary profession in Southeast Asia, while one that is driven by dedication, is facing growing challenges – economic, educational, and mental-health related – that hinder veterinarians and their staff in meeting the demands of both the livestock and the companion pet industry, with a potential effect on human health, animal welfare and local economies.

To better understand the challenges facing the veterinarian industry in Southeast Asia, Boehringer Ingelheim, in partnership with TAGR, an independent strategic consultancy, conducted a survey among 335 veterinarians and veterinary staff across SEA including Indonesia to assess the current state and the perception of the profession of the field. In-depth, one-on-one interviews were also conducted to gather qualitative insights and personal perspectives to identify strategies that can be actioned to support the profession.



"The role of veterinarians in ensuring the safety of animal products or preventing the spread of zoonotic diseases is often less recognized by the public. This lack of understanding can have a negative impact on veterinarians, both professionally and psychologically. In addition, the lack of public awareness can also have an impact on policy, limiting the resources available to veterinarians to carry out their duties optimally." - Dr. drh. Muhammad Munawaroh, M.M., Chairman of Perhimpunan Dokter Hewan Indonesia (PDHI).

Key on-ground insights from Indonesian veterinary professionals

The insights from veterinarians and staff in Indonesia clearly show the key challenges that the profession is facing:

Under-recognition of the value of services provided

Rising financial costs, financial pressures as well as investment into new technologies have influenced costs and are increasingly met with a lack on understanding by animal owners as well as mistrust and stigma around why veterinarians charge what they do.



Client base

49%

of Indonesian veterinarians report a decline in client base as their main challenge.

Increased operating costs

39%

For 39%, increased operating costs is a struggle that they are facing, along with clients' lack of knowledge around what veterinarians do (39%).

Technological advances

31%

struggle with keeping up to date with technological advances.

Stress, burnout and compassion fatigue

Despite their dedication, veterinarians are continuously faced with challenges around remuneration and work-life balance. For many, long hours, night shifts, emergency care and weekend work make it nearly impossible to achieve a healthy work-life balance. This is compounded by financial strain, potential harassment from animal owners as well as regular exposure to trauma and euthanasia.



Wellbeing Initiatives

53%

of the surveyed veterinary practises in Indonesia have wellbeing initiatives in place (both official and informal).

Retaining talent

49%

49% see a supportive culture as key along with promoting work-life balance (47%).

Ways to alleviate stress at work

45%

believe flexible work hours would help them better manage stress. Better social connections also played a role for 27%, along with better treatment by managers/colleagues (27%) and better treatment by clients (25%).

Appendix

Indonesia



Key challenges facing the veterinary profession

Based on the survey and interview data, there are three key challenges facing the veterinary profession in Indonesia:



Operational challenges

Increasing operational costs, rising prices of medical devices and clinic operational costs put financial pressure on veterinarians. Many clinic owners must adjust service prices or find ways to reduce costs without sacrificing service quality.

Lack of public understanding

Insufficient public awareness of the value and complexity of veterinary services as well as limited understanding of the cost of veterinary services. This can cause emotional stress when dealing with clients who feel that costs are too high.

Limited wellbeing support

Many veterinarians work long hours, making it difficult to implement wellness initiatives. Clinics with small profit margins may struggle to allocate funds for employee wellness programs. In addition, there still is a lack of recognition of the importance of mental wellness.

"There needs to be extensive public education in order to increase awareness around the role of veterinarians in public health and food security through media, seminars or cooperation with educational institutions. There also needs to be a focus on improving animal welfare and support for veterinarians by building a better support system including work welfare, reasonable working hour regulations and increasing compensation so that this profession is more appreciated." - Dr. drh. Muhammad Munawaroh, M.M, Chairman of Perhimpunan Dokter Hewan Indonesia (PDHI).

A roadmap towards greater recognition and satisfaction in the veterinary industry in Indonesia

To address these challenges and ensure a more sustainable and rewarding veterinary profession in Indonesia, there are some initial recommendations that the animal health industry, veterinary associations and regulatory agencies focused on animal health can come together to implement:

Education and public awareness campaigns



Launch targeted campaigns to increase awareness about the role of veterinarians through media, seminars or cooperation with educational institutions.

Advocacy for regulatory changes



Veterinary organization and clinics can work together with government and regulatory affairs to advocate for pet insurance and streamlined preventative care.

