



# Summary of MPV Business Index Survey

*January 2010*

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This is a summary of the results of the MPV Business Index Survey of January 2010. A total of 57 practices submitted data that has allowed MPV Consulting to analyse the information. We sincerely thank these practices and hope that you will get some valuable information from this results summary.

## Participants Summary

Chart 1 below gives a breakdown of the participants by State, Type, Size and Location. All sub-cultural groups were reasonably well represented considering the population sizes of each group.

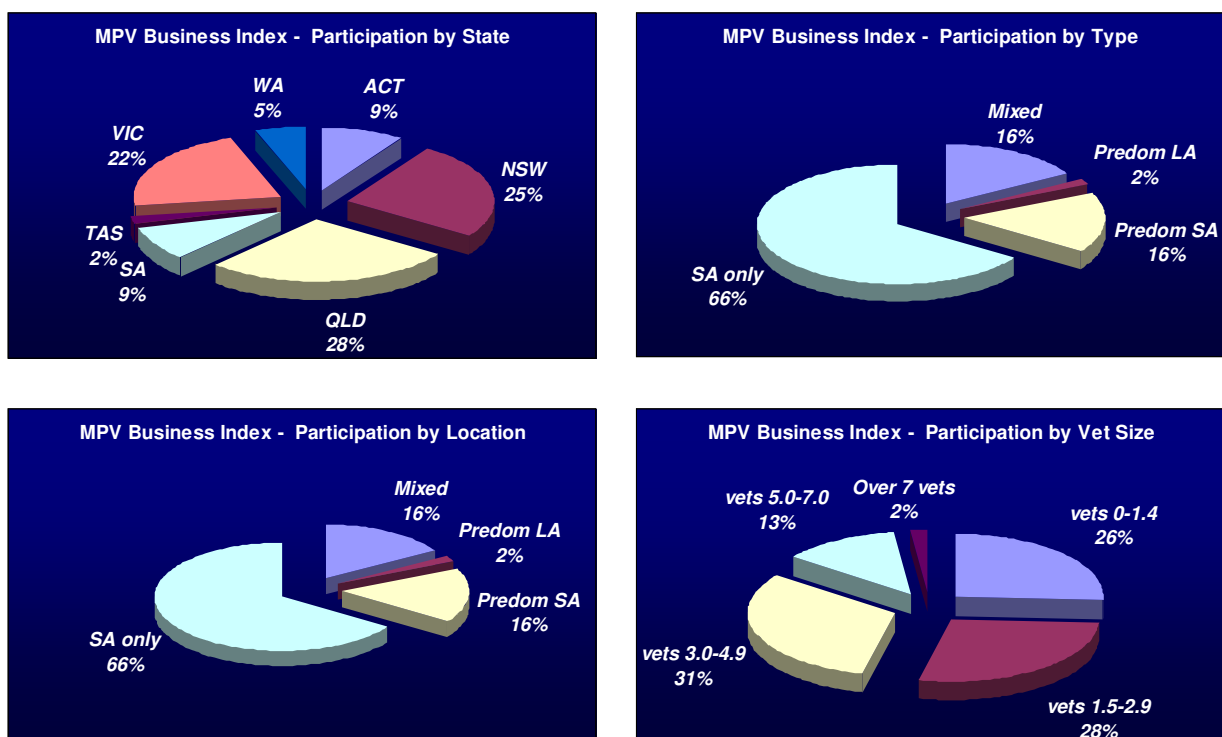
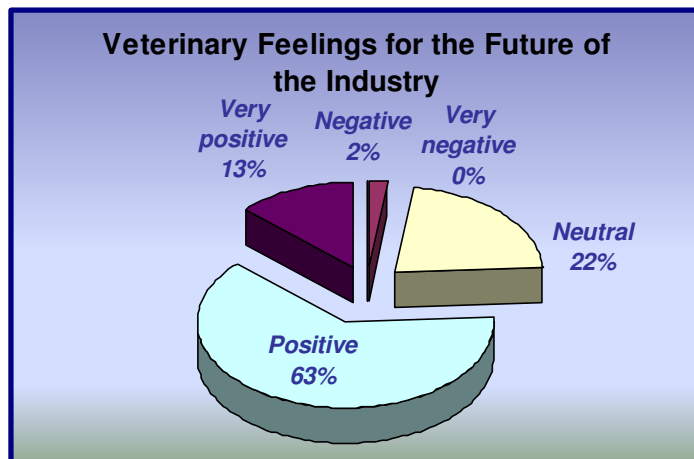


