

Veterinary Perceptions of Animal Health Monitoring Technologies

A Cross-National Comparison of Drivers, Barriers, and Clinical Adoption Intent in the US, UK, and Germany

STUDY SAMPLE



150 Veterinarians

PRACTICE TYPES

Small Animal • Mixed • Production

Executive Summary

GLOBAL KEY FINDINGS



Strong Clinical Consensus

Veterinarians overwhelmingly agree that monitoring technologies improve early disease detection and long-term care outcomes.

Detection Score **4.4 / 5.0**



Operational Headwinds

Workflow integration remains the weakest link. Reliability concerns and lack of interoperability slow down daily usage.

Workflow Integration **3.2 / 5.0**



Economic Friction

Cost is a primary barrier globally, though the US market shows higher willingness to invest due to client demand.

Cost Barrier **4.3 / 5.0**



Future Growth Intent

Despite barriers, there is a strong intent to expand usage in the next 12 months, outpacing current confidence levels.

Adoption Intent **4.0 / 5.0**

REGIONAL THEMES



United States

OPTIMISTIC

Commercial optimism drives proactive integration. Viewed as a competitive differentiator with strong client demand offsetting cost concerns.

Adoption Intent (12mo) **4.4 (Highest)**



United Kingdom

EVIDENCE-LED

Cautious but growing adoption. Decisions are strictly tied to clinical justification, animal welfare protocols, and regulated use cases.

Adoption Intent (12mo) **4.1 (Moderate)**



Germany

CONSERVATIVE

High scientific interest but conservative pacing. Significant skepticism regarding data accuracy and cost requires validated evidence.

Adoption Intent (12mo) **3.5 (Lowest)**

Methodology & Study Design

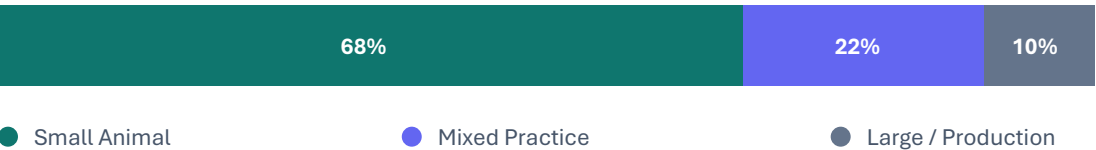
STUDY POPULATION

N=150

Total Veterinarians Surveyed



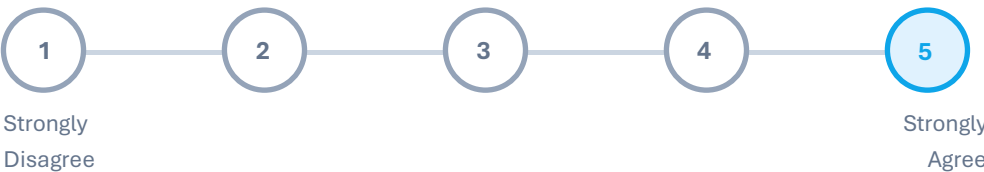
Practice Type Distribution



SURVEY INSTRUMENT

8-Item Likert Scale Analysis

Respondents rated agreement with statements regarding clinical utility, operational impact, and future intent.



Key Domains: Perceived clinical benefits, economic barriers, workflow integration, data reliability, and adoption confidence.

Data Model: Simulated dataset reflecting established market trends: commercially driven US adoption vs. evidence-driven European conservatism.

Methodology note: Regional quotas were fixed (n=50) to allow for balanced cross-market statistical comparison rather than population-weighted global averages.

United States Deep-Dive

Market Profile: Proactive Integration & Commercial Value



UNITED STATES

KEY PERFORMANCE INDICATORS

● US Score | Global Avg

Improves Early Disease Detection

4.6

Clinical Outcomes & Long-term Care

4.5

Reduces Visits & Cost Burden

4.2

User Confidence (Interpretation)

4.0

Workflow Integration

3.6

Cost as a Barrier

3.9



DOMINANT THEME

COMMERCIAL OPTIMISM

US veterinarians view monitoring technology not just as a clinical tool, but as a competitive differentiator. High client demand and pet insurance penetration help offset cost barriers.

