

Accent



Vet Users Survey

Final Report

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Executive Summary

Background

In 2023 the CMA launched a market review¹ into veterinary services for household pets to explore whether consumers were getting a good deal when buying veterinary services and receiving the information they need to make good choices. Having considered this evidence, the CMA were concerned that there may be a number of ways in which the veterinary service market is not working as well as it could be for pet owners nor, potentially, for veterinary professionals.

The CMA launched a consultation on a proposal to make a market investigation reference into veterinary services for household pets in the UK in March 2024 and the CMA launched a market investigation on 23 May 2024.

The research was designed to ascertain the experiences of UK pet owners when accessing veterinary services for household pets in first opinion practices (FOPs). The research findings from this study will form part of the CMA's evidence-gathering process for the market investigation.

Methodology

The research method was to use a “push-to-web” approach, via post, using the Post Office Address File (PAF²) as the sample source. This involved drawing a random sample of residential addresses from the PAF (which provides a robust sampling base as all potential participants can be sampled) and sending letters to the sampled addresses.

The letter was targeted at an in-scope adult (aged 18 or older) in a household which has an eligible pet³ and who was able to answer questions about the care of that pet including use of veterinary services.

Overall, 65,819 letters were posted on 1 November 2024. A reminder was sent to those who had not completed on 15 November 2024. The survey closed on 1 December 2024.

2,376 completed the survey.

¹ See: <https://www.gov.uk/government/news/cma-launches-review-of-vet-sector>

² The PAF is a comprehensive list of all known delivery points in the UK, including whether they are residential or the addresses of organisations.

³ An animal such as a dog or a cat, but not a farm or equine animal, that is kept for companionship or protection and habitually resides in the owner's dwelling

Top Line Findings

Type of Pet

- 67% of eligible households owned a dog or dogs and 45% owned a cat or cats. No other pet was owned by more than 7% of respondents.
- 27% of the sample had been a pet owner for over 30 years. A further 23% had been a pet owner for 11-20 years and another 24% for 4-10 years.

Vet practice

- For 67% the most recent visit to the pets was less than six months ago.
- Dog owners, who had visited a veterinary practice in the past two years, visited with their dog(s) 5.9 times on average. The equivalent average for cat owners was 4.7 visits and it was 4.0 visits for rabbit owners.
- 25% had been with their vet practice for over 10 years and 22% had been with the same practice between 5 to 10 years.

Choice of vet practice

- 53% of pet owners made a decision about which practice to choose when it was time for a routine/non-emergency treatment. 35% chose it in advance of a treatment.
- 42% moved to their current practice from another practice.
- Of those that had been with a practice for less than ten years, 51% considered one vet practice though 66% of them said they felt they had a choice in practices to compare and 24% said they did not.
- 55% of pet owners who said they did not have a choice of vet practice said the lack of any other vet practices in the area was the reason.
- The top reasons for original choice of vet were location (68%), recommendation (44%), practice, staff or websites making good impression (29%) and appointment availability (28%).
- The single main factor was location (36%) followed by recommendations (23%).

Pricing and service information used when sourcing a practice

- Those who **didn't** mention prices or **services** as a factor in choosing a vet were asked whether and how they found out that information. The main sources of information were the practice website (33% for price, 54% for service), over the phone (27% price, 29% services) and in person visit to practices (22% price, 26% services). Word of mouth was important for services (33%).
- Those that **did** look at the prices (73%) were asked how easy or difficult they found it to find the information: 44% said it was easy and 32% said it was difficult, a positive balance of 12%.

Why choose independent practice or large group of vets

- The 14% who chose their practice because it was an independent practice said it was because they were more likely to see the same vet when visiting (56%), independent practices take account more of what is right for their pet (50%), independent practices provide higher quality services (46%), trust in the advice (40%) and the prices for services (33%).
- The 7% who chose their practice because it was part of a large group of vets said it was because it was easier to get appointments (55%), the offer of a wider range of services (42%) and the prices for services and treatments (21%).

Perceived ease/difficulty of changing vet practices

- 64% who had been with a vet practice for over ten years, or who had not moved to their current practice from a different practice said it would be easy to change vet and 12% thought it would be difficult.
- The 12% who thought it would be difficult or not possible to change vet practices mentioned concerns over the need to build a new relationship (37%), difficulty switching medical records (29%) and no alternative practices in their area (22%).
- For the 42% who had changed practice, the main reasons for changing were because they moved home (36%), because they were unhappy with the quality of care at their old practice (25%) and because they were unhappy with the advice offered (19%).