Chart 1: Demographics of participants

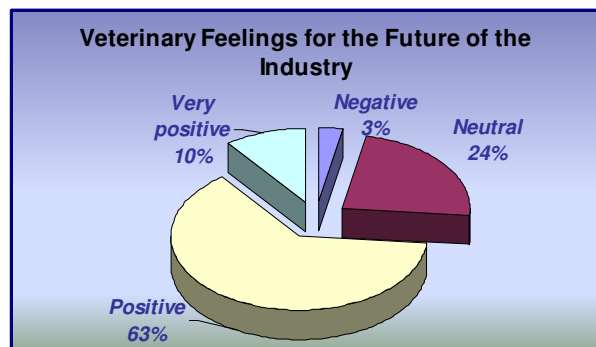
## Section 1: Industry Sentiment

### Feelings of Practice Owners for the Future of the Veterinary Industry

Well the great news to come out of the January survey was the positive feelings that continue from virtually all participants about the future of the veterinary industry. Chart 2 shows that veterinary practice owners/managers feeling either *positive* or *very positive* about the future of the industry has risen from 73% in the July-September quarter to 76% in the October -December quarter. This is well up on the April-June quarter when only 65% of participants felt *positive or very positive*.



Current survey: October – December 2009



Last survey: July-September 2009

Chart 2: Feelings for the future

<i>RESULTS</i>	
October - December 2009	76%
July - September 2009	73%
April - June 2009	65%

Table 1: Feeling positive or very positive about the future of the veterinary industry.

## Industry Performance for the BAS Quarter

The positive feelings for the future above were supported by the actual financial performance of participating practices. The October-December quarter for participating practices has revealed a gross turnover **growth of 6.7%** compared to the previous year.

Chart 4 shows that for the last year growth has been consistently around the 7%.

