

Study on the Development of the Veterinary Profession in Hong Kong

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1 EXECUTIVE SUMMARY

BACKGROUND & OBJECTIVES

1.1 In order to improve understanding of the prospects and constraints of the veterinary profession in Hong Kong, the Veterinary Surgeons Board of Hong Kong (VSB), through the administrative support and assistance from the Agriculture, Fisheries and Conservation Department (AFCD), commissioned Mercado Solutions Associates Ltd. (MSA) to conduct this study. The study results will help VSB in formulating recommendations to further support the development of the veterinary profession in Hong Kong. This summary highlights the major findings of the survey.

METHODOLOGY

1.2 Information was collected from different groups of stakeholders in the industry, namely:

- Registered veterinary surgeons in Hong Kong;
- Persons-in-charge / owners / managers of private veterinary clinics in Hong Kong;
- Hong Kong students who are studying veterinary courses in overseas universities; and
- Pet owners.

Registered Veterinary Surgeons

1.3 Self-administered questionnaires were mailed to all registered veterinary surgeons (totaling 840 as at 10 March 2016, according to the veterinary surgeon list from AFCD). Visits and calls were made to the veterinary clinics for inviting the veterinary surgeons to participate in the survey. During 18 May to 30 June 2016, a total of 307 veterinary surgeons were successfully enumerated. Data from enumerated cases were grossed up (projected) to represent the total 840 registered veterinary surgeons.

Private Veterinary Clinics

1.4 Self-administered questionnaires were mailed to all private veterinary clinics (totaling 160 as at 30 December 2015, according to the veterinary clinic list from AFCD). Visits and calls were made to the veterinary clinics for inviting the persons-in-charge / owners / managers to participate in the survey. During 18 May to 30 June 2016, 14 clinics were found to be closed down. A total of 104 veterinary clinics were successfully

enumerated. Data from enumerated cases were grossed up (projected) to represent the total 146 veterinary clinics.

1.5 For this target segment, information on fees and charges of some general veterinary services were also collected. For those veterinary clinics which did not respond to the pricing information, mystery shoppers were deployed to act as ordinary customers and visit the concerned veterinary clinics for collecting the pricing information.

Overseas Veterinary Students from Hong Kong

1.6 Invitation emails (together with AFCD's introductory letter and bilingual questionnaires) were sent to the responsible persons of 55 selected overseas universities (as at 10 March 2015) whose veterinary courses awards are recognized for registration as a veterinary surgeon in Hong Kong. During the fieldwork period from 23 March to 7 July 2016, a total of 45 universities responded to the survey, indicating that there are 240 Hong Kong students who are studying veterinary courses in overseas universities.

1.7 Finally, a total of 65 completed questionnaires from the students were received. Data from enumerated cases were grossed up (projected) to represent the total 240 overseas veterinary students from Hong Kong.

Pet Owners

1.8 Telephone interviews were conducted during 5 May to 12 June 2016. A total of 5 800 residential telephone numbers were attempted, in which 851 were found to be invalid (including non-operating numbers, fax numbers, non-residential numbers, etc.). After excluding the invalid cases, a total of 2514 households were successfully enumerated (in which 308 of them are pet owners), constituting a response rate of 50.8%. Data from enumerated cases were grossed up (projected) to represent the total 2 368 400 households in Hong Kong (based on the population data of 2011 Census issued by the Census & Statistics Department).

KEY FINDINGS – OVERVIEW OF THE VETERINARY INDUSTRY IN HONG KONG

Hong Kong Veterinary Activities in the Past 10 Years

1.9 Based on the statistics issued by the Census and Statistics Department, in the recent 5 years, the growth of establishments and persons engaged in the veterinary industry has slowed down and was growing at a relatively moderate pace. From a 10-year growth perspective, the number of veterinary establishments has been growing at

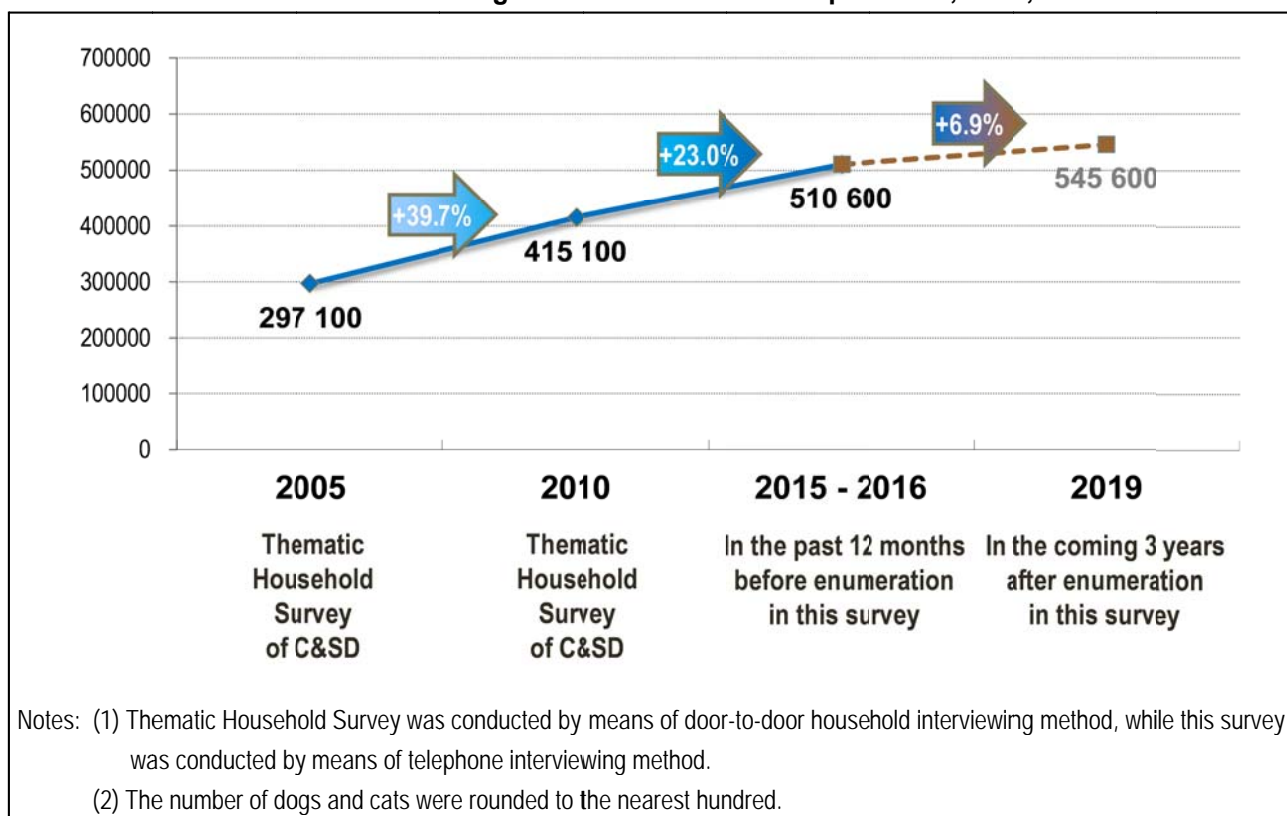
a compound annual growth rate of 8.5%. However, the nearer term establishment growth trend has slowed down as indicated by its 5-year compound annual growth rate at 4.6%. The same observation also appears in number of persons engaged, as its 5-year compound annual growth rate is 4.8%, compared with 10-year compound annual growth of 6.6%.

Estimated Population of Pets in Hong Kong

1.10 Based on the Thematic Household Surveys in 2005 and 2010 (Report No. 26 and 48) conducted by the Census and Statistics Department, it was estimated that about 297 100 and 415 100 dogs and cats were kept at the time of enumeration. In this survey, it was estimated that about 510 600 dogs and cats were kept in the past 12 months before enumeration, and about 545 600 dogs and cats will be kept in the coming 3 years. It was observed that the growth rates on the number of dogs and cats which were kept were decreasing.

(Ref.: Chart 1.10)

Chart 1.10: Estimated number of dogs and cats which were kept in 2005, 2010, 2016 and 2019



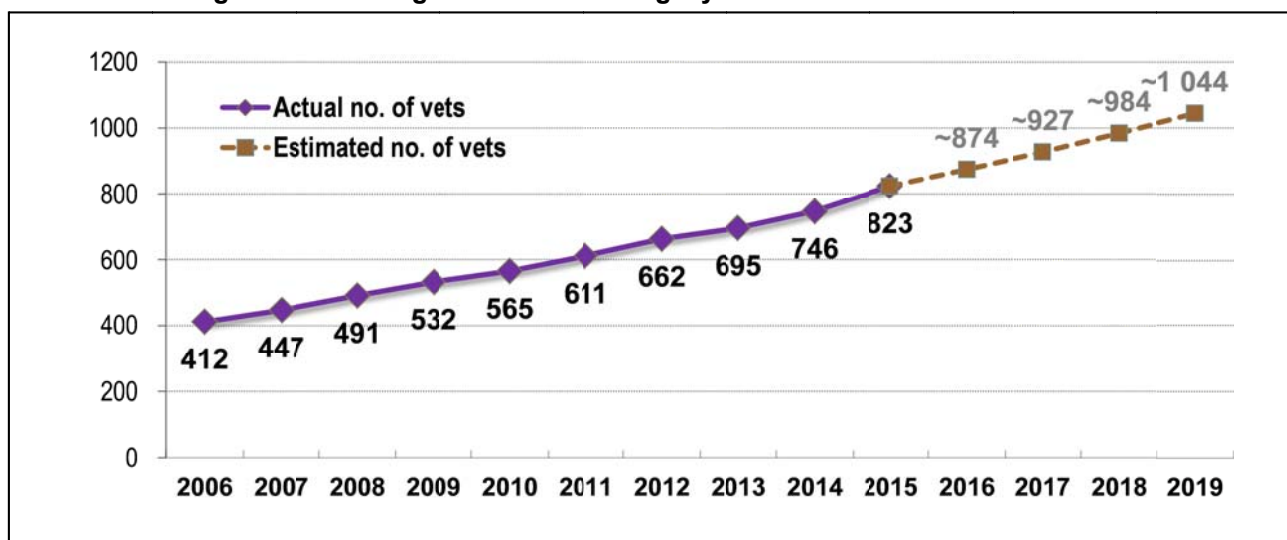
Number of Registered Veterinary Surgeons in Hong Kong

1.11 According to the statistical data from VSB, there were 823 registered vet surgeons in Hong Kong in 2015, which was about a double as compared with 10 years ago (412 in

2006). When using 5-year compound annual growth rate to estimate the number of registered vet surgeons in the coming 3 years, there will be about 874 in 2016, 927 in 2017, 984 in 2018 and 1 044 in 2019 (between 2016 and 2019, the growth rate will be 19.5%).

(Ref.: Chart 1.11)

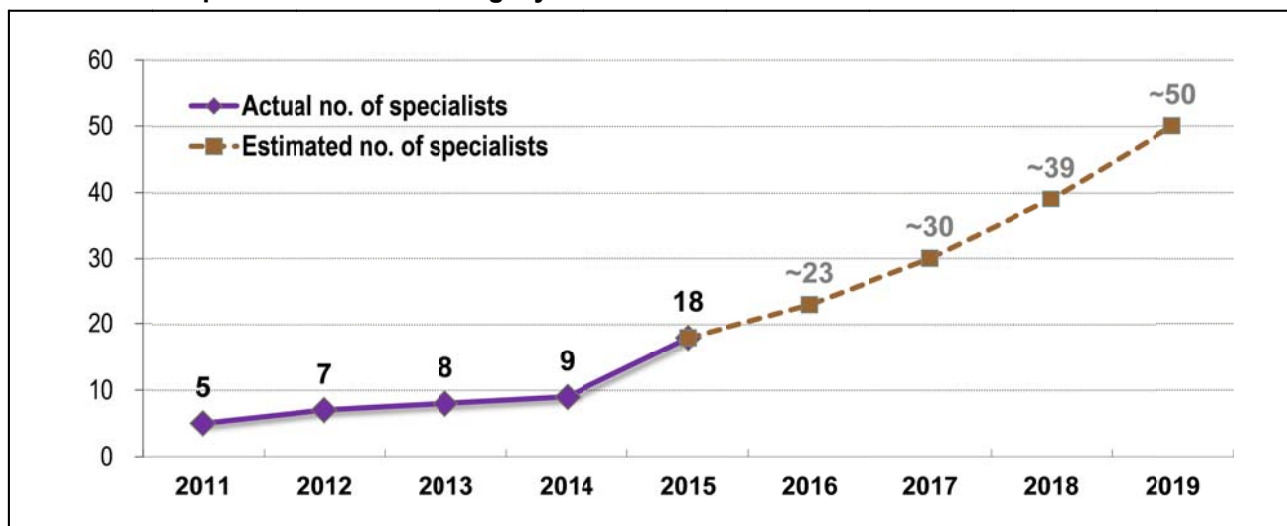
Chart 1.11: Number of registered vet surgeons in the past 10 years and estimated number of registered vet surgeons in the coming 3 years



1.12 According to the statistical data from VSB, there were 18 registered vet surgeons who were authorized to advertise as, or profess to be, specialists in Hong Kong in 2015, which was increased by 360% as compared with 5 years ago (5 in 2011). When using 5-year compound annual growth rate to estimate the number of specialists in the coming 3 years, there will be about 23 in 2016, 30 in 2017, 39 in 2018 and 50 in 2019.

(Ref.: Chart 1.12)

Chart 1.12: Number of specialists registered in VSB in the past 5 years and estimated number of specialists in the coming 3 years

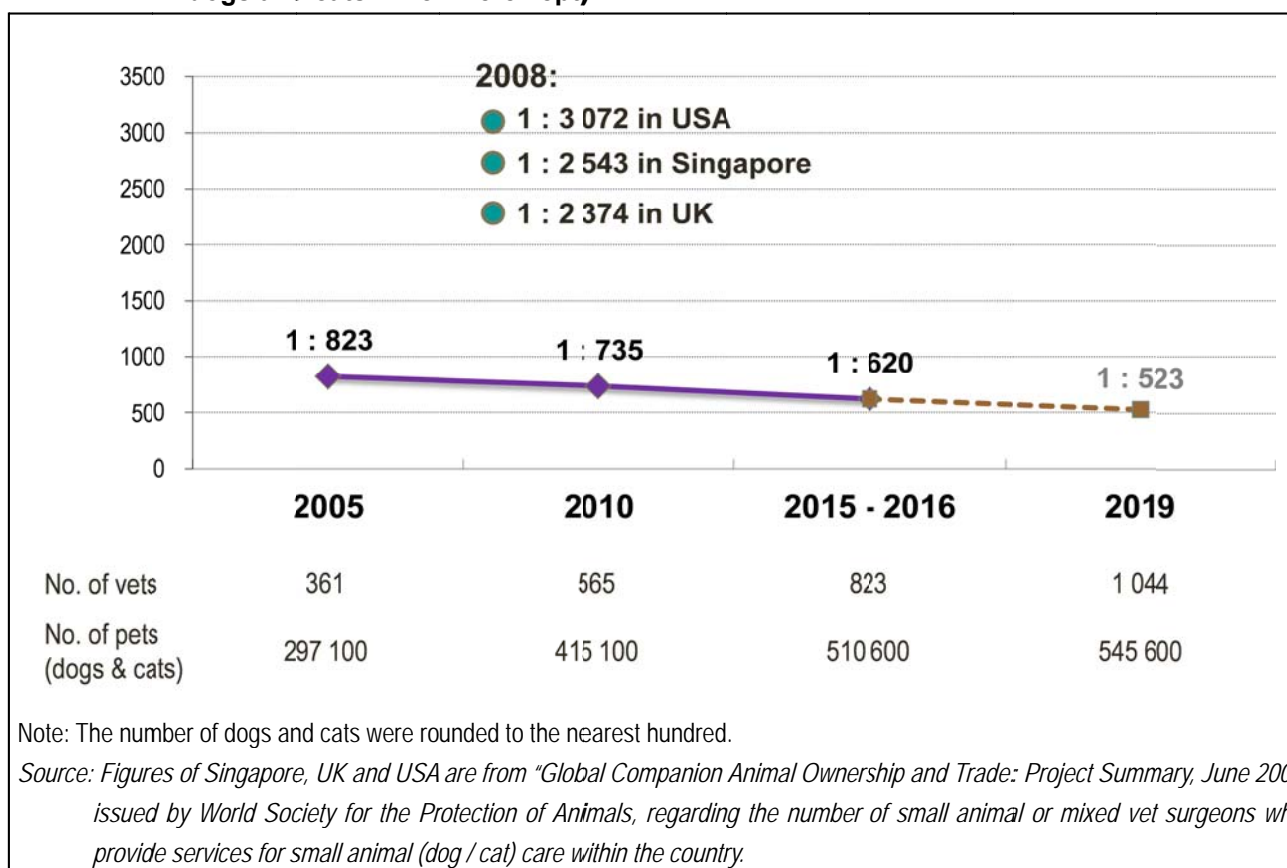


Vet-to-pet Ratio in Hong Kong

1.13 One common indicator to access the overall situation of veterinary services is to compare Hong Kong’s veterinarian-to-pet ratio (mainly cats and dogs) with selected developed countries^{Note}. According to a summary of report issued by World Society for the Protection of Animals in 2008, the vet-to-pet ratios of other comparable developed countries were: 1 : 2 543 in Singapore, 1 : 2 374 in UK and 1 : 3 072 in USA. As compared with the vet-to-pet ratios in Hong Kong in similar years (1 : 823 in 2005 and 1 : 735 in 2010), it was observed that Hong Kong’s ratio is much lower than those of Singapore, UK and USA. In addition, it was noted that Hong Kong’s vet-to-pet ratio is likely to be further declined.

(Ref.: Chart 1.13)

Chart 1.13: Vet-to-pet ratio in Hong Kong (the number of registered vet surgeons to the number of dogs and cats which were kept)



^{Note} A smaller ratio means there are more vets available for a number of cats and dogs.

KEY FINDINGS – PET OWNERS

Estimation of Potential Veterinary Services Users

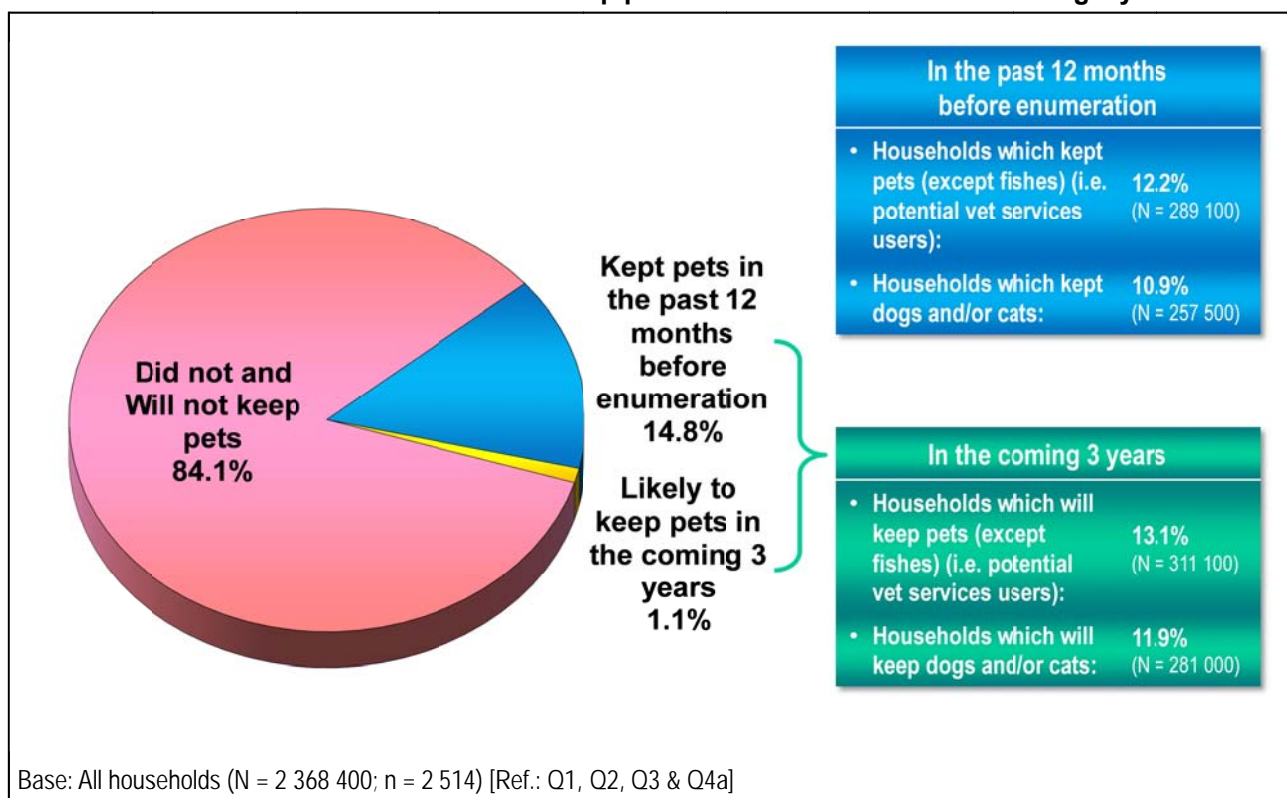
Incidence and Intention of Keeping Pets

1.14 In this survey, of all 2 368 400 households in Hong Kong, 12.2% claimed that they kept pets (except fishes) (i.e. potential veterinary services users; about 289 100 households) in the past 12 months before enumeration. 10.9% kept dogs and/or cats (about 257 500 households), which was increased by 3.2% as compared with about 249 400 households in 2010 (according to the findings of Thematic Household Survey conducted by the Census and Statistics Department).

1.15 Besides, 1.1% of all households which did not keep any pet in the past 12 months said that they were likely to do so in the coming 3 years. When aggregating the households which kept pets in the past 12 months and those which will keep pets in the coming 3 years, it was estimated that about 311 100 households will keep pets (except fishes) (i.e. potential veterinary services users) in the coming 3 years. About 281 000 households will keep dogs and/or cats in the coming 3 years, which will be increased by 9.1% as compared with about 257 500 in the past 12 months.

(Ref.: Chart 1.14-15)

Chart 1.14-15: Whether the households kept pets in the past 12 months before enumeration, and whether those which did not keep pets intended to do so in the coming 3 years



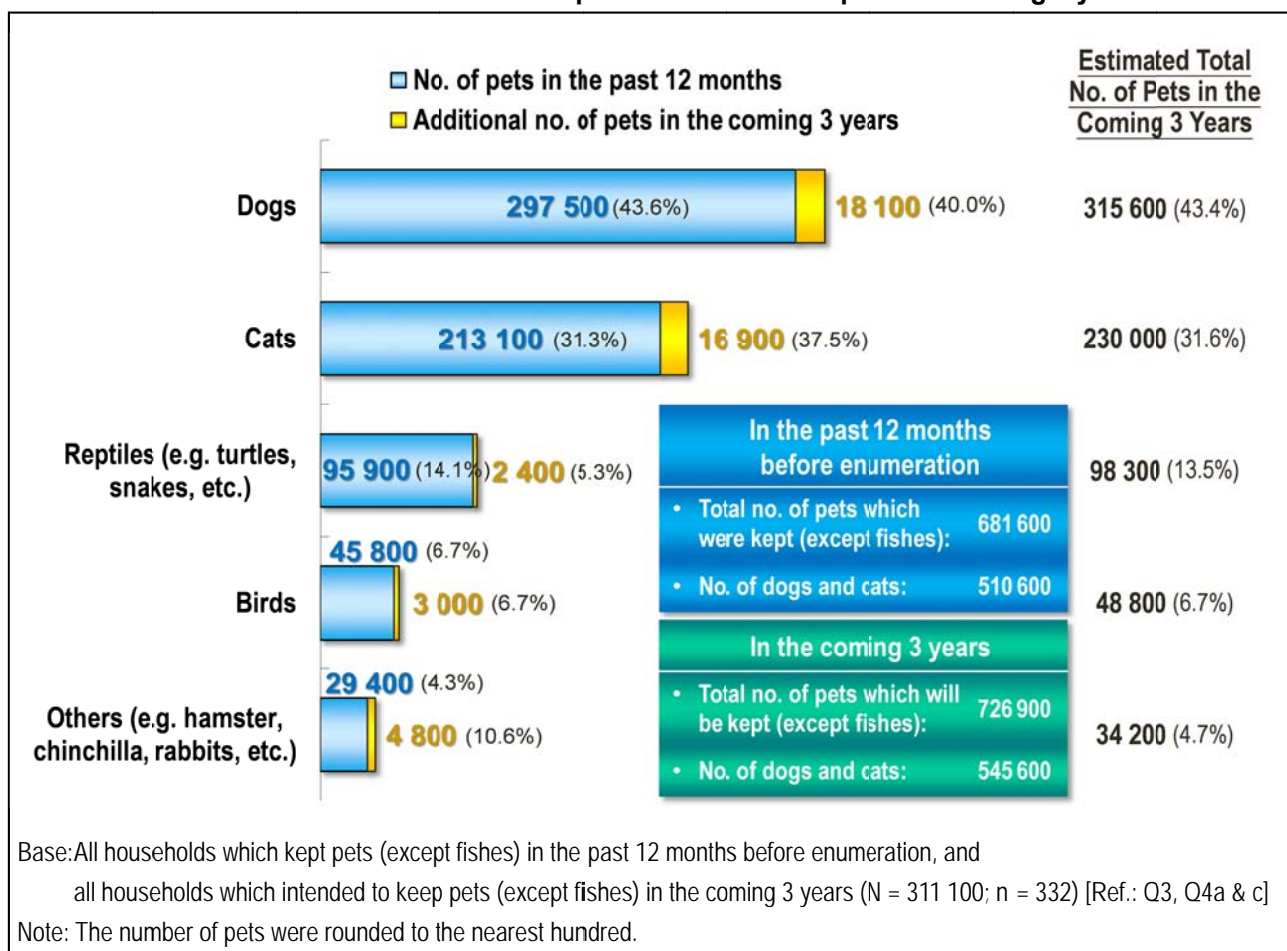
Estimated Population of Pets

1.16 It was estimated that about 681 600 pets (except fishes) were kept in Hong Kong in the past 12 months before enumeration. About 510 600 were dogs and cats, which was increased by 23.0% as compared with about 415 100 dogs and cats in 2010 (according to the findings of Thematic Household Survey conducted by the Census and Statistics Department).

1.17 Assumed that each of the households which were likely to keep pets in the coming 3 years would keep 1 pet only, about 45 300 additional pets (except fishes) will be kept in the coming 3 years. In total, about 726 900 pets (except fishes) will be kept in the coming 3 years (which will be increased by 6.6%, vs. 681 600 in the past 12 months). About 545 600 will be dogs and cats, which will be increased by 6.9% as compared with about 510 600 in the past 12 months.

(Ref.: Chart 1.16-17)

Chart 1.16-17: Estimated number of pets which were kept in the past 12 months before enumeration, and estimated total number of pets which will be kept in the coming 3 years



Experiences of Using Veterinary Services and Opinions towards Veterinary Services in Hong Kong

Usage Rate of Veterinary Services

1.18 Of the households which kept pets (except fishes) in the past 12 months, 71.4% said they have ever brought their pets to see veterinary surgeons (vets), with 40.5% visited vets in the past 12 months. Among the 28.6% who have never brought their pets to see vets, the majority said “my pet has no sickness before” (87.1%).

Types of Veterinary Services which were Used

1.19 Of the households which have ever brought pets to see vets, 86.8% said that they sought general consultation (e.g. health examinations / follow-up consultation) in last time of seeing vets. It was followed by vaccination / microchipping (31.3%) and surgery (18.9%).

Spending on Veterinary Services in Last Year

1.20 Of the households which brought pets to see vets in the past 12 months, the median range of spending on veterinary services in the last year was \$2,000 – less than \$3,000.

Opinions towards the Fees and Charges of Veterinary Services

1.21 Of the households which have ever brought pets to see vets, 45.2% considered that the fees and charges of veterinary services in Hong Kong were very / quite reasonable. Yet, a similar proportion (47.5%) considered the opposite. Among them, relatively more (63.8%) thought that the consultation fee of general vets was very / quite unreasonable, followed by medicine (36.3%) and surgery (30.1%).

1.22 If they were told that certain examination / treatment (e.g. lab tests, imaging, surgery or other kinds of treatment) was required for their pets, nearly three-quarters of the pet owners said either the vet (55.3%) or other clinic staff (19.1%) have explained to them about the reason of conducting those examinations / treatments before doing so (the vast majority of them considered that the explanation of vet (96.1%) or other clinic staff (95.1%) was very / quite clear). Only 7.3% claimed that no explanation was given.

1.23 Among the pet owners who have ever been told that certain examination / treatment was required for their pets (no matter whether explanation was given), 77.3% said that the vet / clinic staff have explained the approximate fees and charges before service. Moreover, 94.4% said that receipt was issued to them after paying the required fees and charges. Among them, 88.8% said that breakdown items of the fees and charges for examination / treatment were shown on the receipt.

1.24 Besides, of the households which have ever brought pets to see vets, 45.8% considered the price transparency very / quite adequate. 26.8% rated average. Among the 22.9% who considered very / quite inadequate, relatively more thought that the price transparency of consultation fee of general vets (67.4%) was inadequate, followed by hospitalization (37.7%) and medicines (36.3%). Besides, when asked to suggest ways for improvement, many of them claimed that the clinics should post the list of basic fees and charges at the clinic (78.5%).

Satisfaction of Veterinary Services in Hong Kong

1.25 Based on their experience from the last time they sought veterinary attention, the majority of pet owners were very / quite satisfied with the attitude and courtesy (86.4%) and professional knowledge (77.3%) of vets. Relatively speaking, their satisfaction levels were lower on other aspects, including whether alternative treatment advice was offered by the vets (59.8%), whether proactive suggestions were made on taking care of the pets (61.9%) and value for money of the overall service quality of the vets (61.9%). Nevertheless, only small proportions of the pet owners were very / quite dissatisfied with these aspects (about 1% - 7%).

1.26 29.4% of the pet owners said that they have ever consulted more than one vets for the same problem of their pets. Among them, most of the reasons were related to the vet / clinic, including: “the problem of my pet did not improve” (58.0%), “the fees and charges of the first vet / clinic for the required examination / treatment were too expensive” (20.5%) and “dissatisfaction with the vet’s professional knowledge” (2.7%).

1.27 In overall of the various aspects of their veterinary visit, 55.4% of the pet owners were very / quite satisfied with the veterinary services in Hong Kong. Among the 4.8% who were very / quite dissatisfied, many said it was because of the unreasonable fees and charges (80.6%).

1.28 About their reaction towards dissatisfactory veterinary services, most of the pet owners (64.7%) claimed that they have not encountered dissatisfactory veterinary services. However, for the others who have ever encountered such situation, relatively more (27.1%)

did not take any action. Many of them said it was because they just decided not to visit that vet clinic / hospital again (33.2%), they were not aware of the complaint channels (30.3%) and they did not think taking any action could help (28.6%). On the other hand, for the 8.2% who have taken action, many of them said they have reported to the vet clinic / hospital (and undergo mediation) (66.5%). Some shared their experience in forum / social network on the internet (30.7%).

Perceived Sufficiency of Veterinary Surgeons in Hong Kong

1.29 Of the pet owners who have experience in using veterinary services, 49.7% considered the number of vets in Hong Kong very / quite sufficient. On the contrary, 25.2% considered the opposite. Among them, many thought that the number of general vets (70.3%) was insufficient, followed by the vets who are specialized in exotic animals (29.9%) and internal medicine (22.6%).

Channels for Access to Information on the Veterinary Services in Hong Kong

1.30 Of all potential veterinary services users (no matter whether ever used veterinary services or not), relatively more said that they know about the veterinary services in Hong Kong from friends / relatives (37.2%), followed by social network / forum on the internet (23.5%), websites of vet clinics (18.0%) and printing materials (e.g. leaflet, booklet) (17.1%).

KEY FINDINGS – VETERINARY CLINICS

Number of Private Veterinary Clinics in Hong Kong

1.31 During the survey period from May to June 2016, there were about 146 private veterinary clinics in Hong Kong. Relatively speaking, fewer were located in Kowloon East (i.e. Wong Tai Sin and Kwun Tong – 3.4%; vs. more than 19% in other districts).

Current Business Operation

Scope of Services

1.32 Virtually all veterinary clinics (vet clinics) provide services for cats (97.7%) and dogs (96.1%). About half provide services for rabbits (51.2%) and hamster and chinchilla (49.9%) respectively. Relatively speaking, fewer provide services for reptiles (e.g. turtles, snakes, lizards, etc.) (26.8%) and birds (18.1%).

1.33 Apart from general consultation (e.g. health examination, vaccination, microchipping) which was provided by all vet clinics, the vast majority of vet clinics provide routine / simple surgery (99.3%), on-site diagnostic tests (95.7%), imaging (92.8%) and hospitalization (93.9%). Moreover, about half of the vet clinics provide advanced surgery (50.3%) and acupuncture (47.3%) respectively, 42.8% provide vets house call service / mobile service, and some provide Chinese veterinary medicine (15.4%), pet boarding service (14.9%) and pet grooming service (12.2%).

1.34 Moreover, 64.3% of the vet clinics have 24 hours hospitalization services. Yet, among them, only 27.2% have 24 hours attending staff (with 15.7% having attending vets and 15.6% having attending clinic staff). Furthermore, 31.5% of the clinics have after-hours / 24 hours consultation service. Most of them (64.5%) said that they do not have 24 hours vets on-site (i.e. the vets will be attended on-call).

1.35 21.3% of the clinics claimed that they provide specialty services. Among them, relatively more provide the specialty services of imaging (63.2%), followed by dentistry (51.6%), surgery (38.7%), small animal internal medicine (36.6%), dermatology (35.5%) and ophthalmology (33.6%).

Years of Establishment and Gross Floor Area

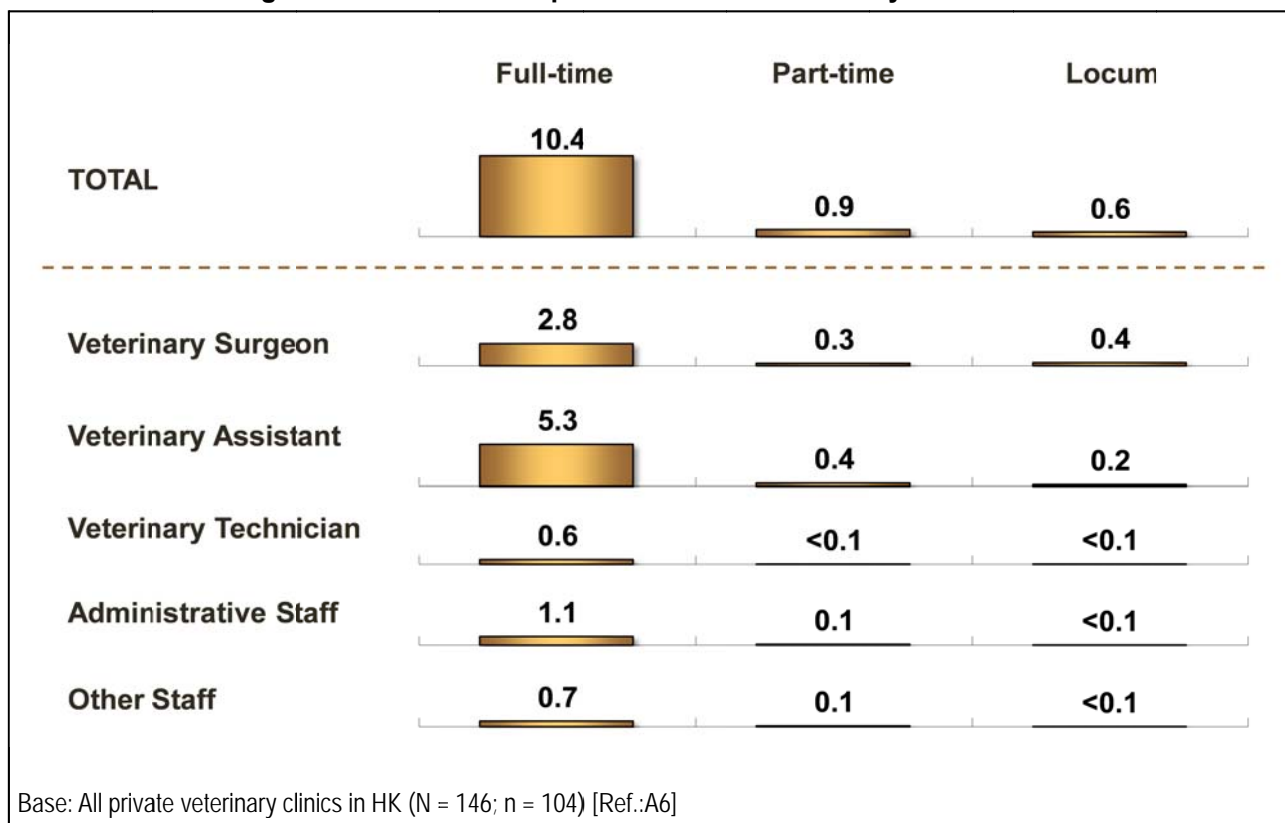
1.36 51.2% of the vet clinics have been established for 10 years or more. Only a few (7.7%) were established in the recent 2 years. Besides, most of the clinics occupied 500 – less than 1,000 sq.ft. (33.6%) and 1,000 – less than 1,500 sq.ft. (27.3%) of gross floor area.

Manpower Deployment

1.37 On average, each vet clinic has about 10 – 11 full-time positions (not persons, because a person can be employed by multiple clinics), including about 3 vet surgeons, 5 vet assistants, 1 vet technician, 1 administrative staff and 1 other staff. Part-time and locum positions accounted for about 13% of all positions only.

(Ref.: Chart 1.37)

Chart 1.37: Average number of different positions in each veterinary clinic



1.38 In overall, 70.2% of the vet clinics were small-sized establishments, with employment size of 1 – 9, while 9.0% were medium-sized with employment size of 20 or above.

Difficulties in Operating Veterinary Clinics in Hong Kong

1.39 When asked about their perceived difficulties in operating vet clinics in Hong Kong, 81.3% of the clinics ranked “high rent” as one of the top 3 difficulties. It was followed distantly by “keen competition among vet clinics” (35.5%) and “lack of qualified supporting staff in HK” (33.8%). Apart from these 3 aspects, many clinics mentioned that “difficult customers / pet owners’ unrealistic expectations toward veterinary services” (32.8%) and “high staff cost (incl. salary, fringe benefits, etc.)” (30.5%) are their major difficulties.

Future Plans

Manpower Requirements in the Coming 3 Years

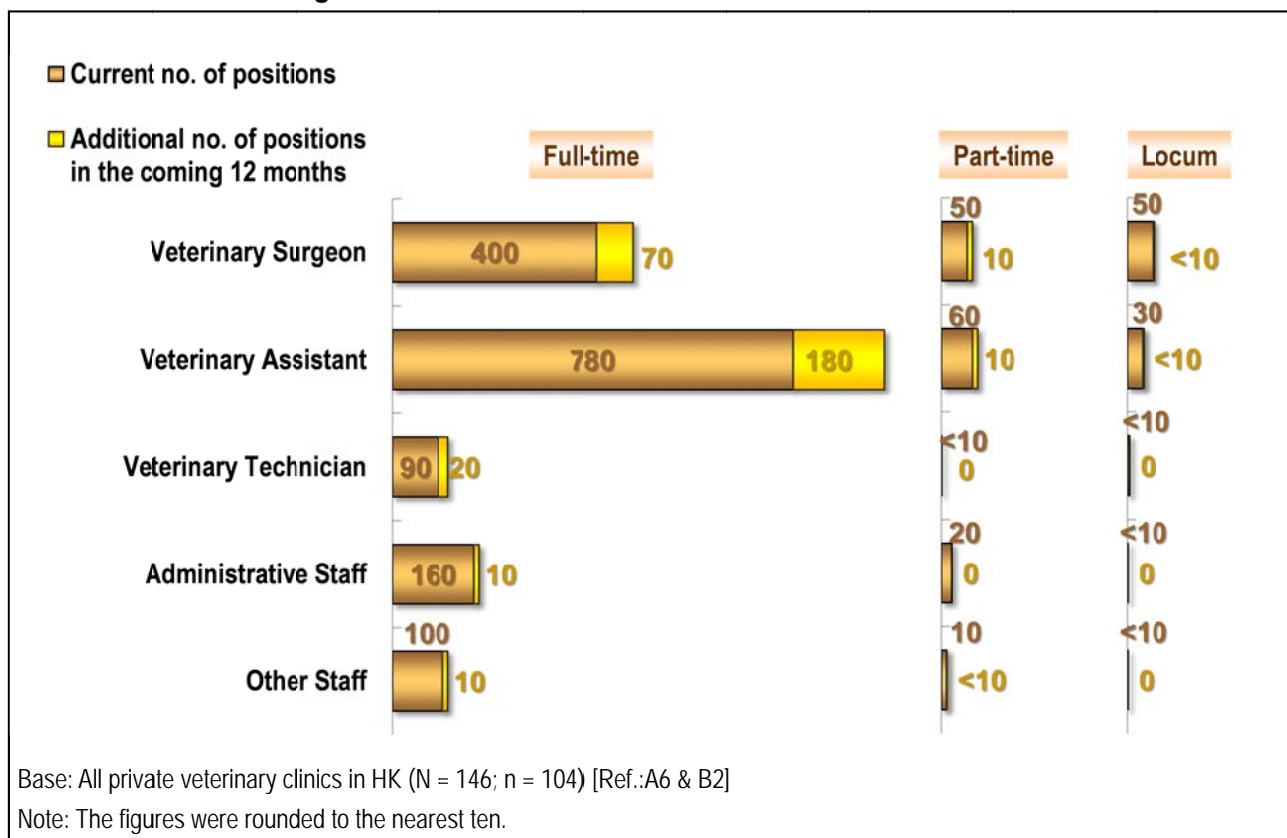
1.40 It was estimated that during the survey period in total there were about 1 520 full-time positions, 130 part-time positions and 80 locum positions in the industry at the time of enumeration, including about 400 veterinary surgeon (vet surgeon) positions.

1.41 60.8% of the vet clinics claimed that they intended to hire more staff in the coming

3 years. Among them, 63.8% claimed that they intended to hire fresh / recent veterinary graduates. Moreover, they were further asked about the number of additional positions that they anticipated to open in the coming 12 months. The survey results showed that about 280 – 290 additional full-time positions will be opened, including about 70 vet surgeons, 180 vet assistants, 20 vet technicians, 10 administrative staff and 10 other staff.

(Ref.: Chart 1.40-41)

Chart 1.40-41: Current manpower deployment and manpower requirements of veterinary clinics in the coming 12 months



1.42 Of all clinics, 48.8% said that they had no preference in hiring vets who graduated from universities in particular countries / regions. Of those which had preference, relatively more preferred vets who graduated from Australia (38.0%) and UK (36.3%), followed by New Zealand (26.2%). Besides, 52.3% of all clinics had no preference in hiring vets with specialty / special interests. Of those which had preference, slightly more preferred vets with specialty / special interests of surgery (24.3%), exotic pets (20.6%), small animal internal medicine (17.9%) and Chinese medicine / acupuncture (14.0%).

Relocation and Expansion Plans in the Coming 3 Years

1.43 About one-tenth of the vet clinics respectively claimed that they had relocation plan (9.6%) and expansion plan in opening more clinics in Hong Kong (13.8%) in the coming 3 years. Among those which had relocation plan, 55.7% said they will stay in the same district, while 8.6% will move to other district. Among those which had expansion plan, only 6.8% said the additional clinics will be opened in the same district, whereas 43.3% preferred other district. Besides, most of them (66.0%) intended to open one more clinic only in the coming 3 years.

1.44 Assumed that those which claimed “undecided on the number of additional clinics” (for expansion) will open one clinic only, it was estimated that in total about 20 more vet clinics will be opened in the coming 3 years (which will be increased by 13.7% between 2016 and 2019). Furthermore, assumed that those which claimed “no preference on district” (for relocation or expansion) will remain in the same district or will open more clinics in the same district, it was observed that the proportion of vet clinics in Kowloon East will still be relatively small (4.8%; vs. more than 18% in other districts) in the coming 3 years.

(Ref.: Table 1.44)

Table 1.44: Number of veterinary clinics during the survey period (May – June 2016) and in the coming 3 years – by districts

	May – June 2016		In the coming 3 years	
	No.	(%)	No.	(%)
HK Island	35	24.0	37	22.3
Kowloon East	5	3.4	8	4.8
Kowloon West	38	26.0	44	26.5
NT East	29	19.9	31	18.7
NT West	39	26.7	46	27.7
Total	146	100.0	166	100.0

Base: All private veterinary clinics in HK (N = 146; n = 104)

Notes:(1) Assumed that those which claimed “no preference on district” (for relocation or expansion) will remain in the same district; and

(2) Assumed that those which claimed “undecided on the no. of additional clinics” (for expansion) will open 1 clinic only;

Views on the Prospect of Operating Veterinary Clinics in Hong Kong

1.45 Of all vet clinics, only 7.1% said they were very optimistic / tended to be optimistic about the prospect of operating vet clinics in Hong Kong. 73.0% were neutral on this issue. Among the 19.9% which were very pessimistic / tended to be pessimistic, the key reasons are “HK market is too small / too many vet clinics in HK” (37.5%), “keen competition among vet clinics” (33.4%) and “higher and higher operating costs” (28.0%).

Pricing Information

Whether Pricing Information is Readily Accessible

1.46 The survey results showed that only 14.4% of the clinics posted the general price list at prominent positions of the clinics. For the remaining majority (85.6%), pricing information is not readily accessible for walk-in customers.

Ranges of Fees and Charges

1.47 For a general consultation on cats / dogs and a routine canine vaccination with 5-in-1 DHPPI/L vaccine, most of the clinics charged \$200 - \$299 (65.8% and 76.7% respectively).

1.48 For routine de-sexing surgeries on cats / dogs, the survey revealed that there are variations among different vet clinics. For cats, about 15% of the clinics charged below \$600, 32% charged \$600 - \$799, 25% charged \$800 - \$999, and 27% charged \$1,000 or above. The median price range was \$800 - \$899. For dogs, about 22% of the clinics charged below \$1,100, 23% charged \$1,100 - \$1,299, 23% charged \$1,300 - \$1,499, and 31% charged \$1,500 or above. The median price range was \$1,300 - \$1,399.

1.49 For over-night hospitalization for an adult dog, about 10% of the clinics charged below \$300, 23% charged \$300 - \$399, 23% charged \$400 - \$499 and 21% charged \$500 or above. Besides, about 23% of the clinics did not provide such service. Among those which have such service, the median price range was \$400 - \$499.

KEY FINDINGS – VETERINARY SURGEONS

Number of Registered Veterinary Surgeons in Hong Kong

1.50 According to the statistical data from VSB, there were 823 registered vet surgeons in Hong Kong in 2015, which was about a double as compared with 10 years ago (412 in 2006). In addition, there were 18 registered vet surgeons who were authorized by VSB to advertise as, or profess to be, specialists in Hong Kong in 2015, which was increased by 360% as compared with 5 years ago (5 in 2011).

1.51 For the newly registered vet surgeons in the past 10 years, it was observed that since 2009, the number of Hong Kong Identity Card (HKID) / HKSAR passport holders and non-HKID / HKSAR passport holders were very close. Among the newly registered vet surgeons who were holding HKID / HKSAR passport in the past 10 years, it was observed that there are more and more fresh / recent graduates who were registered in VSB within 3

years of graduation. On the other hand, the numbers of those who were not fresh / recent graduates are relatively stable.

(Ref.: Charts 1.51a & b)

Chart 1.51a: Number of newly registered vet surgeons with / without HKID / HKSAR passport in the past 10 years

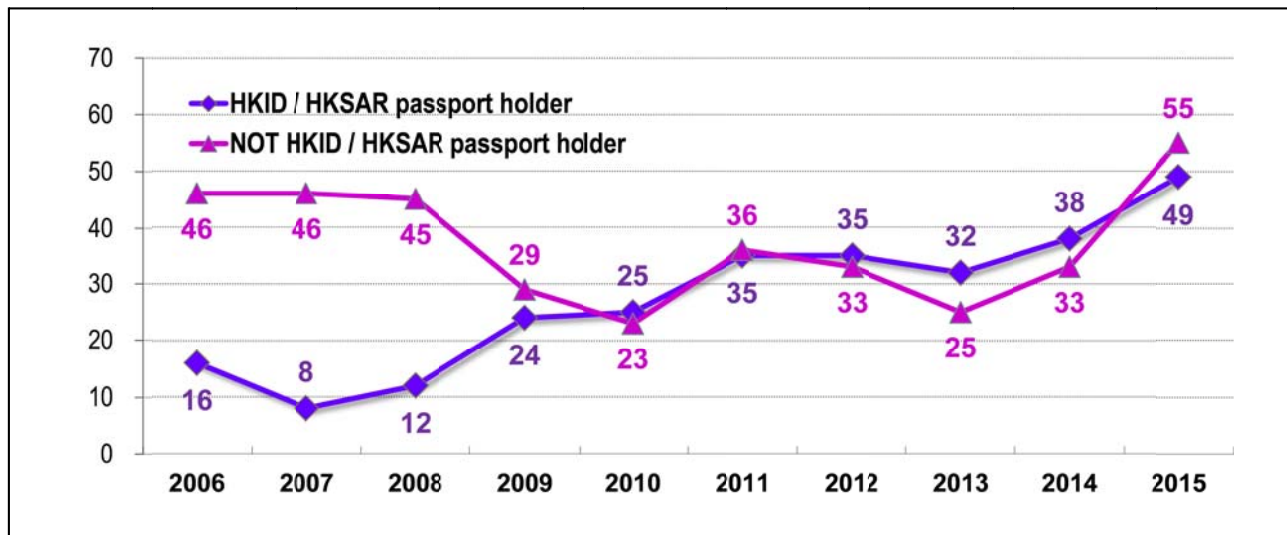
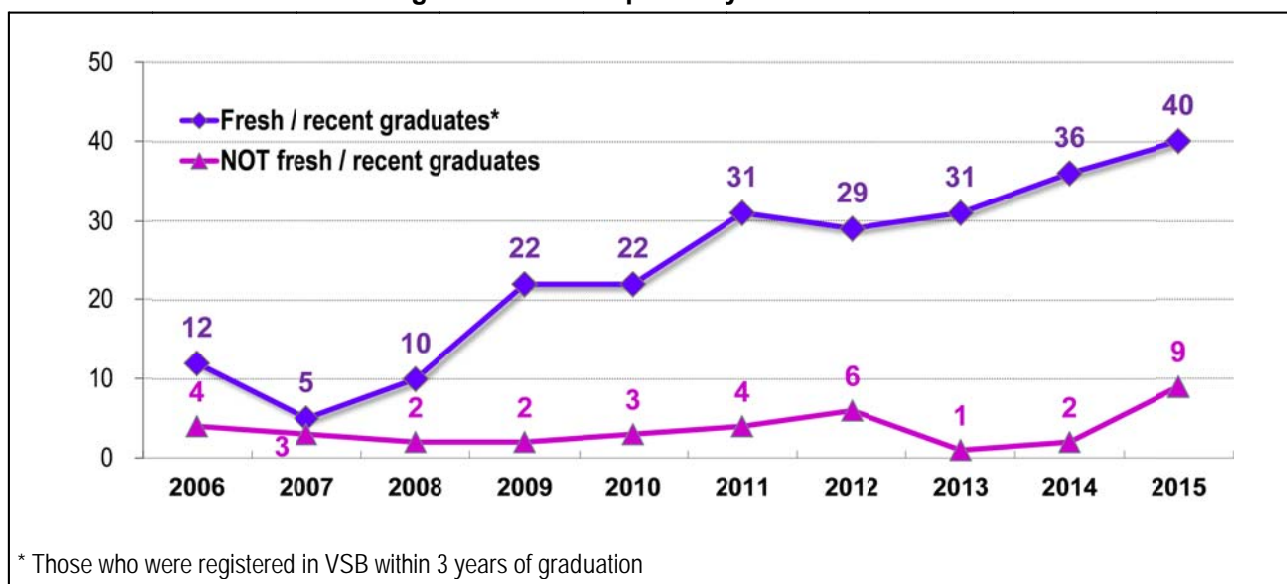


Chart 1.51b: Number of newly registered vet surgeons (with HKID / HKSAR passport) who were / were not fresh / recent graduates in the past 10 years



Profile of the Registered Veterinary Surgeons

1.52 This survey covered 840 veterinary surgeons (vets) who were registered in VSB as at 10 March 2016. Among them, relatively more obtained their veterinary qualifications in Australia (41.0%), followed by Taiwan (24.5%) and UK and Ireland (17.0%). About 12% of all registered vets were fresh / recent graduates, with 2 years of experience or less in practicing, whilst about 76% have 5 years of experience or more (28.3% for 5 – 9 years;

47.5% for 10 years or above).