STRATEGIC IMPLICATIONS

Client Value: Position tech as a premium "peace of mind" service for pet owners.

Insurance Alignment: Leverage reimbursement codes to lower the barrier to entry.

Speed to Value: Streamlined onboarding is critical to maintain high adoption momentum.

12-Month Adoption Intent

4.4 / 5.0

Highest among all regions



United Kingdom Deep-Dive

Market Profile: Evidence-Led & Cautious Growth



UNITED KINGDOM

KEY PERFORMANCE INDICATORS

● UK Score | Global Avg



DOMINANT THEME CLINICAL JUSTIFICATION

UK adoption is moderately positive but highly conditional on clinical evidence. Veterinarians prioritize tools that align with established welfare protocols and regulated use cases over purely commercial benefits.

STRATEGIC IMPLICATIONS

Evidence First: Provide peer-reviewed summaries to validate clinical utility before sales.

Welfare Alignment: Demonstrate how monitoring supports RCVS standards and animal welfare.

Integration Guides: Offer clear protocols to lower friction in established clinical workflows.

12-Month Adoption Intent

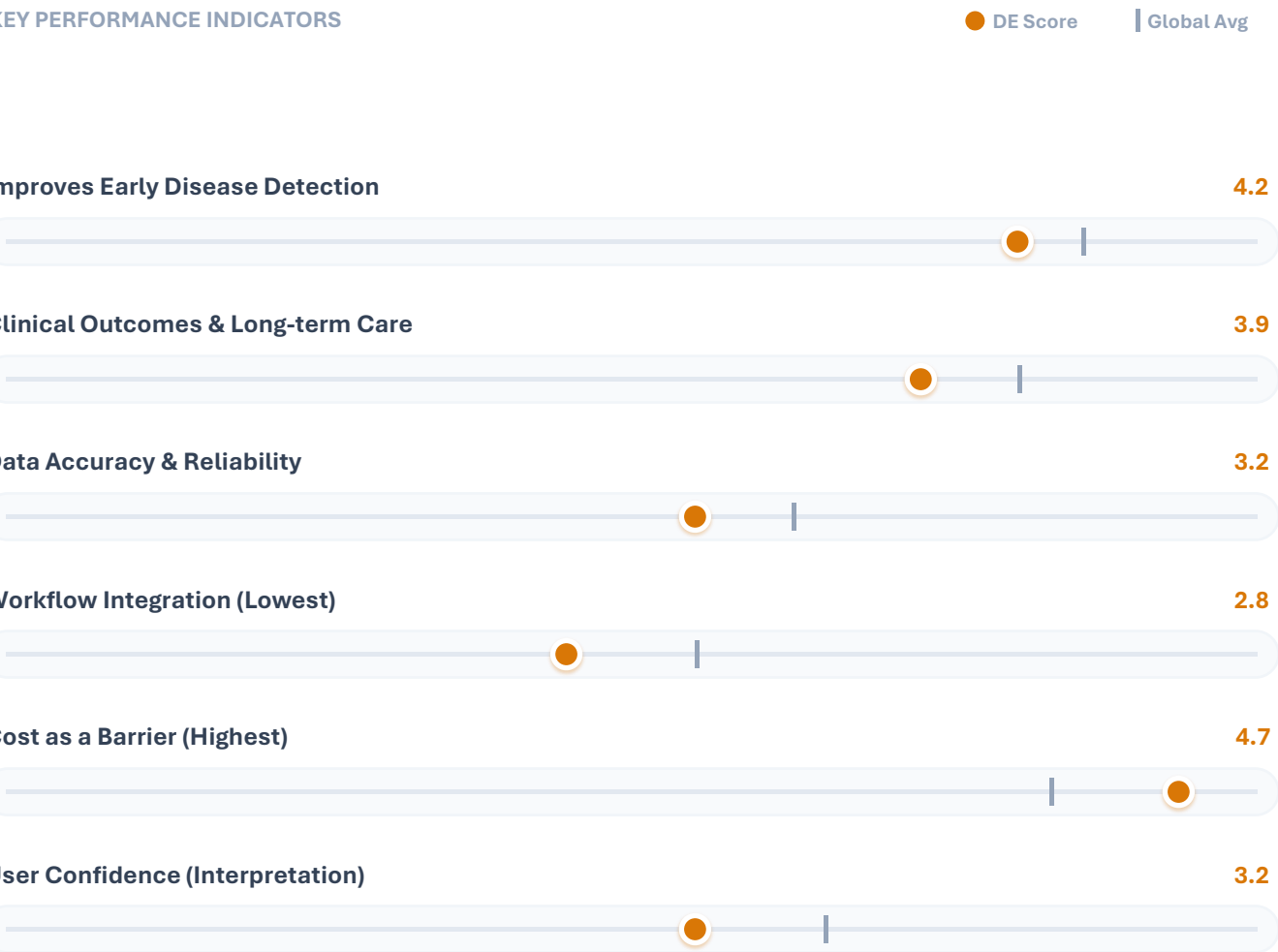
4.1 / 5.0

Growing steady momentum



Germany Deep-Dive

Market Profile: Scientific Interest & Conservative Pacing



DOMINANT THEME EVIDENCE-FIRST ADOPTION

German veterinarians show strong scientific interest but remain the most conservative adopters. Hesitancy is driven by high cost sensitivity, data accuracy concerns, and a demand for strictly validated clinical evidence.

STRATEGIC IMPLICATIONS

Validation: Adoption requires rigorous, peer-reviewed studies proving clinical accuracy.

Standardization: Establish clear SOPs and reference ranges to build user confidence.

Cost Transparency: Demonstrate clear ROI to overcome the significant cost barrier (4.7/5).