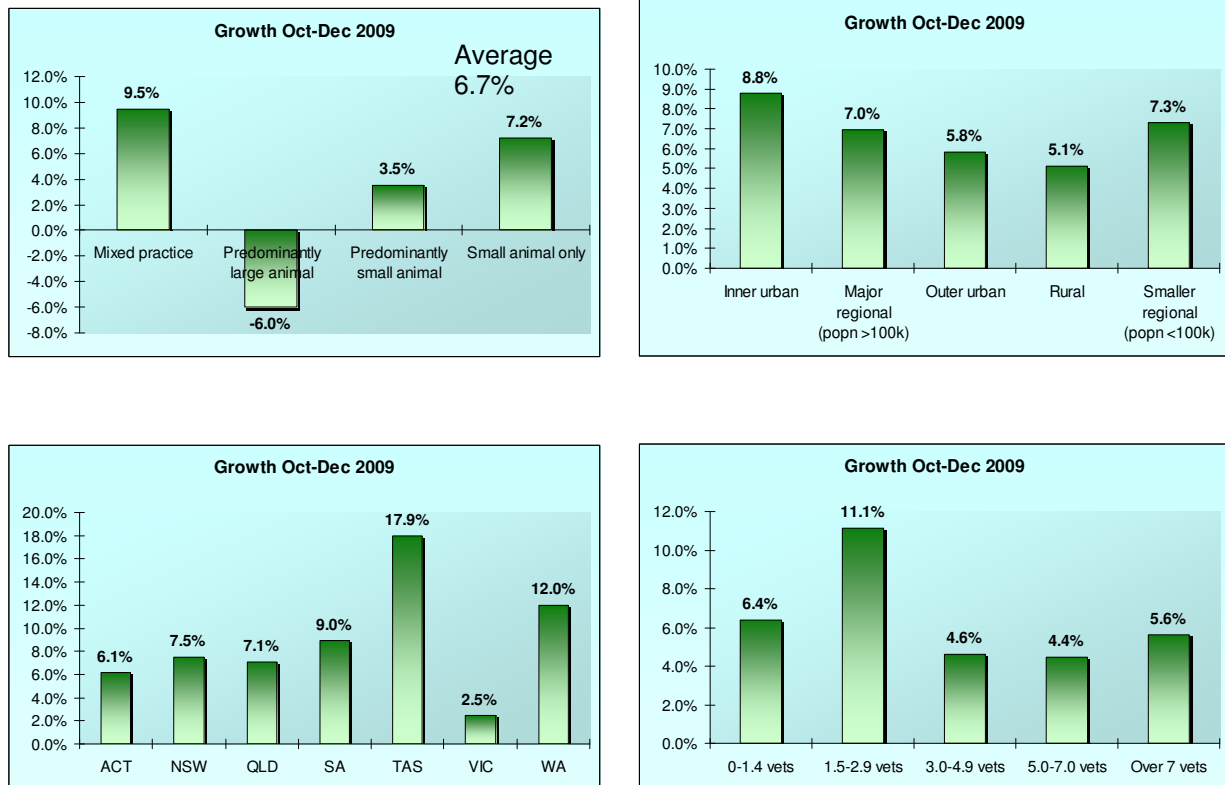


Chart 3: Current BAS quarters by profile groups

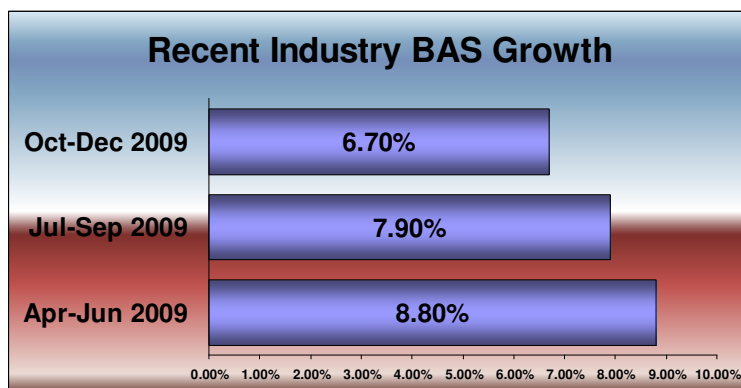


Chart 4: BAS growth for current and previous periods

**Note:** how BAS growth is continuing in a positive manner but the rate of growth has been declining for the past 3 quarters.

**Mixed practice:** The winners for the quarter were again mixed practices, they topped the BAS growth at 9.5% growth in business. This figure was on top of a 10.5% growth in the previous quarter. It would seem that mixed practice are doing very well in the current environment. It is interesting to note that Mixed Practices also performed well in the previous two BAS periods.

<i>Period</i>	<i>Growth</i>
Oct. - Dec. 2009	9.5%
Jul. - Sept. 2009	10.5%
Apr.- June 2009	16.5%

**Small animal only practices:** Have maintained good growth at 7.2 % even though this is well down on previous years. This is compared with the 8.0% growth in the previous quarter.

<i>Period</i>	<i>Growth</i>
Oct. - Dec. 2009	7.2%
Jul. - Sept. 2009	8.0%
Apr.- June 2009	6.6%

**Predominantly small animal practices:** Continue to suffer more than the other two groups with the growth of 3.5% which was well below average. This trend continues what has happened in the previous two quarters.

<i>Period</i>	<i>Growth</i>
October - December 2009	3.5%
July - September 2009	
April - June 2009	

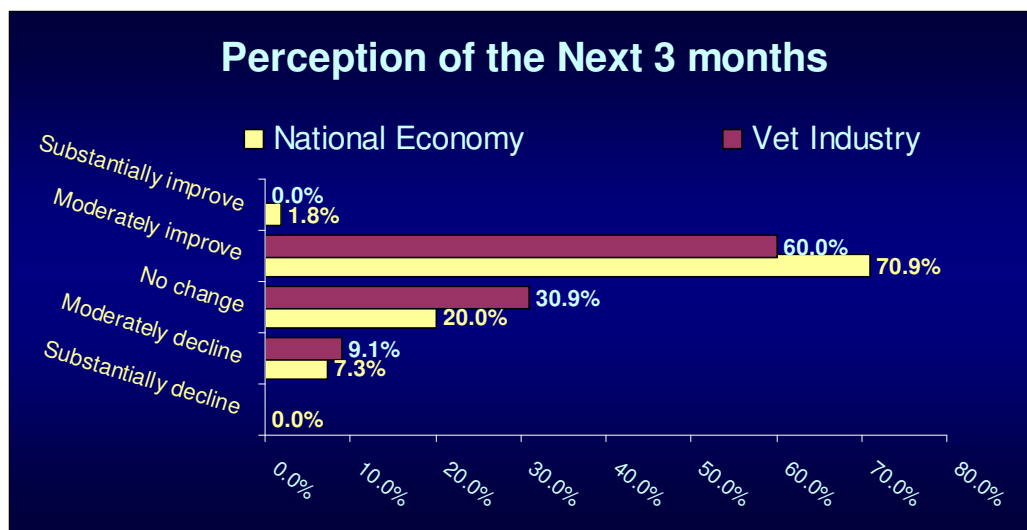
**Large Animal only:** The figure is statistically invalid due to low participating numbers.

This is for the industry as a whole and does not reflect what specific individual practices or groups of practices may be experiencing. It is unfortunate that some practices are in fact suffering considerably whilst others have done very well. I would recommend for those that are suffering should not be disheartened and may consider more promotional activity to see if your practices can weather this storm as well as possible.

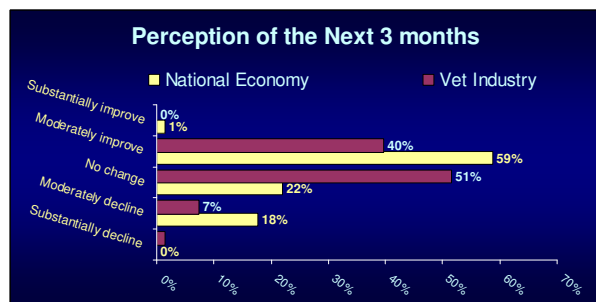
## Veterinary Practice Owner / Manager Feelings for the Future

In the survey questionnaire veterinarians were asked their opinions of how they see the future of both the national economic situation as well as the future of the veterinary industry. This included the next BAS Quarter (January- March 2010) and the next 12 months (2010 calendar year).