Awareness of practice ownership

- There was low awareness of practice ownership: 31% said their practice was part of a large group, 21% part of a small group and 24% independent. 24% did not know.
- Comparing the perceptions with the vet practice data as coded by the CMA shows that 53% of those at a large vet practice did not know that their vet was part of a large practice.
- The awareness of the name of the large vet group was low apart from for Pets at Home (77% correct) and Medivet (76% correct).

Relationship between pet owner and vet

- All were shown five statements about the relationship with their vet practice. The net agreement scores (agreement minus disagreement) were significantly higher rated at the 95% confidence level for those at an independent practice compared to those at a large vet group for all statements:
 - My vet focuses on the highest standard of care for my pet's health (89% v 82%).
 - I clearly understand the options presented to me by my vet and I can make informed decisions (85% v 75%).
 - My vet takes the time to clearly explain various treatment options to me (83% v 73%).
 - I have the capability to challenge my vet's treatment advice, if needed (68% v 55%).
 - I trust my vet practice to offer the fairest prices for pet treatment (55% v 33%).
 - My vet considers my personal circumstances (36% v 21%).

Treatments and services used at Vet

- The main treatments and services used when visiting a vet practice were:
 - vaccinations (69%)
 - regular/routine health checks (57%)
 - consultations to diagnose or treat a condition (54%)
 - medication (44%)
 - diagnostic test (26%)
 - prescription (20%)
 - neutering (20%)
 - end of life services (17%)
- For 48% of pet owners the most recent visit was within the last three months and it was between three and six months for a further 29%.
- For 42% the recent visit was a one-off visit and for 35% it was a regular/routine check-up.

Advance pricing information for the most recent visit

- 46% were provided price information in advance of the treatment/service. 15% were **not** provided with pricing information because the service was included in their pet plan or insurance and a further 34% were **not** provided pricing information at all in advance.
- Pricing information was mainly received through talking to someone about it (67%), for 17% it was from an itemised pricing list.
- Once participants received the pricing information, 58% said they felt they could decline and consider an alternative option, but did not feel the need to. However, 31% said they did not feel they were able to decline.

Treatment options for most recent visit

- 47% were offered one treatment option and 19% were given alternative options but were recommended one in particular.
- The main information the vet gave during the discussion of diagnosis or treatment options was potential outcomes (62%), price (42%), range of options (37%) and information about what is covered by the insurance policy (25%).

Treatment Types and Services

The survey included modules for the following treatment options and services in preceding two years:

- **Regular check-ups:** 85% of the sample
- **Referrals:** 20% of the sample
- **Diagnostics:** 41% of the sample
- **Out-of-hours Care:** 16% of the sample
- **Medicines:** 65% of the sample
- **After Life Services:** 23% of the sample
- **Pet health plans:** 37% of the sample
- **Pet Insurance:** 56% of the sample
- **Complaints:** 8% of the sample considered making a complaint
- **In-home consultations/ mobile vets/ remote consultations/ telemedicine:** 7% of the sample.

Each of these are covered below.

Regular check-ups

- Pet owners agreed most with the following statements about attending regular checks for their pets:
 - 89% 'it is the right thing to do for my pet'
 - 66% 'I get reminders from my vet practice to attend regularly'
 - 51% 'Of financial considerations'
 - 44% 'It's part of my Pet Health Plan'.
- Pet owners disagreed most with the following statements about attending regular checks for their pets:
 - 30% 'My insurance covers the (full or partial) price of regular check-ups'
 - 29% 'My pet has an ongoing medical condition requiring regular checks'.

Referrals

- The most recent referrals were mainly for:
 - 31% consultation to diagnose or treat a condition
 - 13% diagnostic tests
 - 10% surgery
 - 10% regular/routine health check.
- For 86% the referring vet was their current vet and for 10% it was not. 4% did not know.
- 56% of those recommended a referral said their usual vet gave them options of different ways to diagnose/treat their pet, 23% said only one option was given and 11% said that a second consultation was needed or suggested.