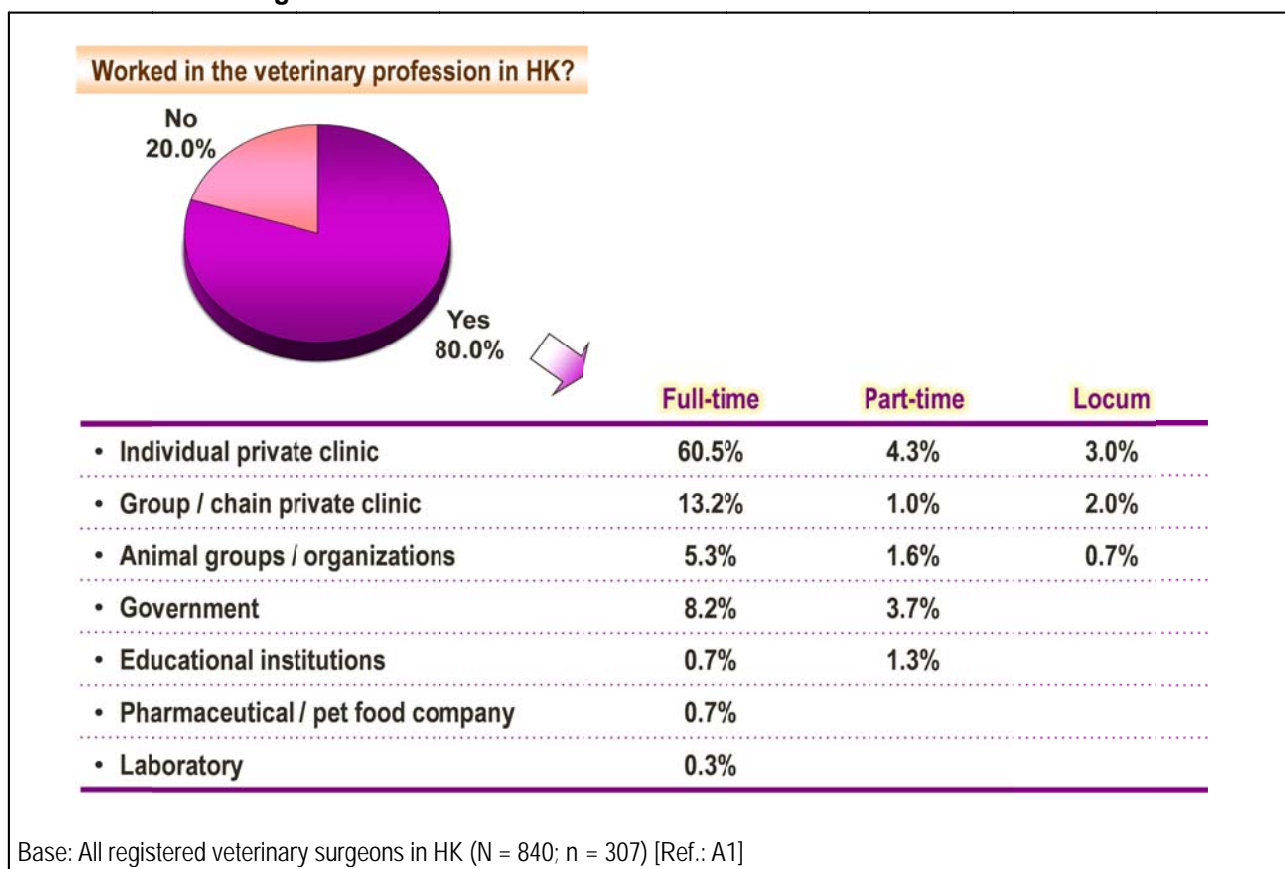
1.53 72.5% of the registered vets have been living in Hong Kong for 7 years or above, in which 93.8% have Hong Kong permanent identity card. In other words, among all registered vets, 67.9% are Hong Kong permanent residents.

Working Status

1.54 80.0% of the registered vets were working in the veterinary profession in Hong Kong at the time of enumeration. Among them, the majority were working full-time in individual private clinics (60.5%) and/or group / chain private clinics (13.2%). Some were working full-time in the government (8.2%), animal groups / organizations (5.3%), educational institutions (0.7%), pharmaceutical / pet food companies (0.7%) and/or laboratory (0.3%). In overall, about 87% of the vets have full-time jobs, 11% have part-time jobs and 4% were working as locum at the time of enumeration^{Note}.

(Ref.: Chart 1.54)

Chart 1.54: Types of veterinary establishments for which they were working and the corresponding working status at the time of enumeration



1.55 Among the 80.9% of the vets who worked in individual or group / chain private

^{Note} Some of the vets have more than one job at the time of enumeration.

clinics, 31.3% claimed that they owned veterinary clinics in Hong Kong. Among those who did not, only 7.1% said they considered to open their own clinic in the coming 3 years.

1.56 Of all vets who worked in the veterinary profession in Hong Kong, virtually all provide services for cats (93.1%) and/or dogs (92.1%). For other types of animals, relatively more vets provide services for rabbits (37.5%), followed by hamster and chinchilla (30.9%), reptiles (e.g. turtles, snakes, lizards, etc.) (21.7%) and birds (20.1%).

Other Post-graduate / Specialists Qualification

1.57 Of all vets who worked in Hong Kong, apart from their basic veterinary qualifications, 36.5% said they obtained other veterinary post-graduate / specialists qualifications. In addition, 55.6% of the vets said they were very / quite likely to take other veterinary post-graduate / specialists studies in the coming 3 years. Most of them were interested in the area of small animal internal medicine (59.8%). It was followed by small animal surgery (28.4%), acupuncture (23.7%), veterinary imaging (21.9%) and Chinese veterinary medicine (20.7%).

Views on the Difficulties and Prospect of Veterinary Surgeons in Hong Kong

Difficulties Facing Practicing Veterinary Surgeons in Hong Kong

1.58 When asked about their perceived difficulties facing as vets in Hong Kong, relatively more vets in Hong Kong (46.0%) claimed that one of the top 3 difficulties was that there were “too many vet surgeons in HK, which leads to intense competitions”. It was followed by “difficult customers / pet owners’ unrealistic expectations toward vet services” (36.2%) and “decreasing / stagnated salary” (32.2%). Apart from these 3 aspects, many vets mentioned that “long working hours” (27.7%), “stress from complaints and customers” (27.3%) and “lack of qualified vet assistants” (27.0%) are their major difficulties.

Views on the Prospect of Working as Veterinary Surgeons in Hong Kong

1.59 Of all vets who worked in Hong Kong, 18.7% said they were very optimistic / tended to be optimistic about the prospect of working as vet surgeons in Hong Kong, whilst 23.7% were very pessimistic / tended to be pessimistic. 57.6% were neutral on this issue. Among those who were optimistic, relatively more mentioned that “pet owners are willing to spend more / care about their pets more” (31.6%) and “pet numbers will be increased / there is still demand for vets” (28.1%). It was noteworthy that among those who were pessimistic, many of them claimed that “HK market is too small / too many vets in HK” (34.7%).

Views on the Manpower Requirements for Vet Surgeons in Hong Kong in the Coming 3 Years

1.60 21.4% of the vets thought that the manpower requirements for vet surgeons in Hong Kong will be increased, whereas a similar proportion (24.0%) thought that the manpower requirements will be decreased. 31.2% considered that it will remain unchanged.

Perceived Necessity of Setting Up an Accreditation / Classification Scheme for the Vet Clinics in Hong Kong

1.61 38.5% of the vets considered very / quite necessary to set up an accreditation scheme / classification scheme for the vet clinics in Hong Kong, while relatively few (11.2%) considered the opposite. 50.4% were neutral on this issue. Among those who considered necessary, relatively more mentioned the reasons “to set a benchmark of service level / as a guideline for pet owners” (37.6%), “to ensure the quality / standard of vet services” (19.7%) and “quality of vet services will be improved / uplifted” (15.4%). Conversely, among those who considered unnecessary, many of them claimed that it is “difficult to decide on grading / assessment” (14.7%) and “unfair to small clinics / small clinics will be more difficult to survive” (14.7%), and some thought that “good clinic service depends on good vets rather than the setting up of clinic” (11.8%).

Planned Length of Practicing in Hong Kong

1.62 Of all vets who worked in Hong Kong, 80.2% planned to practice in Hong Kong for a long period of time, with 26.3% said they planned for 10 years or above and 54.0% said they have no time frame.

KEY FINDINGS – VETERINARY STUDENTS

Profile of Hong Kong Veterinary Students in Overseas Universities

1.63 During the survey period from March to July 2016, among the 55 selected overseas universities whose veterinary courses awards are recognized for registration as a veterinary surgeon (vet) in Hong Kong, 15 said they have students from Hong Kong who are studying veterinary courses in their universities. They indicated that in total there are 240 Hong Kong veterinary students in overseas universities.

1.64 Most of the students are studying in Australia (63.8%). It was followed by UK (25.8%), Taiwan (5.0%), New Zealand (3.3%) and USA (2.1%).

1.65 Relatively more students were studying Bachelor of Veterinary Science (BVSc) (44.8%) at the time of enumeration, followed by Doctor of Veterinary Medicine (DVM) (20.2%) and Bachelor of Veterinary Medicine and Surgery (BVMS) (16.0%). Besides, 27.8% of the students were studying Year 1, while about 21% were studying in their final stage (18.6% in Year 5 and 2.6% in Year 6).

1.66 71.4% of the students were females. 47.4% aged 21 – 25, 28.9% aged below 21 and 19.5% aged 26 – 29. Besides, 97.5% of the students have been living in Hong Kong for 7 years or above, and are Hong Kong permanent residents.

Future Plans

Preferred Paths after Graduation

1.67 When asked about their preferred paths after graduation, 90.2% of the students ranked “practicing – in clinics” as one of the top 3 preferred paths. It was followed distantly by “practicing – in animal groups / organizations” (59.6%) and “further studies – internship / residency” (51.7%). Apart from these 3 paths, many students mentioned that they preferred “practicing – in government” (48.1%) and “further studies – Master / Ph.D.” (21.7%) after graduation.

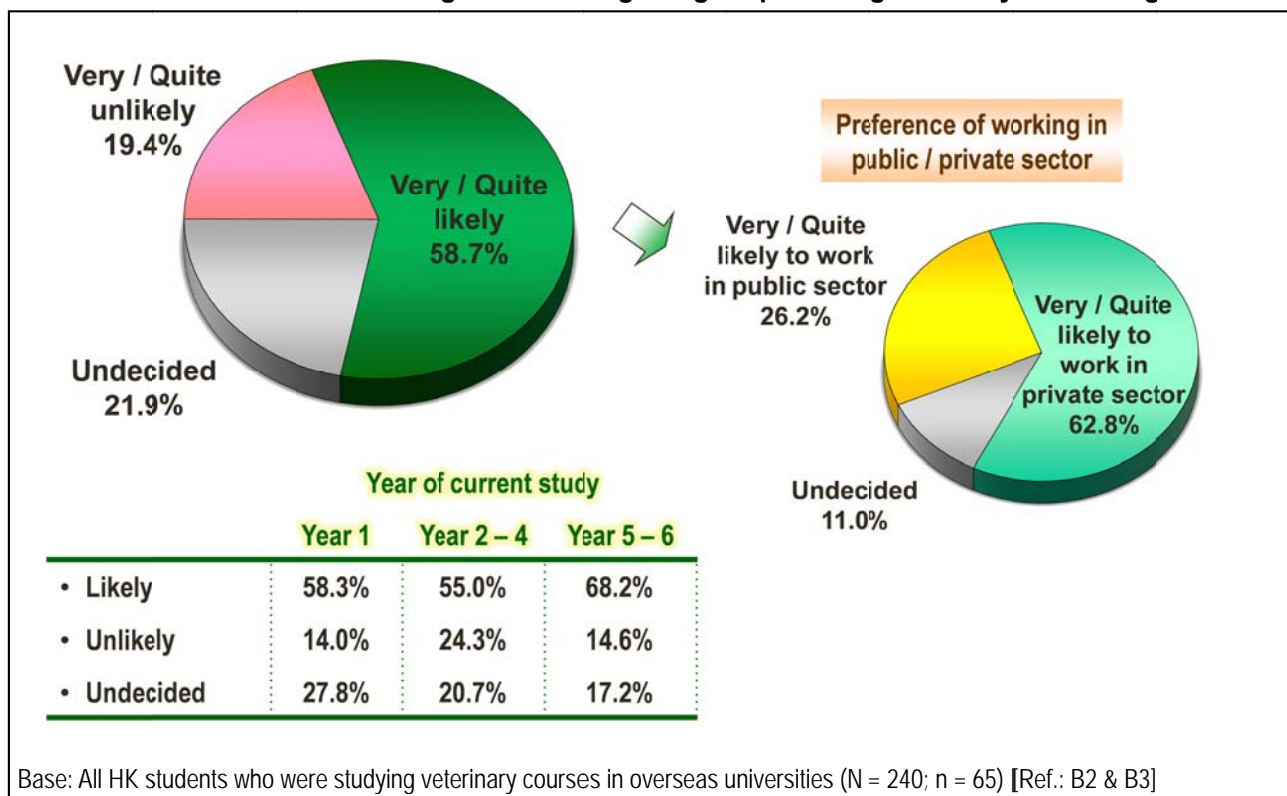
Intention of Coming Back to Hong Kong for Practicing within 3 Years after Graduation

1.68 58.7% of the students said they were very / quite likely to come back to Hong Kong for practicing within 3 years after graduation. Such proportion was relatively higher among those who were studying in Year 5 and 6 (68.2%; vs. below 59% in earlier stages of study).

1.69 Among those who intended to practice in Hong Kong within 3 years after graduation, 62.8% said they were very / quite likely to work in private sector, whereas 26.2% preferred working in the public sector.

(Ref.: Chart 1.68-69)

Chart 1.68-69: Intention of coming back to Hong Kong for practicing within 3 years after graduation



Base: All HK students who were studying veterinary courses in overseas universities (N = 240; n = 65) [Ref.: B2 & B3]

CONCLUSION

Overview of the Industry

1.70 Statistics of the Census and Statistics Department (C&SD) indicated that in the recent 5 years, the growth of establishments and persons engaged in the veterinary industry has slowed down and was growing in a relatively moderate pace. An international third party research supplier also projected slow overall growths of the veterinary services industry national demand and employment.

Views on the Difficulties and Prospect of Vet Surgeons in Hong Kong

1.71 Among the vet surgeons who worked in Hong Kong, the top 3 perceived difficulties were “intense competitions” (46.0%), “difficult customers / pet owners’ unrealistic expectations” (36.2%) and “decreasing / stagnated salary” (32.2%).

1.72 It was noted that the proportions of vets who were optimistic (18.7%) and pessimistic (23.7%) about the prospect of working as vet surgeons in Hong Kong were similar.

Views on the Difficulties and Prospect of Vet Clinics in Hong Kong

1.73 Among the private vet clinics, the majority ranked “high rent” (81.3%) as one of the top 3 difficulties in operating vet clinics in Hong Kong. It was followed distantly by “keen competition among vet clinics” (35.5%) and “lack of qualified supporting staff in HK” (33.8%).

1.74 In fact, survey results showed that about 280 – 290 additional full-time positions will be opened by vet clinics in the coming 12 months, with more than 60% (180) are vet assistant positions. Such results showed that the industry required more new blood to perform the supporting role.

1.75 Besides, only 7.1% of the vet clinics were optimistic about the prospect of operating vet clinics in Hong Kong, whilst 19.9% were pessimistic. Among those which were pessimistic, their major concerns were that “HK market is too small”, they faced “keen competition among vet clinics” and “higher and higher operating costs”.

Pet Owners’ Experiences and Opinions of Vet Services in Hong Kong

1.76 71.4% of the pet owners have ever brought their pets to see vets, with 40.5% visited vets in the past 12 months before enumeration. Such results revealed that bringing pets to see vets for annual health check-up is not a common practice among pet owners.

1.77 Among the pet owners who have ever visited vets, they were generally contented with the vet surgeons and vet services in Hong Kong. Yet, 27.1% claimed that they did not take any action when encountering dissatisfactory vet services. The top 3 reasons were “just decided not to visit that vet clinic / hospital again”, “not aware of the complaint channels” and “don’t think that taking any action could help”. Such results showed that pet owners may need more information about their rights and the complaint channels.

Price Level and Transparency of Veterinary Services in Hong Kong

1.78 45.2% of the vet services users considered that the fees and charges of veterinary services in Hong Kong were reasonable. Yet, a similar proportion (47.5%) considered the opposite.

1.79 General information of the fees and charges of vet clinics was investigated. It was revealed that there are certain extent of variations among different vet clinics. The table below summarized the results.

	Lowest price range	Median price range	Highest price range
A general consultation on cats / dogs (about 15 min. or less)	\$100 - \$199	\$200 - \$299	\$400 or above
A routine canine vaccination with 5-in-1 DHPPi/L vaccine (incl. a basic health examination of dog)	Below \$200	\$200 - \$299	\$400 or above
A routine de-sexing surgery on an average adult female CAT	Below \$500	\$800 - \$899	\$1,000 or above
A routine de-sexing surgery on an average adult female DOG (10 – 20kg)	Below \$1,000	\$1,300 - \$1,399	\$1,500 or above
Over-night hospitalization for an adult dog (under 10kg)	Below \$200	\$400 - \$499	\$500 or above

Base: All private veterinary clinics in HK (N = 146)

1.80 Moreover, when asked their perceived transparency of the fees and charges of veterinary services in Hong Kong, it was observed that less than half of the pet owners (45.8%) considered the price transparency adequate. On the other hand, 22.9% considered inadequate. Among them, many claimed that the clinics should post the list of basic fees and charges at the clinic.

1.81 However, the survey results showed that only 14.4% of the clinics posted the general price list at prominent positions of the clinics. For the remaining majority (85.6%), pricing information is not readily accessible for walk-in customers. The above findings showed that pet owners may need more information on the fees and charges of veterinary services.

2 BACKGROUND & OBJECTIVES

BACKGROUND

2.1 In the course of the consultation exercise on the proposed amendments to the Veterinary Surgeons Registration Ordinance (Chapter 529) in 2015, different stakeholders including registered veterinary surgeons, members of the public and legislators had expressed concerns about (i) the current manpower situation of the veterinary profession in Hong Kong and (ii) whether the rates of fees charged by veterinary surgeons for their services are fair and reasonable. In order to address these concerns, the Veterinary Surgeons Board of Hong Kong (VSB), through the administrative support and assistance from the Agriculture, Fisheries and Conservation Department (AFCD), commissioned Mercado Solutions Associates Ltd. (MSA) to conduct a study on the development of the veterinary profession in Hong Kong.

2.2 This report documented the findings of the study.

OBJECTIVES

2.3 The objectives of this study are to obtain up-to-date information from the concerned stakeholders in the veterinary industry on the following issues:

- The future supply and demand of veterinary surgeons / services in Hong Kong, which may influence the career prospects of registered veterinary surgeons; and
- The current services offered by the registered veterinary surgeons and the views of consumers on veterinary services in Hong Kong.

2.4 Stemming from the aforementioned issues, the objectives of this study attempt to collect and analyze critical information on the following areas:

- To collect data on existing demographic profile and market structure of the veterinary profession in Hong Kong;
- To assess the existing and projected supply and demand of the veterinary services for measuring the adequacy of current and future veterinary services available in Hong Kong;
- To collect and synthesize registered veterinary surgeons' views on the current status of development of the veterinary industry, e.g. career as well as business prospect of the veterinary industry, challenges of operating

veterinary clinics in Hong Kong, different types of veterinary services providing to customers on current market, etc.; and

- To collect consumer's views on various aspects relating to veterinary services, e.g. pet owner's perception and experience on veterinary services in Hong Kong, areas of dissatisfaction and transparency of veterinary information such as pricing, etc.

3 METHODOLOGY

3.1 SURVEY COVERAGE

3.1.1 In view of the survey objectives, information was collected from different groups of stakeholders in the industry, namely:

- Registered veterinary surgeons in Hong Kong;
- Persons-in-charge / owners / managers of private veterinary clinics in Hong Kong;
- Hong Kong students who are studying veterinary courses in overseas universities; and
- Pet owners.

3.1.2 4 sets of bilingual questionnaires were designed to seek their views and attitudes towards the industry. The questionnaires are appended in Appendices for reference.

3.2 SURVEY DESIGN & DATA COLLECTION

3.2.1 REGISTERED VETERINARY SURGEONS

3.2.1.1 Integrated electronic and mailed self-administered questionnaires were used to conduct the survey. Self-administered questionnaires were mailed to all registered veterinary surgeons (totaling 840 as at 10 March 2016, according to the veterinary surgeon list from AFCD). Respondents could choose to return their completed questionnaires via mail, fax, email or complete the online questionnaire. During 18 May to 30 June 2016, visits and calls were made to the veterinary clinics for inviting the veterinary surgeons to participate in the survey. Face-to-face and/or telephone interviews were conducted with them where appropriate. A telephone enquiry hotline was also set up to handle enquiries throughout the survey period.

3.2.1.2 Finally, a total of 307 veterinary surgeons were successfully enumerated. Data from enumerated cases were grossed up (projected) according to the place of correspondence address (i.e. in Hong Kong or outside Hong Kong) to represent the total 840 registered veterinary surgeons. The corresponding level of precision of the survey result was $\pm 4.5\%$ at 95% confidence level.

3.2.2 PERSONS-IN-CHARGE / OWNERS / MANAGERS OF PRIVATE VETERINARY CLINICS

3.2.2.1 Integrated electronic and mailed self-administered questionnaires were used to conduct the survey. Self-administered questionnaires were mailed to all private veterinary clinics (totaling 160 as at 30 December 2015, according to the veterinary clinic list from AFCD). Respondents could choose to return their completed questionnaires via mail, fax, email or complete the online questionnaire. During 18 May to 30 June 2016, visits and calls were made to the veterinary clinics for inviting the persons-in-charge / owners / managers to participate in the survey. Face-to-face and/or telephone interviews were conducted with them where appropriate. A telephone enquiry hotline was also set up to handle enquiries throughout the survey period.

3.2.2.2 During the fieldwork period, 14 clinics were found to be closed down. Finally, a total of 104 veterinary clinics were successfully enumerated. Data from enumerated cases were grossed up (projected) according to the districts to represent the total 146 veterinary clinics. The corresponding level of precision of the survey result was $\pm 5.2\%$ at 95% confidence level.

3.2.2.3 For this target segment, information on fees and charges of some general veterinary services were also collected, so as to find out the range of prices provided in the current market and whether there is a wide range of variations among the veterinary clinics or not. For those veterinary clinics which did not respond to the pricing information, mystery shoppers were deployed to act as ordinary customers and visit the concerned veterinary clinics for collecting the pricing information.

3.2.3 OVERSEAS VETERINARY STUDENTS FROM HONG KONG

3.2.3.1 In order to assess the potential supply of veterinary surgeons in the near future, invitation emails (together with AFCD's introductory letter and bilingual questionnaires) were sent to the responsible persons of 55 selected overseas universities (as at 10 March 2015) whose veterinary courses awards are recognized for registration as a veterinary surgeon in Hong Kong. The responsible persons (dean or other senior management level) were asked whether there are students from Hong Kong who are studying veterinary courses in their universities; and if yes, they were asked to indicate the number of the concerned students and dispatch the questionnaires to the concerned students.

3.2.3.2 During the fieldwork period from 23 March to 7 July 2016, a total of 45 universities responded to the survey, indicating that there are 240 Hong Kong students who are studying veterinary courses in overseas universities.

3.2.3.3 Electronic self-administered questionnaires were used to conduct the survey. Students could choose to return their completed questionnaires via fax, email or complete the online questionnaire. Finally, a total of 65 completed questionnaires from the students were received. Data from enumerated cases were grossed up (projected) according to the place of universities to represent the total 240 overseas veterinary students from Hong Kong. The corresponding level of precision of the survey result was $\pm 10.5\%$ at 95% confidence level.

3.2.4 PET OWNERS

3.2.4.1 In order to assess the potential demand for veterinary services as well as the consumers' satisfaction towards the current veterinary service standards, a telephone survey was conducted for which the objectives are:

- Among non-pet owners, the intention of keeping a pet in the next 3 years and the types of pet intended to keep; and
- Among pet owners, whether have used veterinary services in the past 12 months and their attitudes and views towards the current veterinary services.

3.2.4.2 The survey was conducted by means of deploying the telephone interviewing method. A random sample of residential telephone numbers was drawn systematically from the telephone database maintained by MSA.

3.2.4.3 The telephone interviews were conducted during 5 May to 12 June 2016. A total of 5 800 residential telephone numbers were attempted, in which 851 were found to be invalid (including non-operating numbers, fax numbers, non-residential numbers, etc.). After excluding the invalid cases, a total of 2514 households were successfully enumerated (in which 308 of them are pet owners), constituting a response rate of 50.8%. Data from enumerated cases were grossed up (projected) according to the districts to represent the total 2 368 400 households in Hong Kong (based on the population data of 2011 Census issued by the Census & Statistics Department). The corresponding level of precision of the survey result was $\pm 2.0\%$ at 95% confidence level.

3.3 POINTS TO NOTE

- In this report, “N” denotes the weighted (projected) number of households (for both non-pet owners and pet owners), veterinary surgeons, veterinary clinics and veterinary students, whereas “n” denotes the actual sample sizes.
- The weighted numbers of households were rounded to the nearest hundred, while the weighted numbers of veterinary surgeons, veterinary clinics and veterinary students were rounded to the nearest ten.
- Some of descriptive percentages might not add up to 100% due to rounding of figures.
- Respondents might give multiple responses in a number of questions and therefore the sum of individual responses (numbers / percentages) would probably not add up to the total / subtotal.

4 SURVEY FINDINGS – OVERVIEW OF THE VETERINARY INDUSTRY IN HONG KONG

4.1 HONG KONG VETERINARY ACTIVITIES IN THE PAST 10 YEARS

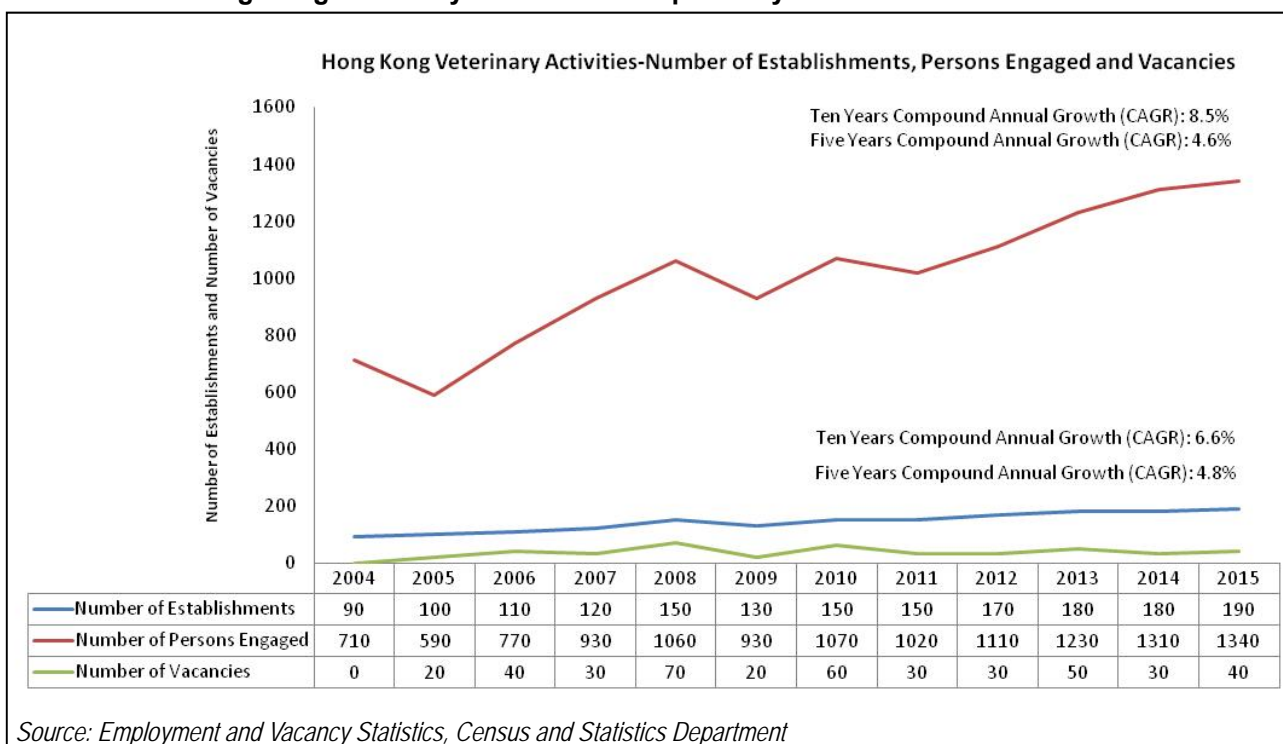
4.1.1 Based on the statistics issued by the Census and Statistics Department, in the recent 5 years, the growth of establishments and persons engaged in the veterinary industry has slowed down and was growing at a relatively moderate pace (i.e. 5-year compound annual growth rates are smaller than 10-year compound annual growth rates).

4.1.2 From a 10-year growth perspective, the number of veterinary establishments has been growing at a compound annual growth rate of 8.5%. However, there are indications that the nearer term establishment growth trend has slowed down as indicated by its 5-year compound annual growth rate at 4.6%, which was much lower than the 10-year compound annual growth of 8.5%.

4.1.3 The same observation also appears in number of persons engaged, as its 5-year compound annual growth rate is 4.8%, compared with 10-year compound annual growth of 6.6%.

(Ref.: Chart 4.1)

Chart 4.1: Hong Kong veterinary activities in the past 10 years



4.1.4 An international third party research supplier, QuERI*, projected slow overall growths of the veterinary services industry national demand (0.4% increase in total demand revenue from 2016 to 2017) and employment (2.6% increase from 2016 to 2017) in 2016 and 2017.

4.1.5 Whilst the accuracy of the absolute forecasted numbers of the veterinary service and employment cannot be determined instantaneously, it is worth to note that the projected growth trend, in terms of percentage growth on both industry demand and employment, do not support the hypothesis of a strong Hong Kong veterinary service industrial growth.

HONG KONG VETERINARY SERVICES FORECAST (NAICS6: 541940.1)

MARCH 2016

Production

#	Analysis Type	2009	2010	2011	2012	2013	2014	2015	2016	2017
A1	Real Production Growth Year to Year Unit of Measure: %	0.962	0.709	0.411	0.125	0.077	-0.909	1.000	0.057	0.004
A2	Real Production (Gross Output) Unit of Measure: Millions 1995 US \$s	58.781	100.483	141.750	159.516	171.753	15.599	164.233	173.596	174.277
A3	Production (Gross Output) Unit of Measure: Millions US \$s	65.179	113.554	167.677	196.794	218.148	20.585	222.926	235.201	234.194

Market Demand

#	Analysis Type	2009	2010	2011	2012	2013	2014	2015	2016	2017
A1	Real Market Demand Growth Year to Year Unit of Measure: %	0.962	0.709	0.411	0.125	0.077	-0.909	1.000	0.057	0.004
A2	Real Market Demand (Apparent Consumption) Unit of Measure: Millions 1995 US \$s	58.781	100.483	141.750	159.516	171.753	15.599	164.233	173.596	174.277
A3	Market Demand (Apparent Consumption) Unit of Measure: Millions US \$s	65.179	113.554	167.677	196.794	218.148	20.585	222.926	235.201	234.194

Employment

#	Analysis Type	2009	2010	2011	2012	2013	2014	2015	2016	2017
A1	Employment (Thousands) Unit of Measure: Thousands	1.582	2.192	2.454	2.731	3.344	3.119	2.923	2.973	3.052
A2	Employment Growth (%) Unit of Measure: %	0.268	0.386	0.120	0.113	0.225	-0.067	-0.063	0.017	0.026
A3	Real Production Growth Year to Year Unit of Measure: %	0.962	0.709	0.411	0.125	0.077	-0.909	1.000	0.057	0.004

Source: - *QuERI- (QuERI Global Forecast is a forecasting service provided by the company Emerging Markets Direct. Emerging Markets Direct is headquartered in Boston, with further research and editorial bureaus in Istanbul, Sofia and Kuala Lumpur, and with staff in 12 countries in Asia, the MENA region, and Europe. Their QuERI-International trade and industry databases cover 72 countries and more than 400 industry (commodity) categories classified at the US NAICS 6 level of detail.)

- Based on primary data sources from the United Nations (UNIDO, UN SNA, Comrades) as well as national source data, QuERI models and databases extend the reach of these government datasets by adding additional information derived from their proprietary methods.

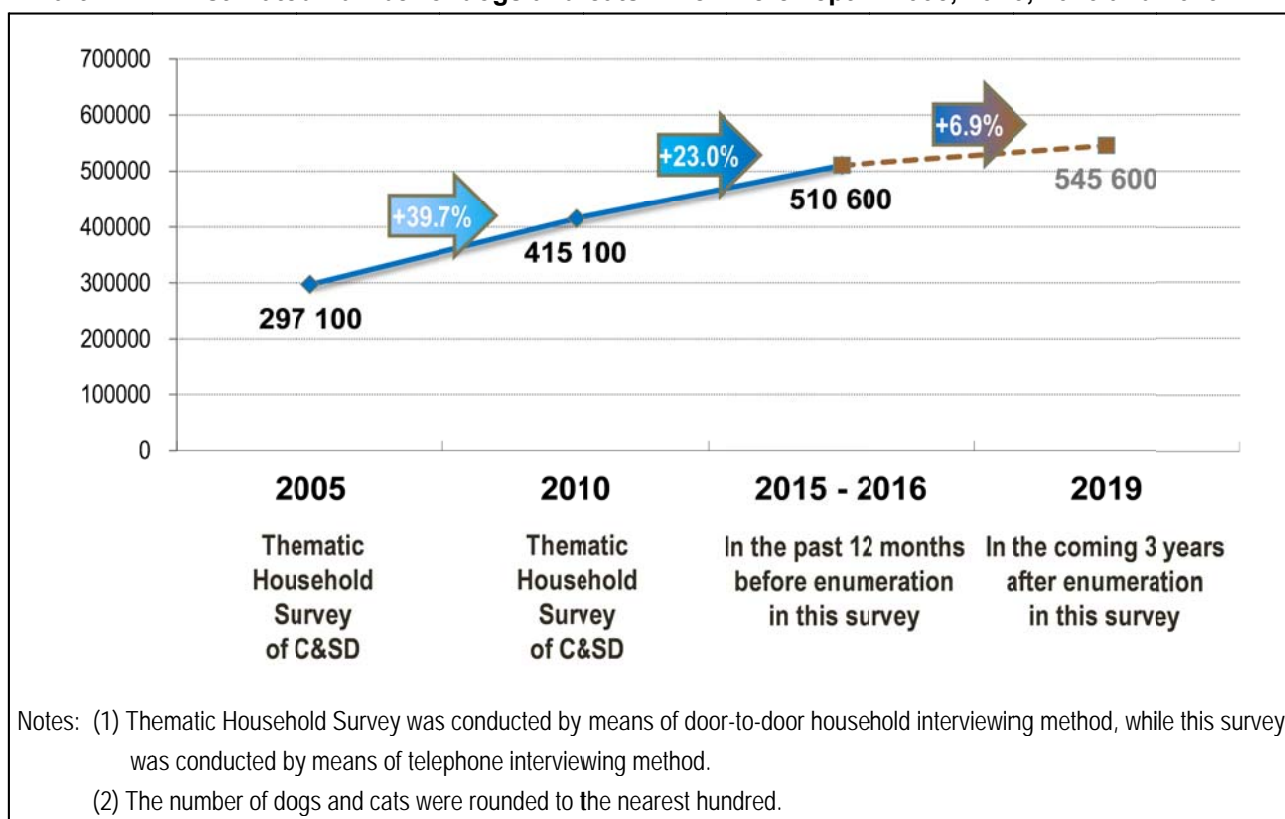
4.2 ESTIMATED POPULATION OF PETS IN HONG KONG

4.2.1 Based on the Thematic Household Surveys in 2005 and 2010 (Report No. 26 and 48) conducted by the Census and Statistics Department, it was estimated that about 297 100 and 415 100 dogs and cats were kept at the time of enumeration. In this survey, it was estimated that about 510 600 dogs and cats were kept in the past 12 months before enumeration, and about 545 600 dogs and cats will be kept in the coming 3 years.

4.2.2 It was observed that the growth rates on the number of dogs and cats which were kept were decreasing, from 39.7% between 2005 and 2010, 23.0% between 2010 and 2015, to 6.9% between 2016 and 2019.

(Ref.: Chart 4.2)

Chart 4.2: Estimated number of dogs and cats which were kept in 2005, 2010, 2016 and 2019



4.3 NUMBER OF REGISTERED VETERINARY SURGEONS IN HONG KONG

4.3.1 According to the statistical data from VSB, there were 823 registered vet surgeons in Hong Kong in 2015, which was about a double as compared with 10 years ago (412 in 2006). When using 5-year compound annual growth rate to estimate the number of registered vet surgeons in the coming 3 years, there will be about 874 in 2016, 927 in 2017, 984 in 2018 and 1 044 in 2019 (between 2016 and 2019, the growth rate will be 19.5%).

(Ref.: Table 4.3.1 & Chart 4.3.1)

Table 4.3.1: Number of registered vet surgeons in the past 10 years and estimated number of registered vet surgeons in the coming 3 years

	Actual no. (from VSB)										Estimated no.			
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
(A) Total no. of registered vets	412	447	491	532	565	611	662	695	746	823	~874	~927	~984	~1 044
Annual growth rate	+14.1%	+8.5%	+9.8%	+8.4%	+6.2%	+8.1%	+8.3%	+5.0%	+7.3%	+10.3%	+6.1% (Note 1)	+6.1% (Note 1)	+6.1% (Note 1)	+6.1% (Note 1)
(B) No. of newly registered vets (C+D)	62	54	57	53	48	71	68	57	71	104	66	66	66	66
(C) No. of vets <u>without</u> HKID / HKSAR passport	46	46	45	29	23	36	33	25	33	55	36 (Note 2)	36 (Note 2)	36 (Note 2)	36 (Note 2)
(D) No. of vets <u>with</u> HKID / HKSAR passport (E+F)	16	8	12	24	25	35	35	32	38	49	30	30	30	30
(E) No. of vets who were fresh / recent graduates (registered in VSB within 3 years after graduation)	12	5	10	22	22	31	29	31	36	40	26 (Note 3)	26 (Note 3)	26 (Note 3)	26 (Note 3)
(F) No. of vets who were NOT fresh / recent graduates	4	3	2	2	3	4	6	1	2	9	4 (Note 4)	4 (Note 4)	4 (Note 4)	4 (Note 4)
(G) Net reduction	11	19	13	12	15	25	17	24	20	27	15 (Note 5)	13 (Note 5)	9 (Note 5)	6 (Note 5)

Notes: (1) 5-Year Compound Annual Growth Rate: 2011 – 2015: 6.1%.

(2) Average no. of newly registered vets without HKID / HKSAR passport between 2011 and 2015: 36

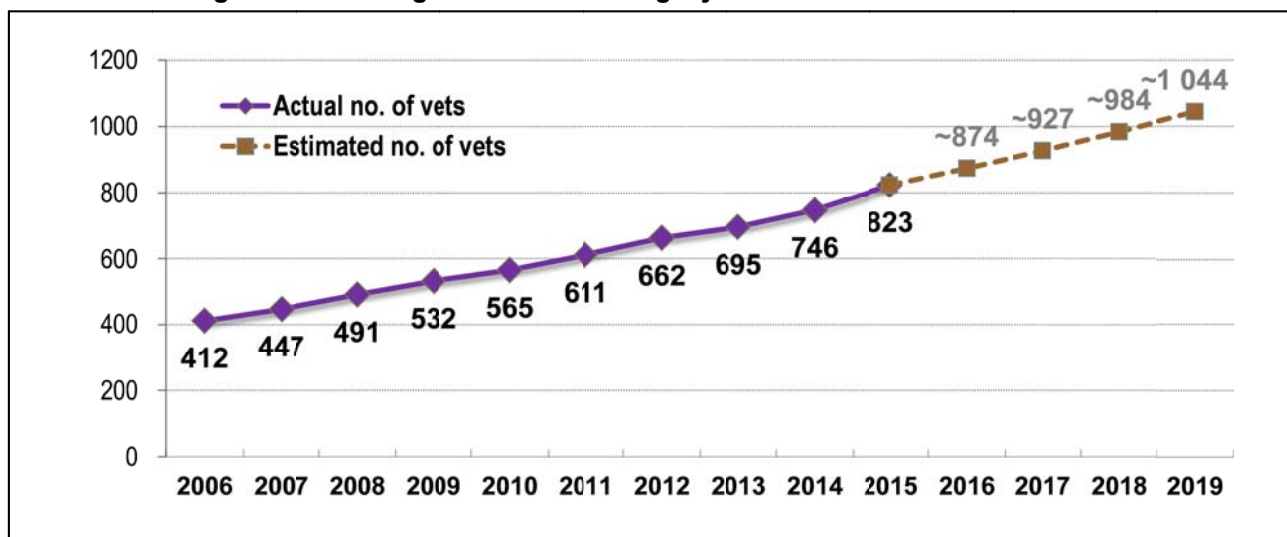
(3) In this survey, it was found that 102 vet students who were studying Year 2 – 6 said they are likely to come back to HK for practicing within 3 years after graduation, i.e. about 26 in each year.

(4) Average no. of newly registered vets with HKID / HKSAR passport who were NOT fresh / recent graduates between 2011 and 2015: 4

(5) Total no. of registered vets (A) in the previous year + No. of newly registered vets (B) in the present year – Total no. of registered vets (A) in the present year (i.e. in the year 2016: 823 + 66 – 874; in the year 2017: 874 + 66 – 927; in the year 2018: 927 + 66 – 984; in the year 2019: 984 + 66 – 1044).

Chart 4.3.1: Number of registered vet surgeons in the past 10 years and estimated number of

registered vet surgeons in the coming 3 years



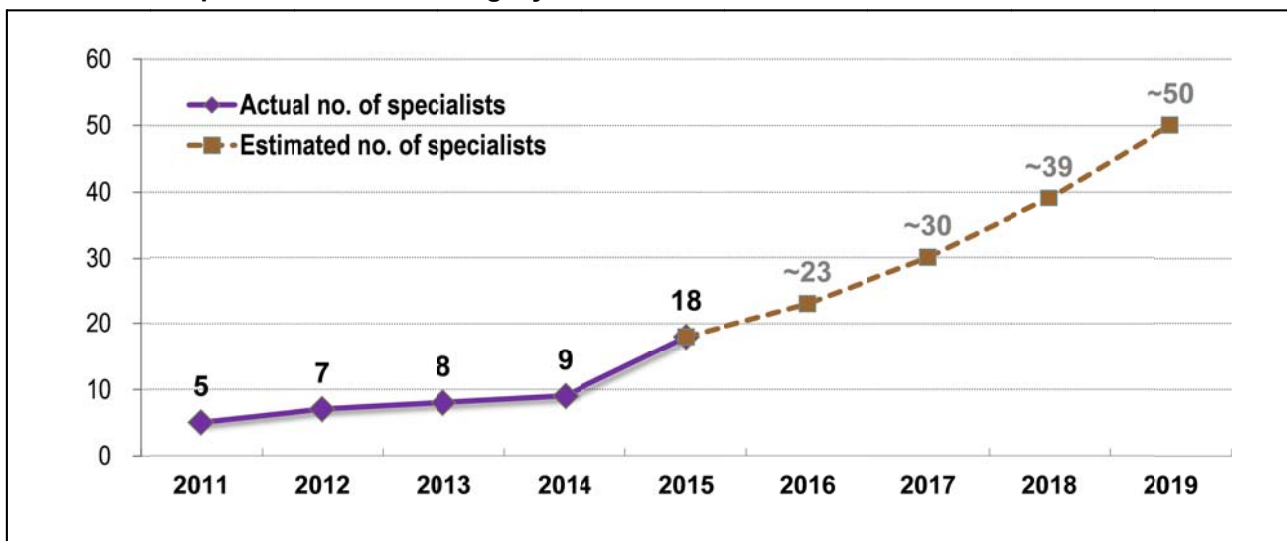
4.3.2 According to the statistical data from VSB, there were 18 registered vet surgeons who were authorized to advertise as, or profess to be, specialists in Hong Kong in 2015, which was increased by 360% as compared with 5 years ago (5 in 2011). When using 5-year compound annual growth rate to estimate the number of specialists in the coming 3 years, there will be about 23 in 2016, 30 in 2017, 39 in 2018 and 50 in 2019.

(Ref.: Table 4.3.2 & Chart 4.3.2)

Table 4.3.2: Number of specialists registered in VSB in the past 5 years and estimated number of specialists in the coming 3 years

	Actual no. (from VSB)					Estimated no.			
	2011	2012	2013	2014	2015	2016	2017	2018	2019
(A) Total no. of registered specialists	5	7	8	9	18	~23	~30	~39	~50
Annual growth rate		+40.0%	+14.3%	+12.5%	+100%				
5-Year Compound Annual Growth Rate: 2011 – 2015	29.2%					+29.2%	+29.2%	+29.2%	+29.2%

Chart 4.3.2: Number of specialists registered in VSB in the past 5 years and estimated number of specialists in the coming 3 years



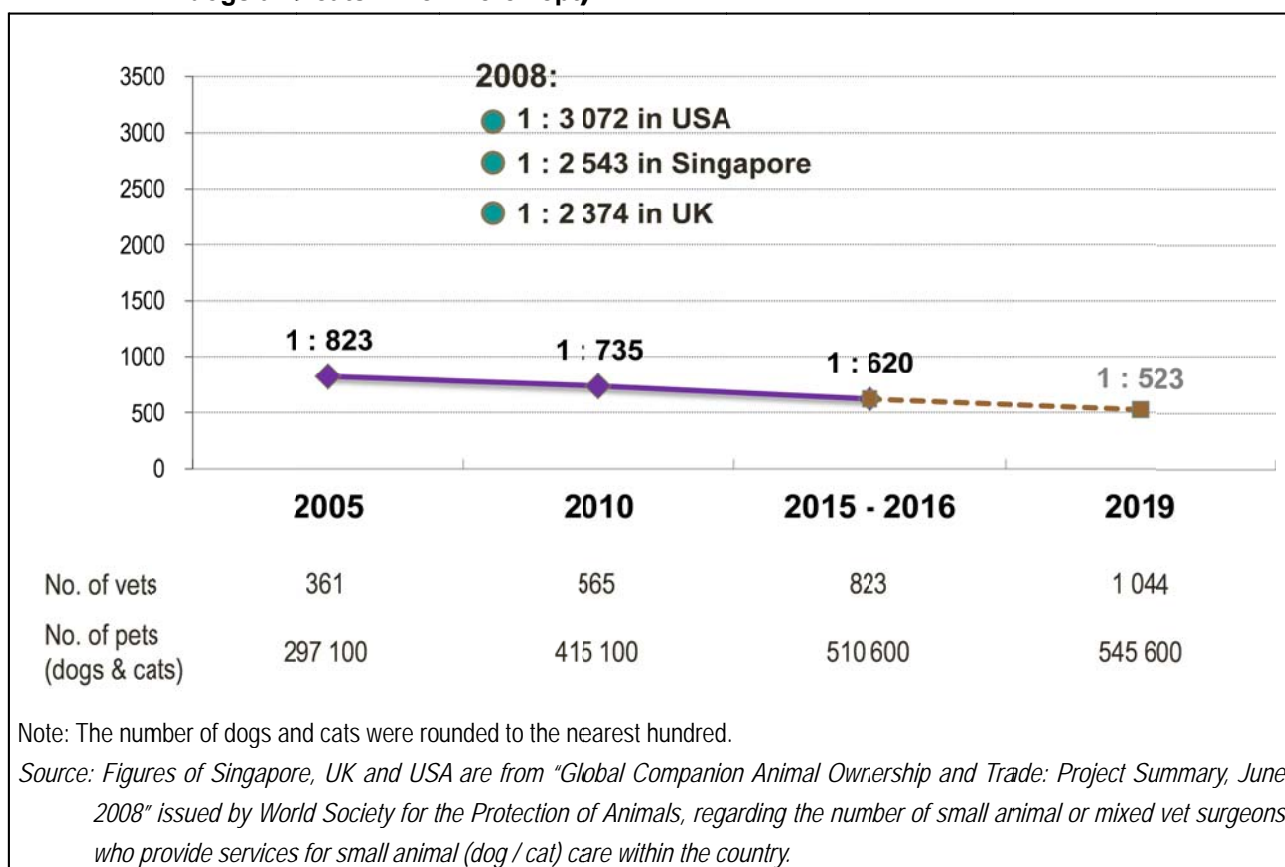
4.4 VET-TO-PET RATIO IN HONG KONG

4.4.1 One common indicator to access the overall situation of veterinary services is to compare Hong Kong’s veterinarian-to-pet ratio (mainly cats and dogs) with selected developed countries^{Note}.