### Next 3 months



Current survey: October – December 2009



Last survey: July-September 2009

Chart 5: Perceptions for the next 3 months

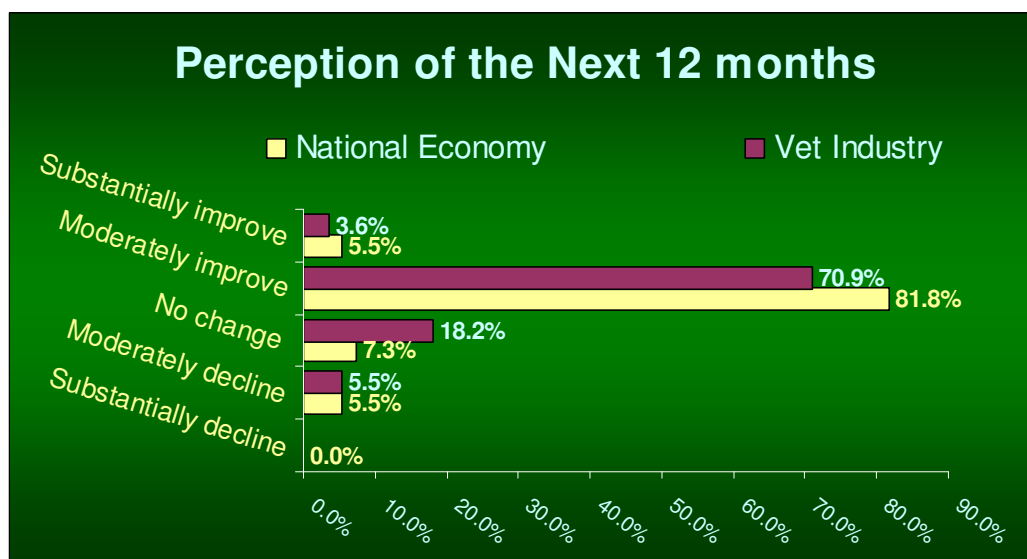
As you can see from the above graphs, the last quarter has come with a renewed optimism for both the national economy and for the veterinary industry. In the April-June 2009 quarter only 19.0% of respondents thought that the national economy would *moderately improve* in the next 3 months. By July-September 2009 this had risen to 59% of respondents. In the last October - December quarter a substantial 70.9% of respondents felt the national economy would moderately improve within the next 3 months.

<i>Period</i>	<i>National</i>	<i>Vet Industry</i>
Oct. - Dec. 2009	70.9%	60.0%
Jul. - Sept. 2009	59.0%	40.0%
Apr.- June 2009	19.0%	38.0%

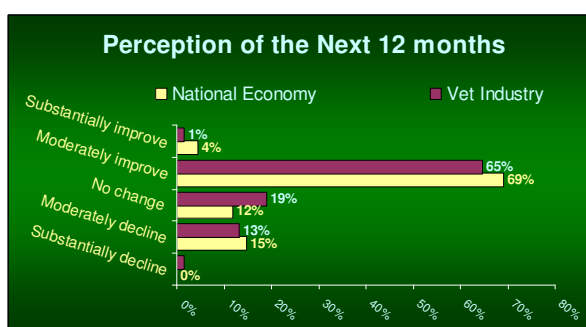
Table 2: Respondents feeling moderately positive about the next three months

As far as the veterinary industry is concerned there is a less positive feel (relative to national economy) however statistics show that we all have felt positive about our own industry for the entire GFC anyway when compared to the national economy. In other words we have felt positive about our industry all the way through and thus the change in attitude is not as dramatic.

### Next 12 months



Current survey: October – December 2009



Last survey: July-September 2009

Chart 6: Projected future of veterinary industry for next BAS quarter and next 12 months





Similarly to the comments on chart 5, chart 6 is further evidence that participants for the most part feel pretty good about both the national economy and the veterinary industry over the next 12 months.