Veterinary talent retention



Advocate for fair compensation, benefits and competitive salaries. Support defining clear career development paths for those who may feel trapped in their position.

Industry recognition programs



Implement industry-wide award and recognition programs that reward veterinarians and staff for their service and increase public appreciation.

Implementation of wellbeing programs



Build mental health support system to provide professional counselling, support groups for veterinarians to share experiences and reduce stress as well training to vet practices on integrating mental health support and stress management programs.

Strengthening professional organizations



Veterinary associations can come together to work with animal health companies and governments to strengthen their voice and drive proactivity in voicing issues crucial to the profession.

By implementing these recommendations, Indonesia can create a more supportive and sustainable environment for its veterinary professionals, ensuring the continued health and wellbeing of animals and the communities they serve.



The Philippines: Charting a Sustainable Future for Veterinary Medicine



Driven by a passion for animal welfare, the Philippine veterinary profession faces a crisis stemming from underappreciation and operational challenges. With 48% citing the public's lack of understanding as a top concern, veterinarians and staff feel increasingly undervalued, contributing to burnout and threatening sustainable animal care. This impacts not only veterinary wellbeing but also the broader community, given their role in animal health.

To better understand the challenges facing the veterinary industry in Southeast Asia, Boehringer Ingelheim, in partnership with TAGR, an independent strategic consultancy, conducted a comprehensive survey of 335 veterinarians and veterinary staff across six Southeast Asia countries, including the Philippines, to assess the current state and perception of the profession. In-depth, one-on-one interviews were also conducted to gather qualitative insights and personal perspectives to identify actionable strategies to support the industry.



"While vets play a major role in food inspection safety and epidemiology, the general public often sees them as pet doctors only, which can often result in veterinarians feeling underrecognized and underappreciated by the public." - Dr Russell Tianzaon, National Officer, Philippine Veterinary Medicine Association (PVMA)

Key on-ground insights from Filipino veterinary professionals

The insights from the vet professionals paint a concerning picture of the veterinary landscape in the Philippines:

Under-recognition of the value of services provided

Veterinary professionals in the Philippines face significant challenges due to client price sensitivity and a lack of public understanding of the value of their services. These factors contribute to stress in the workplace which may be alleviated with greater client appreciation.



Pricing perception

42%

of veterinary professionals cite clients' acceptance of veterinary costs as a major challenge.

Lack of recognition

28%

Only 28% of veterinarians and clinic staff feel that the public very much understands the role they and the broader veterinary industry play.

Further client appreciation required

44%

feel that a better understanding of their profession would help to alleviate stress at work.

Stress, burnout and limited wellbeing support

Feeling a strong sense of responsibility and dedication to their profession, veterinary professionals face significant stress due to demanding work conditions. Long hours are common, with a majority working over 40 hours per week. This, together with limited wellbeing support and work-life balance, contributes to a challenging work environment.



Wellbeing initiatives

64%

of veterinary practices in the Philippines do not have wellbeing initiatives in place (whether official or informal).

Long working hours

46%

of veterinary professionals work up to 49 hours per week.

Promoting work-life balance

74%

view promoting work-life balance initiatives as the main way to motivate new veterinarians to stay in the industry.

Appendix

The Philippines



Key challenges facing the veterinary profession

Based on the survey and interview data, there are three key challenges facing the veterinary profession in the Philippines:



Operational challenges

Balancing high-quality care with client price sensitivity creates operational strain, leading to potential compromises in treatment and care.

Lack of public understanding

Insufficient public awareness of the value and complexity of veterinary services contributes to underappreciation and limits support for the profession.

Limited wellbeing support

Inadequate focus on mental health and work-life balance initiatives contributes to stress and burnout.

"Staff recognition plays an underestimate role for boosting morale, especially when paired with an incentive. Regular bonding sessions such as outings, lunches together or engaging in sports as a team can be a great starting point."
- Dr Russell Tianzon, National Officer, Philippine Veterinary Medicine Association (PVMA)

A roadmap towards greater recognition and satisfaction in the veterinary industry in the Philippines

To address these challenges and create a more sustainable and rewarding veterinary profession in the Philippines, these are some initial recommendations for the animal health industry, veterinary profession, and animal health regulatory agencies in the Philippines to come together to address:



Public awareness campaigns

Launch targeted campaigns to educate the public and raise understanding about the expertise of veterinarians and their roles in public health and food safety.