4.4.2 According to a summary of report issued by World Society for the Protection of Animals in 2008, the vet-to-pet ratios of other comparable developed countries were: 1 : 2 543 in Singapore, 1 : 2 374 in UK and 1 : 3 072 in USA. As compared with the vet-to-pet ratios in Hong Kong in similar years (1 : 823 in 2005 and 1 : 735 in 2010), it was observed that Hong Kong’s ratio is much lower than those of Singapore, UK and USA. In addition, it was noted that Hong Kong’s vet-to-pet ratio is likely to be further declined (from 1 : 735 in 2010, 1 : 620 in 2015 – 2016 to 1 : 523 in 2019).

(Ref.: Chart 4.4)

Chart 4.4: Vet-to-pet ratio in Hong Kong (the number of registered vet surgeons to the number of dogs and cats which were kept)



^{Note} A smaller ratio means there are more vets available for a number of cats and dogs.

5 SURVEY FINDINGS – PET OWNERS

5.1 ESTIMATION OF POTENTIAL VETERINARY SERVICES USERS

5.1.1 INCIDENCE AND INTENTION OF KEEPING PETS

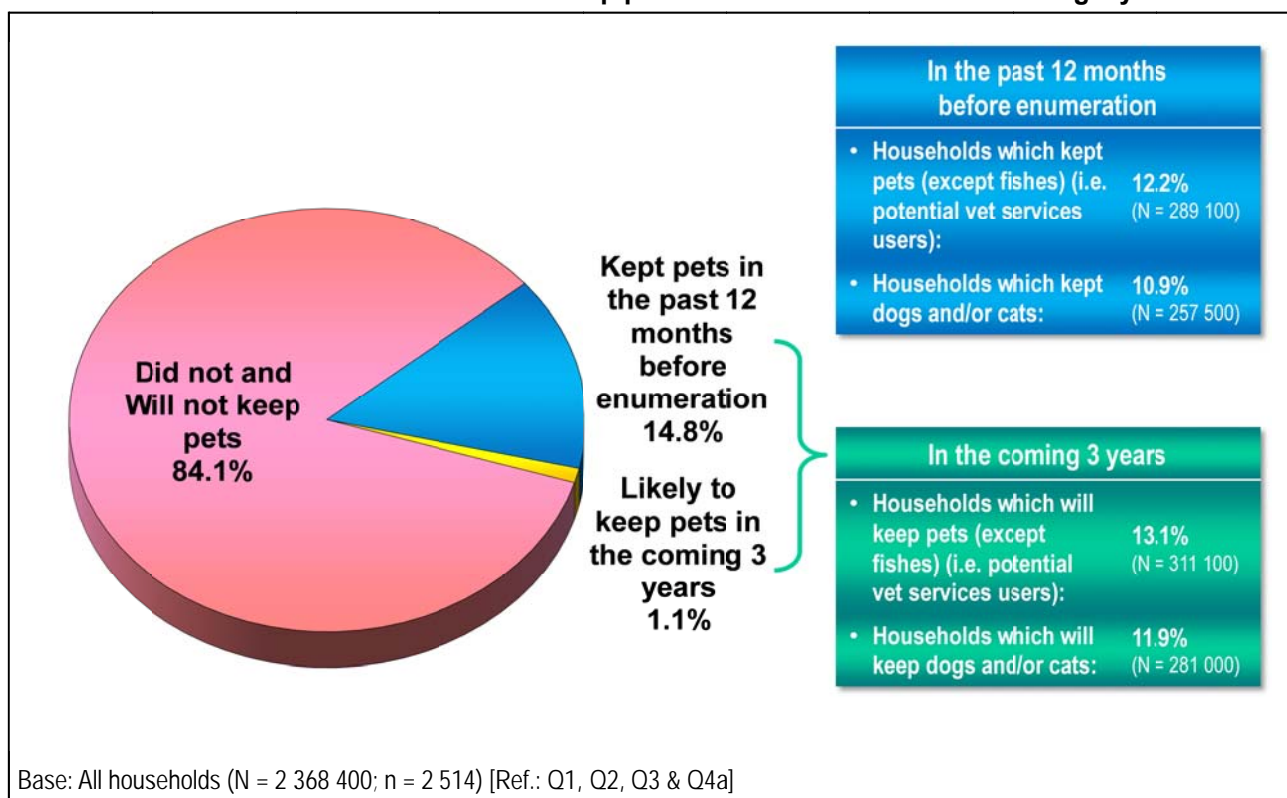
5.1.1.1 Based on the Thematic Household Survey (Report No. 48) conducted by the Census and Statistics Department, it was estimated that about 10.6% of all households in Hong Kong (i.e. about 249 400 households) were keeping dogs and/or cats (about 415 100 dogs and cats) at the time of enumeration (Oct – Dec 2010).

5.1.1.2 In this survey, of all 2 368 400 households in Hong Kong, 14.8% claimed that they kept pets (any species) in the past 12 months before enumeration, with 2.6% kept fishes only, and 12.2% kept other pets (except fishes) (i.e. potential veterinary services users; about 289 100 households).

5.1.1.3 Of all households, 10.9% kept dogs and/or cats (about 257 500 households), which was increased by 3.2% as compared with about 249 400 households in 2010.

(Ref.: Chart 5.1.1a)

Chart 5.1.1a: Whether the households kept pets in the past 12 months before enumeration, and whether those which did not keep pets intended to do so in the coming 3 years



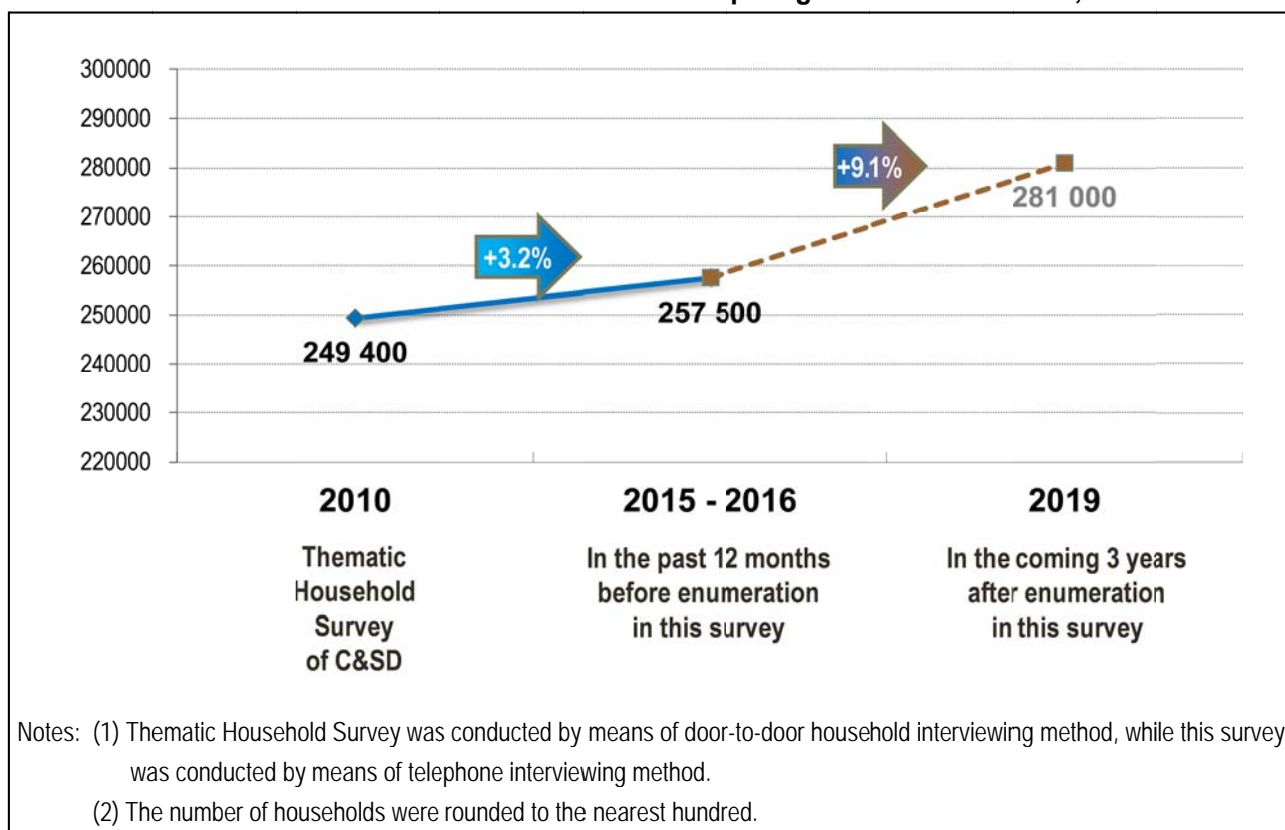
5.1.1.4 Besides, 1.1% of all households which did not keep any pet in the past 12 months said that they were likely to do so in the coming 3 years. Some of them would keep fishes only, and some would keep other pets.

5.1.1.5 When aggregating the households which kept pets in the past 12 months and those which will keep pets in the coming 3 years, it was estimated that about 311 100 households will keep pets (except fishes) (i.e. potential veterinary services users) in the coming 3 years.

5.1.1.6 In addition, it was estimated that about 281 000 households will keep dogs and/or cats in the coming 3 years, which will be increased by 9.1% as compared with about 257 500 in the past 12 months.

(Ref.: Chart 5.1.1b)

Chart 5.1.1b: Estimated number of households which kept dogs and/or cats in 2010, 2016 and 2019



5.1.1.7 Of the about 289 100 households which kept pets (except fishes) in the past 12 months, most of them were living in the New Territories (N.T.), with 30.6% in N.T. East and 30.8% in N.T. West.

(Ref.: Table 5.1.1)

Table 5.1.1: Number of households which kept pets (except fishes) in the past 12 months before enumeration – by districts

	No.	(%)
HK Island	35 300	12.2
Kowloon East	39 500	13.7
Kowloon West	36 700	12.7
NT East	88 500	30.6
NT West	89 200	30.8

Base: All households which kept pets (except fishes) in the past 12 months before enumeration (N = 289 100; n = 308) [Ref.: X3]

Notes: (1) HK Island incl. Central & Western, Wan Chai, Eastern, Southern

Kowloon East incl. Wong Tai Sin, Kwun Tong

Kowloon West incl. Yau Tsim Mong, Sham Shui Po, Kowloon City

NT East incl. North, Tai Po, Sha Tin, Sai Kung

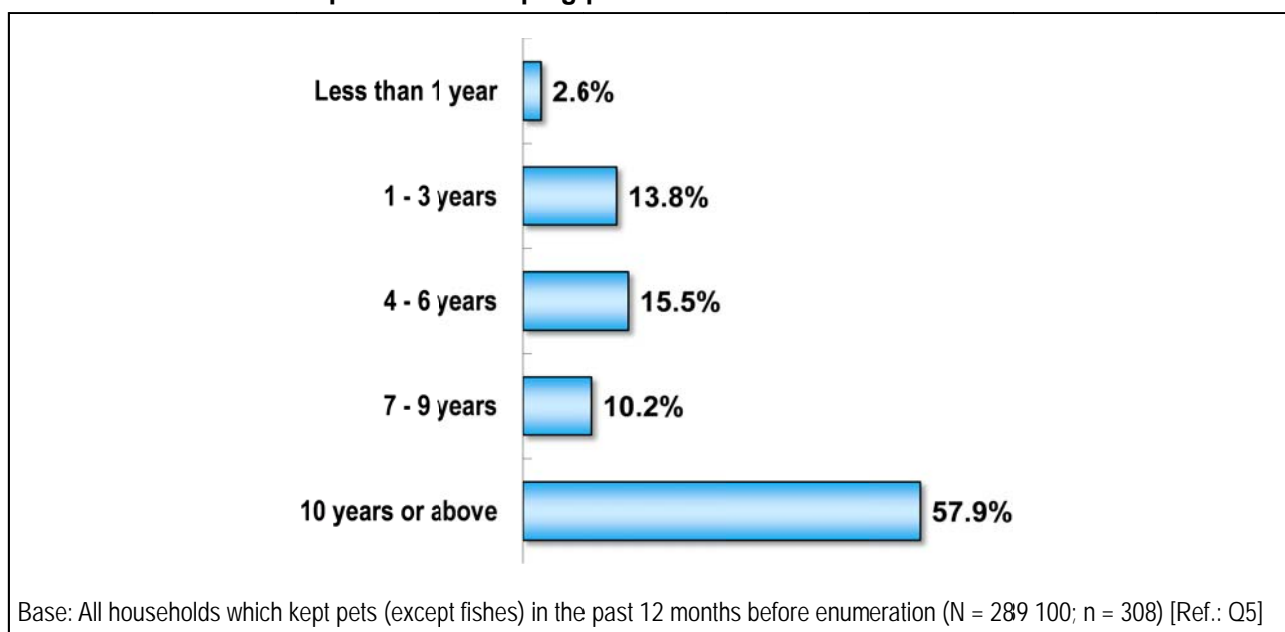
NT West incl. Kwai Tsing, Tsuen Wan, Tuen Mun, Yuen Long, Islands

(2) The number of households were rounded to the nearest hundred.

5.1.1.8 Most of these pet owners were experienced in keeping pets. Nearly three-fifths of the households which kept pets (except fishes) in the past 12 months (57.9%) said that they had 10 years or more of experience in keeping pets.

(Ref.: Chart 5.1.1c)

Chart 5.1.1c: Years of experience in keeping pets



5.1.2 ESTIMATED POPULATION OF PETS

5.1.2.1 It was estimated that about 681 600 pets (except fishes) were kept in Hong Kong in the past 12 months before enumeration. About 510 600 were dogs and cats (297 500 dogs and 213 100 cats respectively), which was increased by 23.0% as compared with about 415 100 dogs and cats in 2010. Other pets included:

- about 95 900 reptiles (e.g. turtles, snakes, etc.);
- about 45 800 birds; and
- about 29 400 other pets (e.g. hamster, chinchilla, rabbits, etc.)

5.1.2.2 Assumed that each of the households which were likely to keep pets in the coming 3 years would keep 1 pet only, about 45 300 additional pets (except fishes) will be kept in the coming 3 years. In total, about 726 900 pets (except fishes) will be kept in the coming 3 years (which will be increased by 6.6%, vs. 681 600 in the past 12 months). About 545 600 will be dogs and cats, which will be increased by 6.9% as compared with about 510 600 in the past 12 months.

(Ref.: Charts 5.1.2a & b)

Chart 5.1.2a: Estimated number of pets which were kept in the past 12 months before enumeration, and estimated total number of pets which will be kept in the coming 3 years

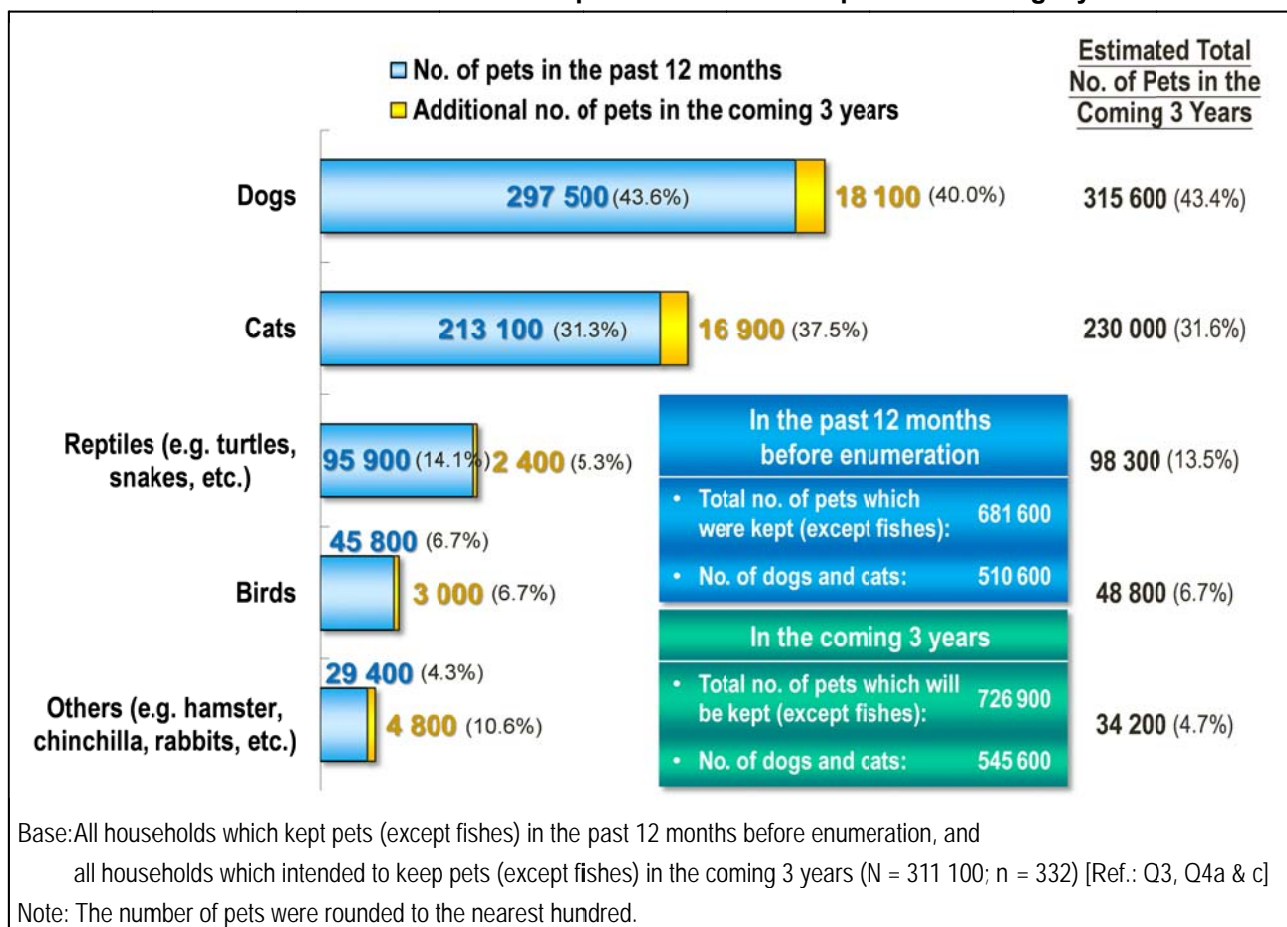
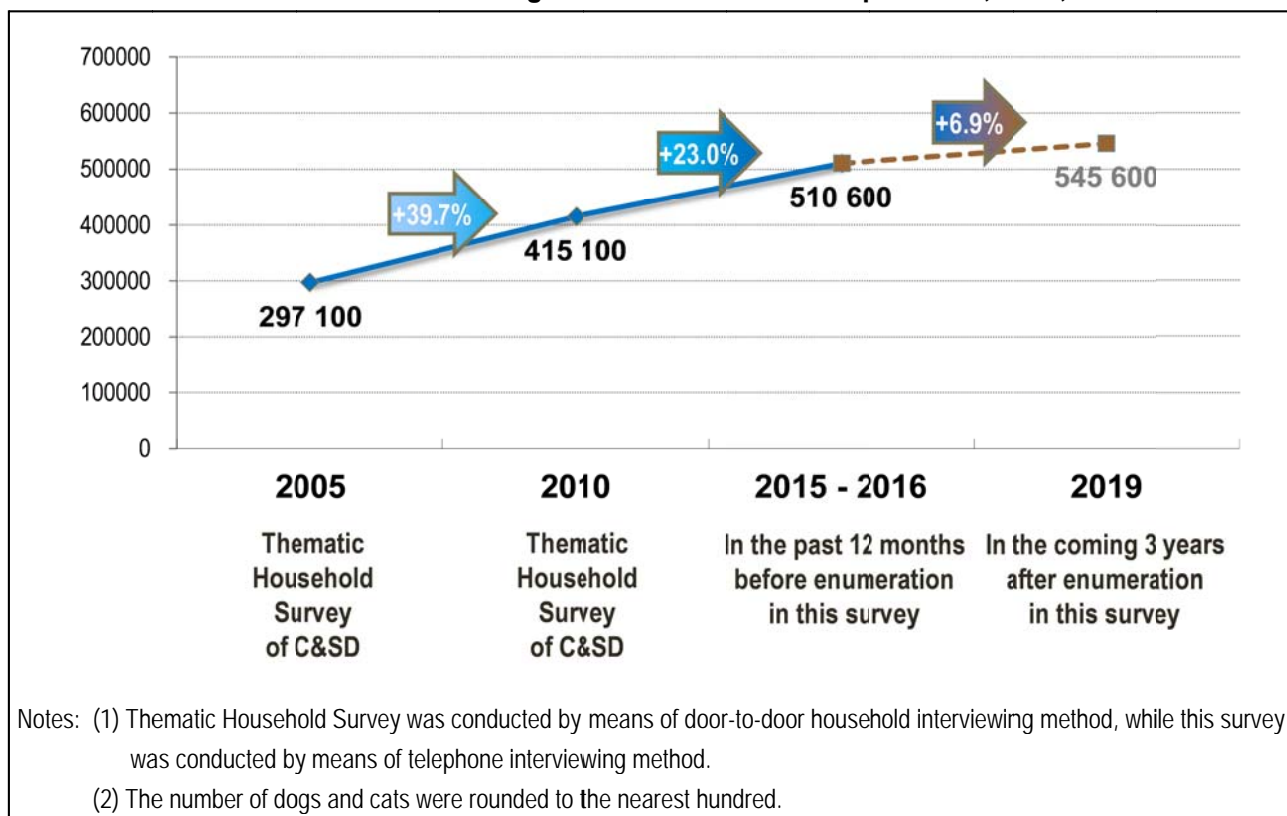


Chart 5.1.2b: Estimated number of dogs and cats which were kept in 2005, 2010, 2016 and 2019



5.1.2.3 Similar to the pet owners, most of the pets were kept in the New Territories (N.T.), with 28.3% in N.T. East and 38.3% in N.T. West.

(Ref.: Table 5.1.2)

Table 5.1.2: Number of households which kept pets (except fishes) and estimated number of pets which were kept in the past 12 months before enumeration – by districts

	Households		Pets	
	No.	(%)	No.	(%)
HK Island	35 300	12.2	67 200	9.9
Kowloon East	39 500	13.7	76 200	11.2
Kowloon West	36 700	12.7	84 000	12.3
NT East	88 500	30.6	192 900	28.3
NT West	89 200	30.8	261 400	38.3

Base: All households which kept pets (except fishes) in the past 12 months before enumeration (N = 289 100; n = 308) [Ref.: X3]

Notes: (1) HK Island incl. Central & Western, Wan Chai, Eastern, Southern

Kowloon East incl. Wong Tai Sin, Kwun Tong

Kowloon West incl. Yau Tsim Mong, Sham Shui Po, Kowloon City

NT East incl. North, Tai Po, Sha Tin, Sai Kung

NT West incl. Kwai Tsing, Tsuen Wan, Tuen Mun, Yuen Long, Islands

(2) The number of households and pets were rounded to the nearest hundred.

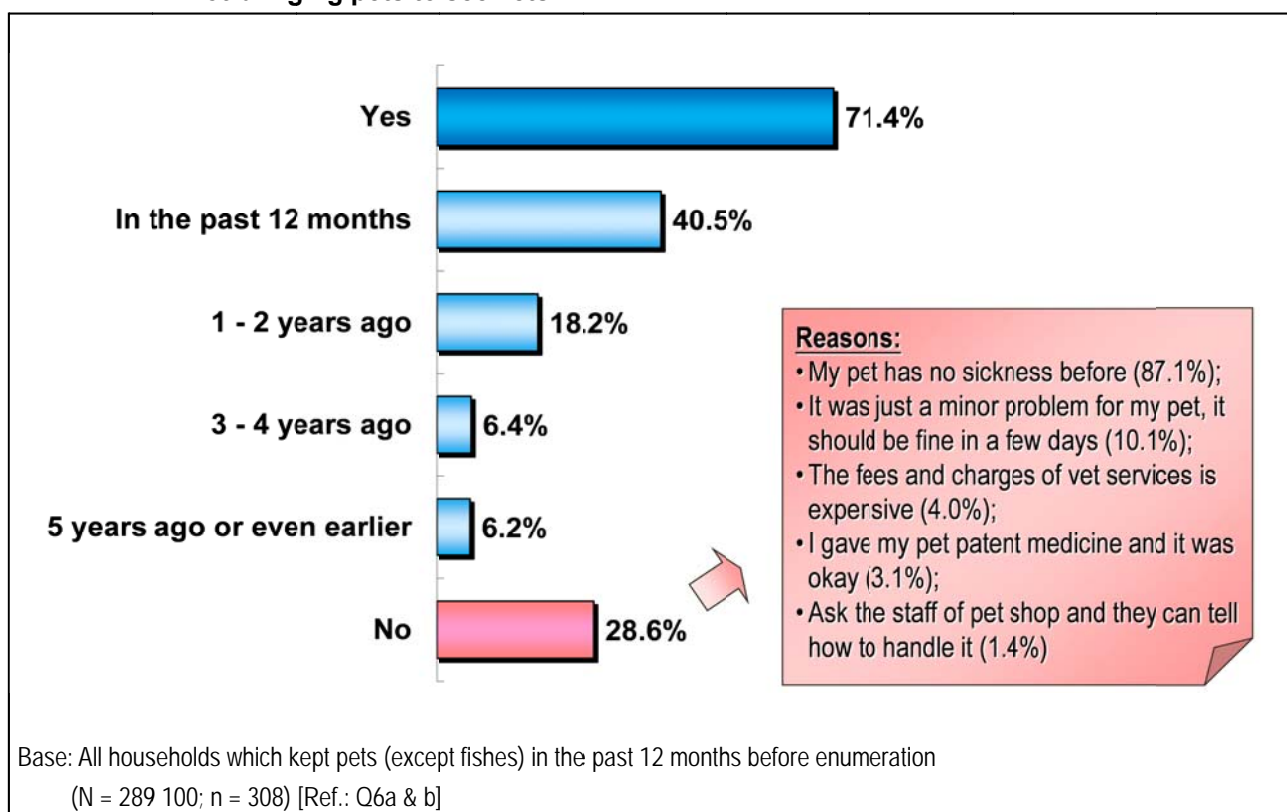
5.2 EXPERIENCES OF USING VETERINARY SERVICES AND OPINIONS TOWARDS VETERINARY SERVICES IN HONG KONG

5.2.1 USAGE RATE OF VETERINARY SERVICES

5.2.1.1 Of the households which kept pets (except fishes) in the past 12 months, 71.4% said they have ever brought their pets to see veterinary surgeons (vets), with 40.5% visited vets in the past 12 months.

5.2.1.2 On the other hand, 28.6% of the pet owners have never brought their pets to see vets. Among them, the majority said “my pet has no sickness before” (87.1%). Some claimed that “it was just a minor problem for my pet, it should be fine in a few days” (10.1%).
(Ref.: Chart 5.2.1)

Chart 5.2.1: Whether the pet owners brought pets to see veterinary surgeons (vets), and reasons of not bringing pets to see vets



5.2.2 TYPES OF VETERINARY SERVICES WHICH WERE USED

5.2.2.1 Of the households which have ever brought pets to see vets, when asked about the types of veterinary services which were used in the last time of seeing vets, the majority of them (86.8%) said that they sought general consultation (e.g. health examinations / follow-up consultation). It was followed by vaccination / microchipping (31.3%) and surgery (18.9%).

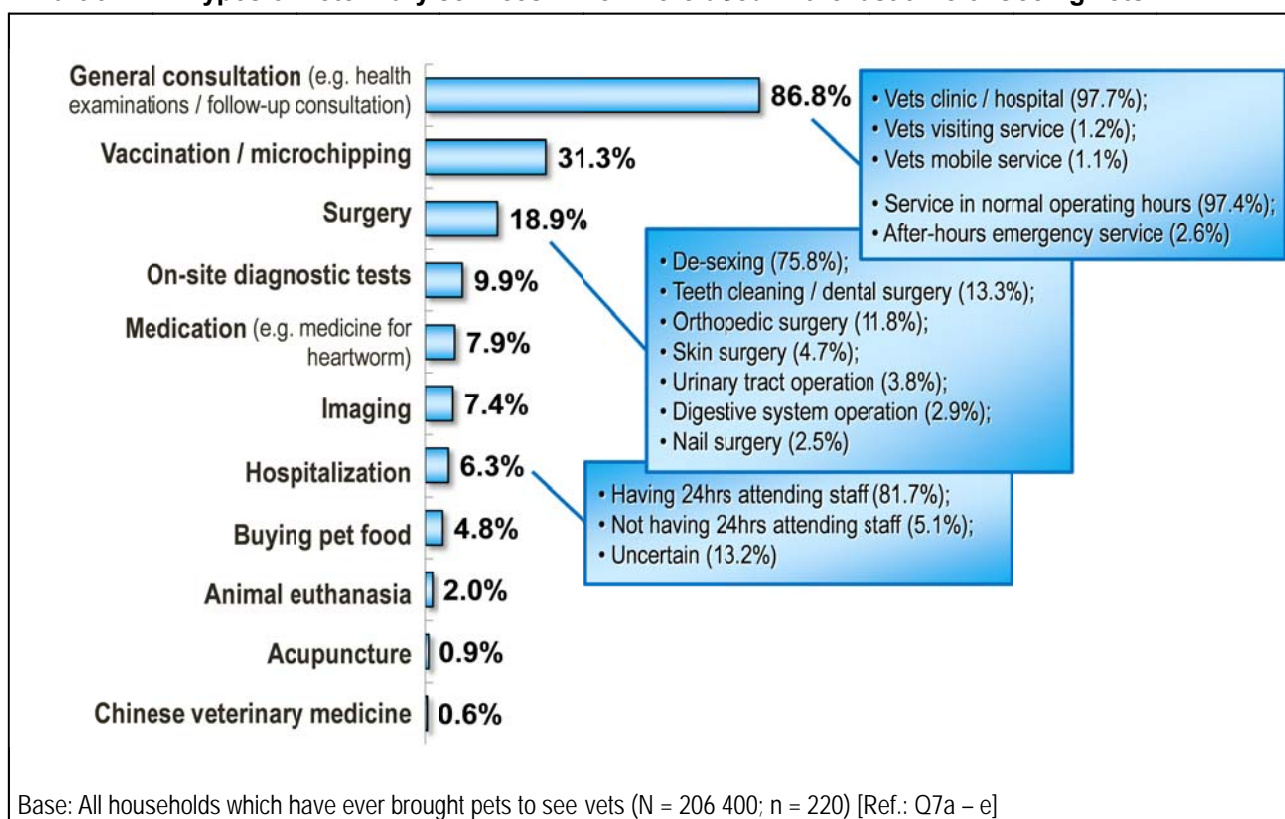
5.2.2.2 Among those pet owners who sought consultation, virtually all visited veterinary clinic / hospital (97.7%) and used the veterinary services in normal operating hours (97.4%).

5.2.2.3 Among those who brought pets to see vets for surgery, most of them (75.8%) had their pets receiving de-sexing surgery, followed by teeth cleaning / dental surgery (13.3%) and orthopedic surgery (11.8%).

5.2.2.4 Among the 6.3% who used the hospitalization services, the majority (81.7%) said the veterinary clinic / hospital provided 24 hours attending staff for taking care of their pets.

(Ref.: Chart 5.2.2)

Chart 5.2.2: Types of veterinary services which were used in the last time of seeing vets



5.2.3 SPENDING ON VETERINARY SERVICES IN LAST YEAR

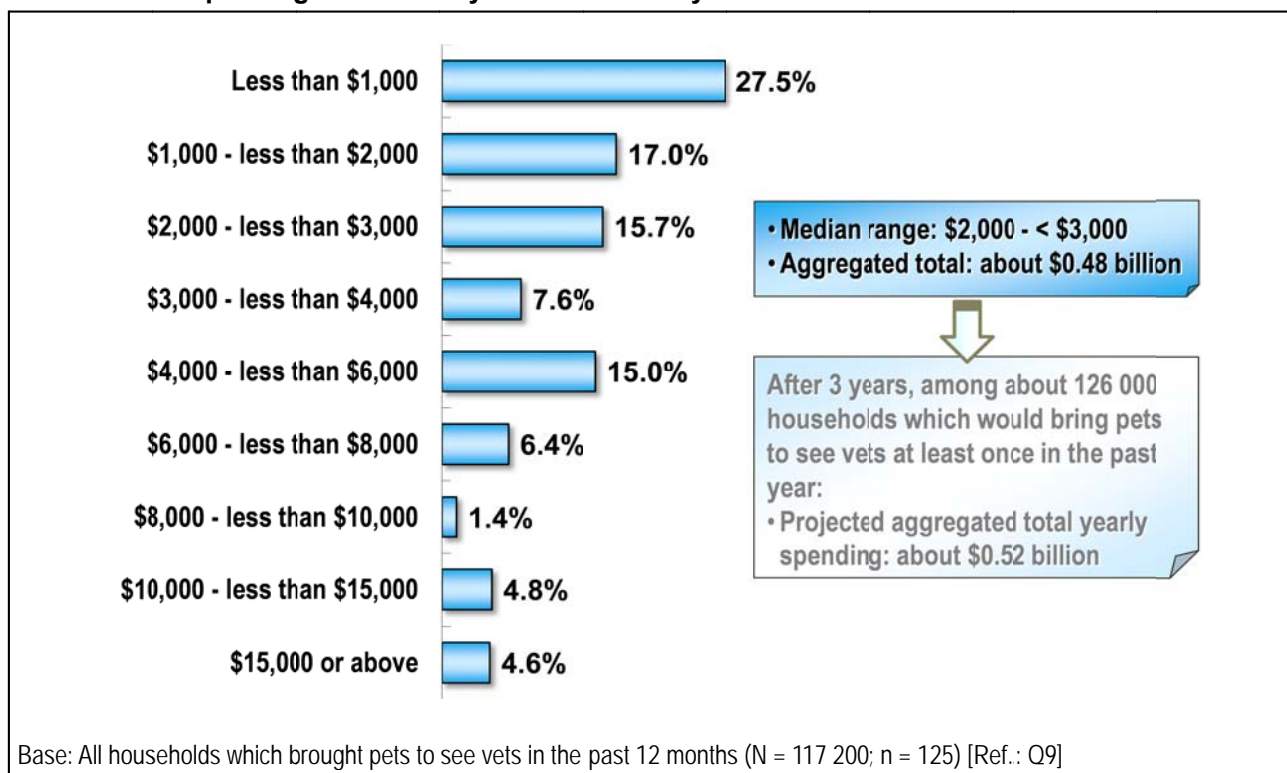
5.2.3.1 Of the households which brought pets to see vets in the past 12 months, the median range of spending on veterinary services in the last year was \$2,000 – less than \$3,000.

5.2.3.2 Using the mid-point of each range to calculate the aggregated total spending of all households which brought pets to see vets in the past 12 months, it is about \$0.48 billion.

5.2.3.3 As mentioned in section 5.1.1, there are about 311 100 potential veterinary services users in the coming 3 years. Assumed that 40.5% of them would bring pets to see vets at least once in the past year (with reference to section 5.2.1), the projected aggregated total yearly spending on veterinary services is about \$0.52 billion among about 126 000 households.

(Ref.: Chart 5.2.3)

Chart 5.2.3: Spending on veterinary services in last year



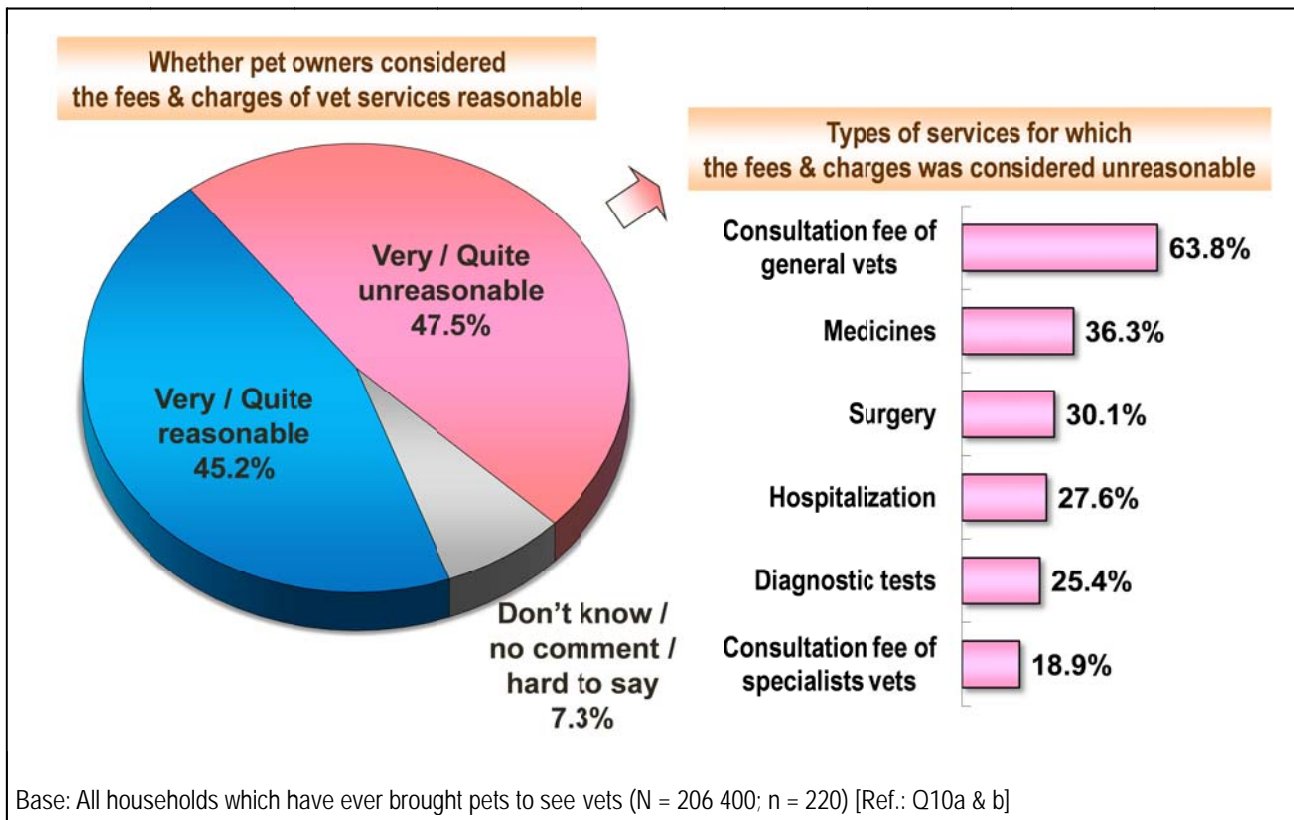
5.2.4 OPINIONS TOWARDS THE FEES AND CHARGES OF VETERINARY SERVICES

Whether pet owners considered the fees and charges of veterinary services reasonable

5.2.4.1 Of the households which have ever brought pets to see vets, 45.2% considered that the fees and charges of veterinary services in Hong Kong were very / quite reasonable. Yet, a similar proportion (47.5%) considered the opposite. Among them, relatively more (63.8%) thought that the consultation fee of general vets was very / quite unreasonable, followed by medicine (36.3%) and surgery (30.1%).

(Ref.: Chart 5.2.4a)

Chart 5.2.4a: Whether pet owners considered the fees and charges of veterinary services in Hong Kong reasonable, and the types of services for which the fees and charges was considered unreasonable



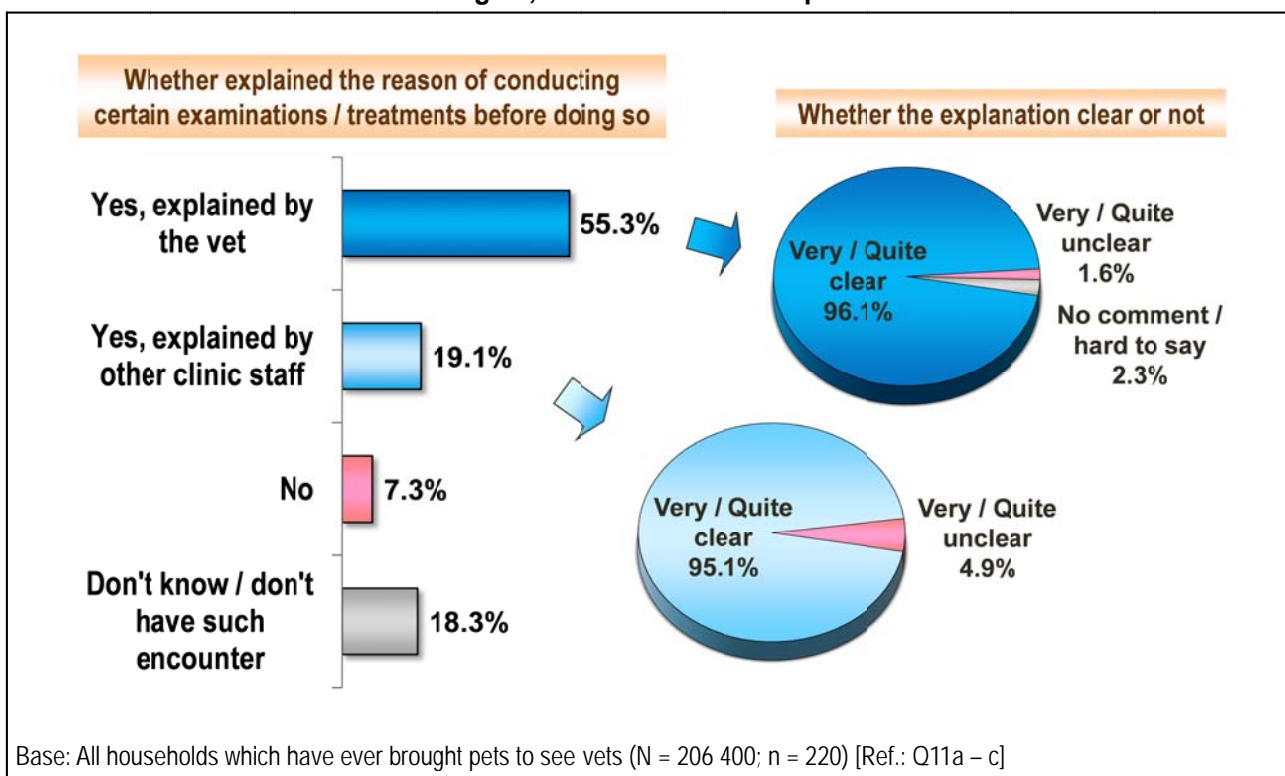
Whether the vets / clinic staff have clearly communicated with pet owners about their pets' required medical examination / treatment and notified the approximate fees and charges before service, and availability of receipts and breakdown items on receipts

5.2.4.2 If they were told that certain examination / treatment (e.g. lab tests, imaging, surgery or other kinds of treatment) was required for their pets, nearly three-quarters of the pet owners said either the vet (55.3%) or other clinic staff (19.1%) have explained to them about the reason of conducting those examinations / treatments before doing so. Only 7.3% claimed that no explanation was given.

5.2.4.3 When further asked about the clarity of explanation, the vast majority of pet owners considered that the explanation of vet (96.1%) or other clinic staff (95.1%) was very / quite clear, whereas only small proportions considered the opposite (1.6% and 4.9% respectively).

(Ref.: Chart 5.2.4b)

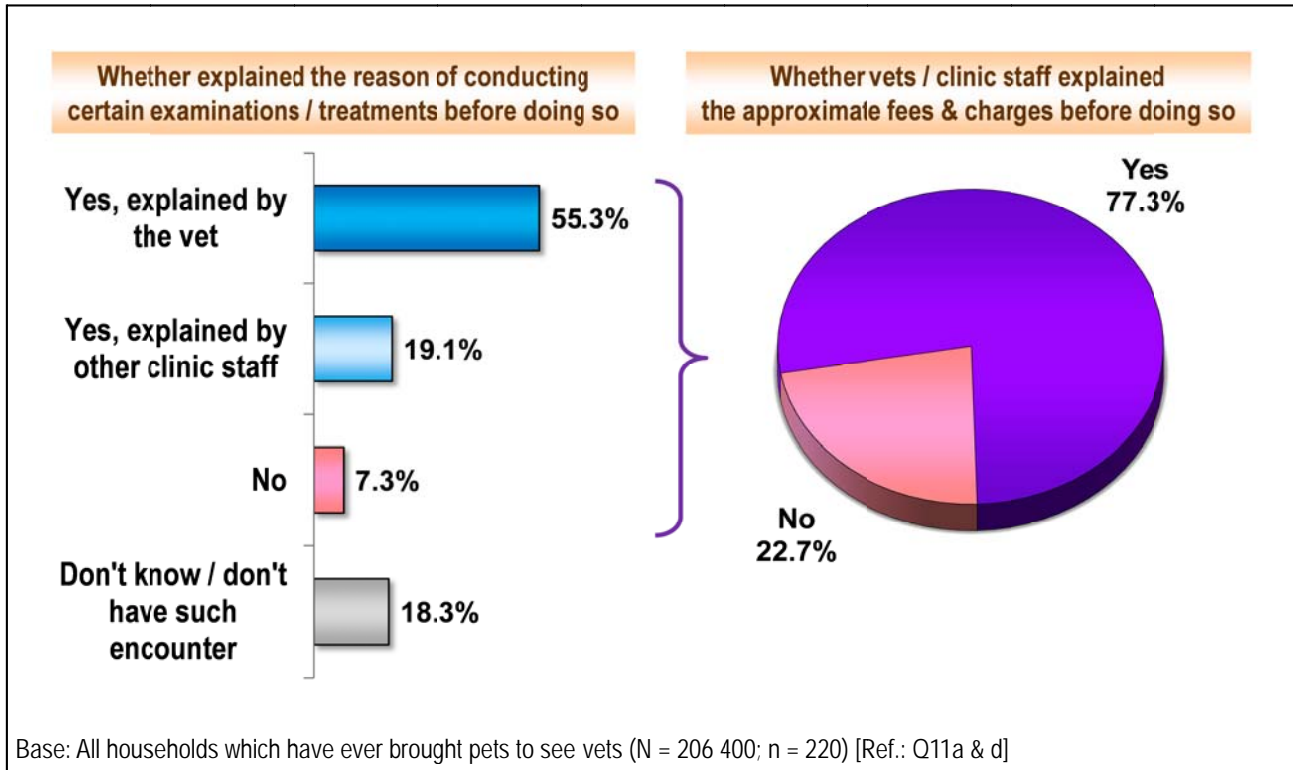
Chart 5.2.4b: Whether vets / clinic staff explained the reason of conducting certain examinations or treatments before doing so, and whether their explanation clear or not



5.2.4.4 Among the pet owners who have ever been told that certain examination / treatment was required for their pets (no matter whether explanation was given), 77.3% said that the vet / clinic staff have explained the approximate fees and charges before service, whilst 22.7% said they were not notified about the fees and charges before having the services.

(Ref.: Chart 5.2.4c)

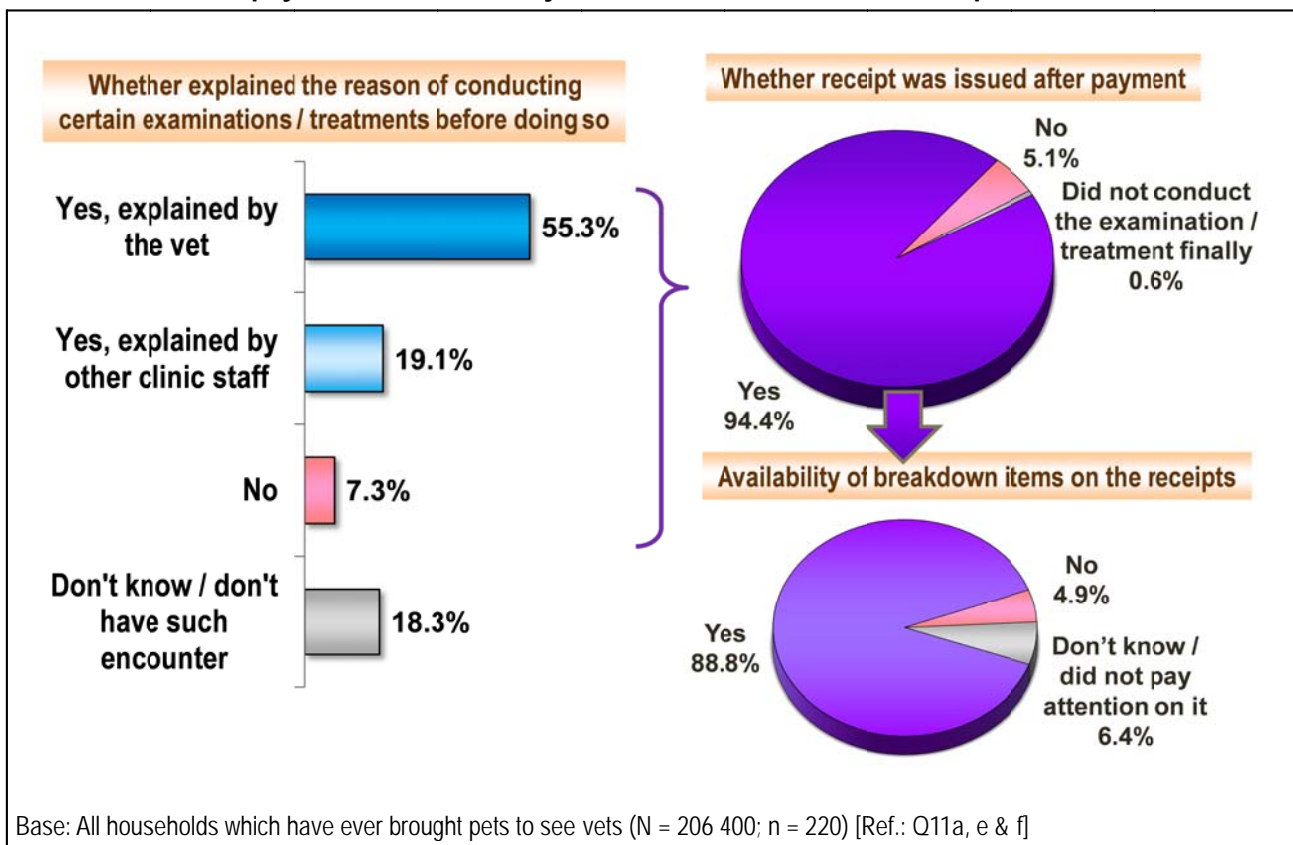
Chart 5.2.4c: If their pets required certain examinations or treatments, whether vets / clinic staff explained the approximate fees & charges before doing so



5.2.4.5 Moreover, among the pet owners who have ever been told that certain examination / treatment was required for their pets (no matter whether explanation was given and whether they were notified about the fees and charges), 94.4% said that receipt was issued to them after paying the required fees and charges. Among them, 88.8% said that breakdown items of the fees and charges for examination / treatment were shown on the receipt.