## Section 2: Cruciate Repair Techniques in General Practice

### General

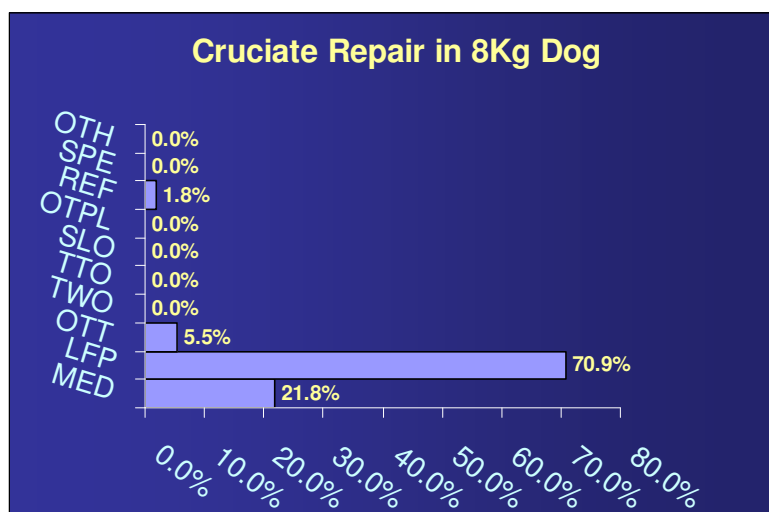
In recent times there has been much conjecture about the best way to treat rupture of the anterior cruciate. We hear the various methods proposed by the ‘gurus’ but I felt it was time to find out what was considered to be the norm in veterinary practice generally. Because of the variations in methodology based on size of the patient I asked what techniques would be used for different types of patient.

We would have to assume that each respondent achieves ‘good results’ with the techniques that they have chosen for each category or they would presumably not use the technique.

### Legend

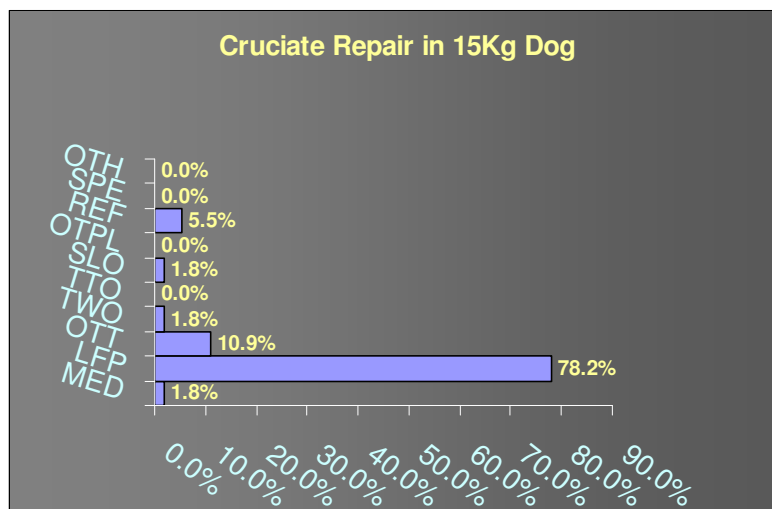
- MED = medical treatment only
- LFP = lateral flabella prosthesis (De Angelo’s )
- OTT = Over the top technique in-house
- TWO = Tibial wedge osteotomy in-house
- TTO = Triple tibial osteotomy in-house
- SLO = Slocum tibial plateau leveling in-house
- OTPL = Other TPLO technique in-house
- REF = External referral
- SPE = Specialist / contract surgeon in-house
- OTH = Other treatment not listed

### Cruciate Repair in an 8Kg Dog



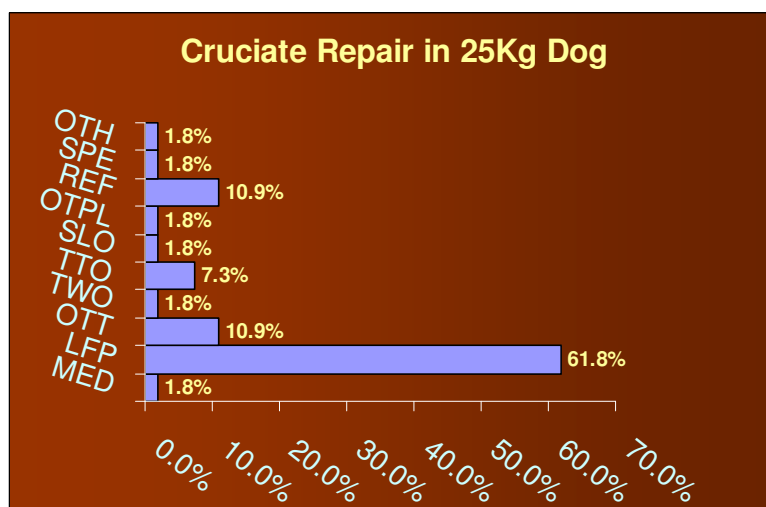
The vast majority of respondents have chosen the *De Angelo’s technique* for these smaller dogs but it is of interest that 1 in 5 participants has chosen a *Medical only* treatment.