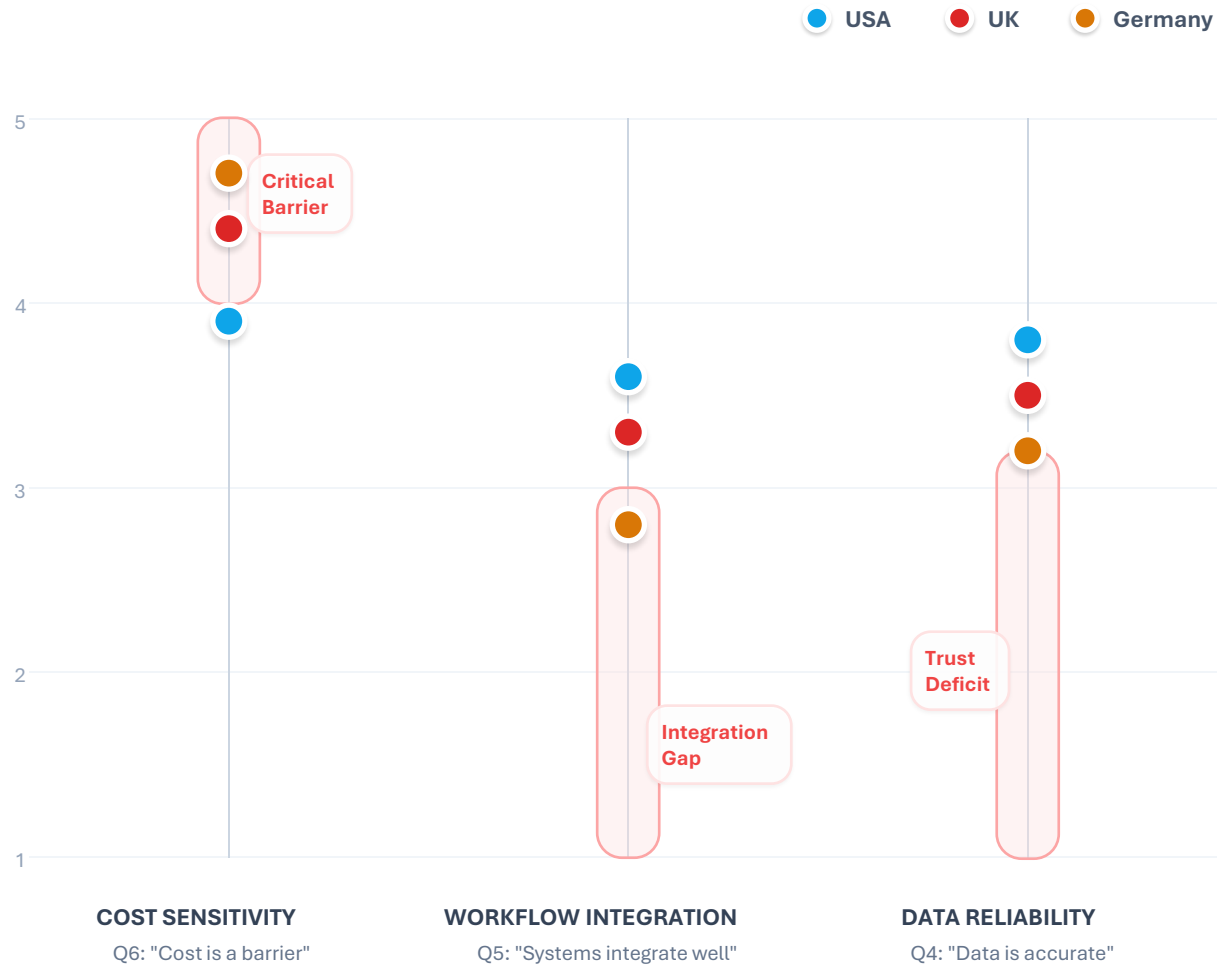
12-Month Adoption Intent

3.5 / 5.0

Cautious growth expected



Key Barriers to Adoption



Economic Barrier

Highest in Germany (4.7) & UK (4.4)

STRATEGIC ACTION

- ✓ Develop tiered pricing models and ROI calculators to demonstrate value beyond upfront hardware costs.

Workflow Friction

Critical bottleneck in Germany (2.8)