- The main types of information the vet gave during the discussion of diagnosis or treatment options were:
 - 65% potential outcomes
 - 53% information about how quickly they would be seen
 - 49% the range of options
 - 48% the price of a consultation.
- 64% did **not** do their own research on the treatments offered and/or look for alternatives which their vet did not suggest and 28% did.

Diagnostics

- For 88%, the diagnostic test was at their current vet and for 11% it was not.
- The most recent diagnostics test was within the last three months for 21%, between three and six months for 20% and between seven months and a year for 22%.
- 52% said a range of options was indicated and one was recommended, 30% said no options were offered and 11% said a range of options were offered and the vet did **not** recommend one.
- The main information the vet gave during the discussion of the diagnosis test(s) were:
 - 84% potential benefits and consequences
 - 81% timescales for test(s) and results
 - 67% risks
 - 64% price range
 - 29% information on insurance cover.
- 64% decided to progress with the diagnostic test because they trusted the vet (significantly higher among those at an independent practice (70%) compared to those at a large vet group practice (60%)), 38% said there was no reason not to and 24% said it was an emergency.

Out-of-hours Care

- 48% went to a different practice and 48% went to their usual practice for out-of-hours care.
- For the 48% who used a different vet or used a mobile vet for out-of-hours care, 70% found out about it from their usual vet practice and 19% did their own search.
- The out-of-hours service was rated **worse** than their regular vet practice for:
 - The stress I experienced during my visit (negative balance of 15%)
 - The pressure I felt to make decisions about treatment during my visit (negative balance of 7%)
 - The confidence about any decisions I had to make (negative balance of 4%).
- The out-of-hours service was rated **better** than their regular vet practice for:
 - The care received by my pet (positive balance of 5%)
 - The quality of the information given to me about the treatment (positive balance of 3%).

Medicines

- 57% were aware that they could obtain a prescription from their vet practice and get the medication elsewhere (for example a retailer, a pharmacy, or another vet) while 38% were unaware of this.

- The 57% who were aware learned about the option via ‘word of mouth’ (42%), their current vet told them (35%) and ‘website advice’ (22%).
- The medication prescribed was one-off for 60% and part of a repeat prescription for 39%.
- Those who purchased medication from their vet practice (80% who had purchased medicines for their pet) were asked about their reasons for doing so:
 - 50% said it was the most convenient option
 - 36% trusted that the medication from their vet practice was the most reliable / best quality
 - 32% said the vet didn’t offer any alternative.

After Life Services

- Among those whose pet had died in the preceding two years (23% of the overall sample), 67% chose to have their pet cremated, while 27% buried their pet at home.
- Of those who had their pet cremated, 64% purchased the cremation service through their usual vet practice.
- 9% compared different providers of cremation services and 88% didn’t
- Of those who had their pet cremated the following information was provided by their vet:
 - 52% details about the price and available packages
 - 47% the range of options, including doing nothing
 - 34% the process involved in the service.
- 49% of those who didn’t compare different cremation providers said they just went with their vet’s advice, 38% said they either didn’t want to or didn’t get the chance to look at other options. 15% made their choice based on previous use.
- The most important factors in choosing a cremation service were:
 - 48% the vet’s recommendation
 - 26% the crematorium’s good reputation
 - 26% types of cremation services offered.

Pet health plans

- Those at a large vet group were significantly more likely to have a pet health plan (42% compared to 29% independents).
- The main reasons for having a health plan were:
 - 53% to maintain preventative care
 - 50% perceived value for money
 - 46% reassurance
 - 43% financial planning
 - 40% recommendation from the veterinary practice.
- The main sources of awareness of the per health plan were:
 - 56% the vet practice mentioned it to them
 - 30% noticed advertisements inside the practice
 - 26% saw it advertised on the practice’s website
 - 21% word of mouth.
- The 7% who no longer had a health plan were asked why they cancelled it:
 - 34% did not consider it value for money

- 23% said it became unaffordable
- 21% no longer had a pet
- 17% didn't use it
- 11% changed veterinary practice.

Pet Insurance

- The 43% who did not currently have pet insurance were asked if there was a particular reason why. The main reasons given were:
 - 40% felt it was unnecessary due to poor value or high cost
 - 29% were confident they could cover treatment costs
 - 26% said they couldn't afford insurance
 - 21% set money aside specifically for treatments.
- The 56% with pet insurance were asked why they had pet insurance:
 - 81% said to ease worries about unexpected veterinary costs
 - 15% received recommendations from family, friends, or other pet owners
 - 11% received recommendations from a veterinary practice.
- Those with pet insurance were asked how they decided on their insurance plan:
 - 50% conducted online research
 - 39% used an insurance price comparison website
 - 14% relied on word of mouth.