(Ref.: Chart 5.2.4d)

Chart 5.2.4d: If their pets required certain examinations or treatments, whether receipt was issued after payment and availability of breakdown items on the receipts



Whether pet owners considered the fees and charges of vet services transparent enough

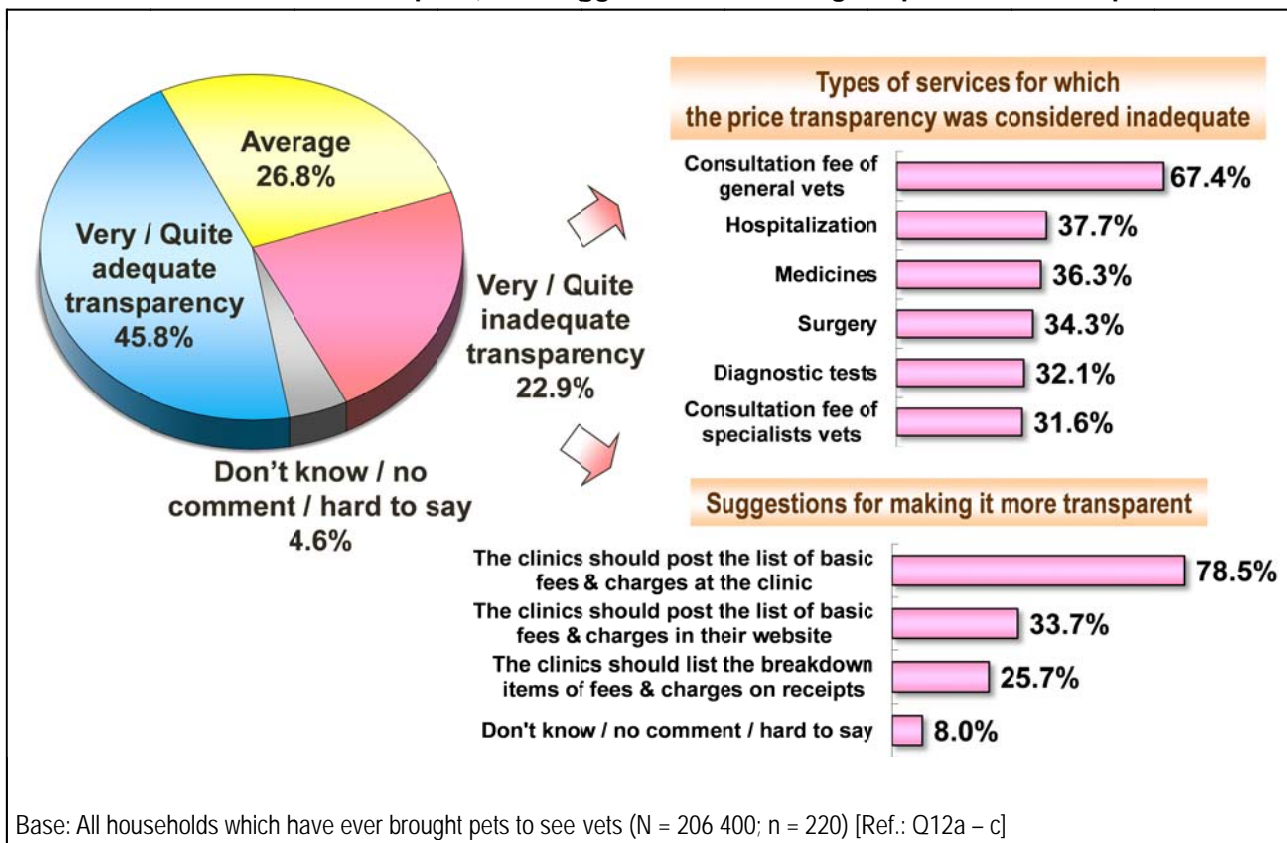
5.2.4.6 Of the households which have ever brought pets to see vets, they were asked their perceived transparency of the fees and charges of veterinary services in Hong Kong (e.g. except in an emergency situation, whether the vet / clinic staff gave the general idea on the fees and charges before conducting the examination / treatment, or whether they were informed when there is additional treatment / testing).

5.2.4.7 It was observed that less than half of the pet owners (45.8%) considered the price transparency very / quite adequate, while 22.9% considered the opposite. 26.8% rated average.

5.2.4.8 Among those who considered the price transparency very / quite inadequate, relatively more thought that the price transparency of consultation fee of general vets (67.4%) was inadequate, followed by hospitalization (37.7%) and medicines (36.3%). Besides, when asked to suggest ways for improvement, many of them claimed that the clinics should post the list of basic fees and charges at the clinic (78.5%) and/or in their websites (33.7%).

(Ref.: Chart 5.2.4e)

Chart 5.2.4e: Whether pet owners considered the fees and charges of veterinary services in Hong Kong transparent enough, the types of services for which the price transparency was considered inadequate, and suggestions for making the price more transparent



5.2.5 SATISFACTION OF VETERINARY SERVICES IN HONG KONG

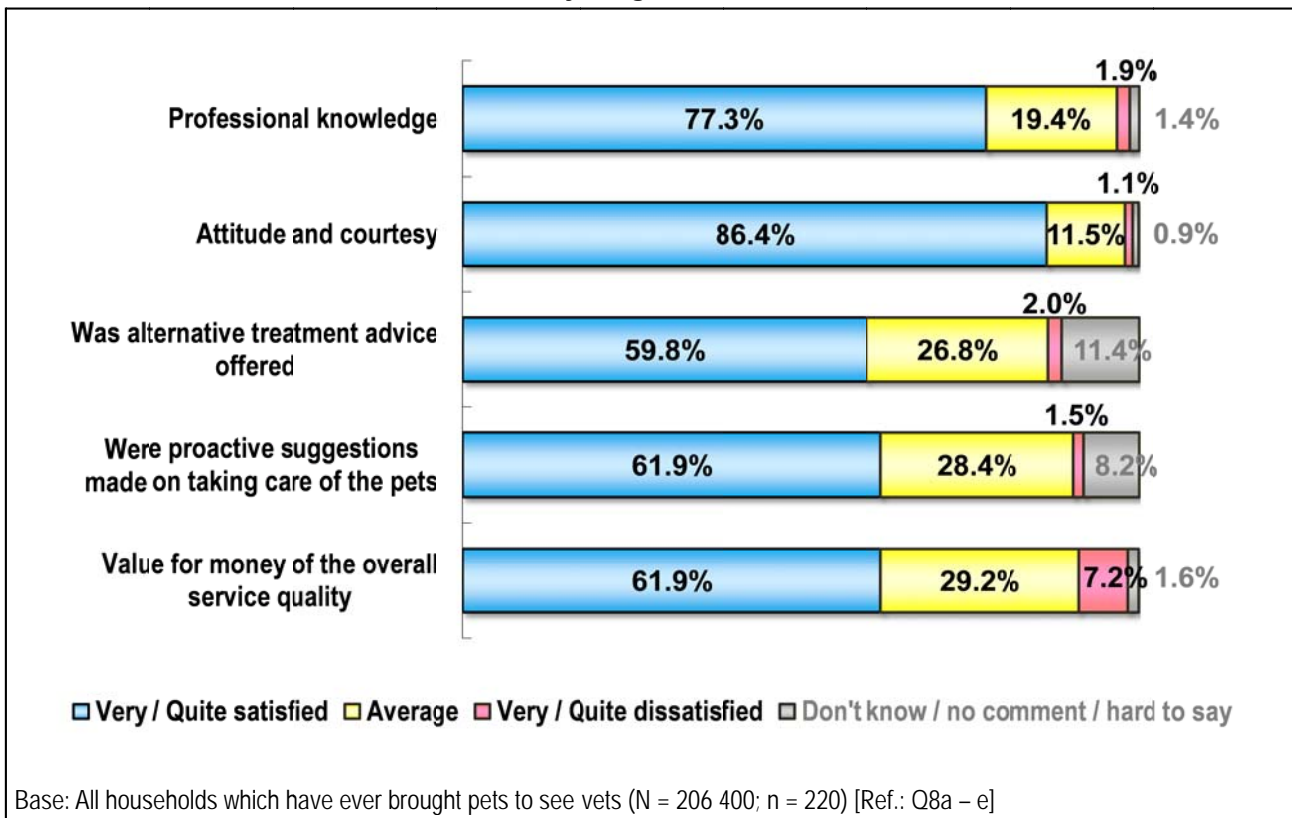
Satisfaction towards veterinary surgeons

5.2.5.1 Based on their experience from the last time they sought veterinary attention, the majority of pet owners were very / quite satisfied with the attitude and courtesy (86.4%) and professional knowledge (77.3%) of vets. Relatively speaking, their satisfaction levels were lower on other aspects, including whether alternative treatment advice was offered by the vets (59.8%), whether proactive suggestions were made on taking care of the pets (61.9%) and value for money of the overall service quality of the vets (61.9%).

5.2.5.2 Nevertheless, only small proportions of the pet owners were very / quite dissatisfied with these aspects (about 1% - 7%).

(Ref.: Chart 5.2.5a)

Chart 5.2.5a: Satisfaction towards veterinary surgeons

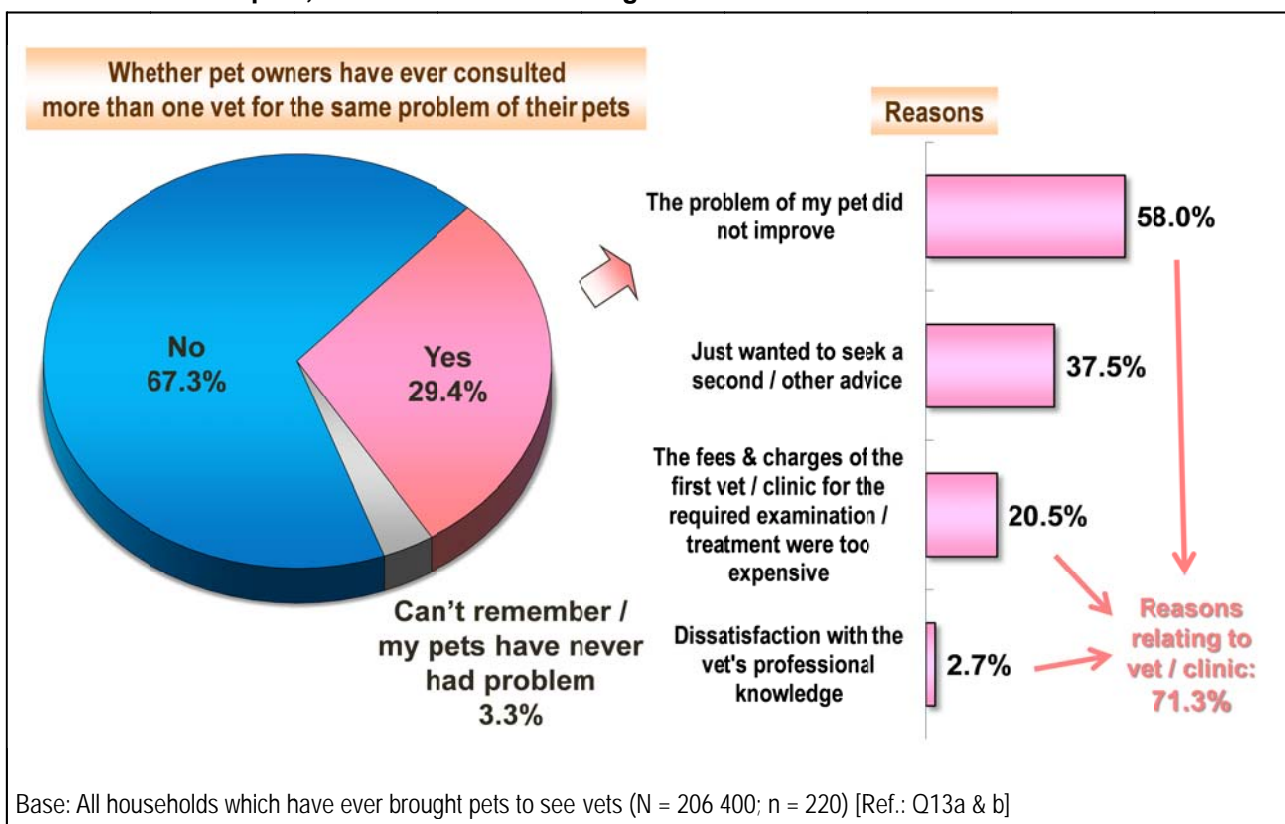


Experience of consulting multiple vets for the same problem of pets

5.2.5.3 About three-tenths of the pet owners (29.4%) said that they have ever consulted more than one vets for the same problem of their pets. Among them, most of the reasons were related to the vet / clinic. They said it was because “the problem of my pet did not improve” (58.0%), “the fees and charges of the first vet / clinic for the required examination / treatment were too expensive” (20.5%) and “dissatisfaction with the vet’s professional knowledge” (2.7%).

(Ref.: Chart 5.2.5b)

Chart 5.2.5b: Whether pet owners have ever consulted more than one vet for the same problem of their pets, and the reasons of doing so

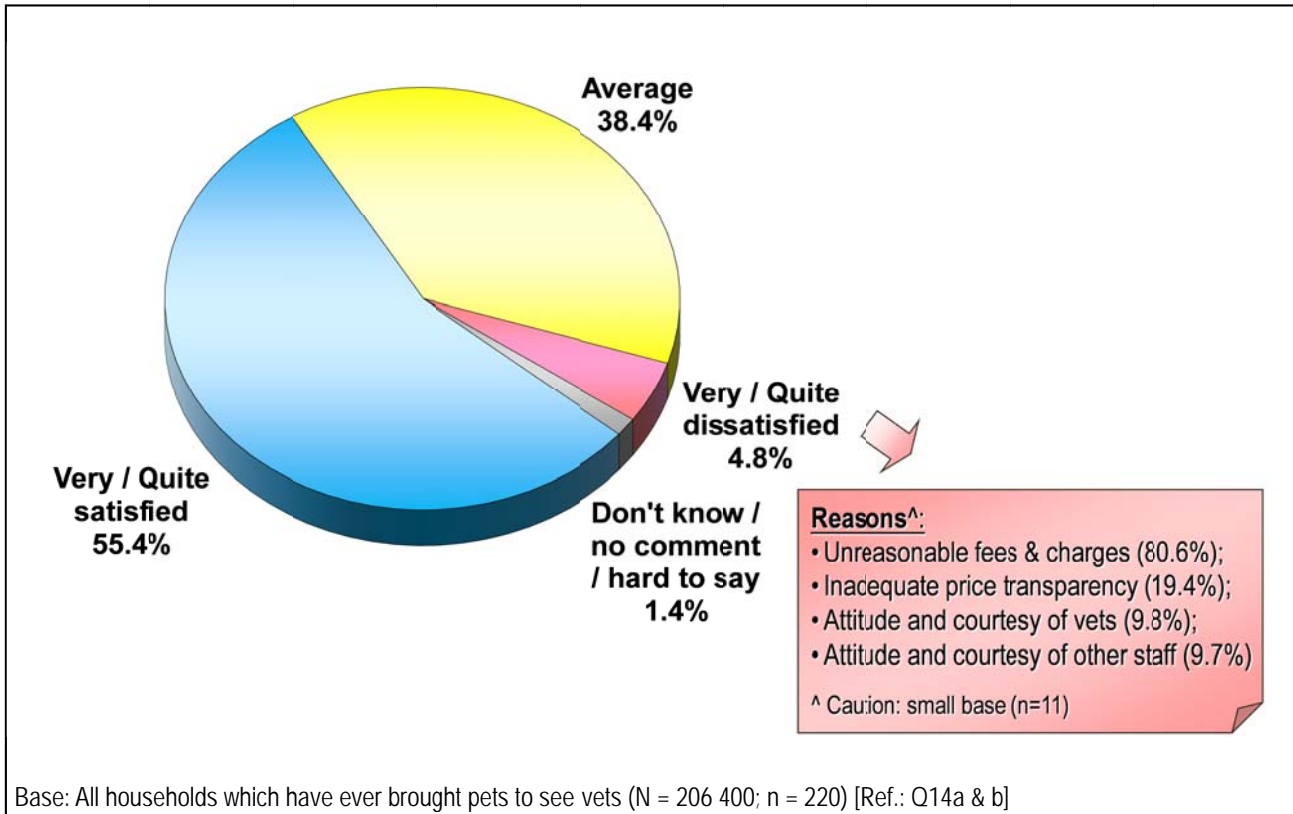


Overall satisfaction of veterinary services in Hong Kong

5.2.5.4 In overall of the various aspects of their veterinary visit, more than half of the pet owners (55.4%) were very / quite satisfied with the veterinary services in Hong Kong. Conversely, only a few (4.8%) were very / quite dissatisfied. Many of them said it was because of the unreasonable fees and charges (80.6%).

(Ref.: Chart 5.2.5c)

Chart 5.2.5c: Overall satisfaction of veterinary services in Hong Kong



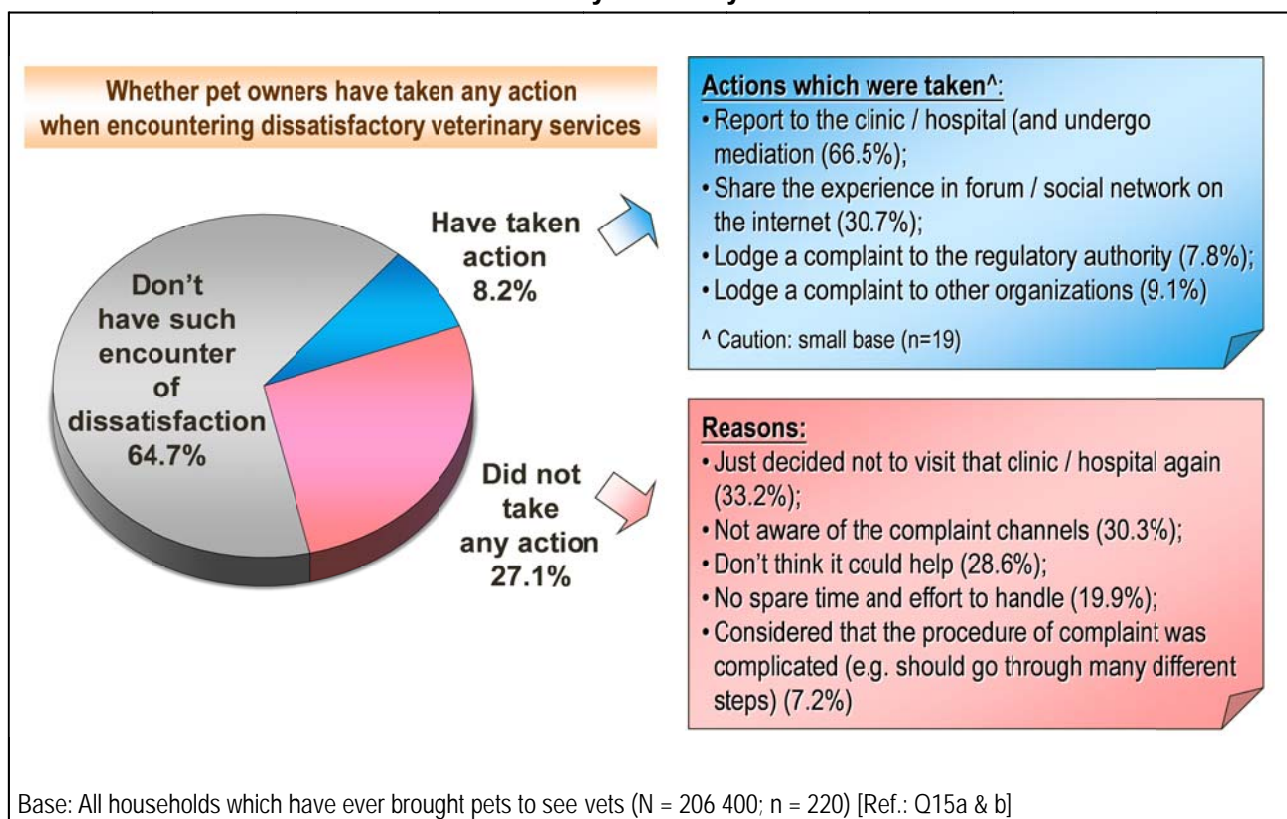
Reaction towards dissatisfactory veterinary services

5.2.5.5 Most of the pet owners (64.7%) claimed that they have not encountered dissatisfactory veterinary services. However, for the others who have ever encountered such situation, relatively more (27.1%) did not take any action. Many of them said it was because they just decided not to visit that vet clinic / hospital again (33.2%), they were not aware of the complaint channels (30.3%) and they did not think taking any action could help (28.6%).

5.2.5.6 On the other hand, for the 8.2% who have taken action, many of them said they have reported to the vet clinic / hospital (and undergo mediation) (66.5%). Some shared their experience in forum / social network on the internet (30.7%).

(Ref.: Chart 5.2.5d)

Chart 5.2.5d: Reaction towards dissatisfactory veterinary services

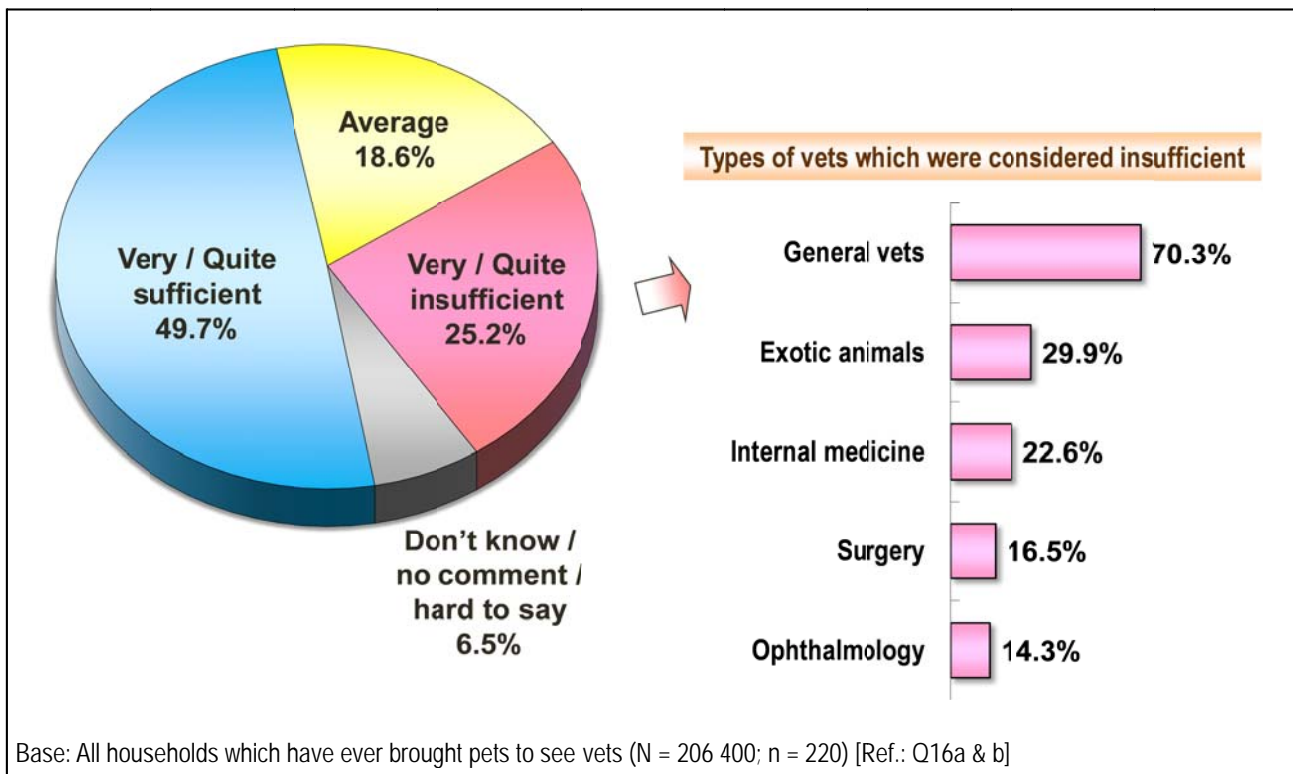


5.3 PERCEIVED SUFFICIENCY OF VETERINARY SURGEONS IN HONG KONG

5.3.1 Of the pet owners who have experience in using veterinary services, about half (49.7%) considered the number of vets in Hong Kong very / quite sufficient. On the contrary, about one-quarter (25.2%) considered the opposite. Among them, many thought that the number of general vets (70.3%) was insufficient, followed by the vets who are specialized in exotic animals (29.9%) and internal medicine (22.6%).

(Ref.: Chart 5.3)

Chart 5.3: Perceived sufficiency of veterinary surgeons in Hong Kong, and the types of vets which were considered insufficient

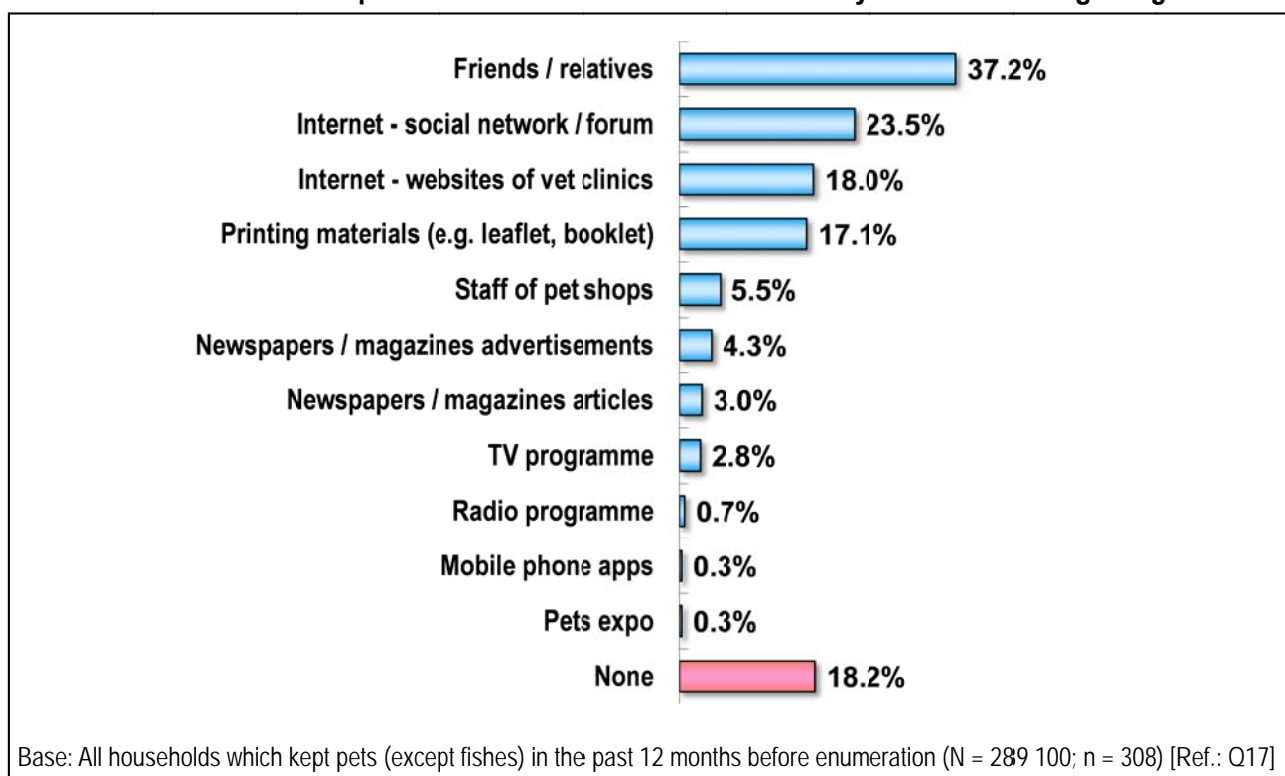


5.4 CHANNELS FOR ACCESS TO INFORMATION ON THE VETERINARY SERVICES IN HONG KONG

5.4.1 Of all potential veterinary services users (no matter whether ever used veterinary services or not), relatively more said that they know about the veterinary services in Hong Kong from friends / relatives (37.2%), followed by social network / forum on the internet (23.5%), websites of vet clinics (18.0%) and printing materials (e.g. leaflet, booklet) (17.1%).

(Ref.: Chart 5.4)

Chart 5.4: Channels for pet owners to know about the veterinary services in Hong Kong



6 SURVEY FINDINGS – VETERINARY CLINICS

6.1 NUMBER OF PRIVATE VETERINARY CLINICS IN HONG KONG

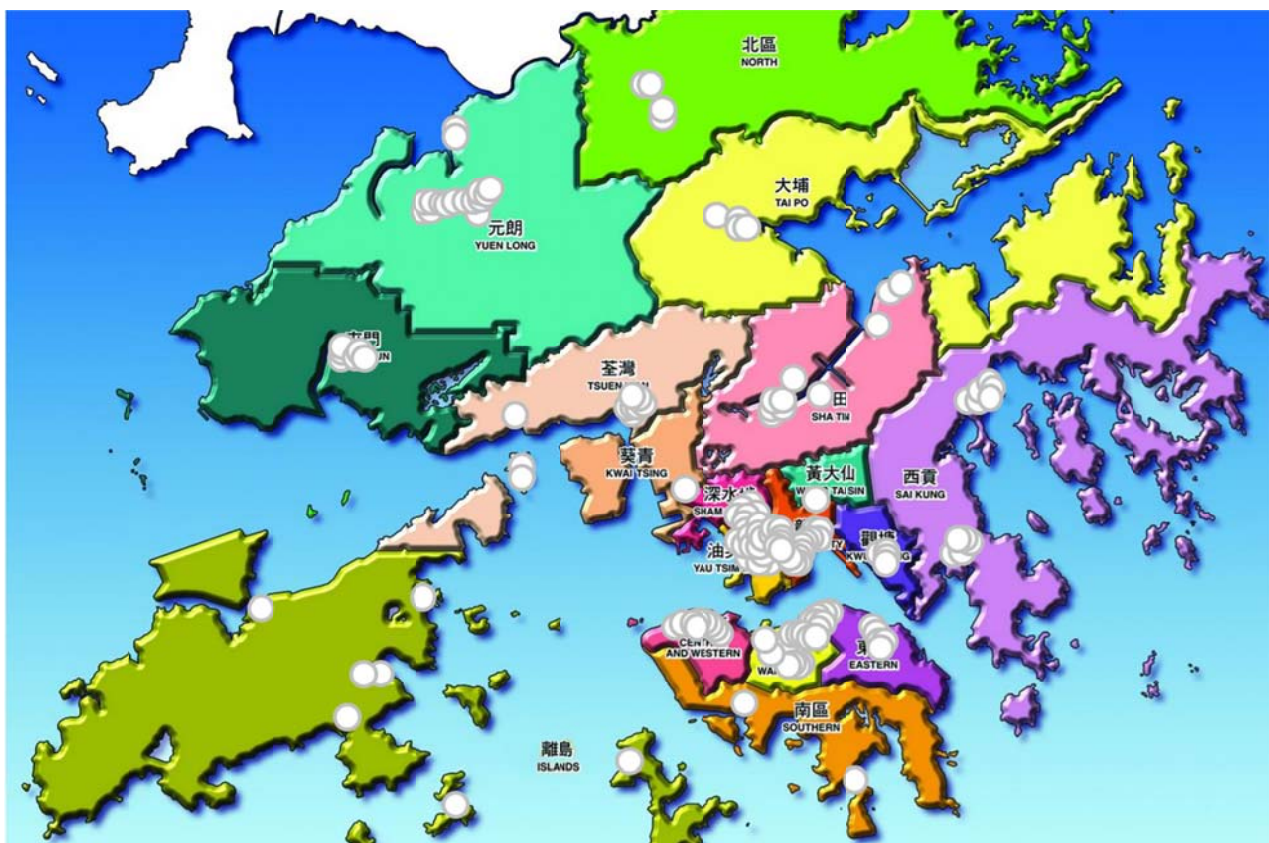
6.1.1 During the survey period from May to June 2016, there were about 146 private veterinary clinics in Hong Kong. Relatively speaking, fewer were located in Kowloon East (3.4%; vs. more than 19% in other districts).

(Ref.: Chart 6.1)

Chart 6.1: Number of private veterinary clinics in Hong Kong

Total no. of private veterinary clinics: 146 (during survey period from May – June 2016)

- 35 in HK Island (24.0%)
- 5 in Kowloon East (3.4%)
- 38 in Kowloon West (26.0%)
- 29 in NT East (19.9%)
- 39 in NT West (26.7%)



Base: All private veterinary clinics in HK (N = 146)

Note: - HK Island incl. Central & Western, Wan Chai, Eastern, Southern

Kowloon East incl. Wong Tai Sin, Kwun Tong

Kowloon West incl. Yau Tsim Mong, Sham Shui Po, Kowloon City

NT East incl. North, Tai Po, Sha Tin, Sai Kung

NT West incl. Kwai Tsing, Tsuen Wan, Tuen Mun, Yuen Long, Islands

6.2 CURRENT BUSINESS OPERATION

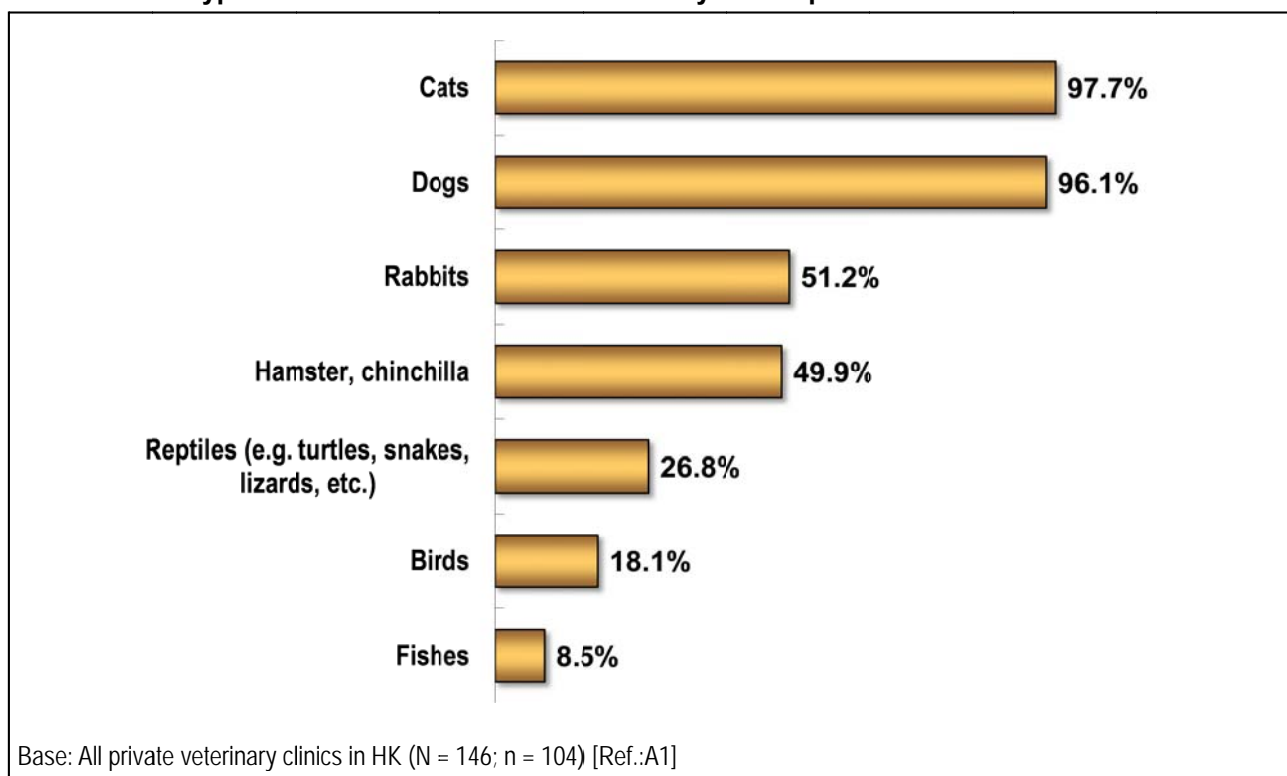
6.2.1 SCOPE OF SERVICES

Types of animals for which the veterinary clinics provide services

6.2.1.1 Virtually all veterinary clinics (vet clinics) provide services for cats (97.7%) and dogs (96.1%). About half provide services for rabbits (51.2%) and hamster and chinchilla (49.9%) respectively. Relatively speaking, fewer provide services for reptiles (e.g. turtles, snakes, lizards, etc.) (26.8%) and birds (18.1%).

(Ref.: Chart 6.2.1a)

Chart 6.2.1a: Types of animals for which the veterinary clinics provide services



Types of veterinary services provided

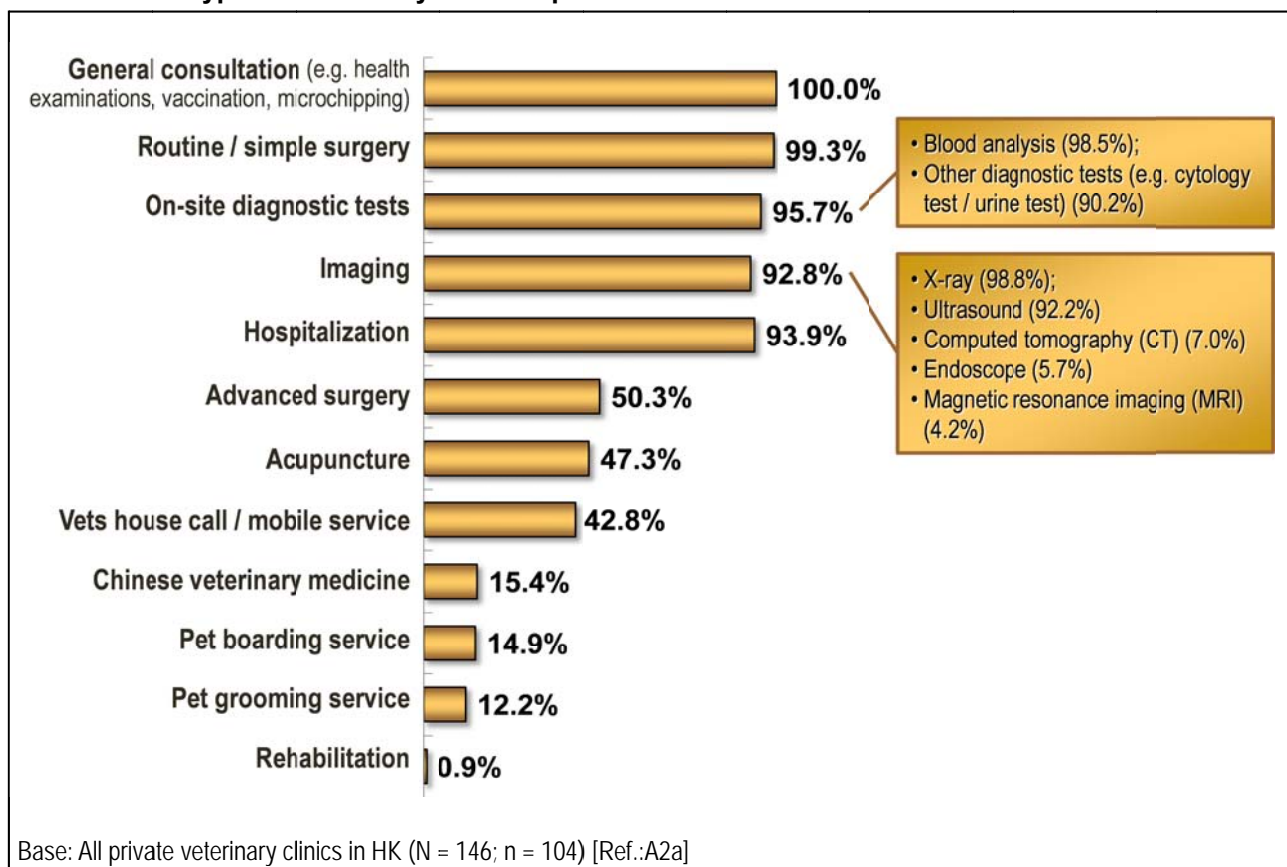
6.2.1.2 Apart from general consultation (e.g. health examination, vaccination, microchipping) which was provided by all vet clinics, it was found that the vast majority of vet clinics provide routine / simple surgery (99.3%), on-site diagnostic tests (95.7%), imaging (92.8%) and hospitalization (93.9%). Moreover, about half of the vet clinics provide advanced surgery (50.3%) and acupuncture (47.3%) respectively, and 42.8% provide vets house call service / mobile service.

6.2.1.3 Among those which provide on-site diagnostic tests, 98.5% provide blood analysis and 90.2% provide other diagnostic tests (e.g. cytology test / urine test).

6.2.1.4 Among those which provide imaging services, the vast majority provide X-ray imaging (98.8%) and ultrasound imaging (92.2%).

(Ref.: Chart 6.2.1b)

Chart 6.2.1b: Types of veterinary services provided



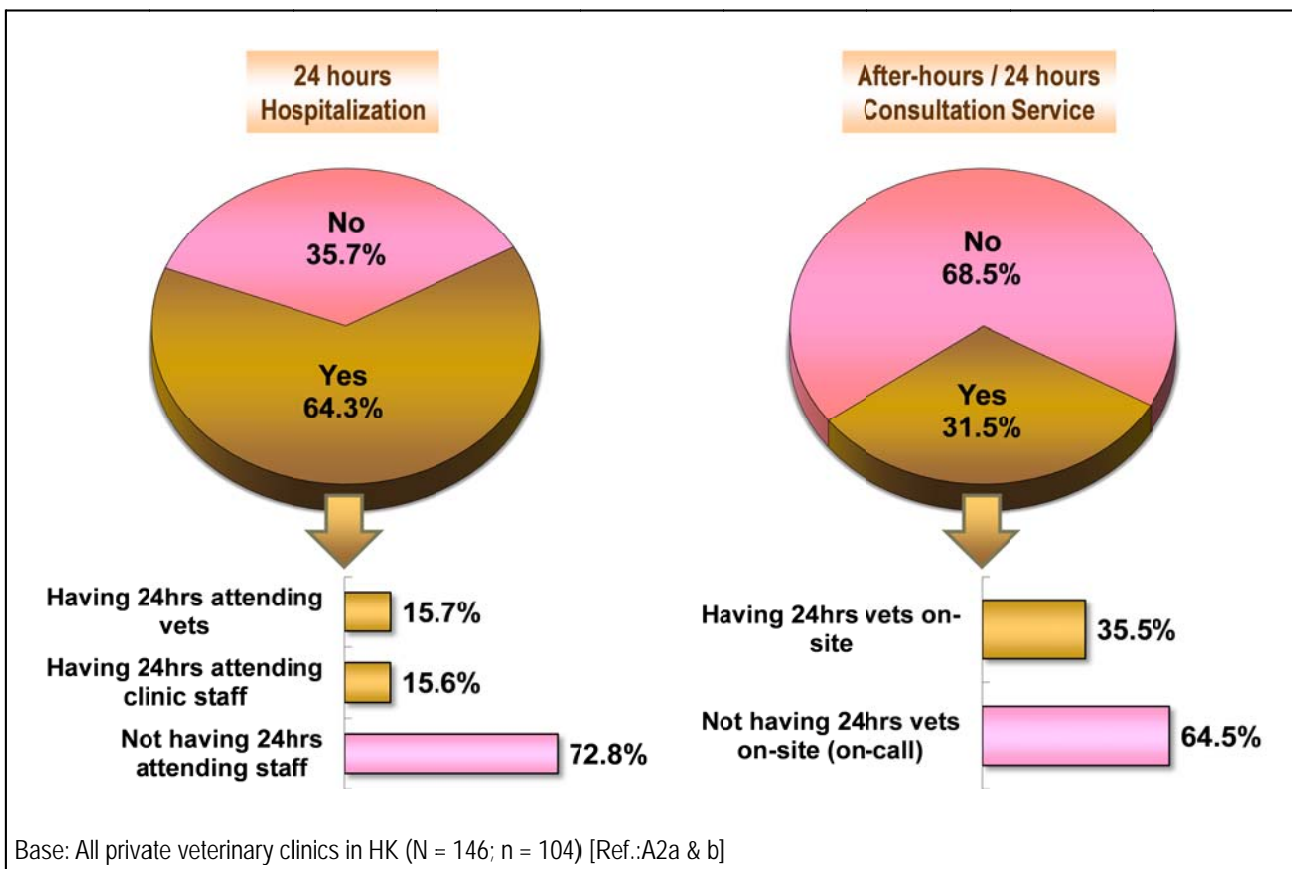
Provision of after-hours services

6.2.1.5 Of all vet clinics, nearly two-thirds (64.3%) have 24 hours hospitalization services. Yet, among them, only 27.2% have 24 hours attending staff (with 15.7% having attending vets and 15.6% having attending clinic staff).

6.2.1.6 Besides, more than three-tenths of the clinics (31.5%) have after-hours / 24 hours consultation service. Most of them (64.5%) said that they do not have 24 hours vets on-site (i.e. the vets will be attended on-call).

(Ref.: Chart 6.2.1c)

Chart 6.2.1c: Provision of after-hours services

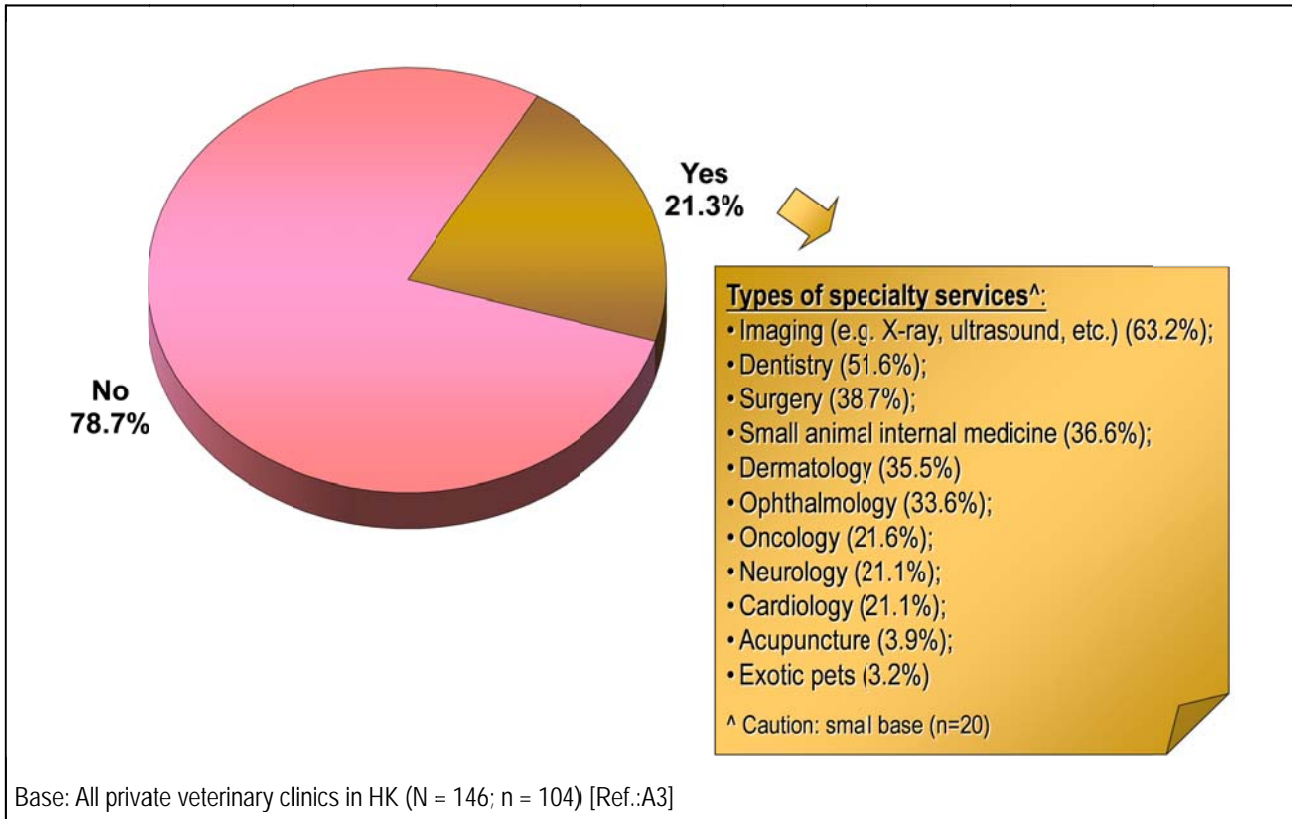


Provision of specialty services by veterinary clinics

6.2.1.7 About one-fifth of the clinics (21.3%) claimed that they provide specialty services. Among them, relatively more provide the specialty services of imaging (63.2%), followed by dentistry (51.6%), surgery (38.7%), small animal internal medicine (36.6%), dermatology (35.5%) and ophthalmology (33.6%).