## Cruciate Repair in an 15Kg Dog



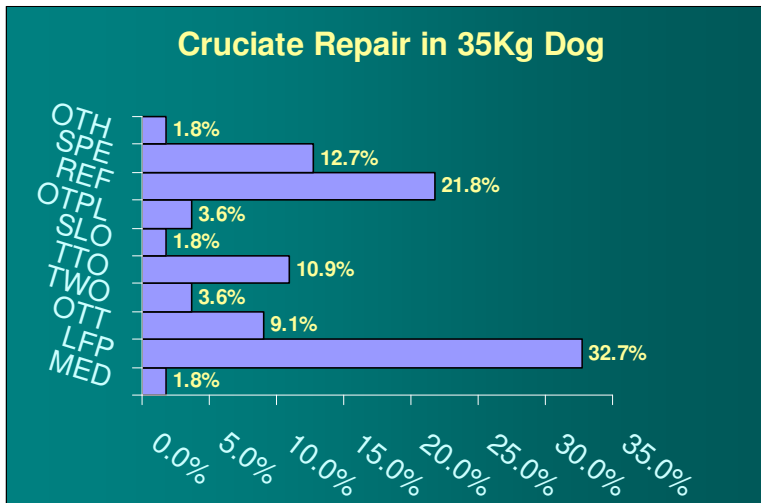
For a 15 kg dog the vast majority of respondents still choose to use *De Angelo's technique*. There is a sharp reduction in those that choose to use *Medical only* treatment. It would appear there is little argument about the treatment of choice for this group.

## Cruciate Repair in an 25Kg Dog



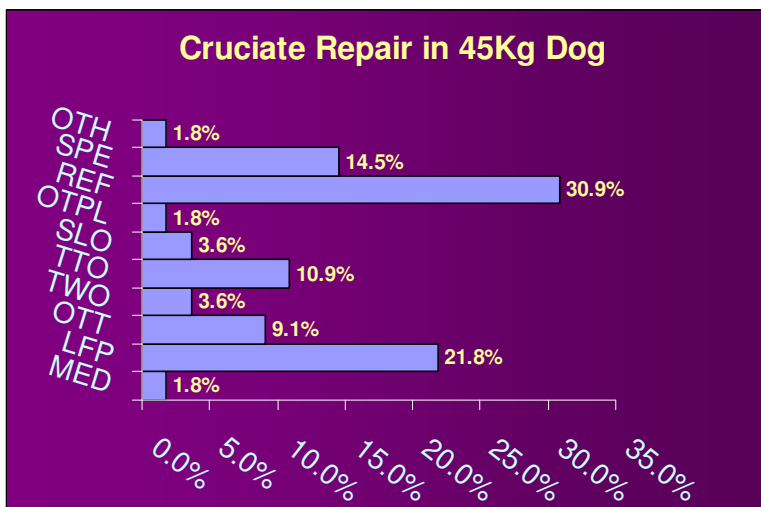
For 25kg still the bulk of respondents feel *De Angelo's* is more than satisfactory although a variety of other techniques are starting to be used. It would appear that most practitioners feel that *De Angelo's* at 25 kg is a satisfactory surgical solution.

## Cruciate Repair in an 35Kg Dog



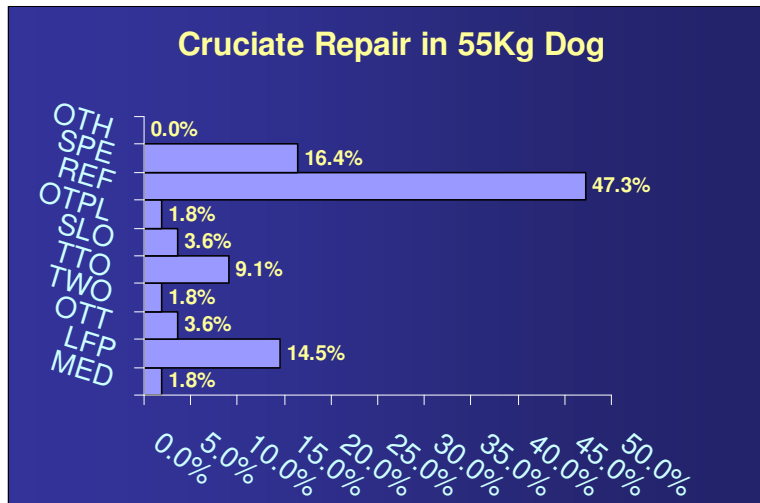
At 35 kg there is a distinctive change in the pattern of techniques. Whilst *De Angelo's* is still used in 33% of practices approximately 34% are also either *Referral* or using a *Contract Surgeon In-house*. Approximately 33% of general practitioners appear to be using a variety of other more sophisticated techniques that for the most part involve some form of tibial plateau leveling.

## Cruciate Repair in an 45Kg Dog



For 45kg the trend is similar to 35kg with lower usage of *De Angelo's* and higher usage of *Contract Surgeon* or *Referral*. It would appear that those who feel comfortable performing tibial plateau leveling techniques are prepared to use the technique on all size dogs.