Advocacy for regulatory changes

Veterinary organization and clinics can work together with government and regulatory affairs to advocate for pet insurance and streamlined preventative care.



Veterinary talent development programs

Support skill-building programs, scholarships, and incentives for vet students, focusing on attracting and retaining talent in underserved areas.



Industry recognition programs

Implement industry-wide recognition programs that reward veterinarians and clinic staff for their service and expertise, fostering a sense of value and appreciation and work with clinics to implement staff recognition incentives.



Implementation of wellbeing programs

Provide funding and training to vet practices on the importance of wellbeing and how to integrate mental health support and stress management programs.



Emphasize preventative care to animal owners

Educational campaigns for animal owners on the importance of preventative care. This approach can help address several challenges including workload and mental health, while building lasting, good client-veterinarian relationships.

By implementing these recommendations, the Philippines can create a more supportive and sustainable environment for its veterinary professionals, ensuring the continued health and wellbeing of animals and the communities they serve.



Malaysia:

Charting a Sustainable Future for Veterinary Medicine



The veterinary profession in Malaysia, while driven by a deep passion for animal welfare, faces a growing crisis. Veterinarians and clinic staff are feeling increasingly undervalued and underappreciated, contributing to burnout and threatening the sustainability of animal healthcare in the country. This situation impacts not only the wellbeing of veterinary professionals but also the broader societal and economic health, given the crucial role animals play in livelihoods and food security.

To better understand the challenges facing the veterinary industry in Southeast Asia, Boehringer Ingelheim, in partnership with TAGR, an independent strategic consultancy, conducted a comprehensive survey of 335 veterinarians and veterinary staff across six Southeast Asia countries, including Malaysia, to assess the current state and perception of the profession. In-depth, one-on-one interviews were also conducted to gather qualitative insights and personal perspectives to identify actionable strategies to support the industry.



"In Malaysia, stagnant wages coupled with inflation and the absence of pet insurance create significant financial barriers to comprehensive veterinary care. This often can lead to owners having to make difficult choices regarding animal care, especially in an emergency." - Dr Tan Check Nam, President, Malaysian Small Animal Veterinary Association (MSAVA)

Key on-ground insights from Malaysian veterinary professionals

The insights from the vet professionals paint a concerning picture of the veterinary landscape in Malaysia:

Under-recognition of the value of services provided

Rising financial costs, financial pressures as well as investment into new technologies have impacted costs but are increasingly met with a lack of understanding, trust, and even stigma around why veterinarians charge what they do.



Pricing perception

57%

Malaysian veterinary professionals cite perception of cost vs. value being delivered as a major challenge.

Staffing issues

63%

report staffing issues as a significant obstacle.

Increased operating costs

62%

struggle with rising operational costs.

Stress, burnout and compassion fatigue

Despite their dedication, veterinarians continue to face significant challenges related to remuneration and stress levels. For many, work-life balance is nearly impossible due to long hours, night shifts, and weekend work, along with emergency surgeries, financial strain, potential harassment from animal owners, and frequent exposure to trauma and euthanasia.



Wellbeing initiatives

50%

of veterinary practices in Malaysia have wellbeing initiatives in place, but these are often focused on professional development and equipment upgrades rather than mental health support.

Motivating new talent

61%

see promoting work-life balance initiatives as the best way to retain new talent.

Correlation between client appreciation & wellbeing

50%

believe a better understanding of their job by clients would alleviate stress.

Appendix

Malaysia



Key challenges facing the veterinary profession

Based on the survey and interview data, there are three key challenges facing the veterinary profession in Malaysia:



Operational challenges

Balancing the need to provide high-quality care with client price sensitivity and rising operational costs, as well as a chronic shortage of veterinarians and skilled staff, leading to increased workloads and stress.

Lack of public understanding

Insufficient public awareness of the value and complexity of veterinary services.

Limited wellbeing support

Inadequate focus on mental health and work-life balance initiatives.

"The financial realities of veterinary practice, including the cost of equipment, labor and facilities, are often overlooked by clients, creating a disconnect between their expectations and the cost of providing quality care." - Dr Salehatul Khuzaimah, President of the Malaysian Association of Companion Animal Medicine Industry (MACAMI)

A roadmap towards greater recognition and satisfaction in the veterinary industry in Malaysia

To address these challenges and create a more sustainable and rewarding veterinary profession in Malaysia, these are some initial recommendations for the animal health industry, veterinary profession and animal health regulatory agencies in Malaysia to come together to address:



Public awareness campaigns

Launch targeted campaigns to educate the public about the expertise and societal contribution of veterinarians.