(Ref.: Chart 6.2.1d)

Chart 6.2.1d: Provision of specialty services



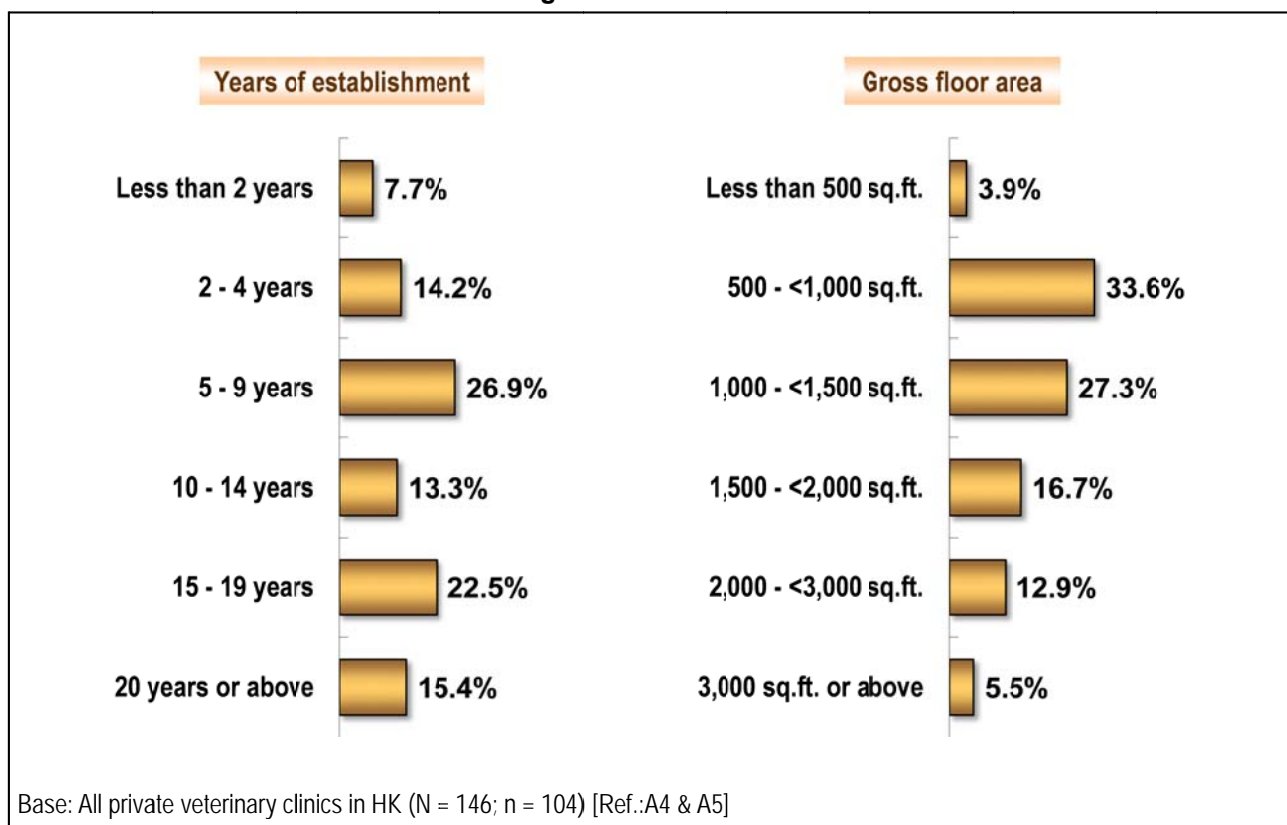
6.2.2 YEARS OF ESTABLISHMENT AND GROSS FLOOR AREA

6.2.2.1 More than half of the vet clinics (51.2%) have been established for 10 years or more. Only a few (7.7%) were established in the recent 2 years.

6.2.2.2 Besides, most of the clinics occupied 500 – less than 1,000 sq.ft. (33.6%) and 1,000 – less than 1,500 sq.ft. (27.3%) of gross floor area.

(Ref.: Chart 6.2.2)

Chart 6.2.2: Years of establishment and gross floor area



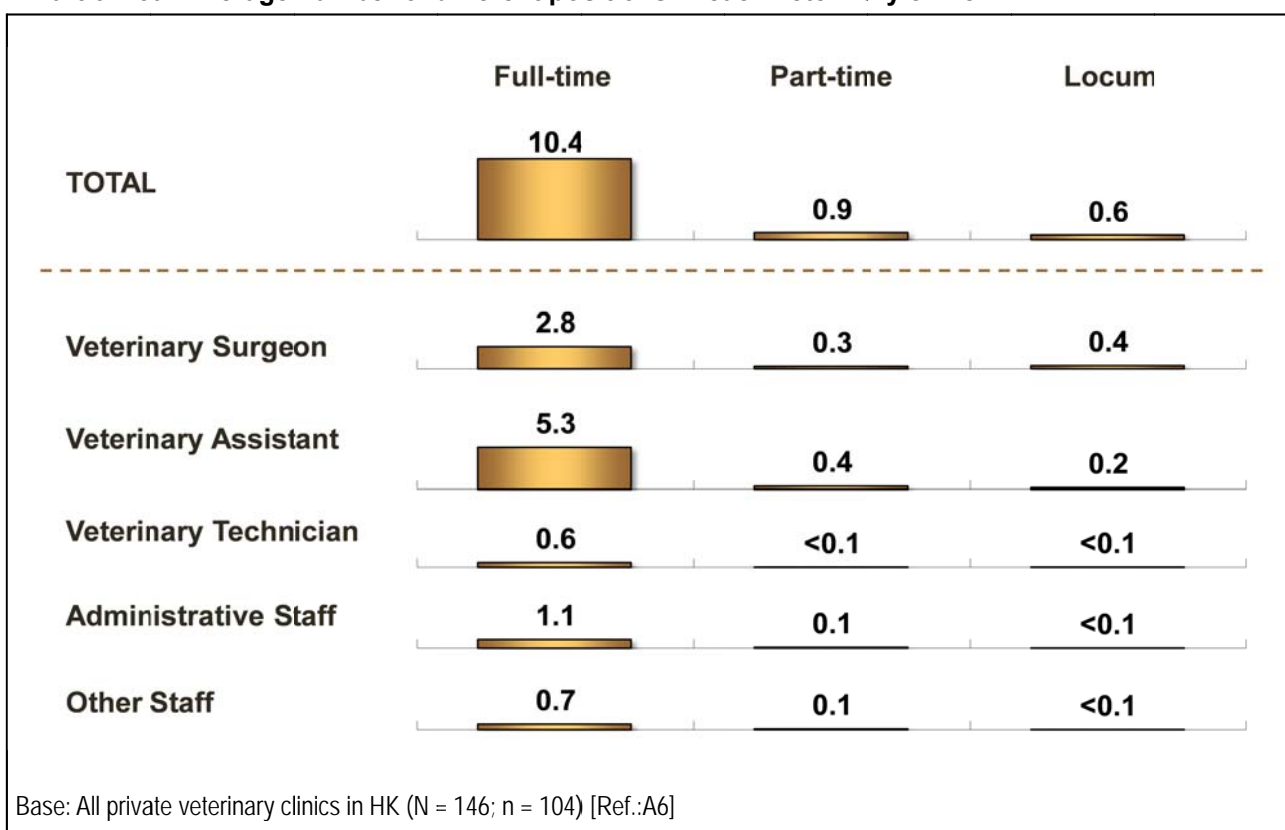
6.2.3 MANPOWER DEPLOYMENT

6.2.3.1 On average, each vet clinic has about 10 – 11 full-time positions (not persons, because a person can be employed by multiple clinics), including about 3 vet surgeons, 5 vet assistants, 1 vet technician, 1 administrative staff and 1 other staff. Part-time and locum positions accounted for about 13% of all positions only.

6.2.3.2 In total, it was estimated that there are about 1 520 full-time positions, 130 part-time positions and 80 locum positions in the industry^{Note 1}.

(Ref.: Chart 6.2.3a)

Chart 6.2.3a: Average number of different positions in each veterinary clinic

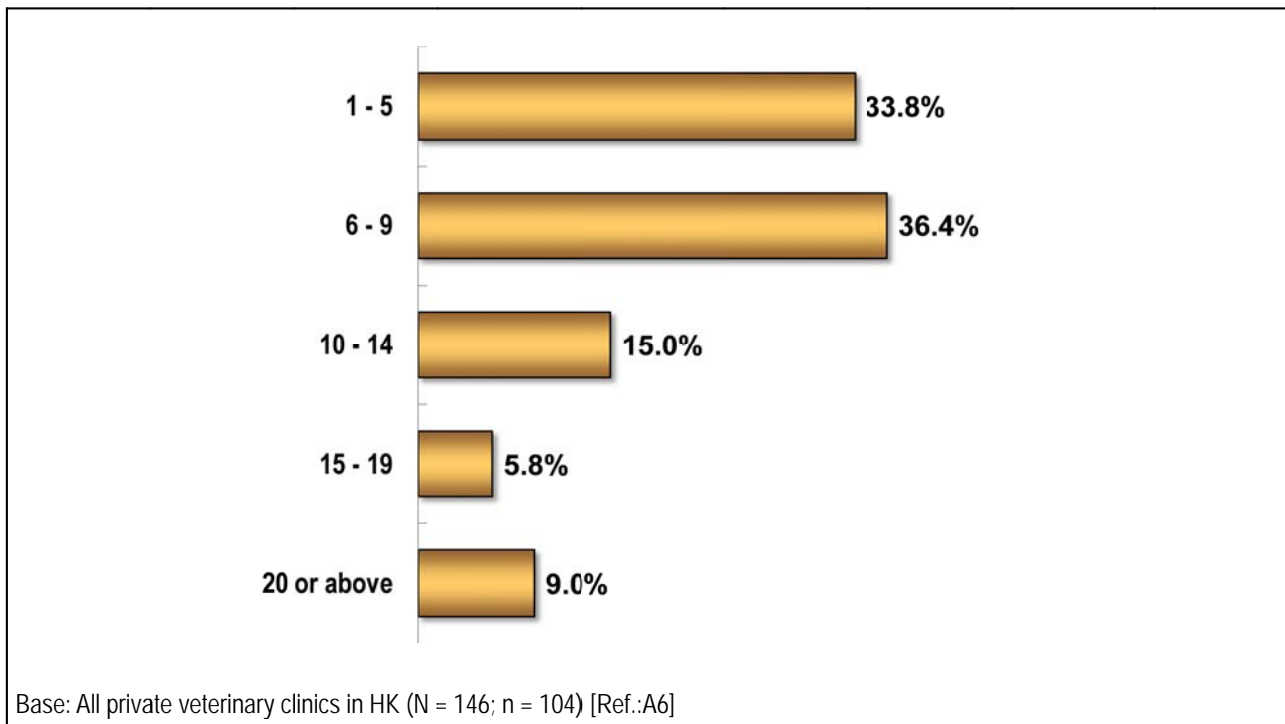


Note 1 The estimated numbers were rounded to the nearest ten.

6.2.3.3 In overall, it was found that about seven out of ten vet clinics (70.2%) were small-sized establishments, with employment size of 1 – 9, while nearly one-tenth (9.0%) were medium-sized with employment size of 20 or above.

(Ref.: Chart 6.2.3b)

Chart 6.2.3b: Employment size (number of full-time staff)



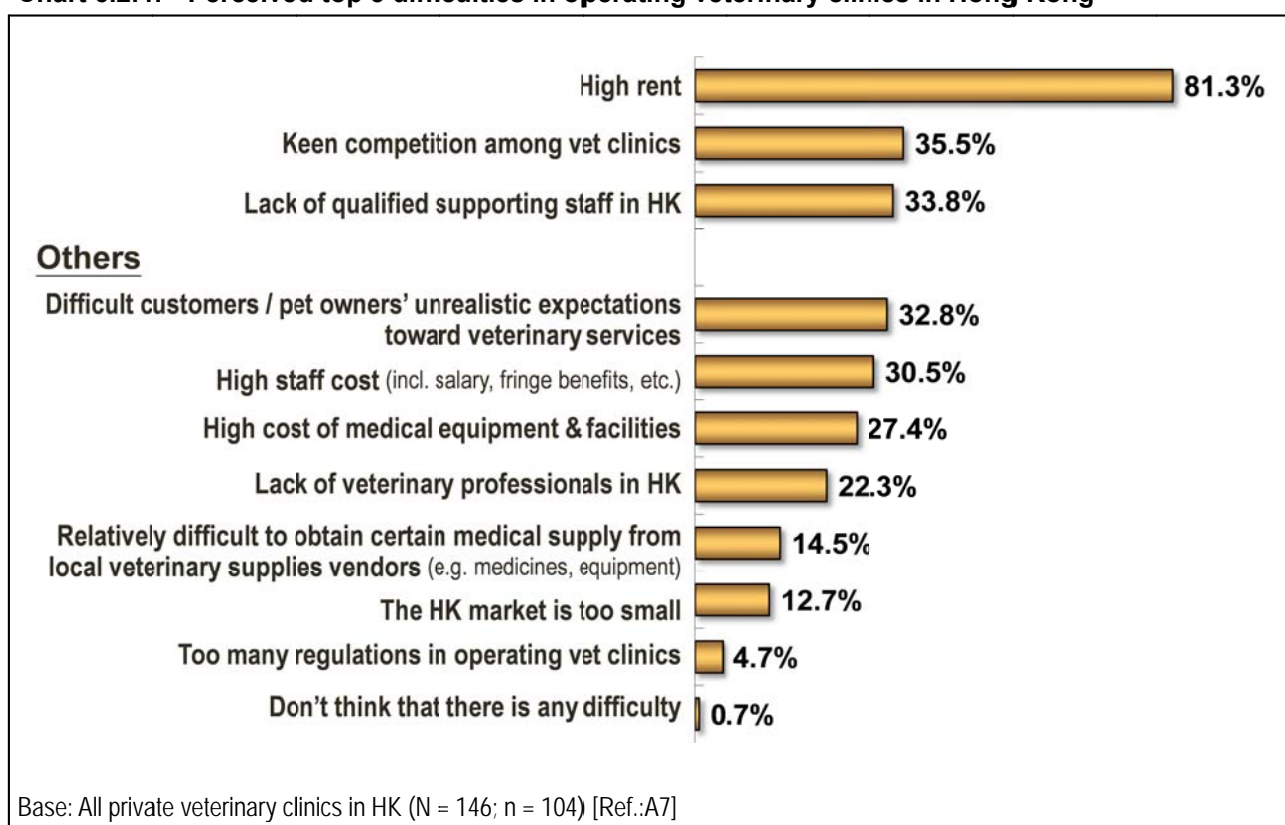
6.2.4 DIFFICULTIES IN OPERATING VETERINARY CLINICS IN HONG KONG

6.2.4.1 When asked about their perceived difficulties in operating vet clinics in Hong Kong, it was found that the majority of clinics (81.3%) ranked “high rent” as one of the top 3 difficulties. It was followed distantly by “keen competition among vet clinics” (35.5%) and “lack of qualified supporting staff in HK” (33.8%).

6.2.4.2 Apart from the above 3 aspects, many clinics mentioned that “difficult customers / pet owners’ unrealistic expectations toward veterinary services” (32.8%) and “high staff cost (incl. salary, fringe benefits, etc.)” (30.5%) are their major difficulties.

(Ref.: Chart 6.2.4)

Chart 6.2.4: Perceived top 3 difficulties in operating veterinary clinics in Hong Kong



6.3 FUTURE PLANS

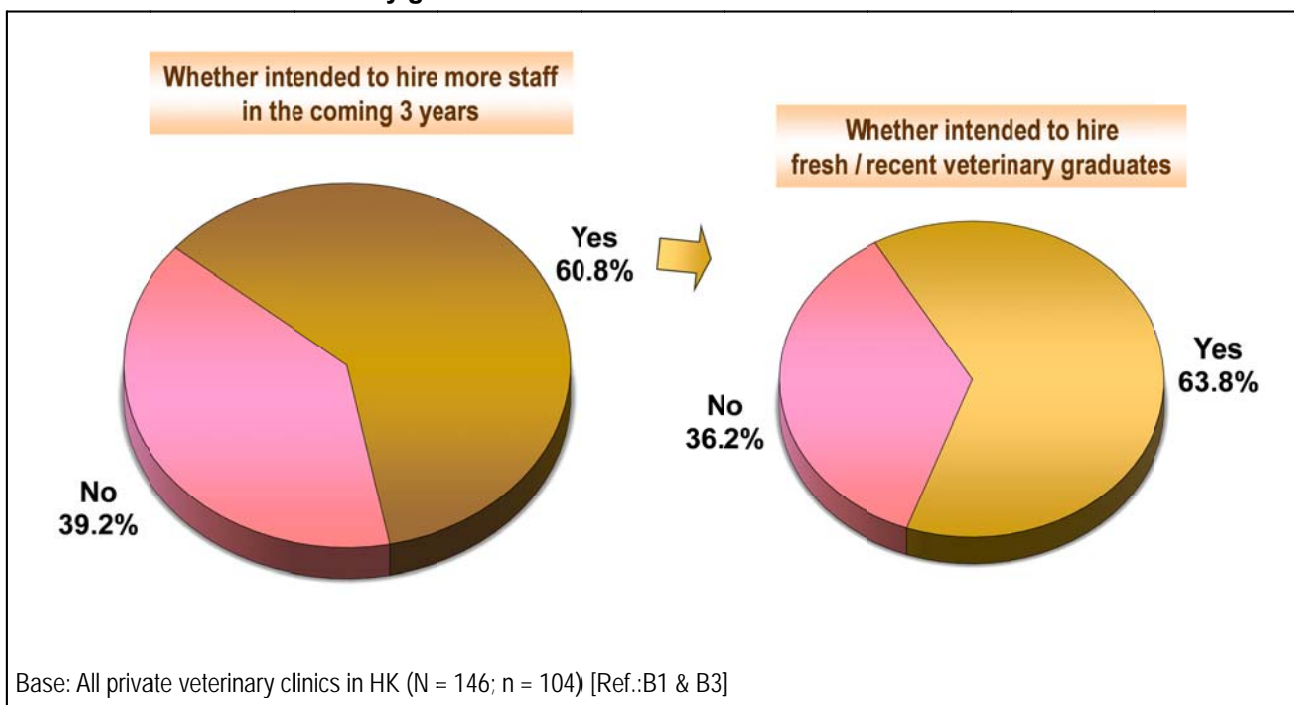
6.3.1 MANPOWER REQUIREMENTS IN THE COMING 3 YEARS

Intention of hiring more staff in the coming 3 years, and whether intended to hire fresh / recent veterinary graduates

6.3.1.1 About three-fifths of the vet clinics (60.8%) claimed that they intended to hire more staff in the coming 3 years. Among them, 63.8% claimed that they intended to hire fresh / recent veterinary graduates.

(Ref.: Chart 6.3.1a)

Chart 6.3.1a: Intention of hiring more staff in the coming 3 years, and whether intended to hire fresh / recent veterinary graduates



Manpower requirements of all veterinary clinics in the coming 12 months

6.3.1.2 It was estimated that during the survey period in total there were about 1 520 full-time positions, 130 part-time positions and 80 locum positions in the industry at the time of enumeration, including about 400 veterinary surgeon (vet surgeon) positions.

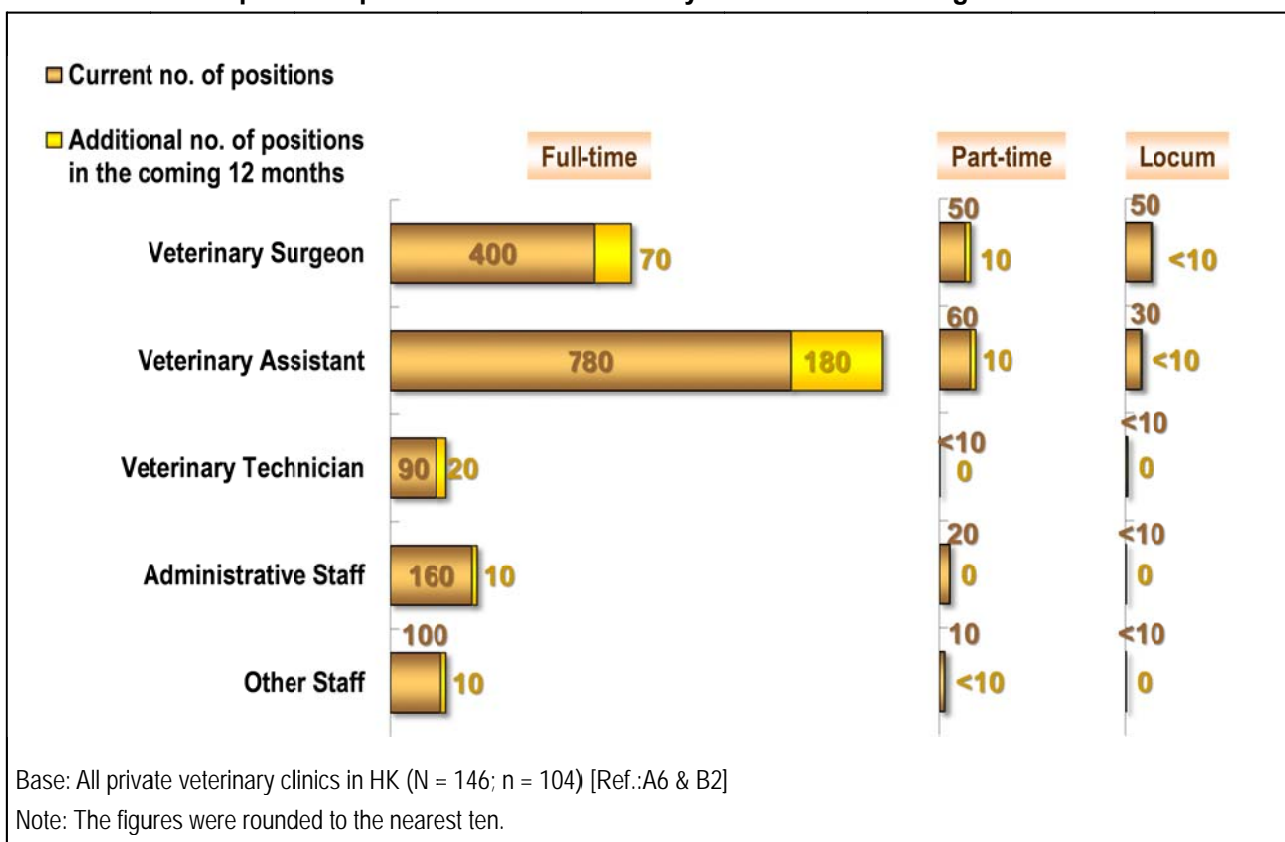
6.3.1.3 Among the vet clinics which claimed that they intended to hire more staff in the coming 3 years, they were further asked about the number of additional positions that they anticipated to open in the coming 12 months.

6.3.1.4 The survey results showed that about 280 – 290 additional full-time positions will be opened in the coming 12 months, including about 70 vet surgeons, 180 vet assistants, 20 vet technicians, 10 administrative staff and 10 other staff.

6.3.1.5 Moreover, it was estimated that there are about 20 part-time additional positions and less than 10 locum additional positions in the industry in the coming 12 months^{Note 2}.

(Ref.: Chart 6.3.1b)

Chart 6.3.1b: Manpower requirements of all veterinary clinics in the coming 12 months



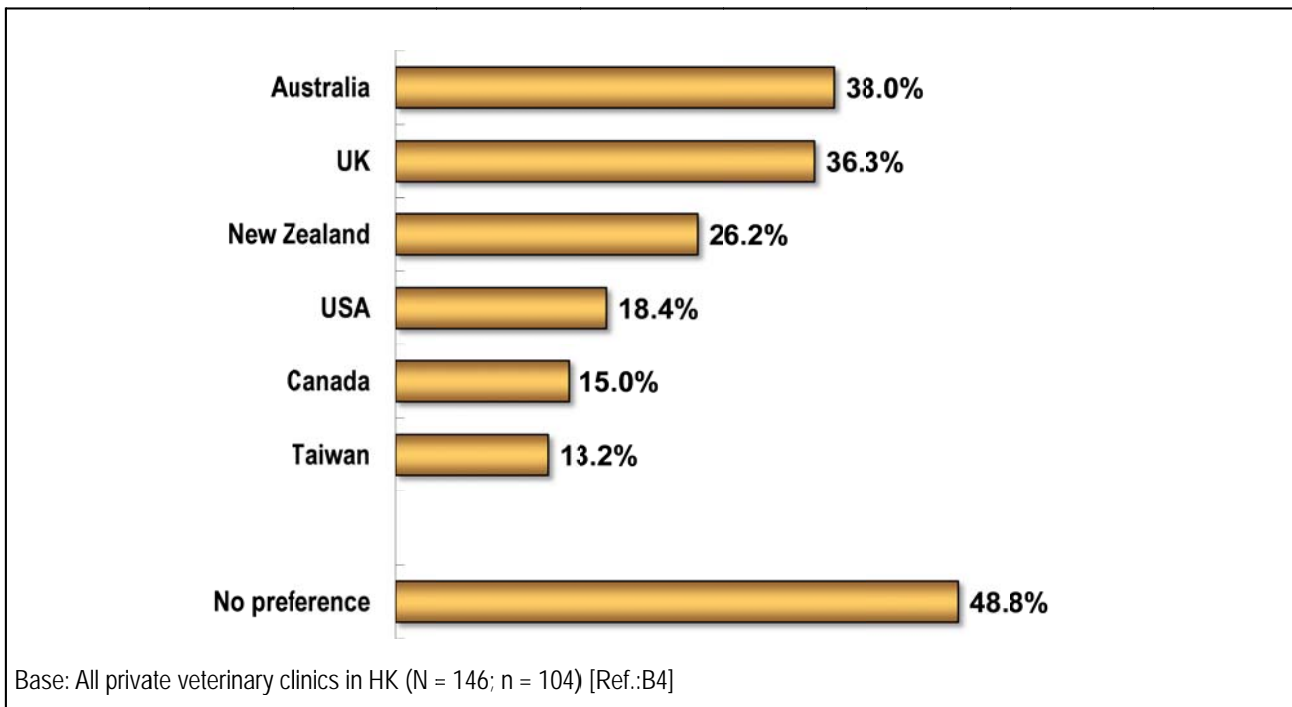
Note 2 The estimated numbers were rounded to the nearest ten.

Preference in hiring vets who graduated from particular countries / regions

6.3.1.5 Nearly half of the vet clinics (48.8%) said that they had no preference in hiring vets who graduated from universities in particular countries / regions. Of those which had preference, relatively more preferred vets who graduated from Australia (38.0%) and UK (36.3%), followed by New Zealand (26.2%).

(Ref.: Chart 6.3.1c)

Chart 6.3.1c: Preference in hiring veterinary surgeons who graduated from universities in particular countries / regions

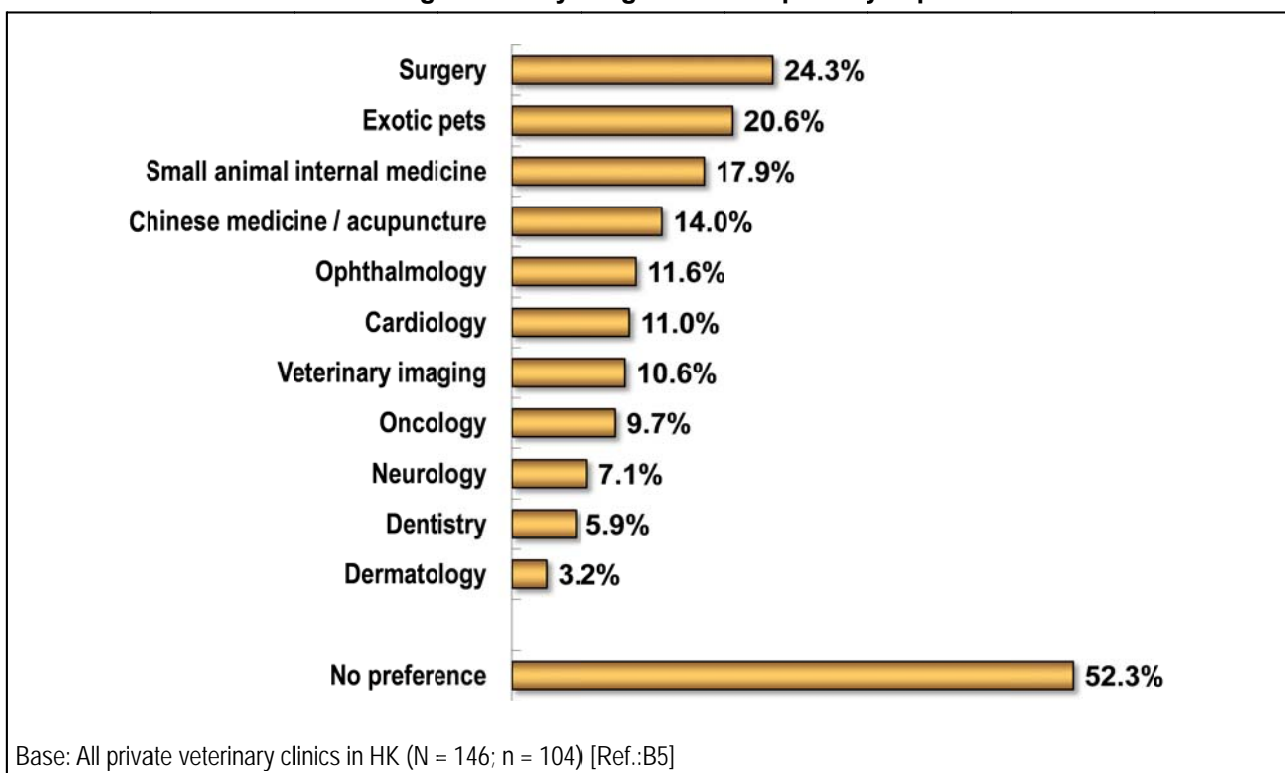


Preference in hiring vets with specialty / special interests

6.3.1.6 More than half of the vet clinics (52.3%) said that they had no preference in hiring vets with specialty / special interests. Of those which had preference, slightly more preferred vets with specialty / special interests of surgery (24.3%), exotic pets (20.6%), small animal internal medicine (17.9%) and Chinese medicine / acupuncture (14.0%).

(Ref.: Chart 6.3.1d)

Chart 6.3.1d: Preference in hiring veterinary surgeons with specialty / special interests



6.3.2 RELOCATION AND EXPANSION PLANS IN THE COMING 3 YEARS

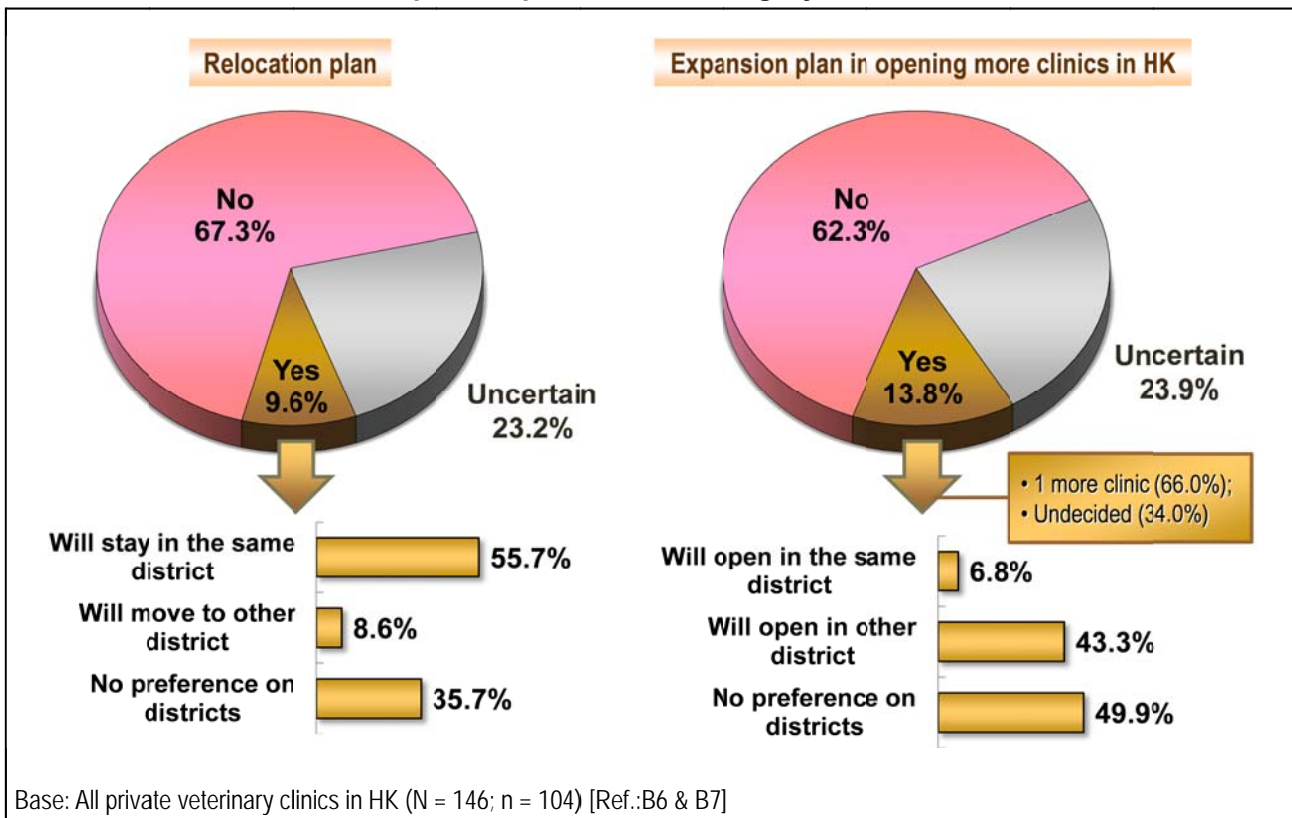
6.3.2.1 About one-tenth of the vet clinics respectively claimed that they had relocation plan (9.6%) and expansion plan in opening more clinics in Hong Kong (13.8%) in the coming 3 years.

6.3.2.2 Among those which had relocation plan, 55.7% said they will stay in the same district, while 8.6% will move to other district.

6.3.2.3 Among those which had expansion plan, only 6.8% said the additional clinics will be opened in the same district, whereas 43.3% preferred other district. Besides, most of them (66.0%) intended to open one more clinic only in the coming 3 years.

(Ref.: Chart 6.3.2)

Chart 6.3.2: Relocation and expansion plans in the coming 3 years



6.3.2.4 Assumed that those which claimed “undecided on the number of additional clinics” (for expansion) will open one clinic only, it was estimated that in total about 20 more vet clinics will be opened in the coming 3 years (which will be increased by 13.7% between 2016 and 2019).

6.3.2.5 Furthermore, assumed that those which claimed “no preference on district” (for relocation or expansion) will remain in the same district or will open more clinics in the same district, it was observed that the proportion of vet clinics in Kowloon East will still be relatively small (4.8%; vs. more than 18% in other districts) in the coming 3 years. With reference to the distribution of households keeping pets in different districts, the proportion of vet clinics in Kowloon East also seemed to be small.

(Ref.: Tables 6.3.2a & b)

Table 6.3.2a: Number of veterinary clinics during the survey period (May – June 2016) and in the coming 3 years – by districts

	May – June 2016		In the coming 3 years	
	No.	(%)	No.	(%)
HK Island	35	24.0	37	22.3
Kowloon East	5	3.4	8	4.8
Kowloon West	38	26.0	44	26.5
NT East	29	19.9	31	18.7
NT West	39	26.7	46	27.7
Total	146	100.0	166	100.0

Base: All private veterinary clinics in HK (N = 146; n = 104)

Notes: (1) Assumed that those which claimed “no preference on district” (for relocation or expansion) will remain in the same district; and

(2) Assumed that those which claimed “undecided on the no. of additional clinics” (for expansion) will open 1 clinic only;

Table 6.3.2b: Number of households which kept pets (except fishes) in the past 12 months and in the coming 3 years – by districts

	In the past 12 months		In the coming 3 years	
	No.	(%)	No.	(%)
HK Island	35 300	12.2	38 900	12.5
Kowloon East	39 500	13.7	40 500	13.0
Kowloon West	36 700	12.7	41 800	13.4
NT East	88 500	30.6	94 900	30.5
NT West	89 200	30.8	95 000	30.5
Total	289 100	100.0	311 100	100.0

Base: All households which kept pets (except fishes) in the past 12 months before enumeration (N = 289 100; n = 308) [Ref.: X3]

Note: The number of households were rounded to the nearest hundred.

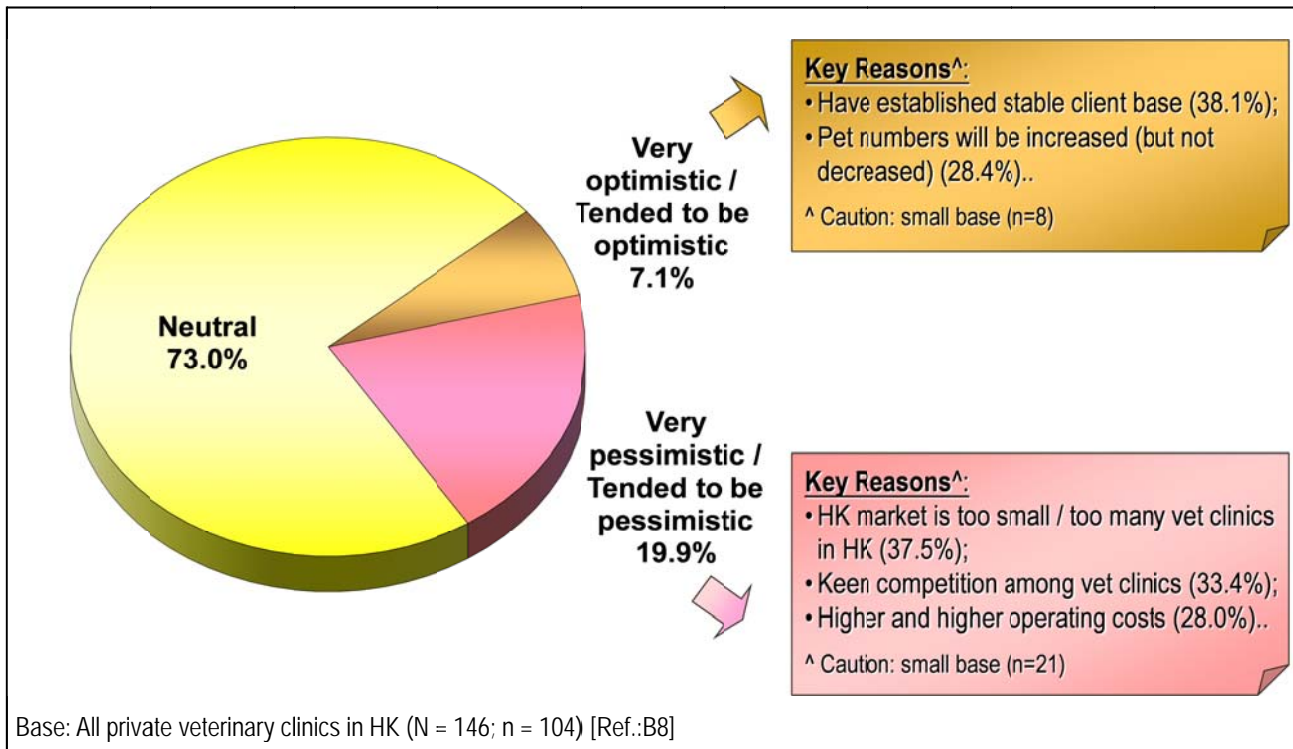
6.3.3 VIEWS ON THE PROSPECT OF OPERATING VETERINARY CLINICS IN HONG KONG

6.3.3.1 Of all vet clinics, it was observed that only 7.1% said they were very optimistic / tended to be optimistic about the prospect of operating vet clinics in Hong Kong, whilst a considerable proportion (19.9%) were very pessimistic / tended to be pessimistic. The remaining majority (73.0%) were neutral on this issue.

6.3.3.2 It was noteworthy that among those which were pessimistic, the key reasons are “HK market is too small / too many vet clinics in HK” (37.5%), “keen competition among vet clinics” (33.4%) and “higher and higher operating costs” (28.0%).

(Ref.: Chart 6.3.3)

Chart 6.3.3: Views on the prospect of operating veterinary clinics in Hong Kong



6.3.3.3 When analyzed by their employment size (i.e. the number of full-time staff), it was observed that the smaller the employment sizes, the higher were the proportions of clinics which were pessimistic (from 11.9% for employment size of 10 or above; to 32.7% for 4 or below).

(Ref.: Table 6.3.3)

Table 6.3.3: Views on the prospect of operating veterinary clinics in Hong Kong – by employment size (number of full-time staff)

	4 or below (%)	5 – 9 (%)	10 or above (%)
Very optimistic / Tended to be optimistic	3.2	6.8	10.7
Neutral	64.1	74.9	77.4
Very pessimistic / Tended to be pessimistic	32.7	18.4	11.9

Base: All private veterinary clinics in HK (N = 146; n = 104)

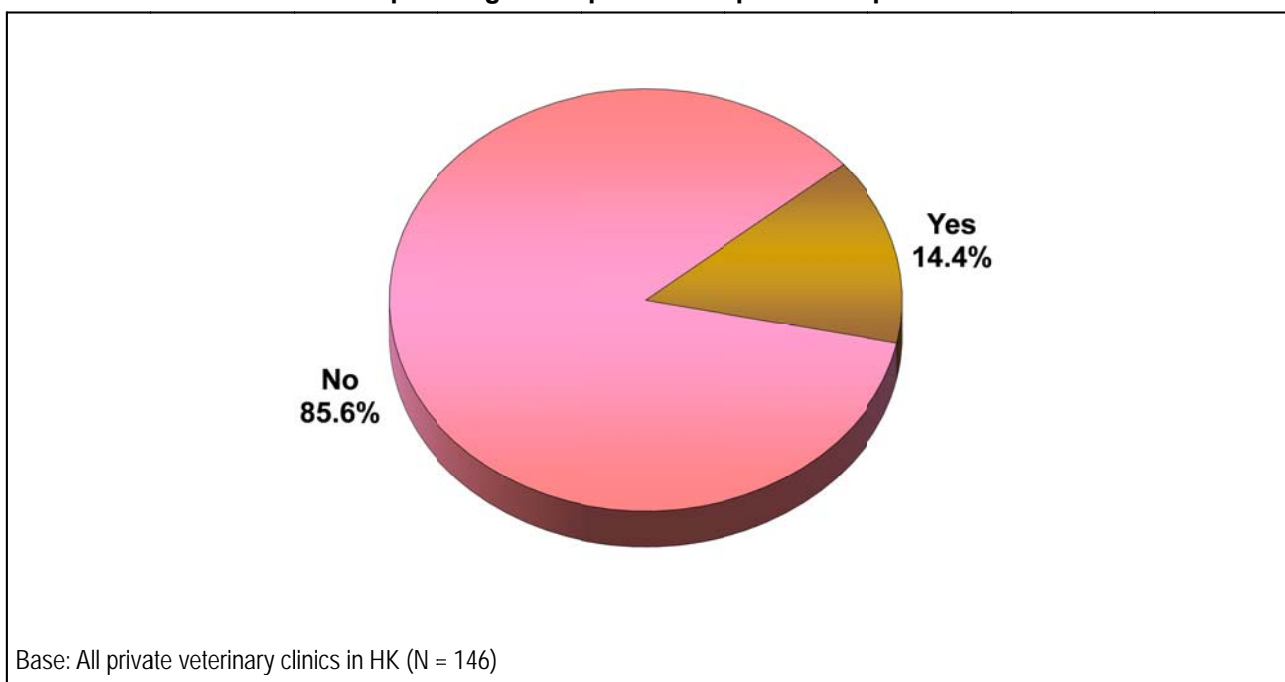
6.4 PRICING INFORMATION

6.4.1 WHETHER PRICING INFORMATION IS READILY ACCESSIBLE

6.4.1.1 When visiting the vet clinics, interviewers were required to pay attention on whether the pricing information is readily accessible. The survey results showed that only 14.4% of the clinics posted the general price list at prominent positions of the clinics. For the remaining majority (85.6%), pricing information is not readily accessible for walk-in customers.

(Ref.: Chart 6.4.1)

Chart 6.4.1: Whether clinics posted general price list at prominent positions of the clinics



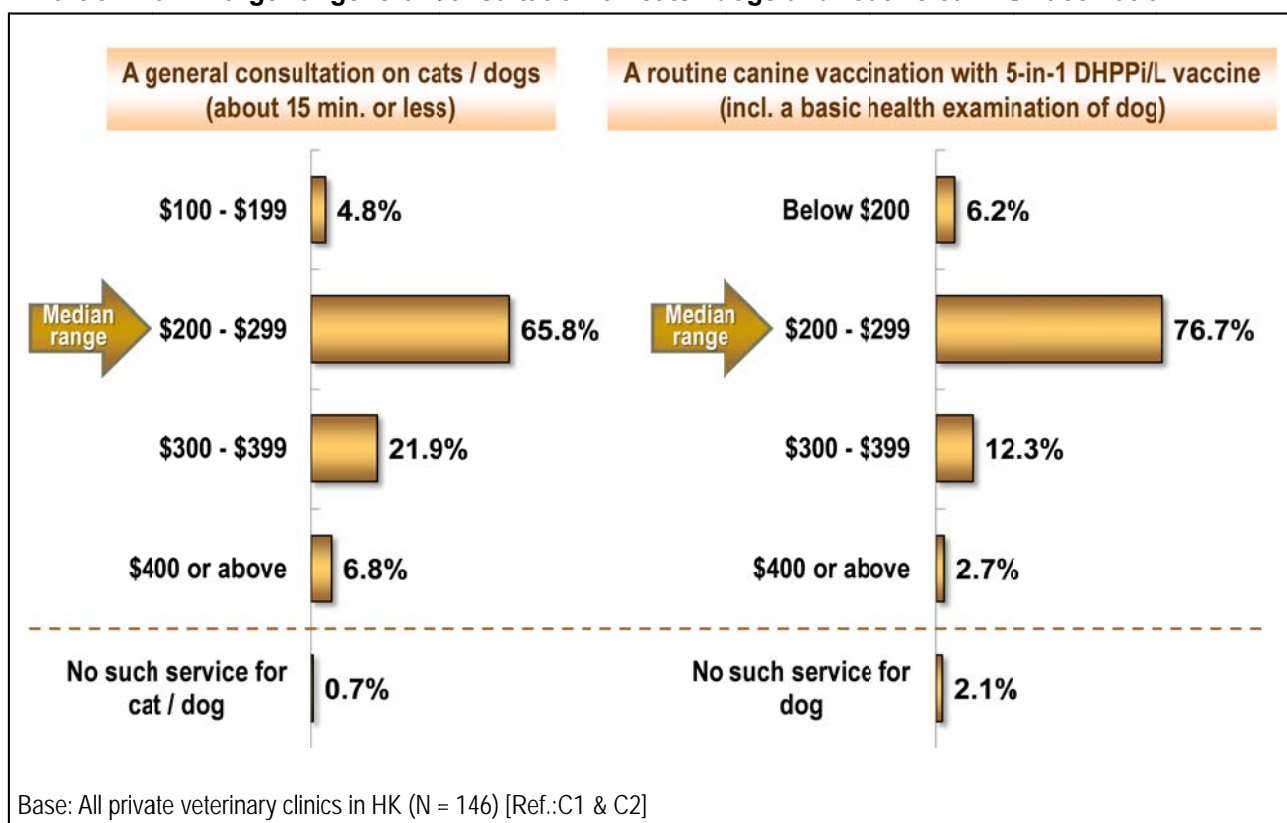
6.4.2 RANGES OF FEES AND CHARGES

6.4.2.1 As mentioned in section 3.2.2, questions about the fees and charges of some general veterinary services were listed on the questionnaire. For those vet clinics which did not respond to these questions, mystery shoppers who acted as ordinary customers have visited them for collecting the pricing information.

6.4.2.2 For a general consultation on cats / dogs (about 15 minutes or less) and a routine canine vaccination with 5-in-1 DHPPi/L vaccine (including a basic health examination of dog), most of the clinics charged \$200 - \$299 (65.8% and 76.7% respectively).

(Ref.: Chart 6.4.2a)

Chart 6.4.2a: Charge for general consultation on cats / dogs and routine canine vaccination



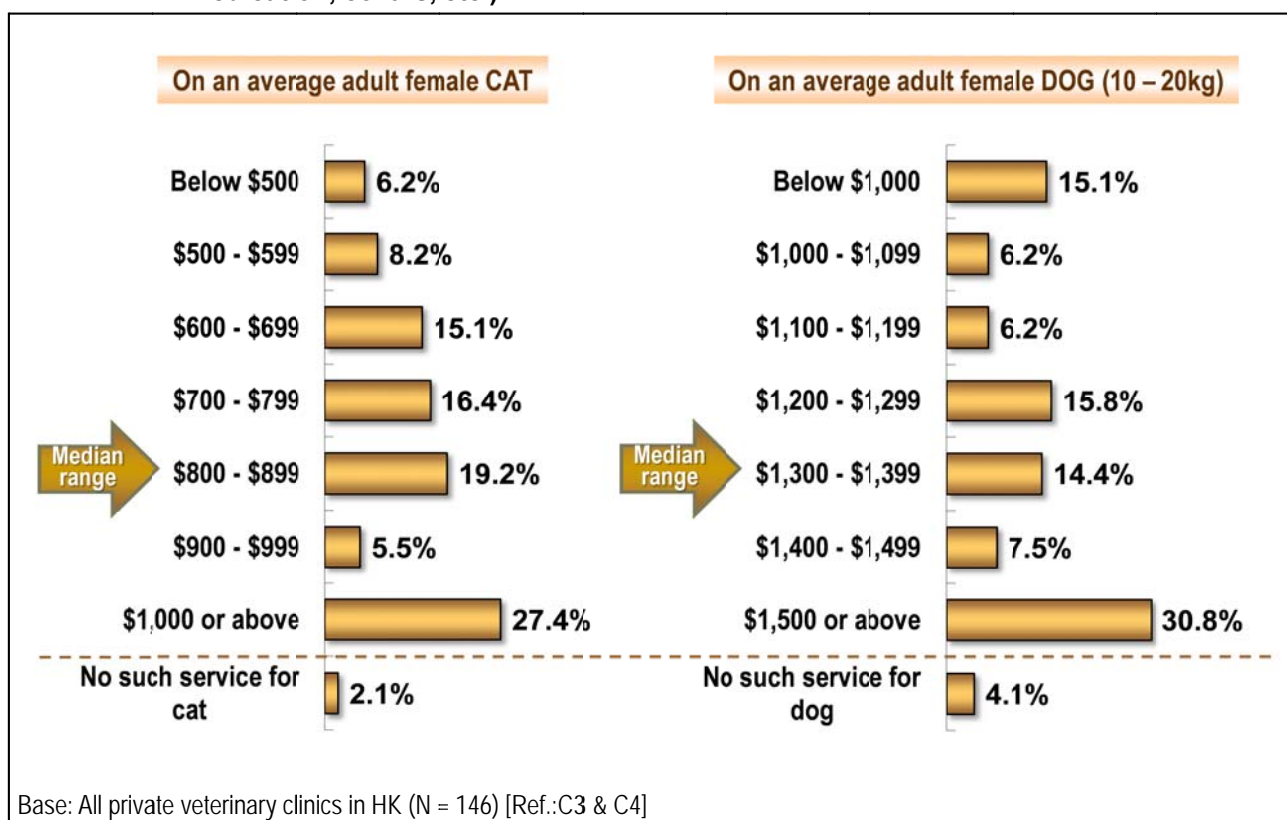
6.4.2.3 For routine de-sexing (non-complicated) surgeries on cats / dogs, the survey revealed that there are variations among different vet clinics.