Complaints

- 8% had considered making a complaint about their vet practice in the past two years mainly about:
 - 50% prices
 - 41% unhappy with the treatment of their pet
 - 33% concerned with the behaviour of the vet or staff.
- The 92% who had not thought about making a complaint about their vet or vet's practice were asked what they would be likely to do if there was ever an issue where they felt they wanted to make a complaint:
 - 61% would make the complaint with the vets practice directly
 - 39% said their response would depend on the nature of the complaint
 - 26% would research online for the process to make a complaint
 - 17% would contact the group who owns the practice, to make a complaint through their system
 - 8% would leave a negative review online.
- Of the 8% who thought about making a complaint 35% went on to make a complaint.
- 75% of complaints were made to the vet practice staff, 17% were directed to the owner(s) of the practice and 11% left a negative online review. For 46% who made a complaint nothing happened as a result, 24% received an apology and 13% received a reduction or reimbursement.
- The 64% who thought about but didn't make a complaint were asked why they didn't.
 - 53% didn't think anything would come of it
 - 38% were worried about their ongoing relationship with the vet
 - 32% didn't know who to complain to
 - 29% didn't feel comfortable doing so.

In-home consultations/ mobile vets/ remote consultations/ telemedicine

- 7% were using or had used them, 58% had not used them and were unaware of the services, 33% had not used them but were aware.
- Reason for use was:
 - 27% suited their work and personal time commitments
 - 21% it was included in their pet insurance
 - 13% location of their in-person practice.
- 35% who no longer use remote consultations or telemedicine services said that they only used it for a temporary need, 33% stated that it was no longer required and 25% preferred to see a vet in person.

Prices

Prices were covered in a few of modules and these are compared below.

Price paid compared to price provided in advance

- **Pricing for most recent visit:** 38% higher than expected (29% a lot higher with significantly higher proportion at a large vet group practice 22% v 14%), 36% about what was expected and 7% lower than expected.
- **Referrals:** 23% higher than expected, 58% as quoted or within the range, 17% lower.
- **Diagnostics – 64% who were given pricing information:** 12% said the price paid was higher, 77% as quoted or within the range, 8% lower.
- **Diagnostics – all:** 49% price was higher than expected (25% a lot higher with significantly higher proportion at large vet practice: 29% v 20%), 33% about what was expected and 7% lower.

Costs and quality compared to three years ago

- The whole sample was asked to what extent they thought that vet prices had changed compared to three years ago
 - 44% said prices were **much more** expensive now (significantly higher for those at a large vet group practice: 47% compared to 39%)
 - 31% said prices were a **little more** expensive (significantly higher for those at an independent practice: 34% compared to 29%).

Source of information on price

- **Referrals:** It was received verbally for 88% and in written form for 50%.
- **Diagnostics:** It was received verbally for 93% and in written form for 38%, price list 16%.

Spend on vet services and how much paid by insurance

- Total spend on vet services over the last two years:
 - 16% spent less than £200
 - 26% spent £200-£499
 - 23% spent £500-£999
 - 30% spent over £1,000.
- The 73% who paid for their most recent vet visit were asked how they funded it
 - 57% used their current account
 - 25% used personal savings
 - 15% used a credit card.

Satisfaction

Satisfaction was covered in a few of modules and these are compared below.

- Satisfaction with aspects of the most recent visit and referrals were similarly high for all aspects except cost. For diagnostic tests, satisfaction was much lower:
 - Satisfaction with **care given to their pet**: most recent visit 88%/referral 85% /diagnostic tests 59%
 - Satisfaction with **quality of service received**: most recent visit 85%/referral 84% /diagnostic tests 58%
 - Satisfaction with the **outcome of the visit**: most recent visit 82% /referral 81% /diagnostic tests 55%
 - Satisfaction with the **information and/or advice received**: most recent visit 80% /referral 81% /diagnostic tests 56%
 - **Dissatisfaction with cost**: most recent visit 23% /referral 25%/diagnostic tests 34% dissatisfied.
- Among those who made a complaint, 60% were unsatisfied and 19% were satisfied with the outcome of the complaint.
- The whole sample was asked to what extent they thought the quality of vet services had changed compared to three years ago:
 - 5% said that services were much worse now (significantly higher for those at a large vet group practice: 6% compared to 2%)
 - 9% said services were a little worse (significantly higher for those at a large vet group practice: 11% compared to 6%)
 - 56% thought there was no change
 - 7% said services were a little better (significantly higher for those at an independent practice: 8% compared to 6%)
 - 7% said services were much better.