Advocacy for regulatory changes

Veterinary organization and clinics can work together with government and regulatory affairs to advocate for pet insurance and streamlined preventative care.



Veterinary talent development programs

Support skill-building programs, scholarships, and incentives for vet students.



Industry recognition programs

Implement industry-wide recognition programs that reward veterinarians and clinic staff for their service and expertise.



Implementation of wellbeing programs

Provide funding and training to vet practices on integrating mental health support and stress management programs.



Emphasize preventative care to animal owners

Educational campaigns for animal owners on the importance of preventative care. By promoting healthier, longer lives for pets, this approach can help address several challenges including workload and mental health, while building good client-veterinarian relationships.

By implementing these recommendations, Malaysia can create a more supportive and sustainable environment for its veterinary professionals, ensuring the continued health and wellbeing of animals and the communities they serve.



Singapore: Charting a Sustainable Future for Veterinary Medicine



The veterinary profession in Southeast Asia, while one that is driven by dedication, is facing growing challenges – economic, educational, and mental-health related – that hinder veterinarians and their staff in meeting the demands of both the livestock and the companion pet industry, with a potential effect on human health, animal welfare and local economies.

To better understand the challenges facing the veterinarian industry in Southeast Asia, Boehringer Ingelheim, in partnership with TAGR, an independent strategic consultancy, conducted a survey among 335 veterinarians and veterinary staff across SEA including Singapore to assess the current state and the perception of the profession of the field. In-depth, one-on-one interviews were also conducted to gather qualitative insights and personal perspectives to identify strategies that can be actioned to support the profession.



“Veterinary contributions to society are not widely promoted in mass media or education. In many countries, veterinary medicine is not included in school curricula as a critical component of public health or food security, which contributes to limited understanding and awareness around the role of veterinary medicine. This is worse in Singapore, as we do not have a significant agriculture industry, nor do we have a veterinary school.” – Dr Teo Boon Han, President, Singapore Veterinary Association & Managing Partner, Vet Trust Singapore

Key on-ground insights from Singaporean veterinary professionals

The insights from veterinarians and staff in Singapore clearly highlight the main challenges that both veterinarians and their staff are faced with on a daily basis.

Under-recognition of the value of services provided

Rising financial costs, financial pressures as well as investment into new technologies have influenced costs and are increasingly met with a lack on understanding by animal owners as well as mistrust and stigma around why veterinarians charge what they do.



Pricing Perception
78%

of Singaporean veterinarians see clients' acceptance of the cost of veterinary services as the top challenge.

Shortage of staff
70%

also see a shortage of staff as a major hurdle, leading to an increased workload and stress.

Talent hiring
62%

For 66%, the inability to hire skilled staff is an additional obstacle that they face. This is closely linked to the existing shortage of staff and rising financial costs.

Stress, burnout and compassion fatigue

Despite their dedication, veterinarians are continuously faced with challenges around remuneration and work-life balance. For many, long hours, night shifts, emergency care and weekend work make it nearly impossible to achieve a healthy work-life balance. This is compounded by financial strain, potential harassment from animal owners as well as regular exposure to trauma and euthanasia.



Wellbeing Initiatives
33%

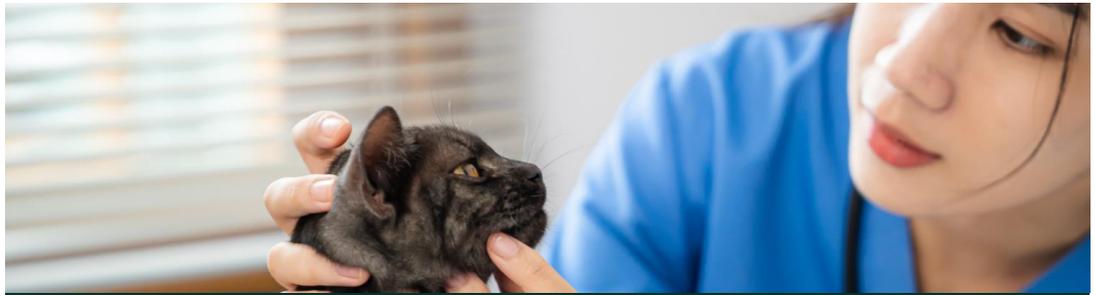
Only 33% of the surveyed veterinary practises in Singapore have wellbeing initiatives in place that are specifically targeted at mental health.