6.4.2.4 For a routine de-sexing surgery on an average adult female cat (including anesthetic, but excluding any blood test, additional post-surgery oral medication, collars, etc.), about 15% of the clinics charged below \$600, 32% charged \$600 - \$799, 25% charged \$800 - \$999, and 27% charged \$1,000 or above. The median price range was \$800 - \$899.

6.4.2.5 For a routine de-sexing surgery on an average adult female dog (10 – 20kg) (including anesthetic, but excluding any blood test, additional post-surgery oral medication, collars, etc.), about 22% of the clinics charged below \$1,100, 23% charged \$1,100 - \$1,299, 23% charged \$1,300 - \$1,499, and 31% charged \$1,500 or above. The median price range was \$1,300 - \$1,399.

(Ref.: Chart 6.4.2b)

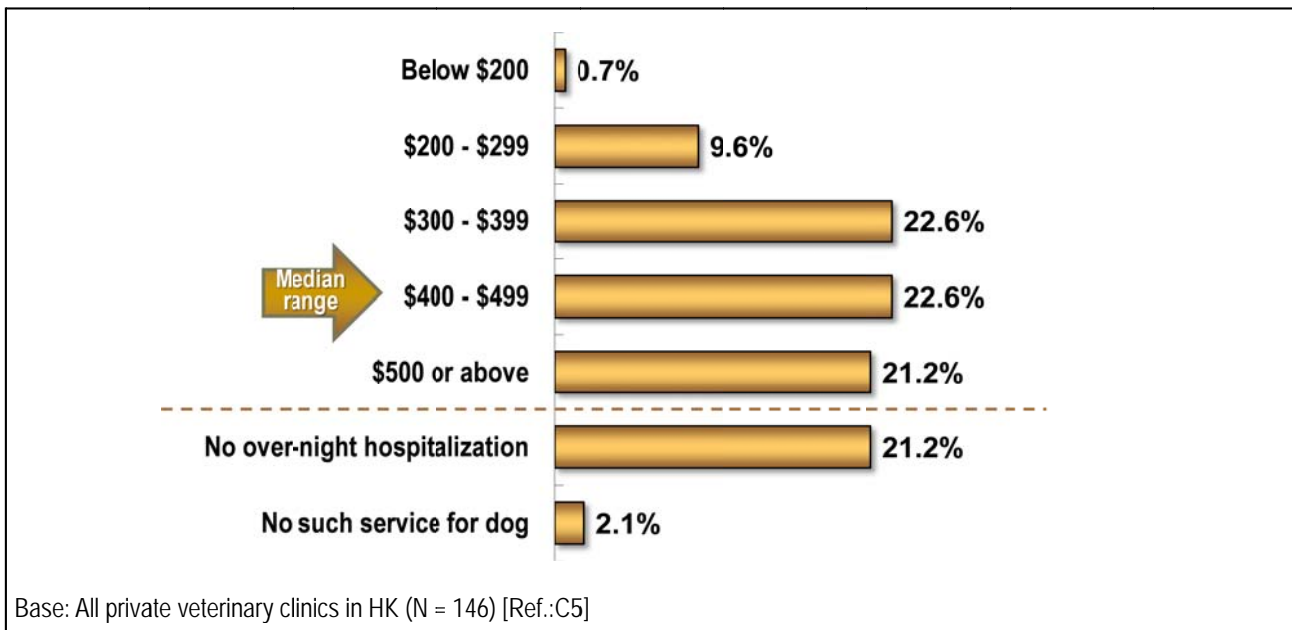
Chart 6.4.2b: Charge for routine de-sexing (non-complicated) surgery on an average adult female cat / dog (10 – 20kg) (incl. anesthetic, but excl. any blood test, additional post-surgery oral medication, collars, etc.)



6.4.2.6 For over-night hospitalization for an adult dog (under 10kg) (excluding any additional care, such as intensive care, oxygenation, heat-pad warming, medication given, etc.), about 10% of the clinics charged below \$300, 23% charged \$300 - \$399, 23% charged \$400 - \$499 and 21% charged \$500 or above. Besides, about 23% of the clinics did not provide such service. Among those which have such service, the median price range was \$400 - \$499.

(Ref.: Chart 6.4.2c)

Chart 6.4.2c: Charge for over-night hospitalization for an adult dog (under 10kg) (excl. any additional care, such as intensive care, oxygenation, heat-pad warming, medication given, etc.)



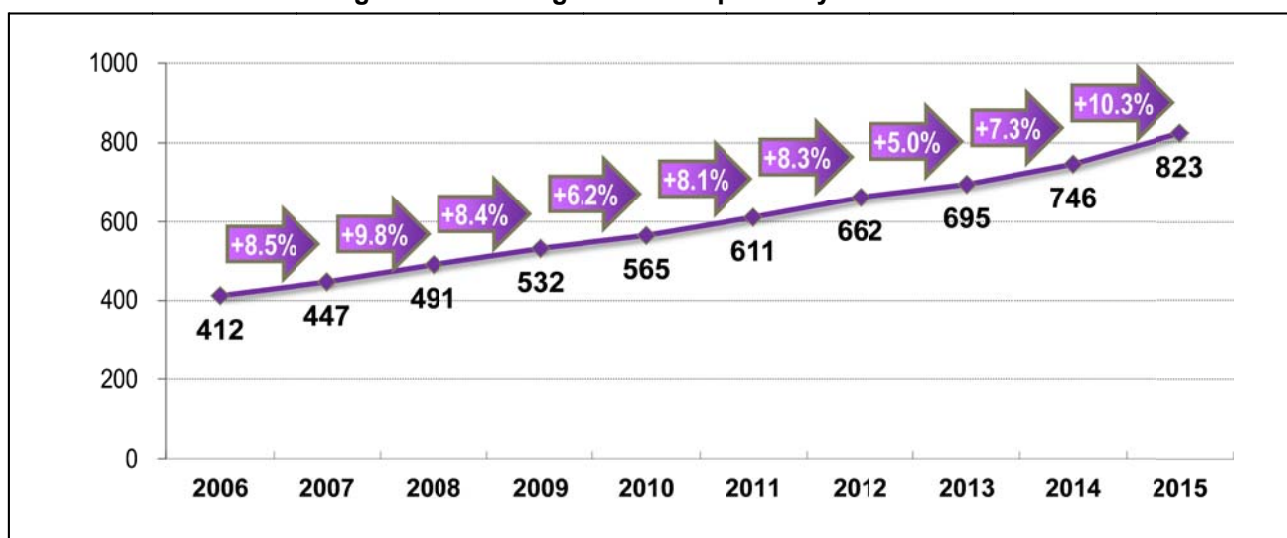
7 SURVEY FINDINGS – VETERINARY SURGEONS

7.1 NUMBER OF REGISTERED VETERINARY SURGEONS IN HONG KONG

7.1.1 According to the statistical data from VSB, there were 823 registered vet surgeons in Hong Kong in 2015, which was about a double as compared with 10 years ago (412 in 2006).

(Ref.: Chart 7.1a)

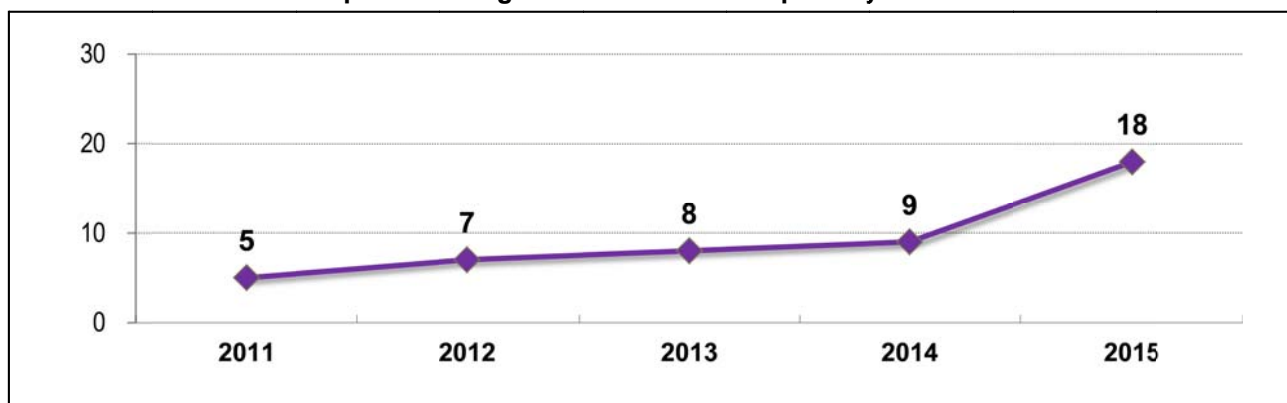
Chart 7.1a: Number of registered vet surgeons in the past 10 years



7.1.2 In addition, there were 18 registered vet surgeons who were authorized by VSB to advertise as, or profess to be, specialists in Hong Kong in 2015, which was increased by 360% as compared with 5 in 2011).

(Ref.: Chart 7.1b)

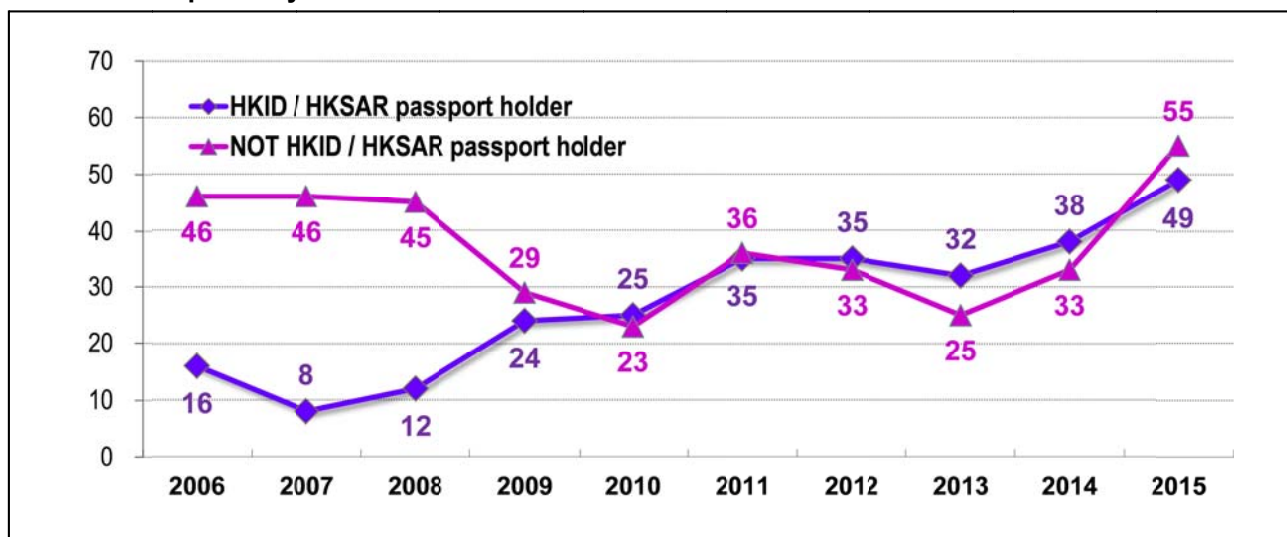
Chart 7.1b: Number of specialists registered in VSB in the past 5 years



7.1.3 For the newly registered vet surgeons in the past 10 years, it was observed that since 2009, the number of Hong Kong Identity Card (HKID) / HKSAR passport holders and non-HKID / HKSAR passport holders were very close.

(Ref.: Chart 7.1c)

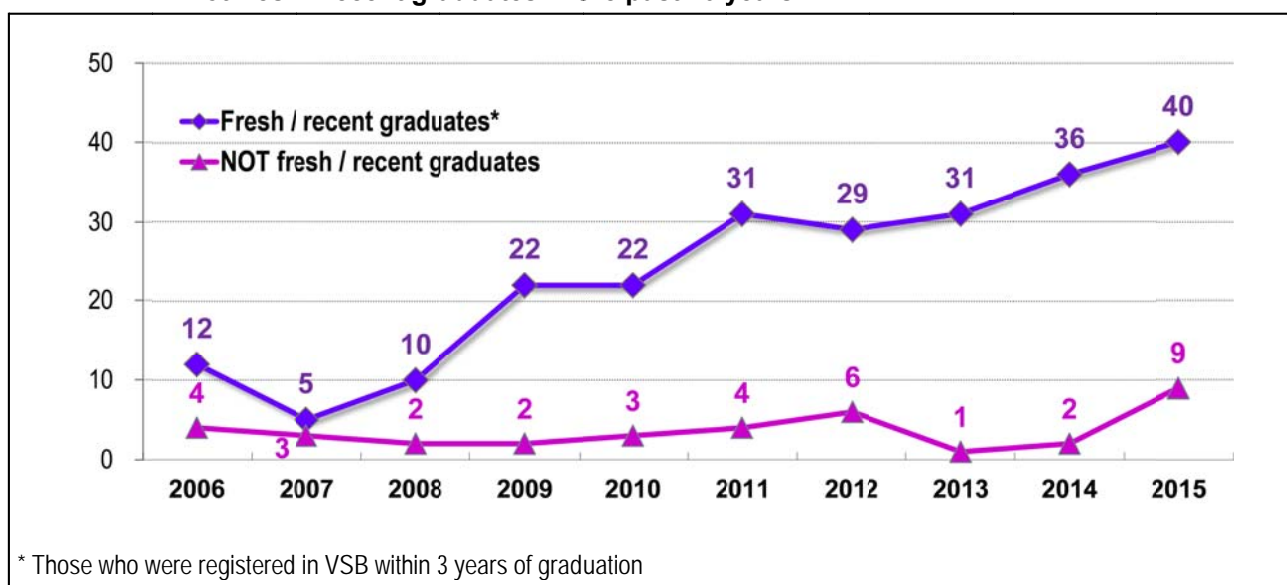
Chart 7.1c: Number of newly registered vet surgeons with / without HKID / HKSAR passport in the past 10 years



7.1.4 Among the newly registered vet surgeons who were holding HKID / HKSAR passport in the past 10 years, it was observed that there are more and more fresh / recent graduates who were registered in VSB within 3 years of graduation. On the other hand, the numbers of those who were not fresh / recent graduates are relatively stable.

(Ref.: Chart 7.1d)

Chart 7.1d: Number of newly registered vet surgeons (with HKID / HKSAR passport) who were / were not fresh / recent graduates in the past 10 years



* Those who were registered in VSB within 3 years of graduation

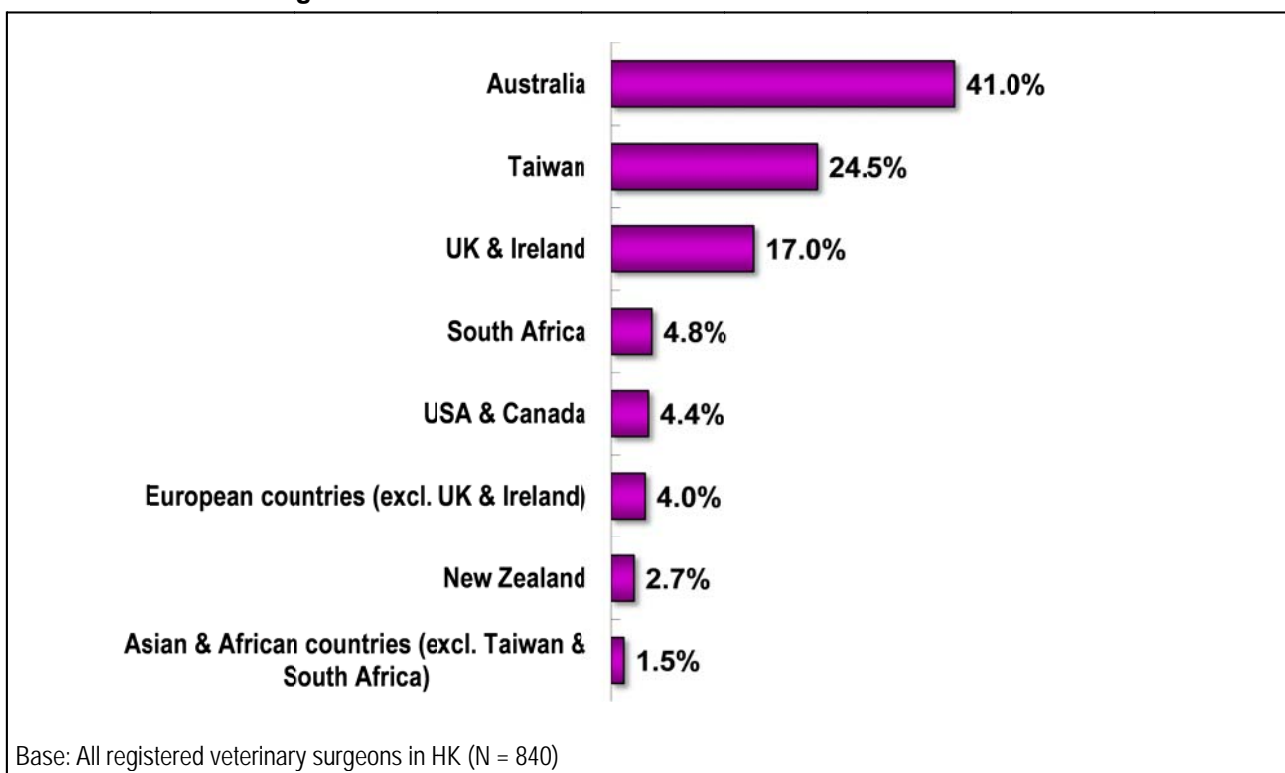
7.2 PROFILE OF THE REGISTERED VETERINARY SURGEONS

Place of graduation

7.2.1 This survey covered 840 veterinary surgeons (vets) who were registered in VSB as at 10 March 2016. Among them, relatively more obtained their veterinary qualifications in Australia (41.0%), followed by Taiwan (24.5%) and UK and Ireland (17.0%).

(Ref.: Chart 7.2a)

Chart 7.2a: Place of graduation



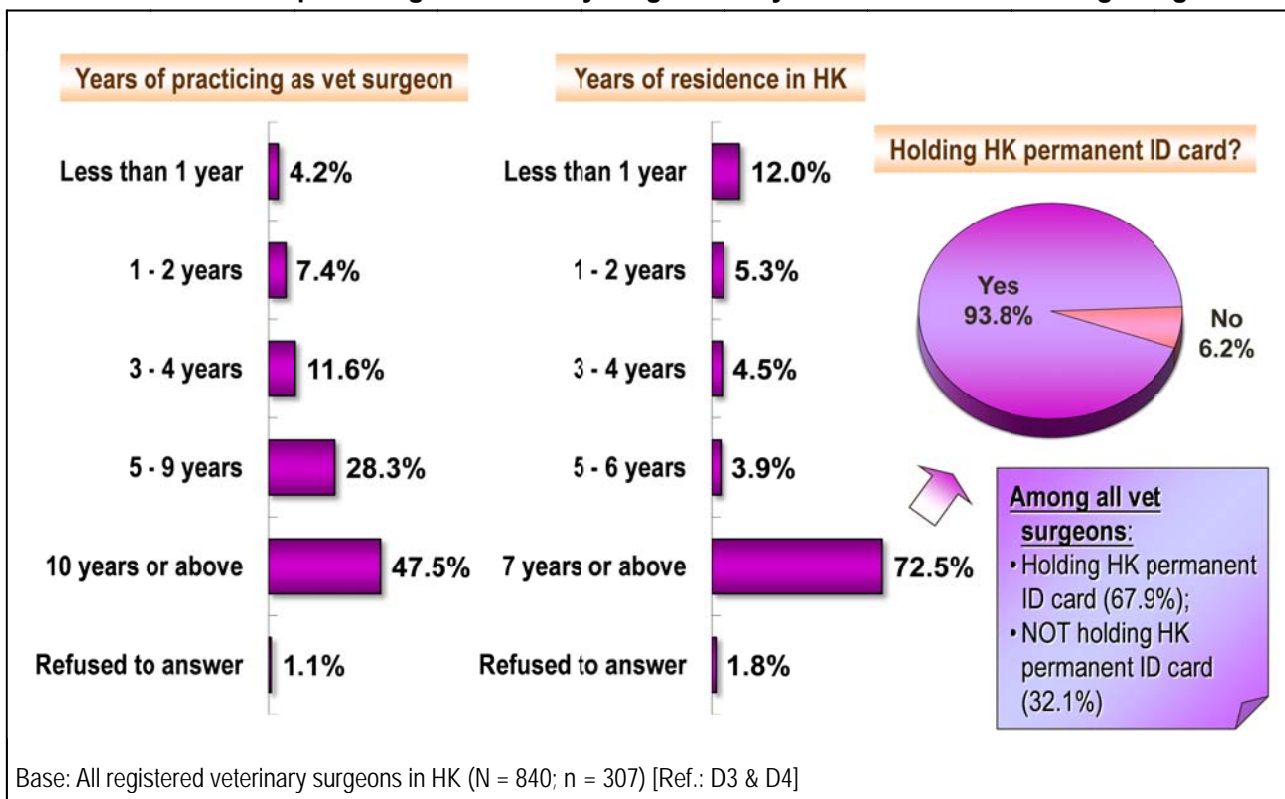
Years of practicing as vets and years of residence in Hong Kong

7.2.2 Of all registered vets, about 12% were fresh / recent graduates, with 2 years of experience or less in practicing, whilst about 76% have 5 years of experience or more (28.3% for 5 – 9 years; 47.5% for 10 years or above).

7.2.3 Besides, about seven out of ten registered vets (72.5%) have been living in Hong Kong for 7 years or above, in which the vast majority (93.8%) have Hong Kong permanent identity card. In other words, among all registered vets, 67.9% are Hong Kong permanent residents.

(Ref.: Chart 7.2b)

Chart 7.2b: Years of practicing as veterinary surgeon and years of residence in Hong Kong

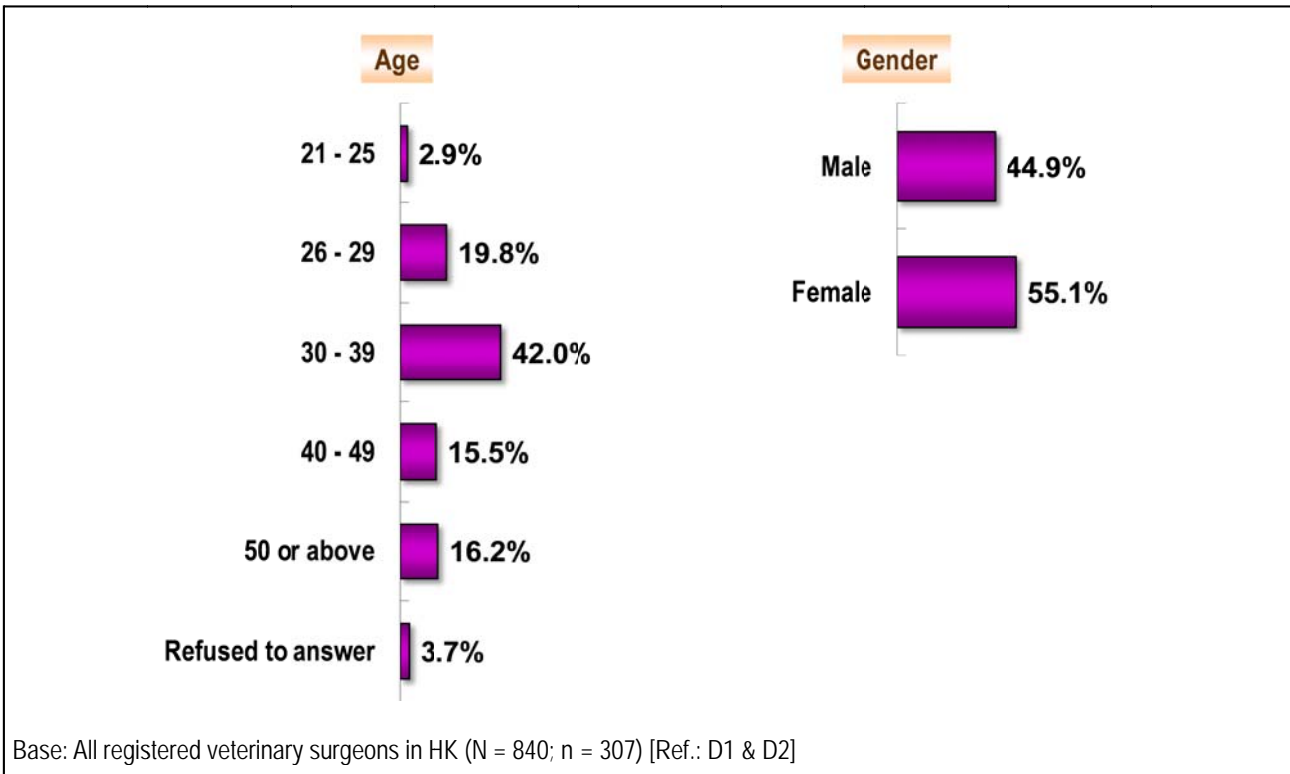


Demographic information

7.2.4 The proportion of female registered vets (55.1%) was relatively higher than that of the males (44.9%). Relatively more of the registered vets aged 30 – 39 (42.0%) and 40 or above (31.7%).

(Ref.: Chart 7.2c)

Chart 7.2c: Demographic information



7.3 WORKING STATUS

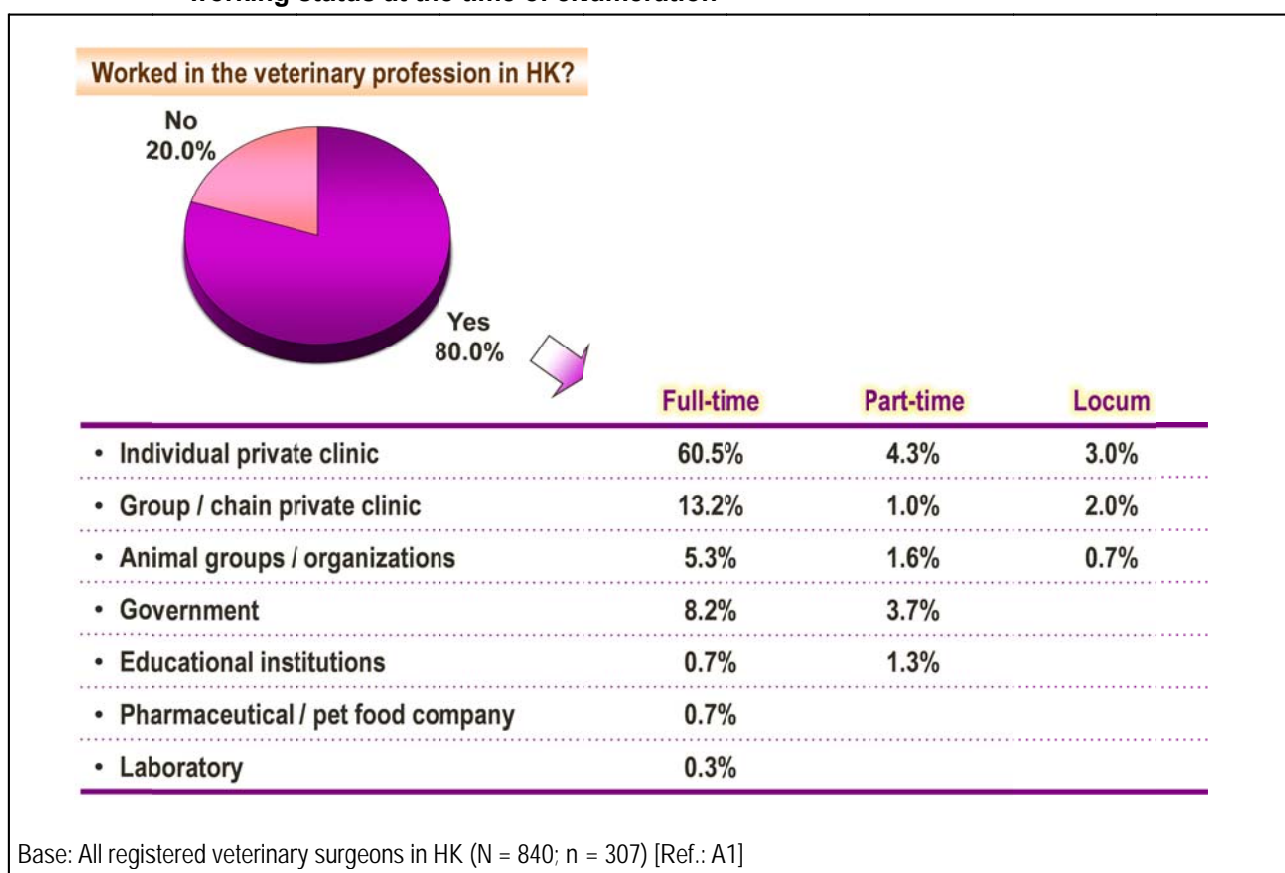
Types of veterinary establishments for which they were working and the corresponding working status at the time of enumeration

7.3.1 Of all registered vets, the majority (80.0%) were working in the veterinary profession in Hong Kong at the time of enumeration. Among them, the majority were working full-time in individual private clinics (60.5%) and/or group / chain private clinics (13.2%). Some were working full-time in the government (8.2%), animal groups / organizations (5.3%), educational institutions (0.7%), pharmaceutical / pet food companies (0.7%) and/or laboratory (0.3%).

7.3.2 In overall, about 87% of the vets have full-time jobs, 11% have part-time jobs and 4% were working as locum at the time of enumeration^{Note 3}.

(Ref.: Chart 7.3a)

Chart 7.3a: Types of veterinary establishments for which they were working and the corresponding working status at the time of enumeration



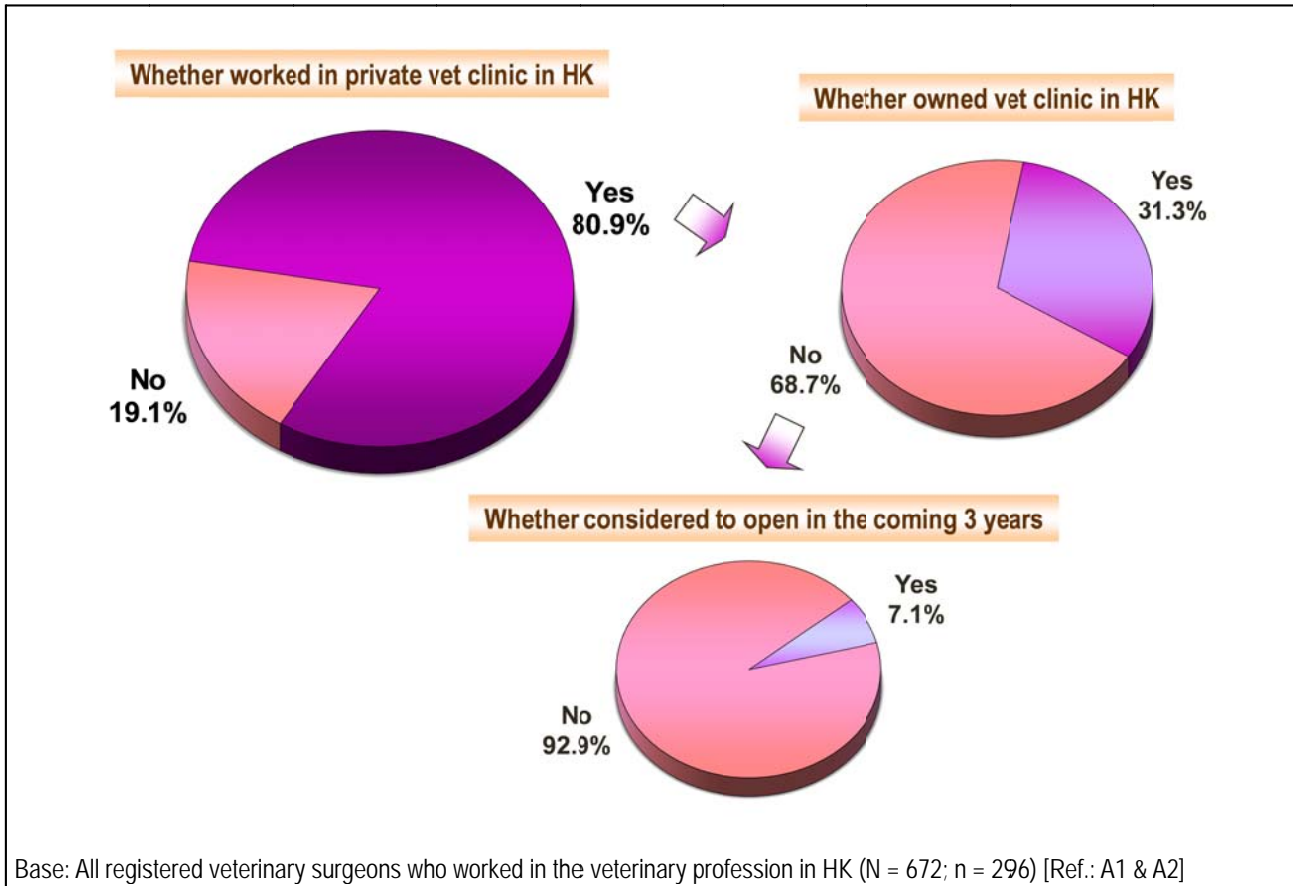
Note 3 Some of the vets have more than one job at the time of enumeration.

Ownership of veterinary clinic in Hong Kong

7.3.3 Among the 80.9% of the vets who worked in individual or group / chain private clinics, 31.3% claimed that they owned veterinary clinics in Hong Kong. Among those who did not, only 7.1% said they considered to open their own clinic in the coming 3 years.

(Ref.: Chart 7.3b)

Chart 7.3b: Ownership of veterinary clinic in Hong Kong

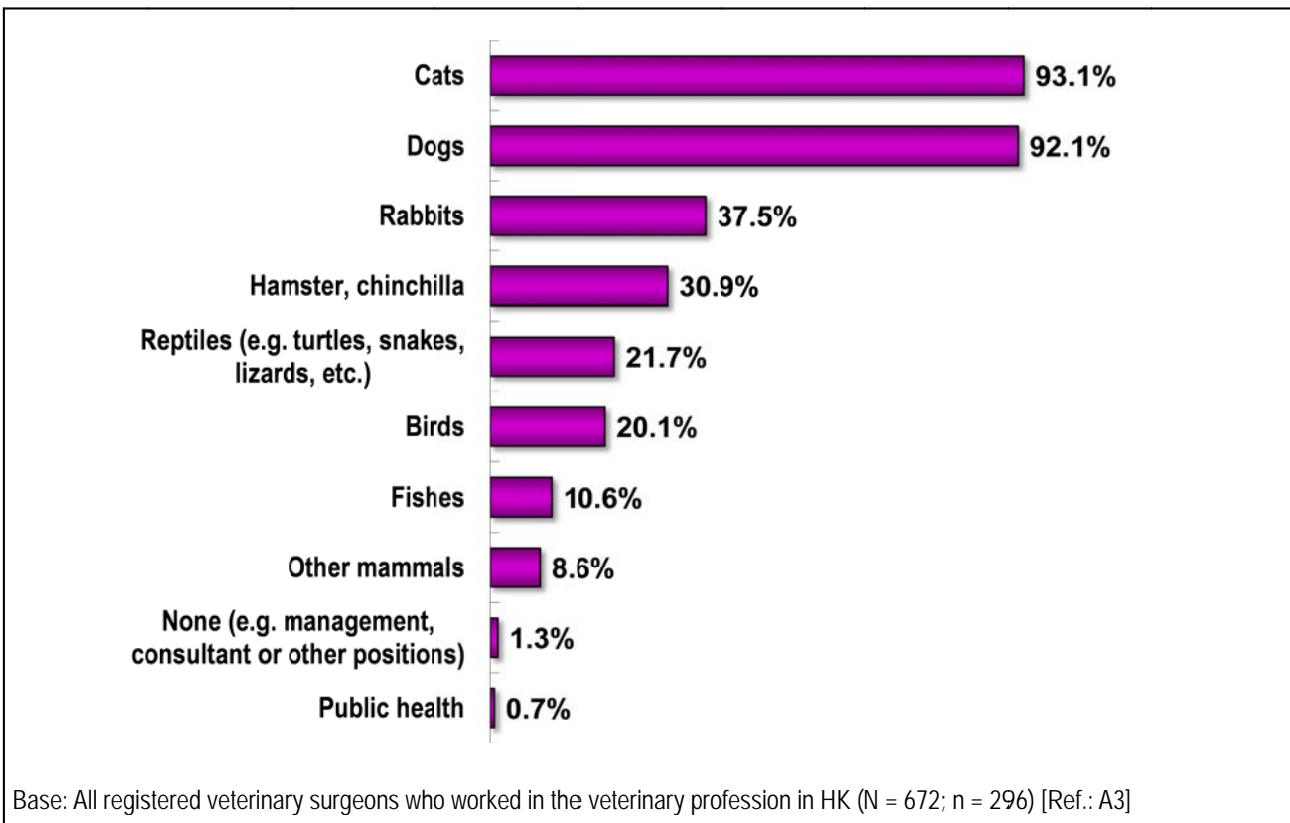


Types of animals for which the vets provide services

7.3.4 Of all vets who worked in the veterinary profession in Hong Kong, virtually all provide services for cats (93.1%) and/or dogs (92.1%). For other types of animals, relatively more vets provide services for rabbits (37.5%), followed by hamster and chinchilla (30.9%), reptiles (e.g. turtles, snakes, lizards, etc.) (21.7%) and birds (20.1%).

(Ref.: Chart 7.3c)

Chart 7.3c: Types of animals for which the vet surgeons provide services



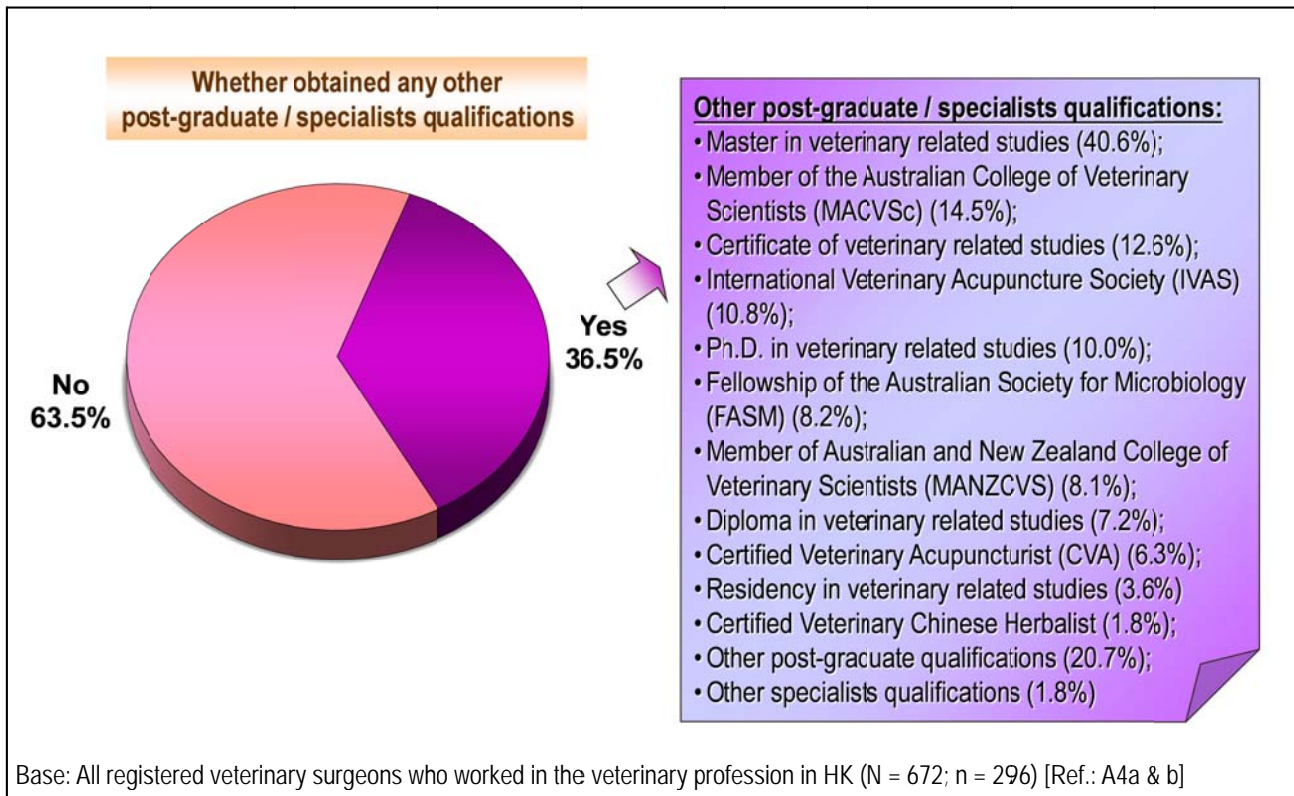
7.4 OTHER POST-GRADUATE / SPECIALISTS QUALIFICATION

Whether obtained any other veterinary post-graduate / specialists qualifications

7.4.1 Of all vets who worked in Hong Kong, apart from their basic veterinary qualifications, more than one-third (36.5%) said they obtained other veterinary post-graduate / specialists qualifications. Among them, relatively more obtained master in veterinary related studies (40.6%), followed by Member of the Australian College of Veterinary Scientists (MACVSc) (14.5%), certificate in veterinary related studies (12.6%) and obtained the qualifications in International Veterinary Acupuncture Society (IVAS) (10.8%).

(Ref.: Chart 7.4a)

Chart 7.4a: Whether the vet surgeons obtained any other veterinary post-graduate / specialists qualifications

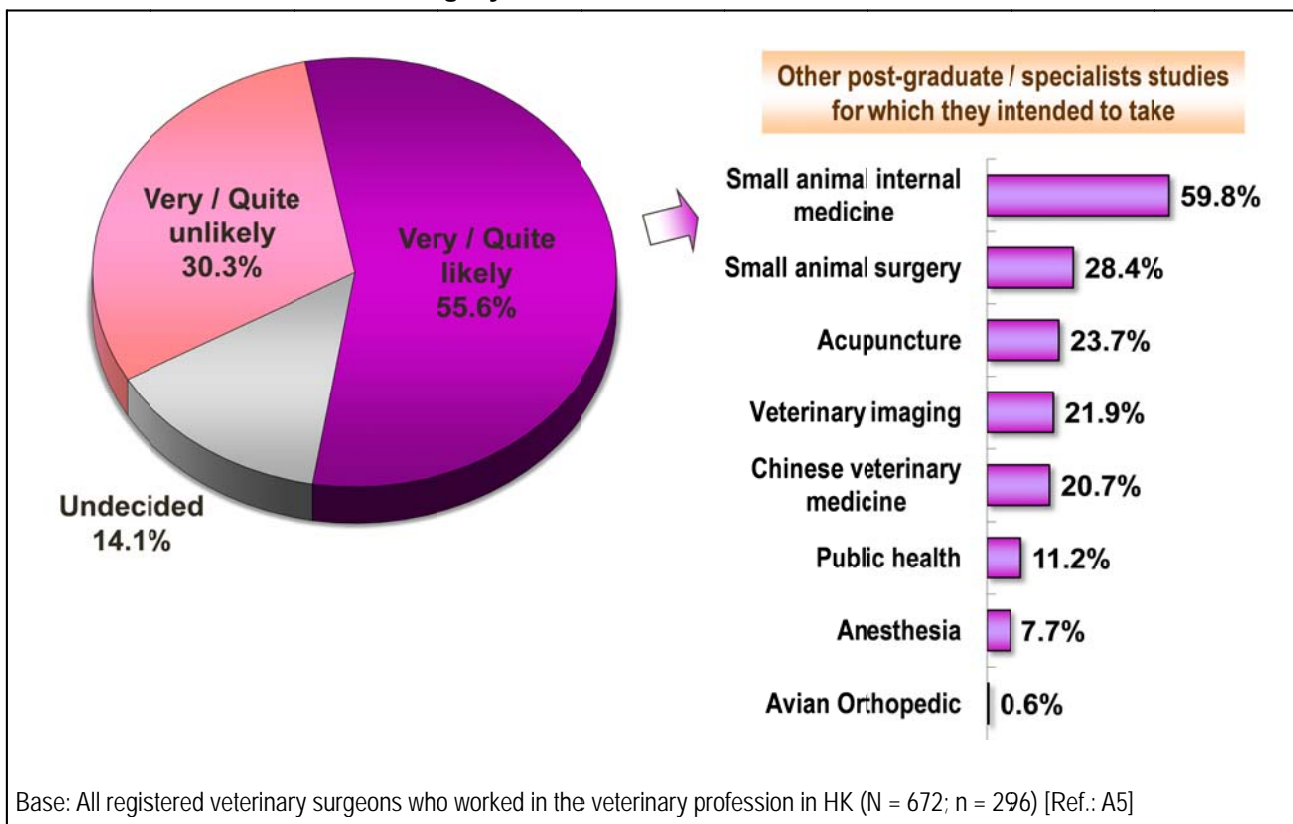


Whether intended to take other veterinary post-graduate / specialists studies in the coming 3 years

7.4.2 In addition, more than half of all vets who worked in Hong Kong (55.6%) said they were very / quite likely to take other veterinary post-graduate / specialists studies in the coming 3 years. Most of them were interested in the area of small animal internal medicine (59.8%). It was followed by small animal surgery (28.4%), acupuncture (23.7%), veterinary imaging (21.9%) and Chinese veterinary medicine (20.7%).

(Ref.: Chart 7.4b)

Chart 7.4b: Whether the vet surgeons intended to take other veterinary post-graduate / specialists studies in the coming 3 years



7.5 VIEWS ON THE DIFFICULTIES AND PROSPECT OF VETERINARY SURGEONS IN HONG KONG

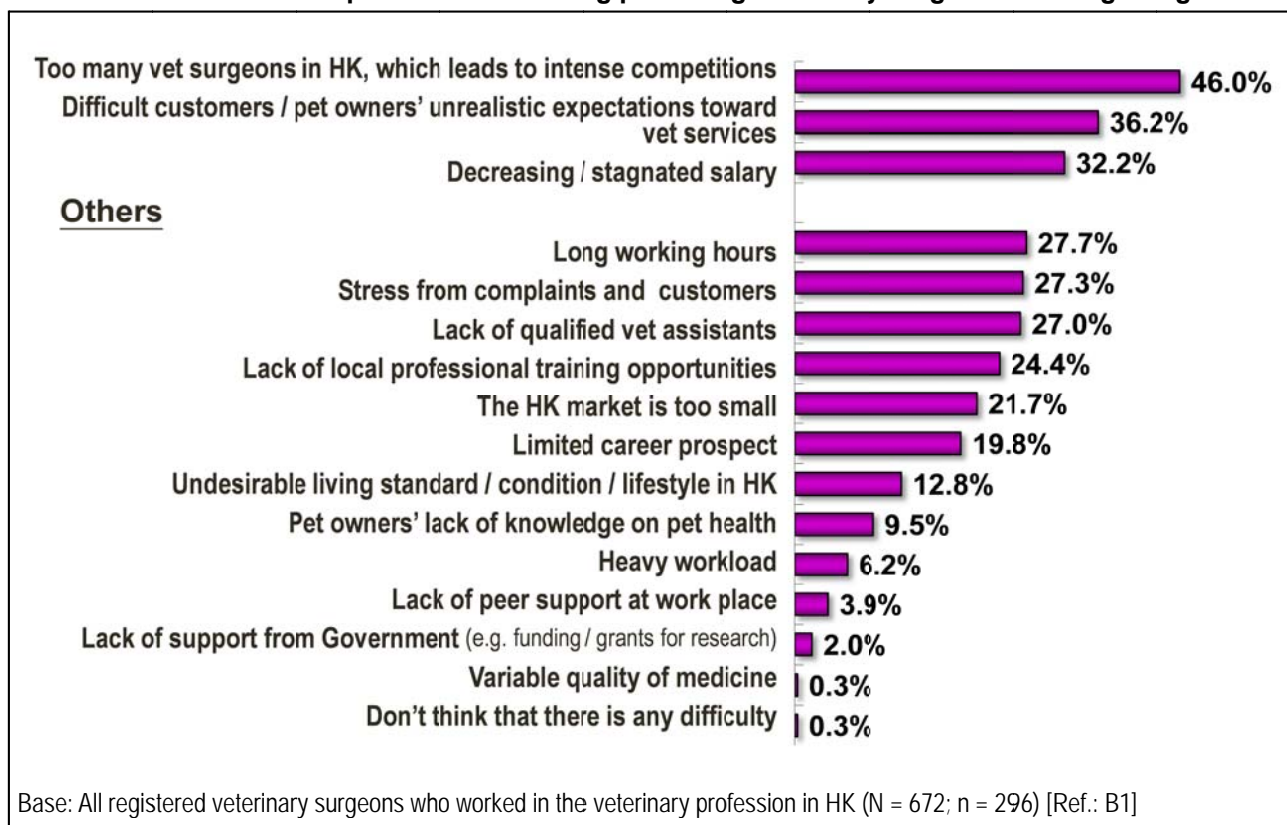
7.5.1 DIFFICULTIES FACING PRACTICING VETERINARY SURGEONS IN HONG KONG

7.5.1.1 When asked about their perceived difficulties facing as vets in Hong Kong, relatively more vets in Hong Kong (46.0%) claimed that one of the top 3 difficulties was that there were “too many vet surgeons in HK, which leads to intense competitions”. It was followed by “difficult customers / pet owners’ unrealistic expectations toward vet services” (36.2%) and “decreasing / stagnated salary” (32.2%).