STRATEGIC ACTION

- ✓ Prioritize seamless EMR/PMS integration (APIs) and create "plug-and-play" training playbooks.

Reliability Concerns

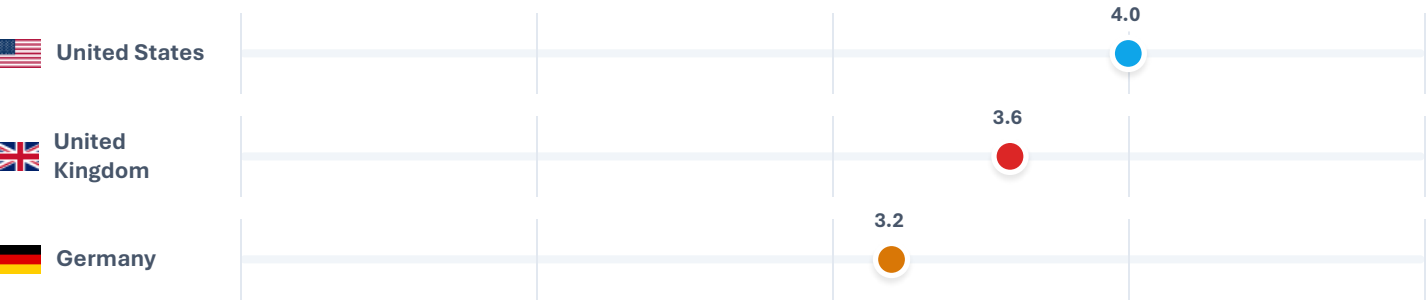
Global skepticism (Avg 3.5)

STRATEGIC ACTION

- ✓ Publish validation studies against gold-standard equipment and implement automated QA outlier alerts.