Veterinary Organisations

- 5% were familiar with The Veterinary Client Mediation Service (VCMS).
- 33% were familiar with the Royal College of Veterinary Surgeons (RCVS).
- 7% were familiar with the RCVS Practice Standards Scheme.

Role of pet in owners' life

- 72% said the importance of their pet's healthcare was equal to that of a family member, 14% said it was somewhat less important, 6% said it was more important.
- 42% said pet care should always be prioritised, even if it means deprioritising other important household expenses. 34% said it should often be prioritised, but not always over other important household expenses.
- For 87%, the participants' pet provided emotional support (e.g. companionship, comfort), for 72%, their pet helped reduce stress or anxiety, for 48% their pet supported their physical health.

Final comments

- All were asked if there was any additional information they would like to provide in relation to their experience with vets. This was an 'open' question and the responses were coded to a code frame.
- The main responses were concerned with:
 - 42% cost issues, for example overcharging or a focus on profit.
 - 26% were positive comments about the vets and/or staff.
 - 19% mentioned good customer service.

1 INTRODUCTION

1.1 Background

In 2023 the CMA launched a market review⁴ into veterinary services for household pets to explore whether consumers were getting a good deal when buying veterinary services and receiving the information they need to make good choices. This included a Call for Information and qualitative research with pet owners. The CMA also gathered information from the six biggest veterinary groups.

Having considered this evidence, the CMA were concerned that there may be a number of ways in which the veterinary service market is not working as well as it could be for pet owners nor, potentially, for veterinary professionals. The following five areas of concern were identified:

- Consumers may not be given enough information to enable them to choose the best veterinary practice or the right treatment for their needs.
- Concentrated local markets, in part driven by sector consolidation, may be leading to weak competition in some areas.
- Large integrated groups may have incentives to act in ways which reduce choice and weaken competition.
- Pet owners might be overpaying for medicines or prescriptions.
- The regulatory framework is outdated and may no longer be fit for purpose.

Given these concerns the CMA launched a consultation on a proposal to make a market investigation reference into veterinary services for household pets in the UK in March 2024 and the CMA launched a market investigation on 23 May 2024.

The research findings from this study will form part of the CMA's evidence-gathering process for the market investigation.

1.2 Objectives

The over-arching objective of the research was to inform the CMA's assessment and decision-making relating to competition concerns and any appropriate remedies to address these concerns. Findings from the research will be analysed alongside other key market data and evidence submitted by relevant parties to the case.

⁴ See: <https://www.gov.uk/government/news/cma-launches-review-of-vet-sector>

The research was designed to ascertain the experiences of UK pet owners when accessing veterinary services for household pets in first opinion practices (FOPs). In particular, the research measured pet owners' experiences of:

- Choosing a FOP
- Agreeing to treatments / services for their pet
- Understanding treatment options and any alternatives on offer
- Accessing pricing information
- Paying for medicines and prescriptions
- Related services (referrals, diagnostics, out-of-hours (OOH) services, animal crematoria) are offered to, and used by, pet owners.

2 METHODOLOGY

2.1 Introduction

The CMA commissioned Accent to conduct a representative survey of household pet owners in the UK who had visited a veterinary practice within the last 2 years. The survey was designed and is presented following the principles set out in the CMA's survey good practice.⁵

2.2 Modules covered

The research covered the following 12 modules:

- Primary Veterinary Practice
- Regular check ups
- Referrals
- Diagnostics
- Out of hours
- Medicines
- After life services
- Pet health plans
- Insurance
- Complaints
- Veterinary Organisations
- Views on in-home consultations/ mobile vets/ remote consultations/ telemedicine.

2.3 Research method

The research method was to use a “push-to-web” approach, via post, using the Post Office Address File (PAF) as the sample source. The PAF is a comprehensive list of all known delivery points in the UK, including whether they are residential or the addresses of organisations.