7.5.1.2 Apart from the above 3 aspects, many vets mentioned that “long working hours” (27.7%), “stress from complaints and customers” (27.3%) and “lack of qualified vet assistants” (27.0%) are their major difficulties.

(Ref.: Chart 7.5.1)

Chart 7.5.1: Perceived top 3 difficulties facing practicing veterinary surgeons in Hong Kong



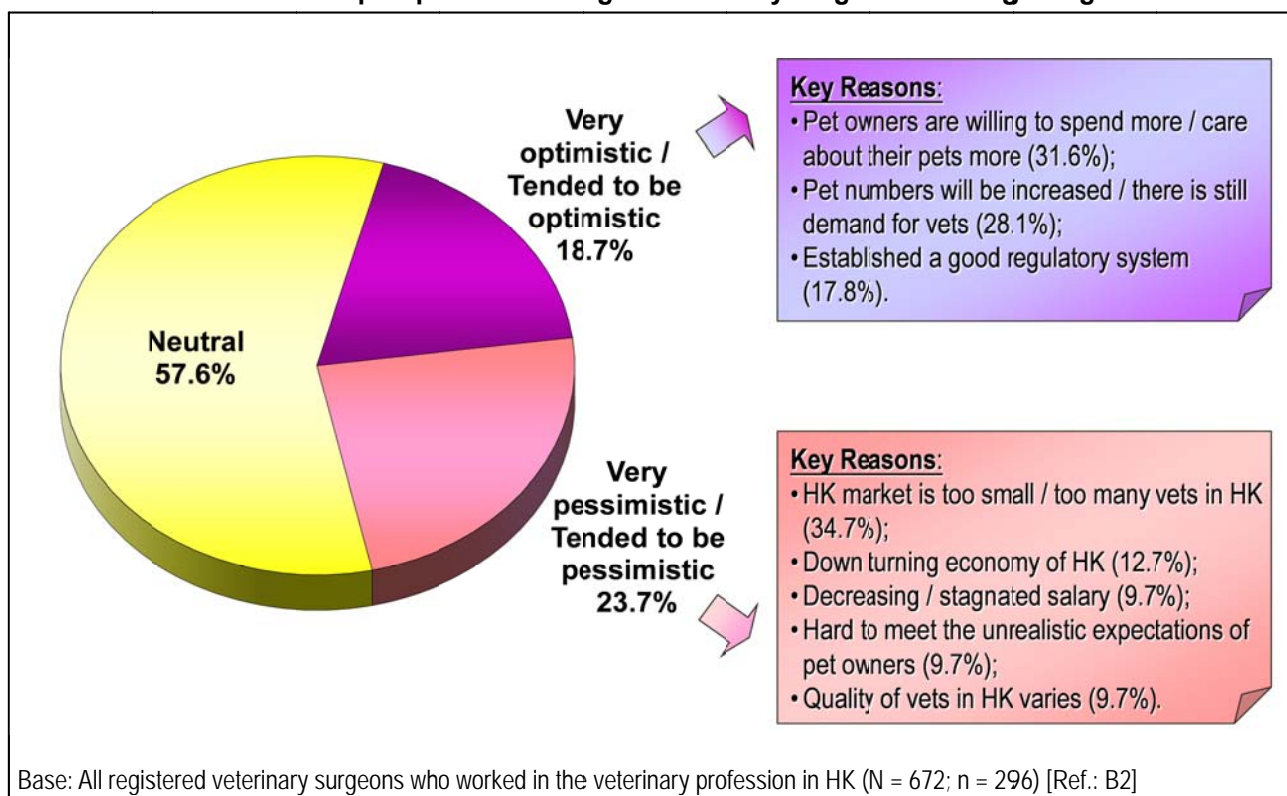
7.5.2 VIEWS ON THE PROSPECT OF WORKING AS VETERINARY SURGEONS IN HONG KONG

7.5.2.1 Of all vets who worked in Hong Kong, 18.7% said they were very optimistic / tended to be optimistic about the prospect of working as vet surgeons in Hong Kong, whilst more than one-fifth (23.7%) were very pessimistic / tended to be pessimistic. The remaining three-fifths (57.6%) were neutral on this issue.

7.5.2.2 Among those who were optimistic, relatively more mentioned that “pet owners are willing to spend more / care about their pets more” (31.6%) and “pet numbers will be increased / there is still demand for vets” (28.1%). It was noteworthy that among those who were pessimistic, many of them claimed that “HK market is too small / too many vets in HK” (34.7%).

(Ref.: Chart 7.5.2)

Chart 7.5.2: Views on the prospect of working as veterinary surgeons in Hong Kong



7.5.2.3 When analyzed by whether they owned vet clinic or not, it was observed that higher proportion of those who owned vet clinic were pessimistic (35.1), as compared with those who did not have their own clinic (19.8%).

(Ref.: Table 7.5.2)

Table 7.5.2: Views on the prospect of working as veterinary surgeons in Hong Kong – by whether owned vet clinic or not

	Owned vet clinic (%)	Not owned vet clinic (%)
Very optimistic / Tended to be optimistic	13.0	20.7
Neutral	51.9	59.5
Very pessimistic / Tended to be pessimistic	35.1	19.8

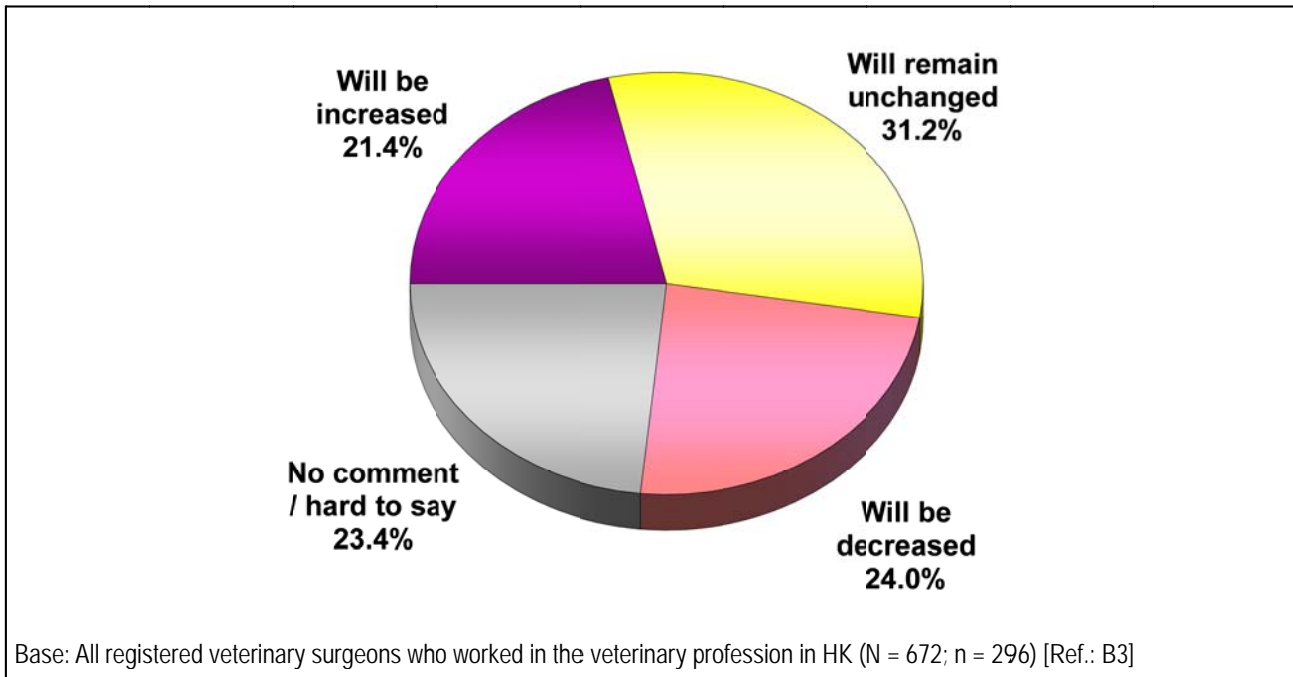
Base: All registered veterinary surgeons who worked in the veterinary profession in HK (N = 672; n = 296)

7.5.3 VIEWS ON THE MANPOWER REQUIREMENTS FOR VETERINARY SURGEONS IN HONG KONG IN THE COMING 3 YEARS

7.5.3.1 21.4% of the vets thought that the manpower requirements for vet surgeons in Hong Kong will be increased, whereas a similar proportion thought that the manpower requirements will be decreased (24.0%). Besides, about three-tenths (31.2%) considered that it will remain unchanged.

(Ref.: Chart 7.5.3)

Chart 7.5.3: Views on the manpower requirements for veterinary surgeons in Hong Kong in the coming 3 years



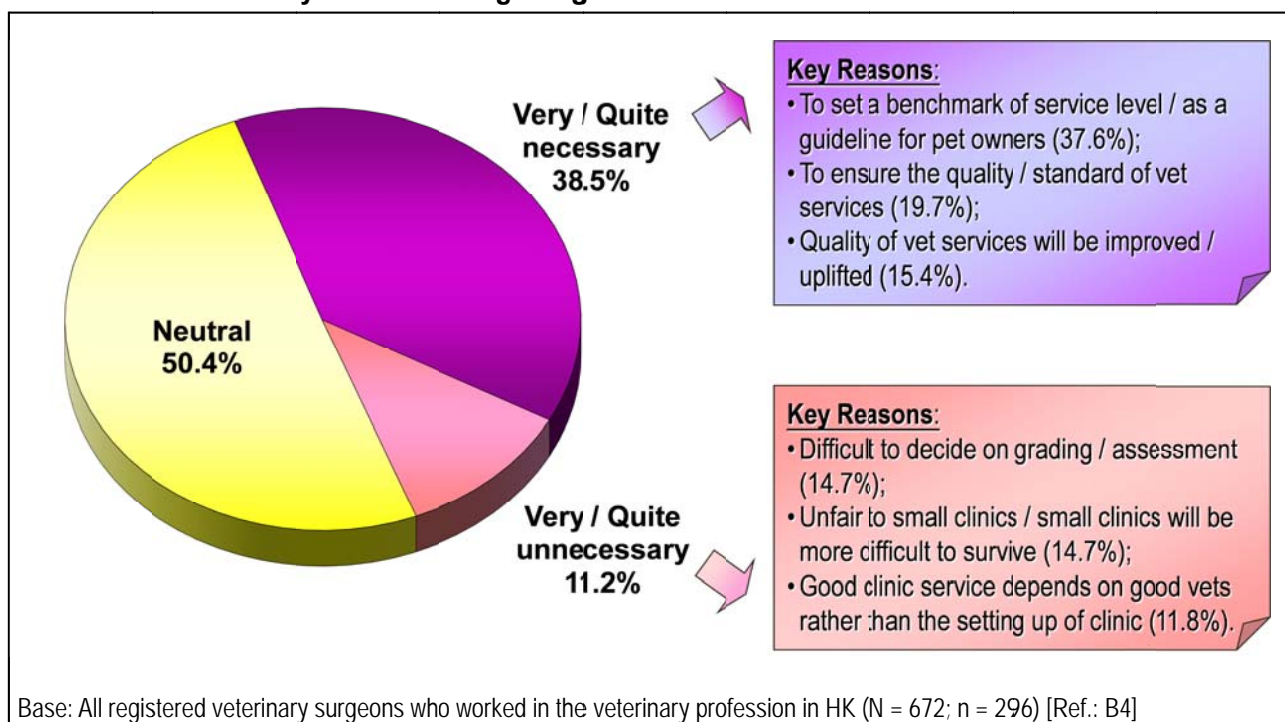
7.5.4 PERCEIVED NECESSITY OF SETTING UP AN ACCREDITATION SCHEME / CLASSIFICATION SCHEME FOR THE VETERINARY CLINICS IN HONG KONG

7.5.4.1 When asked about their perceived necessity of setting up an accreditation scheme / classification scheme for the vet clinics in Hong Kong, nearly two-fifths of the vets (38.5%) considered very / quite necessary, while relatively few (11.2%) considered the opposite. The remaining half (50.4%) were neutral on this issue.

7.5.4.2 Among those who considered necessary, relatively more mentioned the reasons “to set a benchmark of service level / as a guideline for pet owners” (37.6%), “to ensure the quality / standard of vet services” (19.7%) and “quality of vet services will be improved / uplifted” (15.4%). Conversely, among those who considered unnecessary, many of them claimed that it is “difficult to decide on grading / assessment” (14.7%) and “unfair to small clinics / small clinics will be more difficult to survive” (14.7%), and some thought that “good clinic service depends on good vets rather than the setting up of clinic” (11.8%).

(Ref.: Chart 7.5.4)

Chart 7.5.4: Perceived necessity of setting up an accreditation scheme / classification scheme for veterinary clinics in Hong Kong

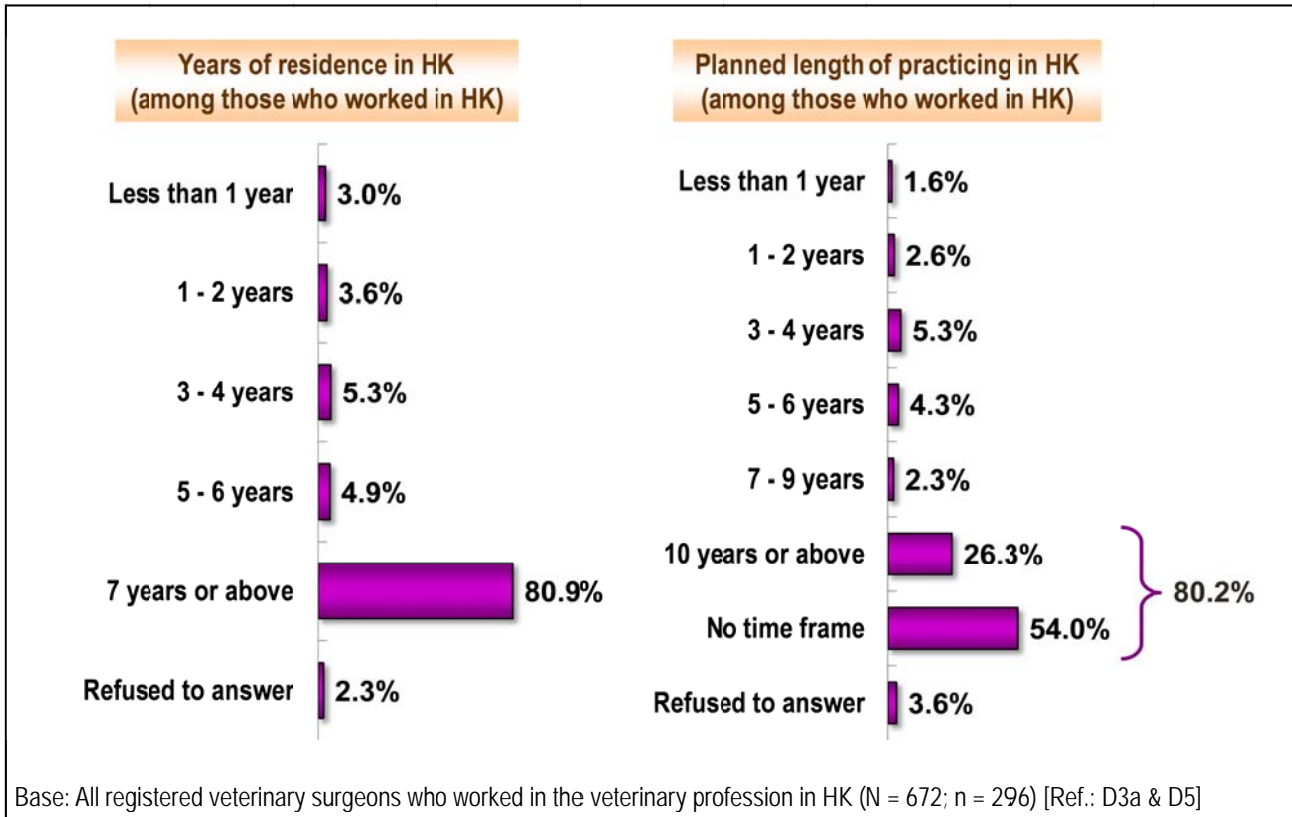


7.6 PLANNED LENGTH OF PRACTICING IN HONG KONG

7.6.1 Of all vets who worked in Hong Kong, the majority have been living in Hong Kong for 7 years or above (80.9%). Moreover, the majority planned to practice in Hong Kong for a long period of time (80.2%), with 26.3% said they planned for 10 years or above and 54.0% said they have no time frame.

(Ref.: Chart 7.6)

Chart 7.6: Planned length of practicing in Hong Kong



8 SURVEY FINDINGS – VETERINARY STUDENTS

8.1 PROFILE OF HONG KONG VETERINARY STUDENTS IN OVERSEAS UNIVERSITIES

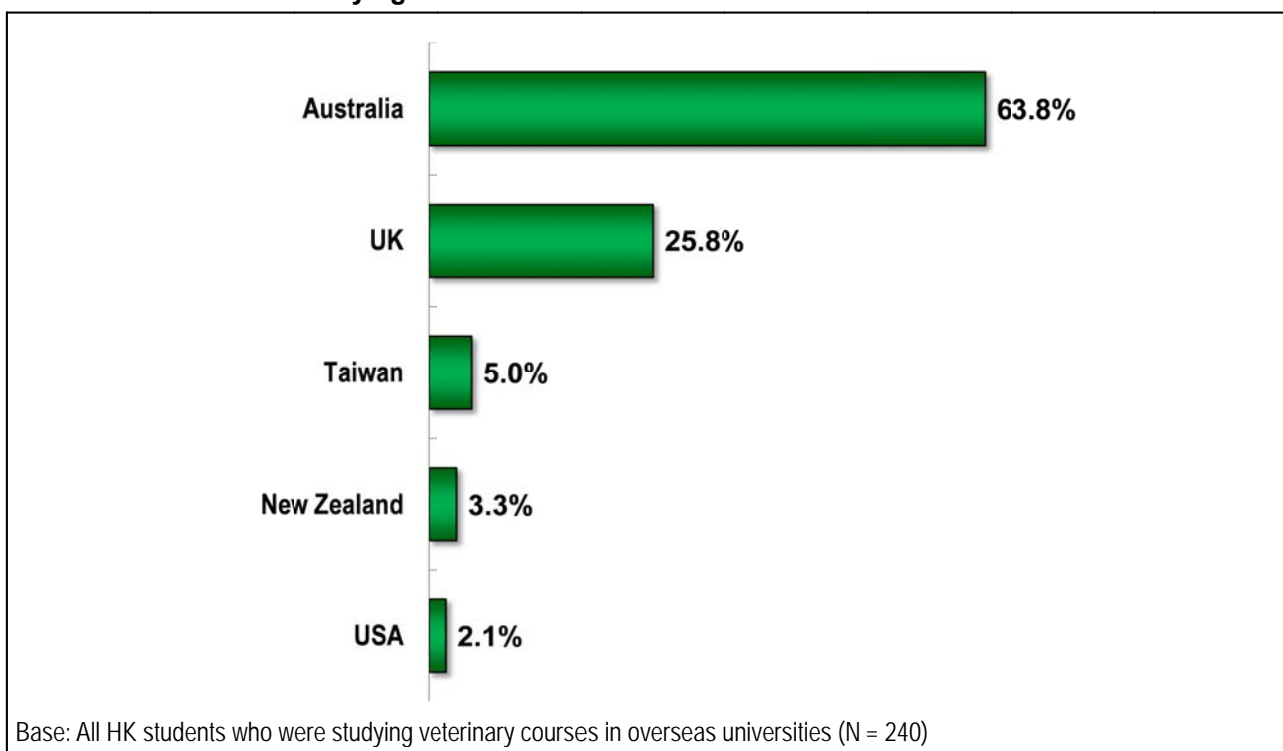
8.1.1 During the survey period from March to July 2016, among the 55 selected overseas universities whose veterinary courses awards are recognized for registration as a veterinary surgeon (vet) in Hong Kong, 15 said they have students from Hong Kong who are studying veterinary courses in their universities. They indicated that in total there are 240 Hong Kong veterinary students in overseas universities.

Place of studying

8.1.2 Most of the students are studying in Australia (63.8%). It was followed by UK (25.8%), Taiwan (5.0%), New Zealand (3.3%) and USA (2.1%).

(Ref.: Chart 8.1a)

Chart 8.1a: Place of studying



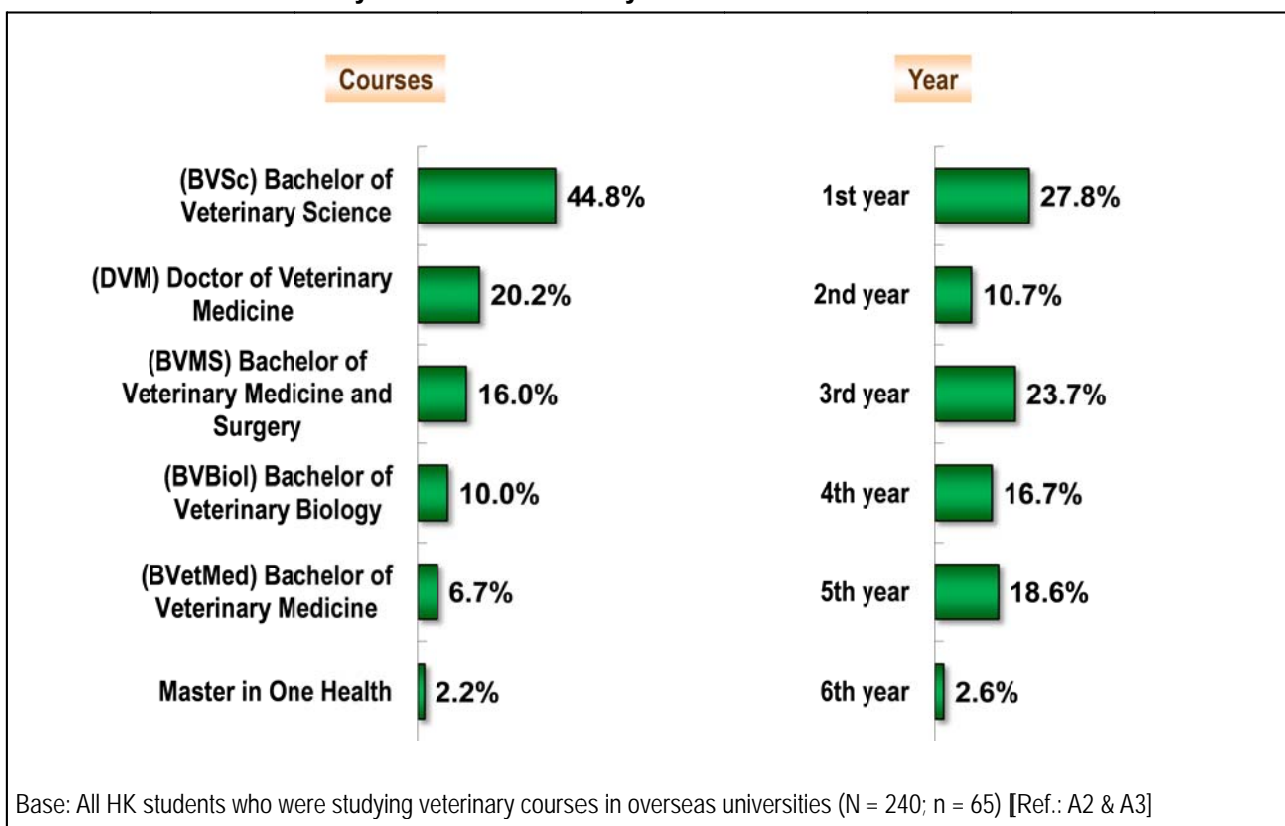
Courses and years of the veterinary students' current studies

8.1.3 Of all Hong Kong veterinary students in overseas universities, relatively more were studying Bachelor of Veterinary Science (BVSc) (44.8%) at the time of enumeration, followed by Doctor of Veterinary Medicine (DVM) (20.2%) and Bachelor of Veterinary Medicine and Surgery (BVMS) (16.0%).

8.1.4 Besides, 27.8% of the students were studying Year 1, while about 21% were studying in their final stage (18.6% in Year 5 and 2.6% in Year 6).

(Ref.: Chart 8.1b)

Chart 8.1b: Courses and years of the veterinary students' current studies

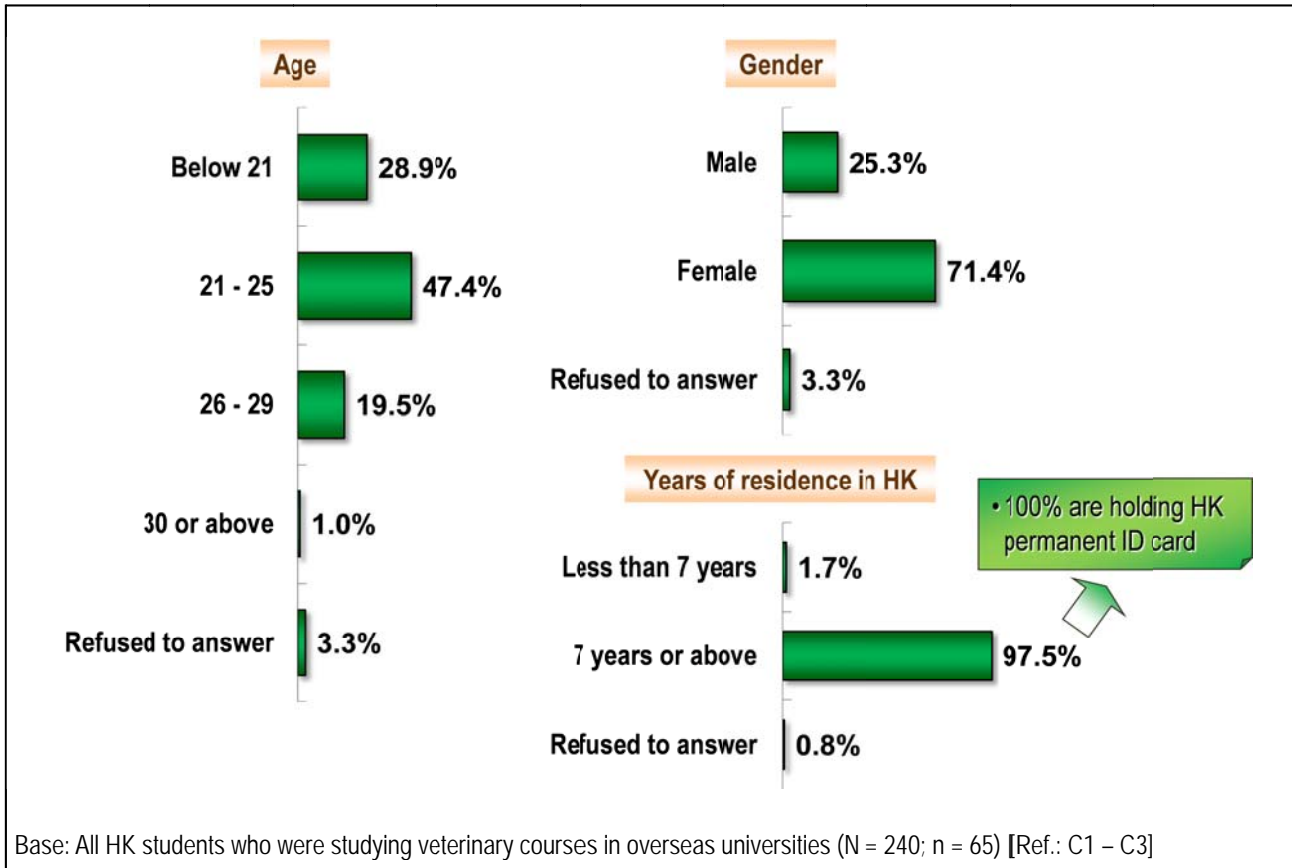


Gender, age and years of residence in Hong Kong

8.1.5 Most of the students (71.4%) were females. Nearly half (47.4%) aged 21 – 25, 28.9% aged below 21 and 19.5% aged 26 – 29. Besides, virtually all students (97.5%) have been living in Hong Kong for 7 years or above, and are Hong Kong permanent residents.

(Ref.: Chart 8.1c)

Chart 8.1c: Gender, age and years of residence in Hong Kong



8.2 FUTURE PLANS

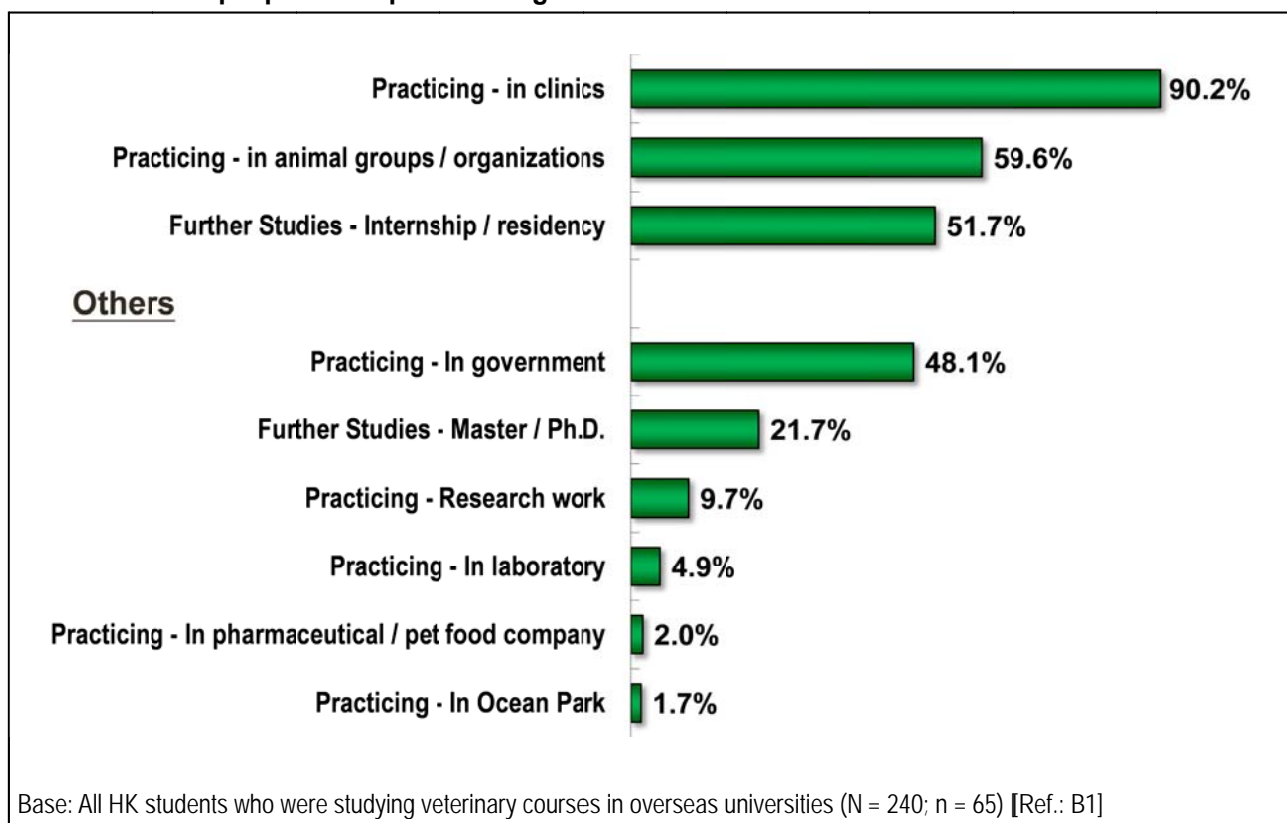
8.2.1 PREFERRED PATHS AFTER GRADUATION

8.2.1.1 When asked about their preferred paths after graduation, it was found that about nine out of ten students (90.2%) ranked “practicing – in clinics” as one of the top 3 preferred paths. It was followed distantly by “practicing – in animal groups / organizations” (59.6%) and “further studies – internship / residency” (51.7%).

8.2.1.2 Apart from the above 3 paths, many students mentioned that they preferred “practicing – in government” (48.1%) and “further studies – Master / Ph.D.” (21.7%) after graduation.

(Ref.: Chart 8.2.1)

Chart 8.2.1: Top 3 preferred paths after graduation



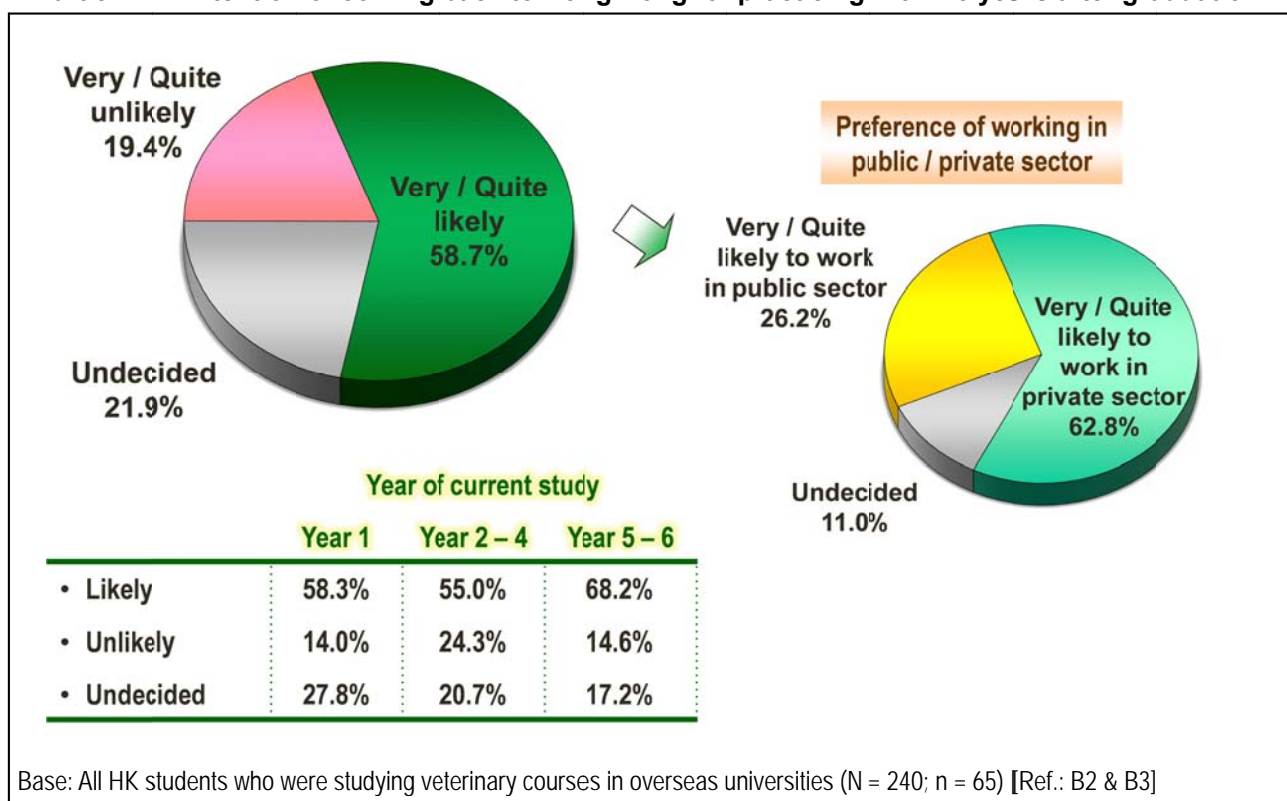
8.2.2 INTENTION OF COMING BACK TO HONG KONG FOR PRACTICING WITHIN 3 YEARS AFTER GRADUATION

8.2.2.1 Nearly three-fifths of the students (58.7%) said they were very / quite likely to come back to Hong Kong for practicing within 3 years after graduation. Such proportion was relatively higher among those who were studying in Year 5 and 6 (68.2%; vs. below 59% in earlier stages of study).

8.2.2.2 Among those who intended to practice in Hong Kong within 3 years after graduation, most of them (62.8%) said they were very / quite likely to work in private sector (including vet clinics, Hong Kong Jockey Club, Ocean Park, Kadoorie Farm, etc.). On the contrary, 26.2% preferred working in the public sector (i.e. government / educational institutions).

(Ref.: Chart 8.2.2)

Chart 8.2.2: Intention of coming back to Hong Kong for practicing within 3 years after graduation



9 CONCLUSION

OVERVIEW OF THE INDUSTRY

9.1 Statistics of the Census and Statistics Department (C&SD) indicated that in the recent 5 years, the growth of establishments and persons engaged in the veterinary industry has slowed down and was growing in a relatively moderate pace. An international third party research supplier also projected slow overall growths of the veterinary services industry national demand and employment.

VIEWS ON THE DIFFICULTIES AND PROSPECT OF VET SURGEONS IN HONG KONG

9.2 Among the vet surgeons who worked in the veterinary profession in Hong Kong, the top 3 perceived difficulties were “intense competitions” (46.0%), “difficult customers / pet owners’ unrealistic expectations” (36.2%) and “decreasing / stagnated salary” (32.2%). Moreover, “long working hours” (27.7%), “stress from complaints and customers” (27.3%) and “lack of qualified vet assistants” (27.0%) were also commonly mentioned.

9.3 It was noted that the proportions of vets who were optimistic (18.7%) and pessimistic (23.7%) about the prospect of working as vet surgeons in Hong Kong were similar.

VIEWS ON THE DIFFICULTIES AND PROSPECT OF VET CLINICS IN HONG KONG

9.4 Among the private vet clinics, the majority ranked “high rent” (81.3%) as one of the top 3 difficulties in operating vet clinics in Hong Kong. It was followed distantly by “keen competition among vet clinics” (35.5%) and “lack of qualified supporting staff in HK” (33.8%). In addition, “difficult customers / pet owners’ unrealistic expectations” (32.8%) and “high staff cost (incl. salary, fringe benefits, etc.)” (30.5%) were also commonly mentioned.

9.5 It was noteworthy that “intense / keen competitions”, “difficult customers / pet owners’ unrealistic expectations” and “lack of qualified supporting staff / vet assistants” were the common difficulties of vet surgeons and clinics. Besides, it was observed that while some vet surgeons were dissatisfied with their “decreasing / stagnated salary”, a number of vet clinics claimed that “high staff cost” was one of their difficulties.

9.6 In fact, survey results showed that about 280 – 290 additional full-time positions will be opened by vet clinics in the coming 12 months, with more than 60% (180) are vet

assistant positions. Such results showed that the industry required more new blood to perform the supporting role.

9.7 Besides, only 7.1% of the vet clinics were optimistic about the prospect of operating vet clinics in Hong Kong, whilst 19.9% were pessimistic. Among those which were pessimistic, their major concerns were that “HK market is too small”, they faced “keen competition among vet clinics” and “higher and higher operating costs”.

PET OWNERS’ EXPERIENCES AND OPINIONS OF VET SERVICES IN HONG KONG

9.8 In this survey, results showed that 71.4% of the pet owners have ever brought their pets to see vets, with 40.5% visited vets in the past 12 months before enumeration. Such results revealed that bringing pets to see vets for annual health check-up is not a common practice among pet owners.

9.9 Among the pet owners who have ever visited vets, they were generally contented with the vet surgeons and vet services in Hong Kong. Yet, 27.1% claimed that they did not take any action when encountering dissatisfactory vet services. The top 3 reasons were “just decided not to visit that vet clinic / hospital again”, “not aware of the complaint channels” and “don’t think that taking any action could help”. Such results showed that pet owners may need more information about their rights and the complaint channels.

PRICE LEVEL AND TRANSPARENCY OF VET SERVICES IN HONG KONG

9.10 45.2% of the vet services users considered that the fees and charges of vet services in Hong Kong were reasonable. Yet, a similar proportion (47.5%) considered the opposite.

9.11 General information of the fees and charges of vet clinics was investigated. It was revealed that there are certain extent of variations among different vet clinics. The table below summarized the results.

	Lowest price range	Median price range	Highest price range
A general consultation on cats / dogs (about 15 min. or less)	\$100 - \$199	\$200 - \$299	\$400 or above
A routine canine vaccination with 5-in-1 DHPPi/L vaccine (incl. a basic health examination of dog)	Below \$200	\$200 - \$299	\$400 or above
A routine de-sexing surgery on an average adult female CAT	Below \$500	\$800 - \$899	\$1,000 or above
A routine de-sexing surgery on an average adult female DOG (10 – 20kg)	Below \$1,000	\$1,300 - \$1,399	\$1,500 or above
Over-night hospitalization for an adult dog (under 10kg)	Below \$200	\$400 - \$499	\$500 or above

Base: All private veterinary clinics in HK (N = 146)

9.12 Moreover, when asked their perceived transparency of the fees and charges of vet services in Hong Kong, it was observed that less than half of the pet owners (45.8%) considered the price transparency adequate. On the other hand, 22.9% considered inadequate. Among them, many claimed that the clinics should post the list of basic fees and charges at the clinic.

9.13 However, the survey results showed that only 14.4% of the clinics posted the general price list at prominent positions of the clinics. For the remaining majority (85.6%), pricing information is not readily accessible for walk-in customers. The above findings showed that pet owners may need more information on the fees and charges of veterinary services.

KEY FINDINGS REFERENCE

PET OWNERS

	Section no.
<ul style="list-style-type: none"> ➤ No. of households which kept pets (except fishes) (i.e. potential vet services users): <ul style="list-style-type: none"> ✧ 289 100 in the past 12 months before enumeration ✧ 311 100 in the coming 3 years ➤ No. of households which kept dogs and/or cats: <ul style="list-style-type: none"> ✧ 249 400 in 2010 (Thematic Household Survey of C&SD) ✧ 257 500 in 2015 – 2016 (in the past 12 months before enumeration in this survey) ✧ 281 000 in 2019 (in the coming 3 years after enumeration in this survey) 	5.1.1
<ul style="list-style-type: none"> ➤ No. of pets which were kept (except fishes): <ul style="list-style-type: none"> ✧ 681 600 in the past 12 months before enumeration ✧ 726 900 in the coming 3 years ➤ No. of dogs and cats which were kept: <ul style="list-style-type: none"> ✧ 297 100 in 2005 (Thematic Household Survey of C&SD) ✧ 415 100 in 2010 (Thematic Household Survey of C&SD) ✧ 510 600 in 2015 – 2016 (in the past 12 months before enumeration in this survey) ✧ 545 600 in 2019 (in the coming 3 years after enumeration in this survey) 	5.1.2
<ul style="list-style-type: none"> ➤ 71.4% of the pet owners have ever brought their pets to see veterinary surgeons (vets), with 40.5% visited vets in the past 12 months. 	5.2.1
<ul style="list-style-type: none"> ➤ Whether pet owners considered the fees and charges of veterinary services in Hong Kong reasonable: <ul style="list-style-type: none"> ✧ 45.2% said very / quite reasonable ✧ 47.5% said very / quite unreasonable ✧ 7.3% said don't know / no comment / hard to say ➤ Whether pet owners considered the fees and charges of veterinary services in Hong Kong transparent enough: <ul style="list-style-type: none"> ✧ 45.8% said very / quite adequate transparency ✧ 26.8% said average ✧ 22.9% said very / quite inadequate transparency ✧ 4.6% said don't know / no comment / hard to say 	5.2.4
<ul style="list-style-type: none"> ➤ Overall satisfaction of veterinary services in Hong Kong: <ul style="list-style-type: none"> ✧ 55.4% said very / quite satisfied ✧ 38.4% said average ✧ 4.8% said very / quite dissatisfied ✧ 1.4% said don't know / no comment / hard to say 	5.2.5

<ul style="list-style-type: none"> ➤ Perceived sufficiency of vet surgeons in Hong Kong: <ul style="list-style-type: none"> ✧ 49.7% said very / quite sufficient ✧ 18.6% said average ✧ 25.2% said very / quite insufficient ✧ 6.5% said don't know / no comment / hard to say 	5.3
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VETERINARY CLINICS

	Section no.
<ul style="list-style-type: none"> ➤ No. of private veterinary clinics in Hong Kong during survey period from May to June 2016: 146 	6.1
<ul style="list-style-type: none"> ➤ 64.3% of the veterinary clinics have 24 hours hospitalization services, in which 72.8% have no 24 hours attending staff ➤ 31.5% of the veterinary clinics have after-hours / 24 hours consultation service, in which 64.5% have no 24 hours vets on-site 	6.2.1
<ul style="list-style-type: none"> ➤ Manpower requirement <ul style="list-style-type: none"> ✧ At the time of enumeration <ul style="list-style-type: none"> - 1 520 full-time positions (incl. 400 vet surgeon, 780 vet assistant, 90 vet technician, 160 administrative and 100 other positions) - 130 part-time positions - 80 locum positions ✧ In the coming 12 months <ul style="list-style-type: none"> - About 280 – 290 additional full-time positions (incl. about 70 vet surgeon, 180 vet assistant, 20 vet technician, 10 administrative and 10 other positions) - About 20 additional part-time positions - About 10 additional locum positions ✧ In the coming 3 years <ul style="list-style-type: none"> - 60.8% of the vet clinics intended to hire more staff, in which 63.8% intended to hire fresh / recent veterinary graduates 	6.3.1
<ul style="list-style-type: none"> ➤ Perceived top 3 difficulties in operating veterinary clinics in Hong Kong: <ul style="list-style-type: none"> ✧ High rent ✧ Keen competition among vet clinics ✧ Lack of qualified supporting staff in HK 	6.2.4
<ul style="list-style-type: none"> ➤ 9.6% of the vet clinics had relocation plan in the coming 3 years ➤ 13.8% of the vet clinics had expansion plan in opening more clinics in Hong Kong in the coming 3 years ➤ Estimated no. of vet clinics in the coming 3 years: 166 	6.3.2
<ul style="list-style-type: none"> ➤ Views on the prospect of operating vet clinics in Hong Kong: <ul style="list-style-type: none"> ✧ 7.1% were very optimistic / tended to be optimistic ✧ 73.0% were neutral ✧ 19.9% were very pessimistic / tended to be pessimistic 	6.3.3

<ul style="list-style-type: none"> ➤ 14.4% of the vet clinics posted the general price list at prominent positions of the clinics ➤ Median price ranges of general veterinary services: <ul style="list-style-type: none"> ✧ \$200 - \$299 for a general consultation on cats / dogs ✧ \$200 - \$299 for a routine canine vaccination with 5-in-1 DHPPI/L vaccine ✧ \$800 - \$899 for a routine de-sexing surgery on an average adult female cat ✧ \$1,300 - \$1,399 for a routine de-sexing surgery on an average adult female dog (10 – 20 kg) ✧ \$400 - \$499 for over-night hospitalization for an adult dog (under 10kg) 	6.4
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VETERINARY SURGEONS

	Section no.
<ul style="list-style-type: none"> ➤ The number of registered vet surgeons in Hong Kong increased from 412 in 2006 to 823 in 2015 (statistical data from VSB) ➤ Using 5-year compound annual growth rate for estimation, the number of registered vets in 2019: 1 044 ➤ The number of registered vets who were authorized to advertise as, or profess to be, specialists in Hong Kong increased from 5 in 2011 to 18 in 2015 (statistical data from VSB) ➤ Using 5-year compound annual growth rate for estimation, the number of specialists in 2019: 50 	4.3
<ul style="list-style-type: none"> ➤ Vet-to-pet ratio in Hong Kong: <ul style="list-style-type: none"> ✧ 1 : 823 in 2005 ✧ 1 : 735 in 2010 ✧ 1 : 620 in 2015 – 2016 ✧ 1 : 523 in 2019 ➤ Vet-to-pet ratios in other comparable developed countries (in 2008): <ul style="list-style-type: none"> ✧ 1 : 2 543 in Singapore ✧ 1 : 2 374 in UK ✧ 1 : 3 072 in USA 	4.4
<ul style="list-style-type: none"> ➤ This survey covered 840 vets who were registered in VSB as at 10 March 2016. Among them, 72.5% have been living in Hong Kong for 7 years or above. 67.9% are Hong Kong permanent residents 	7.2
<ul style="list-style-type: none"> ➤ 80.0% of the registered vets were working in the veterinary profession in Hong Kong at the time of enumeration. Among them, the majority were working full-time in individual (60.5%) and/or group / chain (13.2%) private clinics 	7.3

<ul style="list-style-type: none"> ➤ Among the 80.0% who worked in the veterinary profession in Hong Kong, 36.5% of the vets obtained other veterinary post-graduate / specialists qualifications ➤ Whether intended to take other veterinary post-graduate / specialists studies in the coming 3 years: <ul style="list-style-type: none"> ✧ 55.6% said very / quite likely ✧ 30.3% said very / quite unlikely ✧ 14.1% said undecided 	7.4
<ul style="list-style-type: none"> ➤ Perceived top 3 difficulties facing practicing vet surgeons in Hong Kong: <ul style="list-style-type: none"> ✧ Too many vet surgeons in HK, which leads to intense competitions ✧ Difficult customers / pet owners' unrealistic expectations toward vet services ✧ Decreasing / stagnated salary 	7.5.1
<ul style="list-style-type: none"> ➤ Views on the prospect of working as vet surgeons in Hong Kong: <ul style="list-style-type: none"> ✧ 18.7% were very optimistic / tended to be optimistic ✧ 57.6% were neutral ✧ 23.7% were very pessimistic / tended to be pessimistic 	7.5.2
<ul style="list-style-type: none"> ➤ 80.2% of the vets planned to practice in Hong Kong for a long period of time (10 years or above / no time frame) 	7.6

VETERINARY STUDENTS

	Section no.
<ul style="list-style-type: none"> ➤ 15 out of 55 overseas universities responded that they have veterinary students from Hong Kong. They indicated that in total there are 240 Hong Kong students ➤ Place of studying: <ul style="list-style-type: none"> ✧ 63.8% in Australia ✧ 25.8% in UK ✧ 5.0% in Taiwan ✧ 3.3% in New Zealand ✧ 2.1% in USA ➤ 97.5% of the students are Hong Kong permanent residents 	8.1
<ul style="list-style-type: none"> ➤ Intention of coming back to Hong Kong for practicing within 3 years after graduation: <ul style="list-style-type: none"> ✧ 58.7% said very / quite likely ✧ 19.4% said very / quite unlikely ✧ 21.9% said undecided ➤ Among the 58.7%, preference of working in public / private sector: <ul style="list-style-type: none"> ✧ 62.8% said very / quite likely to work in private sector ✧ 26.2% said very / quite likely to work in public sector ✧ 11.0% said undecided 	8.2.2

APPENDICES – QUESTIONNAIRES

Study on the Development of the Veterinary Profession in Hong Kong – Registered Veterinary Surgeons	For office use only	
	Sup :	Case :
	Edit :	Check :

We sincerely invite you to complete this questionnaire.