## Cruciate Repair in an 55Kg Dog



For 55kg almost 66% of practices choose to use *Contract Surgeons In-house* or Referral. About 33% of practices are comfortable handling these surgeries using in-house staff. Interestingly 14.5% of practices still feel *De Angelo's* technique is the preferred method of cruciate repair. Around 20% of practices are happy to perform a variant of tibial plateau leveling in-house.

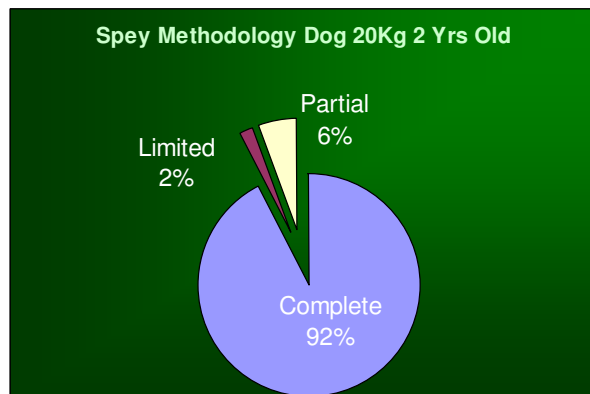
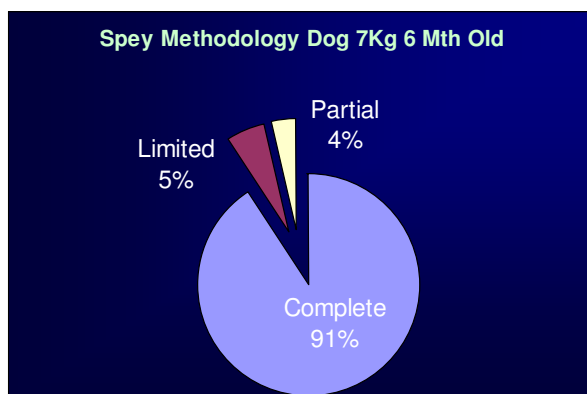
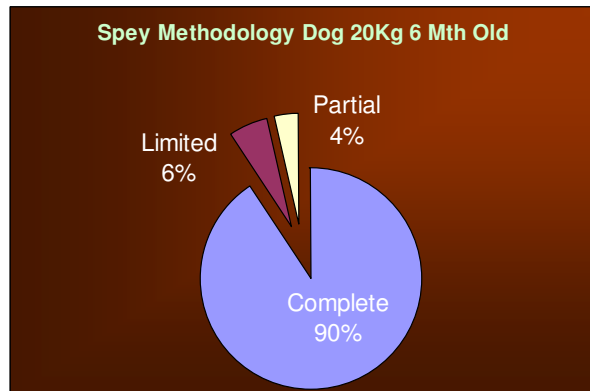
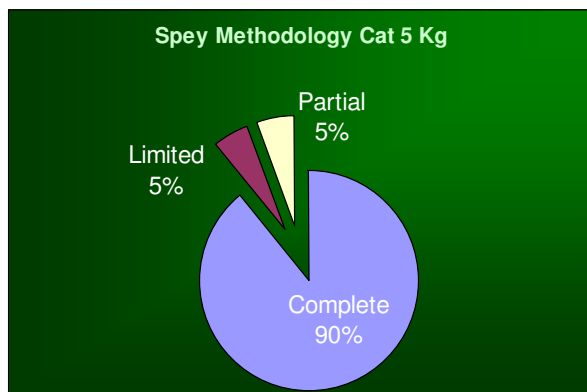
## Section 3: Speying Techniques in General Practice

### General

Recently I attended a continuing education lecture in which the lecturer indicated that in Europe there was a trend towards moving back to ovariectomy rather than ovariohysterectomy. This was based on evidence that stump pyometra was related more to failure to remove all ovarian tissue rather than the amount of uterus removed. For those of us who graduated 30+ years ago this was an interesting step because in the 1970's the technique taught for neutering female cats and dogs was in fact a straight ovariectomy. By late 1980's this was abandoned in favour of the ovariohysterectomy. I thought it would be interesting to see:

