

VETS MARKET INVESTIGATION

Summary of roundtable discussion held via MS Teams to on 19 September 2024

Introduction

1. The following is a summary of points raised in a discussion with senior veterinary professionals who currently work at animal charities.
2. In advance of the roundtable discussion, the Project Director, Lucy Eyre, outlined the key stages in the investigation, the evidence we were collecting and the key issues under consideration.
3. The roundtable discussion focused on the following issues:
 - Key developments / trends in the sector
 - Client expectations
 - Regulation
 - Referrals and out of hours provision

Key developments / trends in the sector

4. Attendees generally agreed that the veterinary profession was different to the types of sectors that the CMA might usually investigate because the consumer was not the ultimate beneficiary. Vets make an oath to put animal welfare above all else. In this context, one attendee said that it was important that the CMA kept in mind that the wellbeing of the consumer did not necessarily align with the wellbeing of the animal.
5. Attendees agreed that the sector had changed significantly with the increased corporatisation of veterinary services coupled with the increase in technical abilities, a drive to do more and the 'super-vet' approach. They said that vets struggled when they felt that they couldn't do everything.
6. Attendees said that corporatisation was not the only source of the problems in the sector and pointed to factors such as the shortage of vets and the high

number of vets leaving the profession, as well as the increased inaccessibility of vet care for those who could not afford the rising cost of veterinary services.

7. Some attendees stated that increasingly sophisticated treatments were not always the best approach for overall animal welfare. One attendee said that the large corporate groups had very rigid protocols that vets must follow and linked that to an increase in over treatment.
8. Another attendee said that they had previously worked for a large corporate group and that, in that situation, performance management for veterinary professionals was very closely linked to revenue and how many diagnostics were completed.
9. One attendee said that the sector seemed to have lost some of the inherent skills of pragmatism within the profession and that vets who came to work for them from the private sector had experienced an environment that was driven by protocols, and that those vets were very nervous about not recommending tests and diagnostics. They said it took a long time, and a lot of evidence, to adjust this approach.
10. One attendee said that euthanasia was now seen as a failure when it was an important welfare outcome and was often the best decision to make when an animal was very unwell. Another said that their charity frequently saw animals with several comorbidities being referred for charity care when a euthanasia decision could have been made in the original practice.

Client expectations

11. Another attendee talked about the difference in client expectations now compared to those several years ago and how the 'humanisation' of pets had impacted the sector, noting that people often referred to pets as their 'fur babies' and wanted 'the best' for their animal.
12. One attendee said that another problem was the types of breeds of dogs and cats that were popular with the public, but which often had particular health issues.
13. Attendees agreed that pet owners' expectations had been increased by television programmes showing extremely advanced techniques in veterinary care but where those watching had no concept of the cost of those treatments.

Regulation

14. Attendees all agreed that the sector needed new legislation and that the Veterinary Surgeons Act was out of date. Attendees agreed there was a fear of litigation in the sector and that fear of reprisals from the RCVS (being struck off) often informed behaviour of vets who might feel they needed to do multiple tests when perhaps they were not entirely necessary. One attendee said that there was a role for the RCVS in making it abundantly clear that vets would not get struck off if they did not do every possible test when seeing an animal.
15. One attendee raised the role of the Veterinary Medicines Directorate (VMD) who, in their view, protected the pharmaceutical industry excessively and said that some of the decisions vets had to make due to the way in which medicines were regulated were unethical. Attendees discussed the cascade system (which covers the rules governing when a human version of a medicine may be prescribed by a vet for a household pet) and confirmed that that cost could not be used to justify the use of a cheaper human medicine if the cascade authorised an equivalent animal medicine even if this meant the animal would go untreated.
16. Attendees also agreed that there were opportunities for veterinary nurses to be utilised a lot more than they currently were and that also potentially could provide a way to reduce costs for owners.

Referrals and out of hours provision

17. Attendees discussed referrals and agreed that it was confusing for owners to understand what a specialist was and whether a practice was a referral practice and the difference in price this distinction could sometimes bring.
18. One attendee said that some people would assume if they were being referred to referral centre that they would be seeing a specialist but that was not always the case. Another attendee said that a large problem for their charity was provision of (and the cost of) out of hours services.

Appendix: List of organisations represented at the discussion

[✂
✂]