Purpose of the survey:

- In order to improve understanding of the prospects and constraints of the veterinary profession in Hong Kong, **the Veterinary Surgeons Board of Hong Kong (VSB)** through the Government's Agriculture, Fisheries and Conservation Department has commissioned an independent research company, Mercado Solutions Associates Ltd. (MSA), to conduct this study. One of the target groups of this study is the **registered veterinary surgeons in Hong Kong**. This survey will help VSB in formulating recommendations to further support the development of the veterinary profession in Hong Kong.

Means to return the completed questionnaire:

- We sincerely invite you to complete the questionnaire and return it to MSA via any of the following means before **16 May 2016**:
 - by post using the enclosed self-addressed envelope;
 - fax to (852) 3167 1193;
 - scan the completed questionnaire into an electronic file and email to ms@mercadosolutions.com;
or
 - visit the website (http://zh.research.net/r/vet-profession_vets), and complete the online questionnaire.
- If you are also the person-in-charge / owner / manager of private veterinary clinic, and received another questionnaire with the title "Persons-in-charge / Owners / Managers of Private Veterinary Clinics", you are cordially invited to complete that questionnaire as well.
- Please be assured that all collected information from the survey will be kept strictly confidential and will be analysed on an aggregated basis. We thank you for your support. Should you have any enquiries about the questionnaire, please call MSA's survey hotline (852) 2598 0909.

填入數據後即成 限閱文件	RESTRICTED WHEN ENTERED WITH DATA
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【For the following questions, Please “✓” the answer chosen in the box .】

Part A. About Your Working Status

A1 Which type(s) of veterinary establishment are you currently working for, and your working status in the corresponding establishment(s) is(are):

[Can choose more than one]

	Full-time	Part-time	Locum (or temporary position)
Individual private clinic	<input type="checkbox"/> 01	<input type="checkbox"/> 02	<input type="checkbox"/> 03
Group / chain private clinic	<input type="checkbox"/> 04	<input type="checkbox"/> 05	<input type="checkbox"/> 06
Animal groups / organizations (e.g. SPCA, HK Jockey Club, Ocean Park, Kadoorie Farm, etc.)	<input type="checkbox"/> 07	<input type="checkbox"/> 08	<input type="checkbox"/> 09
Government	<input type="checkbox"/> 10	<input type="checkbox"/> 11	<input type="checkbox"/> 12
Educational institutions	<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15
Laboratory	<input type="checkbox"/> 16	<input type="checkbox"/> 17	<input type="checkbox"/> 18
Pharmaceutical company / pet food company	<input type="checkbox"/> 19	<input type="checkbox"/> 20	<input type="checkbox"/> 21
Others (pls. specify): _____	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24
<input type="checkbox"/> 99 Not currently working in the veterinary profession in HK → Skip to Part D			

A2 a. Do you own a veterinary clinic in Hong Kong?

opening your own veterinary clinic in the coming 3 years?

A3 For what type(s) of animals do you provide services?

[Can choose more than one]

- | | |
|--|---|
| <input type="checkbox"/> 1 Cats | <input type="checkbox"/> 5 Reptiles (e.g. turtles, snakes, lizards, etc.) |
| <input type="checkbox"/> 2 Dogs | <input type="checkbox"/> 6 Birds |
| <input type="checkbox"/> 3 Rabbits | <input type="checkbox"/> 7 Fishes |
| <input type="checkbox"/> 4 Hamster, chinchilla | Others (pls. specify): _____ |

A4 a. Have you obtained any other veterinary post-graduate / specialist qualification?

(graduate)

(specialist qualification)

A5 Your intention of taking other post-graduate / specialist studies in the coming 3 years is:

Very likely Quite likely Quite unlikely Very unlikely Undecided

4 3 2 1 8

└──Area(s): ───┘

[Can choose more than one]

- 1 Small Animal Surgery 5 Acupuncture
- 2 Small Animal Internal Medicine 6 Public Health
- 3 Anesthesia 7 Veterinary Imaging
- 4 Chinese Veterinary Medicine
- Others (pls. specify): _____

Part B. About the Difficulties and Prospect of Veterinary Surgeons in HK

B1 What do you think are the difficulties facing as veterinary surgeons in Hong Kong?
Please rank the top 3 aspects.

	Major difficulty [Single answer]	2nd [Single answer]	3rd [Single answer]
Too many veterinary surgeons in HK, which leads to intense competitions	<input type="checkbox"/> 01	<input type="checkbox"/> 01	<input type="checkbox"/> 01
Decreasing or stagnated salary	<input type="checkbox"/> 02	<input type="checkbox"/> 02	<input type="checkbox"/> 02
The HK market is too small	<input type="checkbox"/> 03	<input type="checkbox"/> 03	<input type="checkbox"/> 03
Limited career prospect	<input type="checkbox"/> 04	<input type="checkbox"/> 04	<input type="checkbox"/> 04
Long working hours	<input type="checkbox"/> 05	<input type="checkbox"/> 05	<input type="checkbox"/> 05
Heavy workload	<input type="checkbox"/> 06	<input type="checkbox"/> 06	<input type="checkbox"/> 06
Lack of qualified veterinary assistants	<input type="checkbox"/> 07	<input type="checkbox"/> 07	<input type="checkbox"/> 07
Pet owners' lack of knowledge on pet health	<input type="checkbox"/> 08	<input type="checkbox"/> 08	<input type="checkbox"/> 08
Difficult customers / pet owners' unrealistic expectations toward veterinary services	<input type="checkbox"/> 09	<input type="checkbox"/> 09	<input type="checkbox"/> 09
Stress from complaints, demanding / difficult customers	<input type="checkbox"/> 10	<input type="checkbox"/> 10	<input type="checkbox"/> 10
Lack of local professional training opportunities	<input type="checkbox"/> 11	<input type="checkbox"/> 11	<input type="checkbox"/> 11
Lack of peer support at work place	<input type="checkbox"/> 12	<input type="checkbox"/> 12	<input type="checkbox"/> 12
Undesirable living standard / condition / lifestyle in HK	<input type="checkbox"/> 13	<input type="checkbox"/> 13	<input type="checkbox"/> 13
Others (pls. specify):	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
<input type="checkbox"/> 99 Do not think that there is any difficulty			

B2 Your view on the prospect of working as a veterinary surgeon in Hong Kong is:

Very optimistic <input type="checkbox"/> 5	Tended to be optimistic <input type="checkbox"/> 4	Neutral <input type="checkbox"/> 3	Tended to be pessimistic <input type="checkbox"/> 2	Very pessimistic <input type="checkbox"/> 1
Reason(s): _____ _____ _____			Reason(s): _____ _____ _____	

B3 Your view on the manpower requirements for veterinary surgeons in Hong Kong in the coming 3 years is:

- 3 Will be increased
- 2 Will remain unchanged
- 1 Will be decreased
- 8 No comment / hard to say

B4 Do you consider it necessary to set up an accreditation scheme / classification scheme for the veterinary clinics in Hong Kong?

Very necessary <input type="checkbox"/> 5	Quite necessary <input type="checkbox"/> 4	Neutral <input type="checkbox"/> 3	Quite unnecessary <input type="checkbox"/> 2	Very unnecessary <input type="checkbox"/> 1
Reason(s): _____ _____ _____			Reason(s): _____ _____ _____	

Part D. General Background Information

D1 Gender:

- 1 Male
- 2 Female
- 9 Refused to answer

D2 Age:

- 1 Below 21
- 2 21 – 25
- 3 26 – 29
- 4 30 – 39
- 5 40 – 49
- 6 50 or above
- 9 Refused to answer

D3 a. Year(s) of residence in Hong Kong:

- 1 Less than 1 year
- 2 1 – 2 years
- 3 3 – 4 years
- 4 5 – 6 years
- 5 7 years or above
- 9 Refused to answer

b. Are you holding HK permanent ID card?

- 1 Yes
- 2 No

D4 Year(s) of practicing as veterinary surgeon
(incl. experience of practicing in other countries / regions outside Hong Kong):

- ₁ Less than 1 year ₃ 3 – 4 years ₅ 10 years or above
₂ 1 – 2 years ₄ 5 – 9 years ₉ Refused to answer

D5 For how long do you plan to practice in Hong Kong?

- ₁ Less than 1 year ₄ 5 – 6 years ₈ No time frame
₂ 1 – 2 years ₅ 7 – 9 years ₉ Refused to answer
₃ 3 – 4 years ₆ 10 years or above

Contact Information

To ensure the quality of this study, kindly please provide your contact information for some follow-up questions when necessary. All collected information will be kept strictly confidential and will only be used in this study when necessary.

Name: _____

Contact tel. no.: _____

Contact email address: _____

*** End of Questionnaire. Thank You. ***

Study on the Development of the Veterinary Profession in Hong Kong – Persons-in-charge / Owners / Managers of Private Veterinary Clinics	For office use only	
	Sup :	Case :
	Edit :	Check :

We sincerely invite the person-in-charge / owner / manager of this veterinary clinic to complete this questionnaire.

Purpose of the survey:

- In order to improve understanding of the prospects and constraints of the veterinary profession in Hong Kong, **the Veterinary Surgeons Board of Hong Kong (VSB)** through the Government's Agriculture, Fisheries and Conservation Department has commissioned an independent research company, Mercado Solutions Associates Ltd. (MSA), to conduct this study. One of the target groups of this study is the **persons-in-charge / owners / managers of private veterinary clinics in Hong Kong**. This survey will help VSB in formulating recommendations to further support the development of the veterinary profession in Hong Kong.

Means to return the completed questionnaire:

- We sincerely invite you to complete the questionnaire and return it to MSA via any of the following means before **30 March 2016**:
 - by post using the enclosed self-addressed envelope;
 - fax to (852) 3167 1193;
 - scan the completed questionnaire into an electronic file and email to ms@mercadosolutions.com;
or
 - visit the website (http://zh.research.net/r/vet-profession_clinics), and complete the online questionnaire.
- If you are also a registered veterinary surgeon in Hong Kong, and received another questionnaire with the title "Registered Veterinary Surgeons", you are cordially invited to complete that questionnaire as well.
- Please be assured that all collected information from the survey will be kept strictly confidential and will be analysed on an aggregated basis. Thank you for your support. If you have any enquiries about the questionnaire, please call MSA's survey hotline (852) 2598 0909.

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【For the following questions, Please “✓” the answer chosen in the box □.】

Part A. About Your Current Business Operation

A1 For what type(s) of animals does your veterinary clinic provides services?

[Can choose more than one]

- | | |
|---|--|
| <input type="checkbox"/> ₁ Cats | <input type="checkbox"/> ₅ Reptiles (e.g. turtles, snakes, lizards, etc.) |
| <input type="checkbox"/> ₂ Dogs | <input type="checkbox"/> ₆ Birds |
| <input type="checkbox"/> ₃ Rabbits | <input type="checkbox"/> ₇ Fishes |
| <input type="checkbox"/> ₄ Hamster, chinchilla | Others (pls. specify): _____ |

A2 a. What type(s) of service is(are) provided in your veterinary clinic?

[Can choose more than one]

- ₁ General consultation (e.g. health examinations, vaccination, microchipping)
- ₂ Routine / simple surgery
- ₃ Advanced surgery
- ₄ On-site blood analysis
- ₅ Other on-site diagnostic tests (e.g. Cytology test / urine test)
- ₆ X-ray imaging
- ₇ Ultrasound imaging
- ₈ Computed tomography (CT)
- ₉ Magnetic resonance imaging (MRI)

Other imaging (pls. specify): _____

- ₁₀ Day time hospitalization
- ₁₁ 24 hours hospitalization → pls. specify:
 - ₂₁ having 24hrs attending vets
 - ₂₂ having 24hrs attending clinic staff
 - ₂₃ not having 24hrs attending staff
- ₁₄ Vets house call service / mobile service
- ₁₅ Acupuncture
- ₁₆ Chinese veterinary medicine
- ₁₈ Pet boarding service
- ₁₉ Pet grooming service

Other services (pls. specify): _____

b. Does your veterinary clinic provide after-hours consultation service (i.e. consultation service after normal operating hours can be provided upon request) or 24 hours consultation service?

ing 24hrs vets on-site ₃₂ not having 24hrs vets on-site (on-call)

A3 Does your veterinary clinic provide specialist services carried out by a listed specialist in Hong Kong authorized by the VSB? [If yes] What type(s) of specialist services does your clinic provides?

[Can choose more than one]

- | | |
|---|--|
| <input type="checkbox"/> ₁ Dentistry | <input type="checkbox"/> ₇ Small animal internal medicine |
| <input type="checkbox"/> ₂ Ophthalmology | <input type="checkbox"/> ₈ Imaging (e.g. X-ray, ultrasound, etc.) |
| <input type="checkbox"/> ₃ Neurology | <input type="checkbox"/> ₉ Dermatology |
| <input type="checkbox"/> ₄ Cardiology | |
| <input type="checkbox"/> ₅ Oncology | Others (pls. specify): _____ |
| <input type="checkbox"/> ₆ Surgery | <input type="checkbox"/> ₉₉ None |

A4 How long is your veterinary clinic established in Hong Kong?

- | | | |
|---|---|---|
| <input type="checkbox"/> ₁ Less than 2 years | <input type="checkbox"/> ₃ 5 – 9 years | <input type="checkbox"/> ₅ 15 – 19 years |
| <input type="checkbox"/> ₂ 2 – 4 years | <input type="checkbox"/> ₄ 10 – 14 years | <input type="checkbox"/> ₆ 20 years or above |

A5 Can you please estimate the floor area (i.e. total gross floor area) of your veterinary clinic?

- | | |
|---|---|
| <input type="checkbox"/> ₁ Less than 500 sq.ft. | <input type="checkbox"/> ₅ 2,000 – <3,000 sq.ft. |
| <input type="checkbox"/> ₂ 500 – <1,000 sq.ft. | <input type="checkbox"/> ₆ 3,000 – <4,000 sq.ft. |
| <input type="checkbox"/> ₃ 1,000 – <1,500 sq.ft. | <input type="checkbox"/> ₇ 4,000 – <5,000 sq.ft. |
| <input type="checkbox"/> ₄ 1,500 – <2,000 sq.ft. | <input type="checkbox"/> ₈ 5,000 sq.ft. or above |

Note:

1 sq ft = 0.0929 sq meters

A6 How many persons in your veterinary clinic are engaged in the following aspects?

	Full-time	Part-time	Locum (or temporary position)
Veterinary surgeon	<input type="text"/>	<input type="text"/>	<input type="text"/>
Veterinary assistant	<input type="text"/>	<input type="text"/>	<input type="text"/>
Veterinary technician	<input type="text"/>	<input type="text"/>	<input type="text"/>
Administrative staff	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other staff	<input type="text"/>	<input type="text"/>	<input type="text"/>

A7 What do you think are the difficulties in operating veterinary clinics in Hong Kong?
 Please rank the top 3 aspects.

	Major difficulty [Single answer]	2nd [Single answer]	3rd [Single answer]
High rent	<input type="checkbox"/> 01	<input type="checkbox"/> 01	<input type="checkbox"/> 01
Lack of veterinary professionals in HK	<input type="checkbox"/> 02	<input type="checkbox"/> 02	<input type="checkbox"/> 02
Lack of qualified supporting staff in HK	<input type="checkbox"/> 03	<input type="checkbox"/> 03	<input type="checkbox"/> 03
High staff cost (incl. salary, fringe benefits, etc.)	<input type="checkbox"/> 04	<input type="checkbox"/> 04	<input type="checkbox"/> 04
The HK market is too small	<input type="checkbox"/> 05	<input type="checkbox"/> 05	<input type="checkbox"/> 05
Too many regulations in operating vet clinics	<input type="checkbox"/> 06	<input type="checkbox"/> 06	<input type="checkbox"/> 06
Difficult customers / pet owners' unrealistic expectations toward veterinary services	<input type="checkbox"/> 07	<input type="checkbox"/> 07	<input type="checkbox"/> 07
Keen competition among vet clinics	<input type="checkbox"/> 08	<input type="checkbox"/> 08	<input type="checkbox"/> 08
High cost of medical equipment and facilities	<input type="checkbox"/> 09	<input type="checkbox"/> 09	<input type="checkbox"/> 09
Relatively difficult to obtain certain medical supply from local veterinary supplies vendors (e.g. medicines or equipment)	<input type="checkbox"/> 10	<input type="checkbox"/> 10	<input type="checkbox"/> 10
Others (pls. specify):	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
<input type="checkbox"/> 99 Do not think that there is any difficulty			

Part B. Future Plans

B1 Are you intended to hire more staff in the coming 3 years?

B2 In the coming 12 months, how many additional staff do you anticipate to be hired for the following aspects?

	Full-time	Part-time	Locum (or temporary position)
Veterinary surgeon	<input type="text"/>	<input type="text"/>	<input type="text"/>
Veterinary assistant	<input type="text"/>	<input type="text"/>	<input type="text"/>
Veterinary technician	<input type="text"/>	<input type="text"/>	<input type="text"/>
Administrative staff	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other staff	<input type="text"/>	<input type="text"/>	<input type="text"/>

B3 Are you intended to hire fresh or recent veterinary graduates?

B4 Do you have preference in hiring veterinary surgeons who graduated from universities in particular countries / regions? [If yes] Which is(are) your preferred countries / regions?

[Can choose more than one]

- | | |
|---|--|
| <input type="checkbox"/> ₁ UK | <input type="checkbox"/> ₅ Canada |
| <input type="checkbox"/> ₂ USA | <input type="checkbox"/> ₆ Taiwan |
| <input type="checkbox"/> ₃ Australia | Others (pls. specify): _____ |
| <input type="checkbox"/> ₄ New Zealand | <input type="checkbox"/> ₉₉ No preference |

B5 Do you have preference in hiring veterinary surgeons with specialty / special interests? [If yes] Which is(are) your preferred specialty / special areas of interests?

[Can choose more than one]

- | | |
|---|---|
| <input type="checkbox"/> ₁ Dentistry | <input type="checkbox"/> ₇ Small animal internal medicine |
| <input type="checkbox"/> ₂ Ophthalmology | <input type="checkbox"/> ₈ Veterinary imaging |
| <input type="checkbox"/> ₃ Neurology | <input type="checkbox"/> ₉ Dermatology |
| <input type="checkbox"/> ₄ Cardiology | <input type="checkbox"/> ₁₀ Chinese medicine / acupuncture |
| <input type="checkbox"/> ₅ Oncology | <input type="checkbox"/> ₁₁ Exotic pets |
| <input type="checkbox"/> ₆ Surgery | Others (pls. specify): _____ |
| | <input type="checkbox"/> ₉₉ No preference |

B6 a. Does your veterinary clinic have any relocation plan in the coming 3 years?

preference on districts? And which is(are) your preferred districts?

[Can choose more than one]

- | | | |
|---|---|--|
| <input type="checkbox"/> ₁ Central & Western | <input type="checkbox"/> ₂ Wanchai | |
| <input type="checkbox"/> ₃ Eastern | <input type="checkbox"/> ₄ Southern | |
| <input type="checkbox"/> ₅ Yau Tsim Mong | <input type="checkbox"/> ₆ Sham Shui Po | <input type="checkbox"/> ₇ Kowloon City |
| <input type="checkbox"/> ₈ Wong Tai Sin | <input type="checkbox"/> ₉ Kwun Tong | |
| <input type="checkbox"/> ₁₀ Kwai Tsing | <input type="checkbox"/> ₁₁ Tsuen Wan | <input type="checkbox"/> ₁₂ Tuen Mun |
| <input type="checkbox"/> ₁₃ Yuen Long | <input type="checkbox"/> ₁₄ North | <input type="checkbox"/> ₁₅ Tai Po |
| <input type="checkbox"/> ₁₆ Shatin (incl. Ma On Shan) | <input type="checkbox"/> ₁₇ Sai Kung (incl. Tseung Kwan O) | |
| <input type="checkbox"/> ₁₈ Islands (incl. Tung Chung) | | |

B7 a. Does your veterinary clinic have any expansion plan in opening more clinics in Hong Kong in the coming 3 years?

How many clinic(s) do you anticipate to be opened in the coming 3 years?

3 4 5 or more 9 Undecided

Which district(s) do you prefer? And which is(are) your preferred districts?

[None]

- 1 Central & Western 2 Wanchai
- 3 Eastern 4 Southern
- 5 Yau Tsim Mong 6 Sham Shui Po 7 Kowloon City
- 8 Wong Tai Sin 9 Kwun Tong
- 10 Kwai Tsing 11 Tsuen Wan 12 Tuen Mun
- 13 Yuen Long 14 North 15 Tai Po
- 16 Shatin (incl. Ma On Shan) 17 Sai Kung (incl. Tseung Kwan O)
- 18 Islands (incl. Tung Chung)

B8 Your view on the prospect of operating veterinary clinics in Hong Kong is:

Very optimistic	Tended to be optimistic	Neutral	Tended to be pessimistic	Very pessimistic
<input type="checkbox"/> 5	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1
└─Reason(s):─┐			└─Reason(s):─┐	

Part C. General Information of Fees & Charges

C1 Consultation charge for a general consultation on cats / dogs (about 15 minutes or less):

- | | | |
|---|---|---|
| <input type="checkbox"/> ₁ Under HK\$100 | <input type="checkbox"/> ₃ HK\$150 - \$199 | <input type="checkbox"/> ₅ HK\$300 - \$399 |
| <input type="checkbox"/> ₂ HK\$100 - \$149 | <input type="checkbox"/> ₄ HK\$200 - \$299 | <input type="checkbox"/> ₆ HK\$400 or up |
| | | <input type="checkbox"/> ₉ Refused to answer |

C2 Charge for a routine canine vaccination with 5-in-1 DHPPi/L vaccine (incl. canine distemper virus, canine adenovirus type 2, parvovirus, canine parainfluenza and leptospira), including a basic health examination of dog:

- | | | |
|---|---|---|
| <input type="checkbox"/> ₁ Under HK\$150 | <input type="checkbox"/> ₃ HK\$200 - \$299 | <input type="checkbox"/> ₅ HK\$400 or up |
| <input type="checkbox"/> ₂ HK\$150 - \$199 | <input type="checkbox"/> ₄ HK\$300 - \$399 | <input type="checkbox"/> ₉ Refused to answer |

C3 Charge for a routine de-sexing (non-complicated) surgery on an average adult female cat (incl. anesthetic, but excl. any blood test, additional post-surgery oral medication, collars, etc.):

- | | | |
|---|---|---|
| <input type="checkbox"/> ₁ Under HK\$500 | <input type="checkbox"/> ₄ HK\$700 - \$799 | <input type="checkbox"/> ₇ HK\$1,000 or up |
| <input type="checkbox"/> ₂ HK\$500 - \$599 | <input type="checkbox"/> ₅ HK\$800 - \$899 | |
| <input type="checkbox"/> ₃ HK\$600 - \$699 | <input type="checkbox"/> ₆ HK\$900 - \$999 | <input type="checkbox"/> ₉ Refused to answer |

C4 Charge for a routine de-sexing (non-complicated) surgery on an average adult female dog (10 – 20kg) (incl. anesthetic, but excl. any blood test, additional post-surgery oral medication, collars, etc.):

- | | | |
|---|---|---|
| <input type="checkbox"/> ₁ Under HK\$1,000 | <input type="checkbox"/> ₄ HK\$1,200 - \$1,299 | <input type="checkbox"/> ₇ HK\$1,500 or up |
| <input type="checkbox"/> ₂ HK\$1,000 - \$1,099 | <input type="checkbox"/> ₅ HK\$1,300 - \$1,399 | |
| <input type="checkbox"/> ₃ HK\$1,100 - \$1,199 | <input type="checkbox"/> ₆ HK\$1,400 - \$1,499 | <input type="checkbox"/> ₉ Refused to answer |

C5 Charge for over-night hospitalization for an adult dog (under 10kg) (excl. any additional care, such as intensive care, oxygenation, heat-pad warming, medication given, etc.):

- | | | |
|---|---|---|
| <input type="checkbox"/> ₁ Under HK\$200 | <input type="checkbox"/> ₄ HK\$400 - \$499 | <input type="checkbox"/> ₉ Refused to answer |
| <input type="checkbox"/> ₂ HK\$200 - \$299 | <input type="checkbox"/> ₅ HK\$500 or up | <input type="checkbox"/> ₇ No over-night hospitalization service |
| <input type="checkbox"/> ₃ HK\$300 - \$399 | | |

Contact Information

To ensure the quality of this study, kindly please provide your contact information for some follow-up questions when necessary. All collected information will be kept strictly confidential and will only be used in this study when necessary.

Contact person: _____ Title of contact person: _____

Contact tel. no.: _____ Contact email address: _____

*** End of Questionnaire. Thank You. ***

Study on the Development of the Veterinary Profession in Hong Kong – Overseas Veterinary Students from Hong Kong	For office use only	
	Sup :	Case :
	Edit :	Check :

We sincerely invite you to complete this questionnaire.

Purpose of the survey:

- In order to improve understanding of the prospects and constraints of the veterinary profession in Hong Kong, **the Veterinary Surgeons Board of Hong Kong (VSB)** through the Government's Agriculture, Fisheries and Conservation Department has commissioned an independent research company, Mercado Solutions Associates Ltd. (MSA), to conduct this study. One of the target groups of this study is the **Hong Kong students who are studying veterinary science in overseas universities**. This survey will help VSB in formulating recommendations to further support the development of the veterinary profession in Hong Kong.

Means to return the completed questionnaire:

- We sincerely invite you to complete the questionnaire and return it to MSA via any of the following means:
 - fax to (852) 3167 1193;
 - scan the completed questionnaire into an electronic file and email to ms@mercadosolutions.com;
or
 - visit the website (http://zh.research.net/r/vet-profession_students), and complete the online questionnaire.
- Please be assured that all collected information from the survey will be kept strictly confidential and will be analysed on an aggregated basis. Thank you for your support. If you have any enquiries about the questionnaire, please call MSA's survey hotline (852) 2598 0909.



【For the following questions, Please “✓” the answer chosen in the box .】

Part A. About Your Study

A1 Name of university:

UK

- | | |
|--|---|
| <input type="checkbox"/> 1 University of Bristol | <input type="checkbox"/> 5 University of Liverpool |
| <input type="checkbox"/> 2 University of Cambridge | <input type="checkbox"/> 6 University of London |
| <input type="checkbox"/> 3 University of Edinburgh | <input type="checkbox"/> 7 University of Nottingham |
| <input type="checkbox"/> 4 University of Glasgow | |

Ireland

- | | |
|---|---|
| <input type="checkbox"/> 8 Trinity College Dublin | <input type="checkbox"/> 9 University of Dublin |
|---|---|

Australia

- | | |
|---|--|
| <input type="checkbox"/> 10 University of Adelaide | <input type="checkbox"/> 14 University of Murdoch |
| <input type="checkbox"/> 11 University of Charles Sturt | <input type="checkbox"/> 15 University of Queensland |
| <input type="checkbox"/> 12 University of James Cook | <input type="checkbox"/> 16 University of Sydney |
| <input type="checkbox"/> 13 University of Melbourne | |

Canada

- | | |
|--|--|
| <input type="checkbox"/> 17 University of Guelph | <input type="checkbox"/> 20 University of Calgary |
| <input type="checkbox"/> 18 University of Saskatchewan | <input type="checkbox"/> 21 University of Montreal |
| <input type="checkbox"/> 19 University of Prince Edward Island | |

New Zealand

- | |
|---|
| <input type="checkbox"/> 22 Massey University |
|---|

Taiwan

- | |
|--|
| <input type="checkbox"/> 23 National Taiwan University |
|--|

USA

- | | |
|--|---|
| <input type="checkbox"/> 24 Auburn University | <input type="checkbox"/> 37 Mississippi State University |
| <input type="checkbox"/> 25 University of California-Davis | <input type="checkbox"/> 38 University of Missouri-Columbia |
| <input type="checkbox"/> 26 Colorado State University | <input type="checkbox"/> 39 Cornell University |
| <input type="checkbox"/> 27 University of Florida | <input type="checkbox"/> 40 North Carolina State University |
| <input type="checkbox"/> 28 University of Georgia | <input type="checkbox"/> 41 Ohio State University |
| <input type="checkbox"/> 29 University of Illinois | <input type="checkbox"/> 42 Oklahoma State University |
| <input type="checkbox"/> 30 Purdue University | <input type="checkbox"/> 43 Oregon State University |
| <input type="checkbox"/> 31 Iowa State University | <input type="checkbox"/> 44 University of Pennsylvania |
| <input type="checkbox"/> 32 Kansas State University | <input type="checkbox"/> 45 University of Tennessee |
| <input type="checkbox"/> 33 Louisiana State University | <input type="checkbox"/> 46 Texas A&M University |
| <input type="checkbox"/> 34 Tufts University | <input type="checkbox"/> 47 Virginia Tech |
| <input type="checkbox"/> 35 Michigan State University | <input type="checkbox"/> 48 Washington State University |
| <input type="checkbox"/> 36 University of Minnesota | <input type="checkbox"/> 49 University of Wisconsin-Madison |

South Africa

- | |
|--|
| <input type="checkbox"/> 50 University of Pretoria |
|--|

France

- | |
|--|
| <input type="checkbox"/> 51 VetAgro Sup – Campus Veterinaire de Lyon |
|--|

The Netherlands

- | |
|---|
| <input type="checkbox"/> 52 State University of Utrecht |
|---|

Mexico

- | |
|---|
| <input type="checkbox"/> 53 Universidad Nacional Autonoma de Mexico |
|---|

West Indies

- | |
|---|
| <input type="checkbox"/> 54 Ross University |
|---|

- | |
|---|
| <input type="checkbox"/> 55 St. George's University |
|---|

A2 Your current study is:

- ₁ (BVSc) Bachelor of Veterinary Science
- ₂ (BVMS) Bachelor of Veterinary Medicine and Surgery
- ₃ (BVBIol) Bachelor of Veterinary Biology
- ₄ (DVM) Doctor of Veterinary Medicine

Others (pls. specify): _____

A3 Year of your current study:

- ₁ 1st year
- ₂ 2nd year
- ₃ 3rd year
- ₄ 4th year
- ₅ 5th year
- ₆ 6th year

Part B. Future Plan

B1 Your intention of taking the following path(s) after graduation:

Please rank your top 3 preferred paths.

	Top priority [Single answer]	2nd [Single answer]	3rd [Single answer]
<u>Practicing</u>			
In clinics	<input type="checkbox"/> ₀₁	<input type="checkbox"/> ₀₁	<input type="checkbox"/> ₀₁
In animal groups / organizations	<input type="checkbox"/> ₀₂	<input type="checkbox"/> ₀₂	<input type="checkbox"/> ₀₂
In government	<input type="checkbox"/> ₀₃	<input type="checkbox"/> ₀₃	<input type="checkbox"/> ₀₃
In laboratory	<input type="checkbox"/> ₀₄	<input type="checkbox"/> ₀₄	<input type="checkbox"/> ₀₄
Research work	<input type="checkbox"/> ₀₅	<input type="checkbox"/> ₀₅	<input type="checkbox"/> ₀₅
In pharmaceutical company / pet food company	<input type="checkbox"/> ₀₆	<input type="checkbox"/> ₀₆	<input type="checkbox"/> ₀₆
Others (pls. specify):	_____	_____	_____
<u>Further Studies</u>			
Internship / Residency	<input type="checkbox"/> ₀₇	<input type="checkbox"/> ₀₇	<input type="checkbox"/> ₀₇
Master / Ph.D.	<input type="checkbox"/> ₀₈	<input type="checkbox"/> ₀₈	<input type="checkbox"/> ₀₈
Others (pls. specify):	_____	_____	_____
<u>Other intention after graduation (pls. specify):</u>			
	_____	_____	_____
		<input type="checkbox"/> ₉₉ No 2nd priority	<input type="checkbox"/> ₉₉ No 3rd priority

B2 Your intention of coming back to Hong Kong to practice within 3 years of graduation:

- ₄ Very likely ↗ Go to B3
₃ Quite likely ↘
₂ Quite unlikely ↖
₁ Very unlikely | Skip to Part C
₈ Undecided ↙

B3 Your preference of working in public or private sector in Hong Kong:

(Note: Public sector – government / educational institutions

Private sector – incl. veterinary clinics, HK Jockey Club, Ocean Park, Kadoorie Farm, etc.)

- ₄ Very likely to work in public sector
₃ Quite likely to work in public sector
₂ Quite likely to work in private sector
₁ Very likely to work in private sector
₈ Undecided

Part C. General Background Information

C1 Gender:

- ₁ Male ₂ Female ₉ Refused to answer

C2 Age:

- ₁ Below 21 ₃ 26 – 29 ₉ Refused to answer
₂ 21 – 25 ₄ 30 or above

C3 a. Year(s) of residence in Hong Kong:

- ₁ Less than 7 year ₂ 7 years or above → b. Are you holding HK permanent ID card?
₉ Refused to answer ₁ Yes
₂ No

Contact Information

To ensure the quality of this study, kindly please provide your contact information for some follow-up questions when necessary. All collected information will be kept strictly confidential and will only be used in this study when necessary.

Name: _____

Contact email address: _____

*** End of Questionnaire. Thank You. ***

	Sup :	Case :
	Edit :	Check :

Study on the Development of the Veterinary Profession in Hong Kong – Pet Owners

**RESTRICTED WHEN ENTERED WITH DATA
ACCESSIBLE TO AUTHORIZED PERSONS ONLY**

Tel. code: _____

Name of respondent: _____ Contact tel no.: _____

Interviewer no.: _____ Interview date: _____

Time started: _____ Time ended: _____

Introduction:

Hello! My name is _____, an interviewer of Mercado Solutions Associates Ltd. We are commissioned by the Agriculture, Fisheries and Conservation Department (AFCD) to conduct a study on keeping pets, and would like to conduct a short interview with you. The information you provide will be treated with the strictest confidence and will be used for aggregate data analysis only. Your co-operation in completing this survey is both valued and appreciated. **[Interviewer note: make sure that the respondent aged 18 or above.]**

[If necessary, elaborate] Whether your household keeps pets or not, we'd like to know your views on this issue. Your opinion is very important to the work of local veterinary professionals and the government.

Basic Questions

Q1. Has your household kept any pet (any species) in the past 12 months?	Yes No	[SA] 1 2	→ Skip to Q4 → Ask Q2
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Q2. Do you intend to keep any pet in the coming 3 years?	Likely Unlikely Don't know / undecided	[SA] 1 2 8	→ Ask Q3] Skip to X1
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Q3. What type(s) of pets will you keep? [Probe] Any others?			
[MA]			
Cats	01	Reptiles (e.g. turtles, snakes, etc.)	05
Dogs	02	Birds	06
Rabbits	03	Fishes (any animals that live in water)	90
Hamster / chinchilla	04	Others (pls. specify): _____	
		Don't know / undecided	98

]
]

Skip to X1
for all who completed Q3

Main Questionnaire – Pet Owners

[Interviewer note: make sure that the respondent is the household member who is the main person responsible for taking care of the pet(s).]

Q4. a. What type(s) of pet did you keep in the past 12 months? [Probe] Any others?	a. Kept in the past 12 months [MA]	b. No. for each type	c. Will keep in the coming 3 years (those not mentioned in a) [MA]
Cats	01	_____.	01
Dogs	02	_____.	02
Rabbits	03	_____.	03
Hamster / chinchilla	04	_____.	04
Reptiles (e.g. turtles, snakes, etc.)	05	_____.	05
Birds	06	_____.	06
Fishes (any animals that live in water)	90		90
Others (pls. specify):	_____	_____.	_____
			Will not keep other type of pets 99

**CHECK Q4a: For those who kept fish in the past 12 months ONLY → Skip to X1;
Otherwise continue to Q5.**

Q5. Can you tell me your years of experience in keeping pets? [Read out the answers 1 – 5]	[SA]	
Less than 1 year	1	
1 – 3 years	2	
4 – 6 years	3	
7 – 9 years	4	
10 years or above	5	

Q6.	<p>a. Have you ever brought your pets to see veterinary surgeons (vets)? [If yes] When is the last time? [Read out the answers 1 – 4]</p> <p style="text-align: right;">In the past 12 months 1 1 – 2 years ago 2 3 – 4 years ago 3 5 years ago or even earlier 4 Have never brought pets to see vets 9</p>	[SA]	<p>⌋ Skip to Q7 ⌋ → Ask Q6b</p>
Q6	<p>b. Why didn't you bring your pets to see vets? [Probe] Any other reasons? [If the respondent claimed "I considered it unnecessary", probe: "why do you consider it unnecessary?"]</p> <p style="text-align: right;">My pet has no sickness before 01 It's just a minor problem for my pet, it should be fine in a few days 02 Ask the staff of pet shop and they can tell how to handle it 03 I gave my pet patent medicine and it's okay 04 The fees and charges of vet services is expensive 05</p> <p>Others (pls. specify): _____</p>	[MA]	<p>⌋ Skip to Q16 ⌋</p>

<p>Q7. a. For the last time you brought your pets to see vets, what type(s) of vet services did you use? [Probe] Any others? [If necessary, read out the answers 1 – 12]</p> <p style="text-align: center;">General consultation (e.g. health examinations / follow-up consultation)</p> <p style="text-align: center;">Vaccination / microchipping Surgery</p> <p style="text-align: center;">Blood test Other diagnostic tests (e.g. Cytology test) X-ray imaging Ultrasound</p> <p>Other imaging (pls. specify): _____</p> <p style="text-align: center;">Hospitalization</p> <p style="text-align: center;">Acupuncture Chinese veterinary medicine Medication (e.g. medicine for heartworm) Buying pet food</p> <p>Other services (pls. specify): _____</p>	<p>[MA]</p> <p>01</p> <p>02</p> <p>03</p> <p>04</p> <p>05</p> <p>06</p> <p>07</p> <p>08</p> <p>09</p> <p>10</p> <p>11</p> <p>12</p>	<p>→ b. Did you go to the vets clinic or hospital, or use the vets visiting or mobile service?</p> <p style="text-align: right;">Vets clinic / hospital 1 Vets visiting service 2 Vets mobile service 3</p> <p>c. Did you use the service in normal operating hours, or after-hours emergency service upon request?</p> <p style="text-align: right;">Service in normal operating hours 1 After-hours emergency service 2</p> <p>→ d. What kind of surgery?</p> <p style="text-align: right;">De-sexing 01 Orthopedic surgery 02 Teeth cleaning / dental surgery 03</p> <p>Others (pls. specify): _____</p> <p>→ e. Any 24 hours attending staff for taking care of the pets?</p> <p style="text-align: right;">Yes 1 No 2 Don't know 8</p>	<p>[SA]</p> <p>[SA]</p> <p>[MA]</p> <p>[SA]</p>
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Q8. Based on your experience from the last time you sought veterinary attention, were you satisfied with the treatment your pet received from the veterinarian with particular respect to the following aspects? **[Read out a – e one by one]**
[Probe] Would you say “very satisfied”, “quite satisfied”, “average”, “quite dissatisfied” or “very dissatisfied”?

[Read out a – e one by one]	[SA]					
	Very satisfied	Quite satisfied	Average	Quite dissatisfied	Very dissatisfied	Don't know / no comment / hard to say [Do not read out]
a. Professional knowledge of the vets	5	4	3	2	1	8
b. Attitude and courtesy of the vets	5	4	3	2	1	8
c. Was alternative treatment advice offered	5	4	3	2	1	8
d. Were proactive suggestions made on taking care of your pets	5	4	3	2	1	8
e. The overall service quality is value for money	5	4	3	2	1	8

Q9. How much did you spend on vet services in the past year approximately? (Please count from the most recent year that you have sought veterinary attention) [Read out the answers 01 – 11]	[SA]
Less than \$1,000	01
\$1,000 – less than \$2,000	02
\$2,000 – less than \$3,000	03
\$3,000 – less than \$4,000	04
\$4,000 – less than \$6,000	05
\$6,000 – less than \$8,000	06
\$8,000 – less than \$10,000	07
\$10,000 – less than \$15,000	08
\$15,000 – less than \$20,000	09
\$20,000 – less than \$25,000	10
\$25,000 or above	11
Can't remember	98

Q10.	a. Overall, do you consider the fees and charges of vet services in Hong Kong reasonable or not?	[SA]	
	[Probe] Would you say “very reasonable”, “quite reasonable”, “quite unreasonable” or “very unreasonable”?		
	Very reasonable	4] Skip to Q11
	Quite reasonable	3] Skip to Q11
	Quite unreasonable	2] Ask b
	Very unreasonable	1] Ask b
	Don't know / no comment / hard to say	8	→ Skip to Q11
	b. What type(s) of vet services do you consider that the fees and charges are <u>unreasonable</u> ? [Probe] Any others?	[MA]	
	Consultation fee of general vets	01	
	Consultation fee of specialists vets	02	
	Hospitalization	03	
	Medicines	04	
	Diagnostic tests	05	
	Surgery	06	
	Others (pls. specify): _____		

		[SA]		
Q11.	a. If the vet said that your pet requires further examination or certain kind of treatment, e.g. lab tests, imaging, surgery or other kinds of treatment, did the vet or other staff explain to you the reason of conducting those examinations or treatments before doing so?	Yes, explained by the vet	1 → Ask b	
		Yes, explained by other staff	2 → Ask c	
		No	9 → Ask d	
		Don't know / don't have such encounter	8 → Skip to Q12	
	b. Do you consider the explanation of vet clear or not? [Probe] Would you say "very clear", "quite clear", "quite unclear" or "very unclear"?	Very clear	4	} → Skip to d
		Quite clear	3	
		Quite unclear	2	
		Very unclear	1	
		No comment / hard to say	8	
c. Do you consider the explanation of other staff clear or not? [Probe] Would you say "very clear", "quite clear", "quite unclear" or "very unclear"?	Very clear	4		
	Quite clear	3		
	Quite unclear	2		
	Very unclear	1		
	No comment / hard to say	8		
d. Did the vet or other staff explain to you the approximate fees or charges before service?	Yes	1		
	No	2		
e. After paying the required fees or charges, did the vet clinic or hospital issue a receipt for you?	Yes	1	→ Ask f	
	No	2	} Skip to Q12	
	Did not conduct the examination or treatment finally	9		
f. Did they <u>itemise</u> the fees or charges of the examination or treatment on the receipt?	Yes	1		
	No	2		
	Don't know / didn't pay attention on it	8		

<p>Q12. a. Overall, do you consider the <u>fees and charges</u> of vet services in Hong Kong <u>transparent</u> enough? E.g. except in an emergency situation, did they give you a general idea on the fees or charges before conducting the examination or treatment, or were you informed when there is additional treatment / testing? [Probe] Do you consider the price transparency “very adequate”, “quite adequate”, “average”, quite inadequate” or “very inadequate”?</p>	<p>[SA]</p>		
	Very adequate	5] Skip to Q13] Ask b → Skip to Q13
	Quite adequate	4	
	Average	3	
	Quite inadequate	2	
	Very inadequate	1	
	Don't know / no comment / hard to say	8	
<p>b. What type(s) of vet services do you consider that <u>the price transparency is inadequate</u>? [Probe] Any others?</p>	<p>[MA]</p>		
	Consultation fee of general vets	01	
	Consultation fee of specialists vets	02	
	Hospitalization	03	
	Medicines	04	
	Diagnostic tests	05	
	Surgery	06	
	Others (pls. specify): _____		
<p>c. How do you think <u>the fees and charges</u> of vet services <u>can be more transparent</u>? [Probe] Any others?</p>	<p>[MA]</p>		
	The clinics should post the list of basic fees and charges at the clinic	01	
	The clinics should post the list of basic fees and charges in their website	02	
	The clinics should <u>list the breakdown items</u> of the fees or charges on receipts	03	
	Others (pls. specify): _____		
	Don't know / no comment / hard to say	98	

<p>Q13. a. Have you ever consulted more than one vet (i.e. sought second opinion(s)) for the same problem of your pet(s)?</p>	<p>[SA]</p>		
	Yes	1	→ Ask b] Skip to Q14
	No	2	
	Can't remember / my pets have never had problem	9	
<p>b. Why did you consult more than one vet? [Probe] Any others?</p>	<p>[MA]</p>		
	The problem of my pet did not improve	01	
	The fees / charges of the first vet / clinic for the required examination or treatment were too expensive	02	
	Just wanted to seek a second / other advice	03	
	Dissatisfaction with the customer service provided by the clinic	04	
	Others (pls. specify): _____		

<p>Q14. a. Overall of the various aspects of your veterinary visit, are you satisfied with the vet services in Hong Kong? [Probe] Would you say “very satisfied”, “quite satisfied”, “average”, “quite dissatisfied” or “very dissatisfied”?</p> <p style="text-align: right;">Very satisfied 5 Quite satisfied 4 Average 3 Quite dissatisfied 2 Very dissatisfied 1 Don't know / no comment / hard to say 8</p> <p>b. In which aspect are you dissatisfied with? [Probe] Any others?</p> <p style="text-align: right;">Unreasonable fees and charges 01 Inadequate price transparency 02 Attitude and courtesy of vets 03 Attitude and courtesy of other staff 04 Unclear explanation of vets 05 Unclear explanation of other staff 06</p> <p>Others (pls. specify): _____</p>	<p>[SA]</p> <p>[MA]</p>	<p>⌋ Skip to Q15 ⌋ ⌋ Ask b ⌋ → Skip to Q15</p>
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<p>Q15. a. When you encounter the situation that you are dissatisfied with the vet services, did you take any action? [If yes] What actions have you taken?</p> <p style="text-align: right;">Report to the clinic or hospital (and undergo mediation) 01 Lodge a complaint to the regulatory authority 02 Lodge a complaint to other organizations 03 Share the experience in forum or social network on the internet 04 Others (pls. specify): _____ Did not take any action 99 Don't have such encounter of dissatisfaction 98</p> <p>b. Why didn't you take any action? [Probe] Any others?</p> <p style="text-align: right;">Don't think it could help 01 Not aware of the complaint channels 02 Considered that the procedure of complaint was complicated (e.g. should go through many different steps) 03 No spare time and effort to handle 04 Just decided not to visit that clinic or hospital again 05</p> <p>Others (pls. specify): _____</p>	<p>[MA]</p> <p>[MA]</p>	<p>⌋ Skip to Q16 → Ask b → Skip to Q16</p>
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Q16. a. Overall, do you consider the number of vets in Hong Kong sufficient or not? [Probe] Would you say “very sufficient”, “quite sufficient”, “average”, “quite insufficient” or “very insufficient”?		[SA]		
	Very sufficient	5] Skip to Q17	
	Quite sufficient	4		
	Average	3		
	Quite insufficient	2] Ask b	
	Very insufficient	1		
	Don't know / no comment / hard to say	8	→ Skip to Q17	
	b. Which <u>type(s) of vets</u> do you consider <u>insufficient</u> ? [Probe] Any others?		[MA]	
		General	01	
		Ophthalmology	02	
Internal medicine		03		
Surgery		04		
Exotic animal		05		
Others (pls. specify): _____				

Q17. From which channels do you know about the vet services in Hong Kong? [Probe] Any others?		[MA]	
	TV programme	01	
	Radio programme	02	
	Newspapers / magazines articles	03	
	Newspapers / magazines advertisements	04	
	Printing materials (e.g. leaflet, booklet)	05	
	Pets expo	06	
	Staff of pet shops	07	
	Friends / relatives	08	
	Internet – websites of vet clinics	09	
	Internet – social network / forum	10	
	Mobile phone apps	11	
	Others (pls. specify): _____		
None	99		

Background Information

X1. Record the gender:		[SA]	
	Male	1	
	Female	2	

[Read out] Finally, for conducting statistical analysis, would you tell me...

X2.	Which of the following age group are you in? [Read out the answers 1 – 6]		[SA]
		18 – 24	1
		25 – 29	2
		30 – 39	3
		40 – 49	4
		50 – 59	5
		60 or above	6
	Refused to answer [Do not read out]	9	

X3.	Which district do you live in? [Read out 01 – 18 if necessary]	[SA]					
		<u>HK Island</u>	Central & Western	01	<u>New Territories</u>	Kwai Tsing	10
			Wan Chai	02		Tsuen Wan	11
			Eastern	03		Tuen Mun	12
			Southern	04		Yuen Long	13
						North	14
		<u>Kowloon</u>	Yau Tsim Mong	05		Tai Po	15
			Sham Shui Po	06		Sha Tin (incl. Ma On Shan)	16
			Kowloon City	07		Sai Kung (incl. Tseung Kwan O)	17
			Wong Tai Sin	08		Islands (incl. Tung Chung)	18
			Kwun Tong	09		Refused to answer	97
						[Do not read out]	

X4.	Which of the following housing type are you living in? [Read out the answers 1 – 3]		[SA]
		Public housing estates	1
		Subsidized sale flats (HOS)	2
		Private housing	3
		Others (pls. specify): _____	
	Refused to answer [Do not read out]	9	

X5. Would you tell me which of the following group of total monthly **household** income are you in? **[Read out the answers 01 – 10]**

[SA]			
No income	01		
<u>With income</u>			
\$9,999 or below	02	\$30,000 - \$39,999	06
\$10,000 - \$19,999	03	\$40,000 - \$49,999	07
\$20,000 - \$24,999	04	\$50,000 - \$59,999	08
\$25,000 - \$29,999	05	\$60,000 - \$69,999	09
		\$70,000 or above	10
		Don't know [Do not read out]	98
		Refused to answer [Do not read out]	97

~ **Thank you for your co-operation!** ~

[Read out] Supervisory staff of our company may contact you later to re-confirm the interview that I have done or to clarify some other answers to the questions. He/she will ask a few questions only and will not disturb you for a long time.

Interviewer declaration

I hereby authenticate the data accuracy and integrity, and the interview was conducted by following the guidelines maintained by the international standard of market research.

Signature: _____

Date: _____