Confidence & Adoption Intent

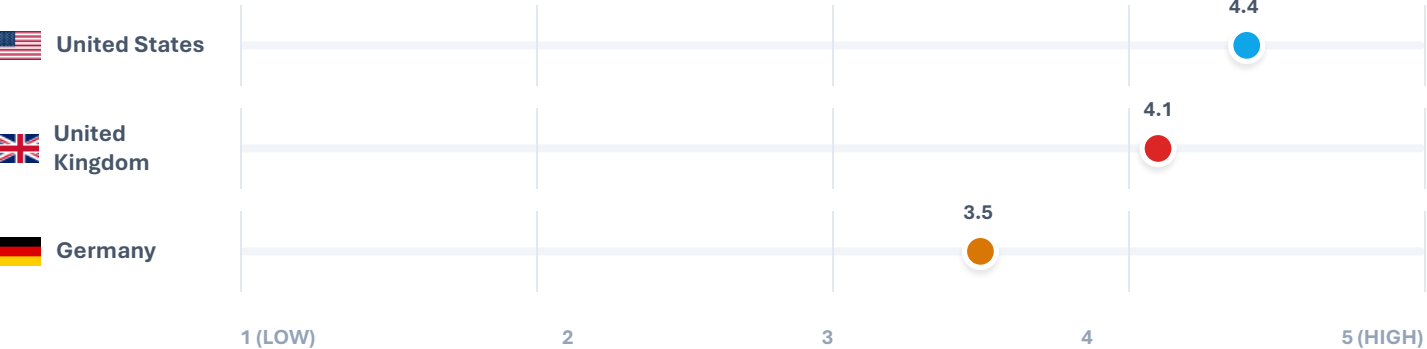
CONFIDENCE INTERPRETING DATA



GAP ANALYSIS SUMMARY

Region	Conf. (Q7)	Intent (Q8)	Gap
USA	4.0	4.4	+0.4
UK	3.6	4.1	+0.5
Germany	3.2	3.5	+0.3

MONTH ADOPTION INTENT



Readiness Insights

The Training Gap:

Intent consistently exceeds confidence across all markets. Veterinarians are willing to adopt but feel under-prepared to interpret complex data streams.

Market Momentum:

US and UK show strong "pull" factors (Gap +0.4/+0.5), suggesting that education programs will yield high ROI. Germany's lower confidence (3.2) remains a bottleneck.

Conclusions & Strategic Implications

GROWTH ACCELERATORS

4.4

Early Detection Belief

High

Client Demand (US)

4.0

Future Adoption Intent

ADOPTION HURDLES

DE: 4.7

Cost Sensitivity

DE: 2.8

Workflow Friction

Avg: 3.5

Data Trust Gap

COUNTRY-SPECIFIC STRATEGIC ACTIONS



UNITED STATES

FOCUS: SCALE & COMMERCE

Accelerate Onboarding Reduce "time-to-value" with pre-configured alerts and plug-and-play PMS integration to maintain momentum.

Client Marketing Kits Equip clinics with digital assets to sell "peace of mind" packages to pet owners, offsetting hardware costs.



UNITED KINGDOM

FOCUS: EVIDENCE & WELFARE

Clinical Justification Publish white papers linking monitoring data to improved outcomes for specific chronic conditions (e.g., cardiac).

Welfare Alignment Frame technology as a tool for "stress-free monitoring" to align with RCVS welfare standards.



GERMANY

FOCUS: VALIDATION & ROI

Rigorous Validation Conduct and publish local validation studies comparing devices against gold-standard clinical equipment.

ROI Transparency Provide detailed Total Cost of Ownership (TCO) models to address high cost sensitivity (4.7/5).

Thank You

Do you have any questions?

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