Retaining new talent
56%

Singapore is the only market where the majority of those in veterinary practice (56%) do not believe that there are sufficient support and investment structures in place to support graduates entering the profession.

Correlation between client appreciation & wellbeing
72%

of surveyed veterinarians believe that better understanding of their job by clients would support in alleviating stress – the highest percentage across the surveyed markets.



Key challenges facing the veterinary profession

Based on the survey and interview data, there are three key challenges facing the veterinary profession in Singapore:



Operational challenges

Balancing the need to provide high-quality care with client price sensitivity and rising operational costs, as well as a chronic shortage of veterinarians and skilled staff, leading to increased workloads and stress.

Lack of public understanding

Insufficient public awareness of the value and complexity of veterinary services.

Limited wellbeing support

Inadequate focus on mental health and work-life balance initiatives compounded by the lack of time to implement such initiatives.

“These challenges—client price acceptance, public knowledge gaps, and rising operational costs—significantly impact the daily work life of veterinarians and veterinary staff. They create stress, financial strain, and even ethical dilemmas, affecting both the quality of care and job satisfaction.” – Dr Teo Boon Han, President, Singapore Veterinary Association & Managing Partner, VetTrust Singapore.

A roadmap towards greater recognition and satisfaction in the veterinary industry in Singapore

To address these challenges and ensure a more sustainable and rewarding veterinary profession in Singapore, there are some initial recommendations that the animal health industry, veterinary associations and regulatory agencies focused on animal health can come together to implement:



Education and public awareness campaigns

Encouraging veterinary professionals to proactively engage in schools, universities, and community programs can create a deeper understanding of the field's societal contributions beyond pet care.



Advocacy for regulatory changes

Veterinary organization and clinics can work together with government and regulatory affairs to advocate for pet insurance and streamlined preventative care.



Support for incoming veterinarians

Implement a multi-faceted approach that improves workplace culture, mentorship, workload management, and professional development opportunities as well as discussing the importance of emotional and mental resilience.



Implementation of wellbeing programs

Build mental health support system to provide professional counselling, support groups for veterinarians to share experiences and reduce stress as well training to vet practices on integrating mental health support and stress management programs.



Emphasize preventative care to animal owners

Educational campaigns for animal owners on the importance of preventative care. By promoting healthier, longer lives for pets, this approach can help address several challenges including workload and mental health, while building good client-veterinarian relationships.

By implementing these recommendations, Singapore can create a more supportive and sustainable environment for all its veterinary professionals, ensuring the continued health and wellbeing of animals and the communities they serve.



Thailand:

Charting a Sustainable Future for Veterinary Medicine



The veterinary profession in Southeast Asia, while one that is driven by dedication, is facing growing challenges – economic, educational, and mental-health related – that hinder veterinarians and their staff in meeting the demands of both the livestock and the companion pet industry, with a potential effect on human health, animal welfare and local economies.

To better understand the challenges facing the veterinarian industry in Southeast Asia, Boehringer Ingelheim, in partnership with TAGR, an independent strategic consultancy, conducted a survey among 335 veterinarians and veterinary staff across SEA including Thailand to assess the current state and the perception of the profession of the field. In-depth, one-on-one interviews were also conducted to gather qualitative insights and personal perspectives to identify strategies that can be actioned to support the profession.



“Many veterinary hospitals in Thailand operate on a two-shift system, typically with morning and evening shifts of 12 hours each. This scheduling system can result in standard working hours of at least 12 hours per day, which can contribute to physical and mental strain, especially when done over an extended period of time.” – Inst. Dr. M.L. Narudee Kashemsant, The Veterinary Practitioner Association of Thailand (VPAT)

Key on-ground insights from Thai veterinary professionals

The insights from veterinarians and staff in Thailand clearly show the key challenges that the profession is facing:

Under-recognition of the value of services provided

Rising financial costs, financial pressures as well as investment into new technologies have influenced costs and are increasingly met with a lack on understanding by animal owners as well as mistrust and stigma around why veterinarians charge what they do.



Client base

42%

of Thai veterinarians report a decline in client base as their main challenge.

