



Veterinarians' Perception of Point-of-Care Diagnostics (POC)

A Comparative Study: Germany, France, UK, United States



Study Overview

Objectives & Methodology



Key Results

Data from 200 Veterinarians



Recommendations

Strategic Adoption Steps



Study Overview & Objectives

Point-of-Care (POC) Context

POC diagnostics are rapidly expanding in veterinary medicine, bridging the gap between clinical exams and external reference labs. This study focuses on the perception of these specific tool categories:



**Rapid Antigen
Tests**



**Portable PCR
Molecular**



**Blood Analyzers
In-Clinic**



**AI Scanners
Cytology**



**Handheld Imaging
Ultrasound/X-Ray**

Research Objectives

Assessing veterinarians' perceptions across 6 key dimensions:



Clinical Value

Perceived utility in diagnosis and treatment planning.



Workflow Impact

Effect on clinic efficiency and decision-making speed.



Economics

Cost-benefit analysis, ROI, and client pricing.



Interpretation

Confidence in reading and trusting the results.



Adoption Intent

Likelihood to purchase or expand usage in 12 months.



Training & Usability

Ease of use and educational requirements.

Methodology



Study Design

Quantitative simulated survey model utilizing validated Likert scale items (1–5) based on prior diagnostic technology adoption literature.



Instrument

10-item Likert scale measuring perceived value, workflow impact, cost, confidence, and adoption intent.

MEAN AGE

46.2 years

EXPERIENCE

15.3 years



Sample Size (n=200)

Balanced Distribution

US

50

USA

GB

50

UK

DE

50

GERMANY

FR

50

FRANCE



Practice Type











Small Animal	60%
Mixed Practice	25%
Large/Production	15%

Results Overview

Mean Likert Scale Scores (1 = Strongly Disagree, 5 = Strongly Agree)


☐ n = 200 Veterinarians

Highest Score

1. POC diagnostics improve clinical decision making	4.3	4.5	4.4	4.2	4.1	
2. POC diagnostics improve patient outcomes	4.2	4.4	4.3	4.1	3.9	
3. POC tools save time vs. external labs	4.0	4.3	4.1	3.9	3.7	
4. Results are accurate and reliable	3.6	3.9	3.7	3.4	3.3	
5. Cost is a barrier to adoption	4.1	3.6	4.0	4.4	4.6	
6. Training is needed to use POC correctly	4.5	4.2	4.4	4.6	4.8	
7. I feel confident interpreting POC results	3.7	4.0	3.8	3.5	3.4	
8. Client's value fast results	4.4	4.6	4.5	4.2	4.1	
9. POC reduces unnecessary treatments	3.9	4.2	4.0	3.8	3.6	
10. I intend to increase use next 12 months	4.0	4.4	4.2	3.8	3.6	

Key Findings & Interpretation


Top 5 insights derived from cross-market data analysis



Clinical Value Consensus

Strong global agreement that POC tools improve decision-making speed and patient safety, particularly in the US and UK.


4.3
MEAN



Client Expectations

Pet owners highly value immediate results. This "Amazon effect" is a primary driver for adoption across all four markets.


#1
DRIVER



Economic Sensitivity

Cost remains the strongest barrier, significantly higher in Germany and France where willingness-to-pay is lower.


High
BARRIER



Education Gap

Universal acknowledgement that current training is insufficient. Confidence in result interpretation lags behind interest.

4.5
NEED



Adoption Momentum

Adoption intent is highest in the US and UK. Continental Europe remains cautious, prioritizing lab accuracy.

US/UK
LEAD

The Adoption Equation

↑ KEY DRIVERS

Fast Triage

Client Satisfaction

Emergency Care

Revenue Gen


↓ KEY BARRIERS

High Device Cost

Consumable Price

Integration Issues

Accuracy Doubts



Adoption Intent by Region

US	4.4
UK	4.2
DE	3.8
FR	3.6

Country Insights: High Adoption Markets

Comparative analysis of adoption drivers in the United States and United Kingdom





United States


Adoption Intent: ★★★★★ 4.4

MARKET THEME

"Innovation accepted as standard of care."

 **Highest Optimism:** Strongest momentum for new technology adoption among all surveyed regions.

 **Client Driven:** High client expectations for immediate answers drive in-clinic testing.

 **Cost Accessibility:** Less prohibitive due to pet insurance penetration and higher willingness-to-pay.





United Kingdom


Adoption Intent: ★★★★★ 4.2

MARKET THEME

"Evidence-driven, quality-focused adoption."

 **Measured Approach:** Positive outlook but more conservative than the US; values proven utility.

 **Protocol Led:** Adoption heavily influenced by standardized clinical protocols and RCVS guidelines.

 **Quality Focus:** Emphasis on diagnostic accuracy and integration with digital health records.

Country Insights: Europe

Contrasting Adoption Drivers in Germany & France

DE Germany

High Standards, High Cost Sensitivity



✓ Strong Clinical Interest

Veterinarians are eager for advanced tools but demand rigorous validation.

⚠ Significant Cost Sensitivity

High upfront costs are a major barrier compared to other regions.

🧪 External Lab Preference

Reliance on established labs due to regulations and trust in accuracy.

STRATEGIC THEME

"Accuracy prioritized over convenience."

FR France

Navigating Barriers & Training Gaps



📉 Lowest Adoption Intention

Currently showing the lowest confidence levels among surveyed nations.

👥 Multiple Adoption Barriers

Cost, lack of training, and difficulty fitting tools into existing workflows.

➕ Latent Interest

Desire to modernize exists, but infrastructure and education lag behind.

STRATEGIC THEME

"Interest exists, but infrastructure and education lag."

Barriers & Drivers of Adoption

Balancing operational obstacles with clinical benefits across markets

Primary Barriers

€ Cost & ROI Concerns

Significant barrier in Germany and France. Initial device investment and consumable costs are weighed heavily against lower willingness-to-pay in some regions.

🔍 Accuracy & Reliability

Mixed confidence levels, particularly in Europe where external lab validation is the gold standard. Concerns about false positives/negatives persist.

🎓 Training & Workflow

Lack of staff training and integration difficulties with existing Practice Management Systems create operational friction.

Key Drivers

⌚ Speed of Decision Making

The ability to diagnose and treat in a single visit reduces patient stress and improves compliance. Critical for urgent care scenarios.

❤️ Improved Patient Outcomes

Immediate results allow for targeted therapy (e.g., antibiotic stewardship) and reduced overtreatment, directly enhancing care quality.

👥 Client Expectations

Pet owners increasingly expect "human-level" diagnostic speed and convenience, driving clinics to adopt rapid in-house tools.

Thank You

Do you have any questions?

+91-959-915-8047

info@sperresearch.com

<https://www.sperresearch.com>

Corporate Office:

#303-304, Tower B, Noida One, Sector 62, Noida, India