1. What techniques are used in general practice?
2. The incidence of stump pyometra?

### Speying Methodologies



#### Legend

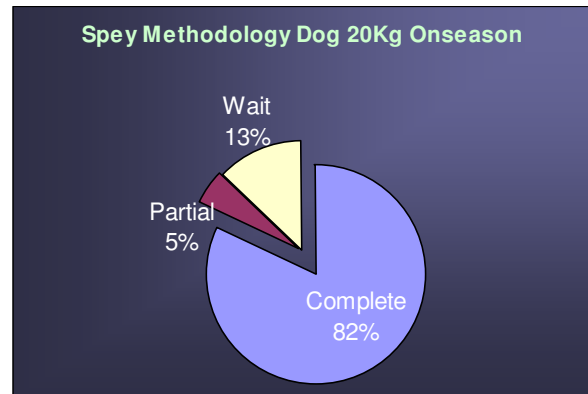
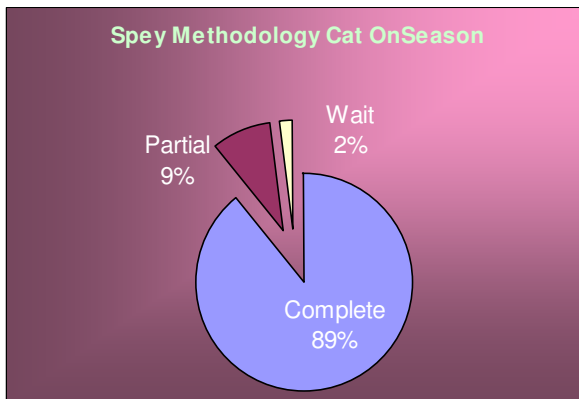
**Complete** - removal of both ovaries and uterus below the bifurcation as a single mass

**Partial** - removal of each ovary and uterine horn separately & immediately above the bifurcation

**Limited** - removal of each ovary but size of uterine removal limited by amount that can be comfortably removed from a modest external abdominal incision size

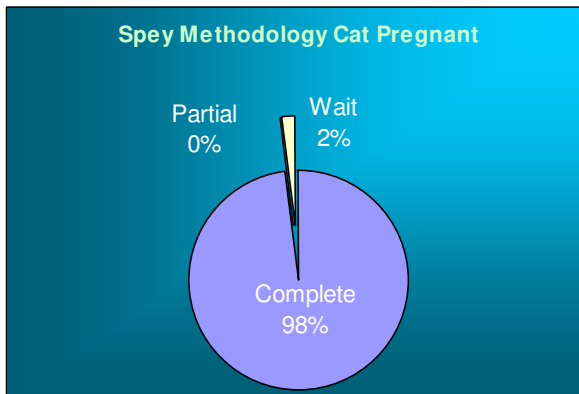
Certainly the above graphs indicate that about 90% of practices chose to perform a complete ovariohysterectomy, whilst the balance chose to perform an incomplete ovariohysterectomy.

## Effect of On Season



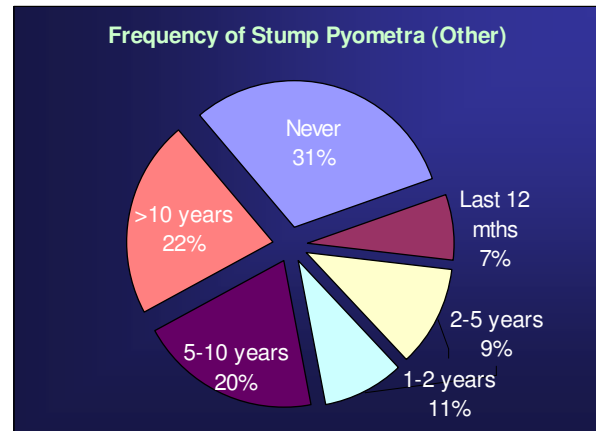
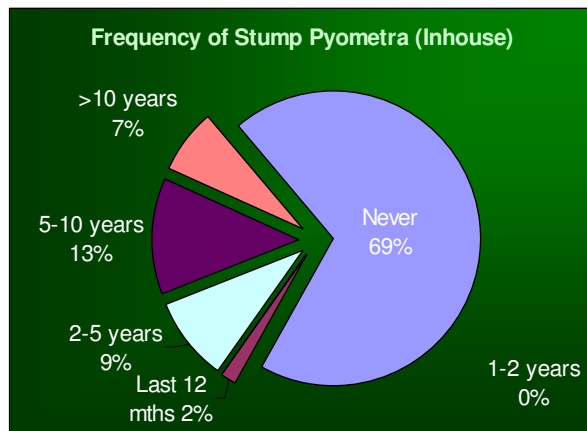
When a cat or dog is on season the technique choice does not appear to largely change compared to routine speying except that a proportion of practices choose to wait until the patient is in anoestrus again.

## Effect of Pregnancy



In pregnant cases all respondents either perform a full ovarohysterectomy or wait for pregnancy to terminate.

## Stump Pyometra



The anecdotal evidence is that stump pyometra is an uncommon occurrence. Following in-house surgery, only 11% of respondents have diagnosed a stump pyometra in the last 5 years. Interestingly more than 66% of respondents have never diagnosed a stump pyometra in-house at all. Also of interest is that of clinics that perform an incomplete ovariectomy, none have diagnosed a *stump pyometra* in the last 10 years.

**Note** the statistics on stump pyometra are not based on clinical records but based on 'feelings' of respondents, therefore the results may not statistically be totally accurate. It is a natural tendency to believe our own practice results to be superior to those performed elsewhere. This may have been a factor in variance between *in-house* and *other* pyometra. Either way it is reasonable to assume stump pyometra is not a common occurrence in general practice.