Client price acceptance

74%

For 74% of Thai veterinarians and clinic staff, client price acceptance is the top challenge they face.

Client lack of knowledge

70%

of Thai vets and clinic staff are struggling with clients' lack of knowledge around animal health.

Stress, burnout and compassion fatigue

Despite their dedication, veterinarians are continuously faced with challenges around remuneration and work-life balance. For many, long hours, night shifts, emergency care and weekend work make it nearly impossible to achieve a healthy work-life balance. This is compounded by financial strain, potential harassment from animal owners as well as regular exposure to trauma and euthanasia.



Work-life balance

58%

of Thai vets and staff regularly work 50 hours or more per week – the second highest percentage of those working such hours across the countries surveyed.

Appreciation by the public

16%

Only 16% of Thai vets and clinic staff feel very much understood by the public.

Ways to alleviate stress at work

64%

believe that a better understanding of their job by clients would help alleviate stress at work. This is closely followed by better treatment by clients (58%) and flexible work hours (42%).

Appendix

Thailand



Key challenges facing the veterinary profession

Based on the survey and interview data, there are three key challenges facing the veterinary profession in Thailand:



Operational challenges

Increasing operational costs, rising prices of medical devices and clinic operational costs put financial pressure on veterinarians. In addition, another pressing issue is a decline in client base, which is another challenge in Thailand.

Lack of public understanding

Insufficient public awareness of the value and complexity of veterinary services as well as limited understanding of the cost of veterinary services can cause emotional stress when dealing with clients who feel that costs are too high.

Limited wellbeing support

Many Thai veterinarians work long hours, making it difficult to implement wellness initiatives. Clinics with small profit margins may struggle to allocate funds for employee wellness programs or not see the necessity of changing the status quo when it comes to wellness initiatives.

“The veterinary industry in Thailand faces challenges related to practitioner availability. While a significant number of veterinary graduates enter the workforce annually, only a smaller proportion pursue careers as practitioners. Furthermore, a limited number of practitioners specialize. This can contribute to a perceived shortage of veterinarians, particularly in larger hospitals.” – Inst. Dr. M.L. Narudee Kashemsant, The Veterinary Practitioner Association of Thailand (VPAT)

A roadmap towards greater recognition and satisfaction in the veterinary industry in Thailand

To address these challenges and ensure a more sustainable and rewarding veterinary profession in Thailand, there are some initial recommendations that the animal health industry, veterinary associations and regulatory agencies focused on animal health can come together to implement:



Education and public awareness campaigns

Launch targeted campaigns to increase awareness about the role of veterinarians through media, seminars or cooperation with educational institutions.



Advocacy for regulatory changes

Veterinary organization and clinics can work together with government and regulatory affairs to advocate for pet insurance and streamlined preventative care.



Veterinary talent retention

Advocate for fair compensation, benefits and competitive salaries. Support defining clear career development paths for those who may feel trapped in their position.



Industry recognition programs

Implement industry-wide award and recognition programs that reward veterinarians and staff for their service and increase public appreciation.



Implementation of wellbeing programs

Build mental health support system to provide professional counselling, support groups for veterinarians to share experiences and reduce stress as well training to vet practices on integrating mental health support and stress management programs.



Strengthening professional organizations

Veterinary associations can come together to work with animal health companies and governments to strengthen their voice and drive proactivity in voicing issues crucial to the profession.

By implementing these recommendations, Thailand can create a more supportive and sustainable environment for its veterinary professionals, ensuring the continued health and wellbeing of animals and the communities they serve.



Vietnam:

Charting a Sustainable Future for Veterinary Medicine



The veterinary profession in Southeast Asia, while one that is driven by dedication, is facing growing challenges – economic, educational, and mental-health related – that hinder veterinarians and their staff in meeting the demands of both the livestock and the companion pet industry, with a potential effect on human health, animal welfare and local economies.

To better understand the challenges facing the veterinarian industry in Southeast Asia, Boehringer Ingelheim, in partnership with TAGR, an independent strategic consultancy, conducted a survey among 335 veterinarians and veterinary staff across SEA including Vietnam to assess the current state and the perception of the profession of the field. In-depth, one-on-one interviews were also conducted to gather qualitative insights and personal perspectives to identify strategies that can be actioned to support the profession.



“There is an opportunity to enhance public understanding of veterinarians’ multi-faceted role in society, especially in developing and low-income countries. Current public awareness in these regions often focuses primarily on the treatment of animal illnesses. Improved communication could highlight the broader contributions of veterinarians, alongside medical doctors, to public health, food safety and food security.” – Lê Quang Thông, Dean of the Faculty of Animal Science and Veterinary Medicine at Nong Lam University, Ho Chi Minh City; President of VSAVA (Vietnam Small Animal Veterinary Association)

Key on-ground insights from Vietnamese veterinary professionals

The insights from veterinarians and staff in Vietnam clearly show the key challenges that the profession is facing:

Operational challenges and a decline in clients

Market uncertainty, financial pressures as well as a decline in client base, have influenced costs and are increasingly met with a lack on understanding by animal owners as well as mistrust and stigma around why veterinarians charge what they do.



Market uncertainty
58%

of Vietnamese veterinarians see uncertainty within the market as a major challenge they need to deal with.

Reduced product sales
44%

struggle with a decline in product sales – the only country surveyed to cite this as a key challenge.

Decline in client base
34%

of Vietnamese vets and clinic staff see a decline in their client base as another hurdle.

Stress, burnout and compassion fatigue

Despite their dedication, veterinarians are continuously faced with challenges around remuneration and work-life balance. For many, long hours, night shifts, emergency care and weekend work make it nearly impossible to achieve a healthy work-life balance. This is compounded by financial strain, potential harassment from animal owners as well as regular exposure to trauma and euthanasia.



Work-life balance
78%

of Vietnamese vets and staff regularly work 50 hours or more per week – the highest percentage of those working such hours across the countries surveyed.

Wellbeing initiatives
14%

Only 14% of surveyed clinics have mental wellbeing initiatives in place – the lowest percentage across the countries surveyed.

Ways to alleviate stress at work
36%

believe that more flexible working hours would alleviate stress at work. This is closely followed by a better understanding of their job by clients (34%).

Appendix

Vietnam



Key challenges facing the veterinary profession

Based on the survey and interview data, there are three key challenges facing the veterinary profession in Vietnam:



Operational challenges

Increasing operational costs, rising prices of medical devices and clinic operational costs put financial pressure on veterinarians. Market uncertainty, a decline in client base, and a reduction in product sales add to these challenges.

Lack of public understanding

Insufficient public awareness of the value and complexity of veterinary services as well as limited understanding of the cost of veterinary services can cause additional stress when dealing with clients who feel that costs are too high.

Limited wellbeing support

Many Vietnamese veterinarians work long hours, and clinics with small profit margins may struggle to allocate funds for employee wellness programs or do not see the necessity of changing the status quo.

"As the veterinary profession continues to seek greater recognition, attracting and retaining talent remains an ongoing opportunity. Strategic human resource management can strengthen the value of the profession while supporting both the emotional and material well-being of veterinary professionals." - Diệp Ngọc Trúc, MSc, Veterinarian, Founder of TrustVet Animal Hospital, Vietnam

A roadmap towards greater recognition and satisfaction in the veterinary industry in Vietnam

To address these challenges and ensure a more sustainable and rewarding veterinary profession in Vietnam, there are some initial recommendations that the animal health industry, veterinary associations and regulatory agencies focused on animal health can come together to implement:

- 

Education and public awareness campaigns
Launch targeted campaigns to increase awareness about the role of veterinarians through media, seminars or cooperation with educational institutions.
- 

Advocacy for regulatory changes
Advocate for policies and regulations that support veterinarians in their work (e.g., improve vaccination efforts, expand the list of permitted veterinary medicines to improve treatment outcomes).
- 

Veterinary talent retention
Develop specialized veterinary training programs together with universities and vet associations and create opportunities for vets to pursue advanced education domestically and abroad.
- 

Industry recognition programs
Implement industry-wide award and recognition programs that reward veterinarians and staff for their service and increase public appreciation.
- 

Implementation of wellbeing programs
Build mental health support systems to provide professional counselling, support groups for veterinarians to share experiences and reduce stress as well training to vet practices on integrating mental health support and stress management programs.
- 

Strengthening professional organizations
Veterinary associations can come together to work with animal health companies and governments to strengthen their voice and drive proactivity in voicing issues crucial to the profession.

By implementing these recommendations, Vietnam can create a more supportive and sustainable environment for its veterinary professionals, ensuring the continued health and wellbeing of animals and the communities they serve.

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