This involved drawing a random sample of residential addresses from the PAF (which provides a robust sampling base as all potential participants can be sampled) and sending letters to the sampled addresses.

The PAF does not include named addressees, so each letter was addressed to “the occupier”. Each envelope included a letter with the CMA logo, explaining the purpose of the survey and any other information needed to fulfil GDPR requirements.

⁵ [CMA Survey Good Practice Guide](#)

Figure 1: Letter to potential participants



CMA
Competition & Markets Authority



Accent

3 Orchard Place
London
SW1H 0BF
www.accent-mr.com

Unique ID: XXXX
PIN: nnnn

Dear Sir/Madam

Survey of Vet Customers

This letter has been sent to you by Accent, an independent market research company, on behalf of the Competition & Markets Authority (CMA). We are looking for pet owners to complete a survey about their views on, and use of, veterinary services.

Anyone completing the full survey, which will take about 20 minutes to complete, will be eligible for a **£10 voucher (Amazon, M&S, or One4All)**. Alternatively, we can donate your incentive to the RSPCA. Details on how to claim your voucher will be given at the end of the survey.

How to take part

To find out if you are eligible to take part, and to undertake the survey online, please scan the QR code or enter the following Accent survey link:
<https://acsvy.com/3659survey>



At the beginning of the questionnaire you will need to enter your **Unique ID (XXXX)** and **PIN (nnnn)**.

If you can't access the survey online, please call 0800 669 6415 and leave your name, Unique ID and PIN, and we will call you back to conduct the survey over the phone.

The final date for us to receive completed surveys is **Sunday 1 December 2024**. The CMA will be very grateful if you are able to complete the survey, but taking part is completely optional.

Any answers you provide will be treated in confidence and in accordance with the Code of Conduct of the Market Research Society. Your data will be treated in accordance with the Data Protection Act 2018.

If you have any questions, please don't hesitate to contact the research team at VetResearch@accent-mr.com

Yours faithfully



Chris Heywood, on behalf of the study team



ISO
20252



UKAS



MRS Evidence
Matters



CYBER
ESSENTIALS
CERTIFIED
PLUS



NHS
Vet Services
Partner

Registered in London No.
2251083. Accent Marketing &
Research Limited
Registered Address: 2 Leman
Street, London, E15 9J5

FURTHER INFORMATION

Why have you received this survey?

The Competition and Markets Authority (CMA), a government body, has asked Accent, an independent market research agency, to carry out a survey in relation to important work it is doing associated with veterinary care.

Your address has been randomly selected from the Postcode Address File (the Royal Mail's database of all addresses in the UK).

More information about the CMA can be found on its website:
www.gov.uk/government/organisations/competition-and-markets-authority

What does the survey involve?

The survey will take about 20 minutes to complete. It can be completed online (by going to <https://acsvy.com/3659survey> and entering your unique ID and PIN from your letter), or by telephone (please call 0800 669 6415 and leave your name, Unique ID and PIN, and we will call you back to conduct the survey over the phone).

If there is more than one adult in your household that meets the eligibility criteria, we suggest you ask the person who has visited the vets most recently to complete the survey (only one response per household is permitted).

Is the survey confidential?

Participation in the survey is entirely voluntary and any personal information you provide will be kept secure by Accent and your survey responses will be shared only with the CMA.

If you choose to complete the survey, Accent (the data processor) and the CMA (the data controller) will be processing your personal data using the lawful basis of 'public task' (processing necessary for the exercise of a statutory function of the CMA under the Enterprise Act 2002). Accent abides by the Market Research Society Code of Conduct, which means that all your personal data will be kept secure and, should you participate in the research, they will share your survey responses only with the CMA. You can find further details on Accent's privacy policy at <https://www.accent-mr.com/privacy-policy/>.

It won't be possible for you to be identified in any of the data that Accent or the CMA shares with others, nor in any of the survey findings that the CMA makes public. For further information you can view the CMA's privacy notice here: www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter

Who can I contact for help?

To find out more about the CMA and the survey being undertaken you can visit:
<https://www.gov.uk/cma-cases/veterinary-services-market-for-pets-review>

For any queries about the survey, or if you wish to opt out from receiving any further contact about the survey, please contact Accent at: VetResearch@accent-mr.com. The CMA can be contacted at: OnlineSurveyD@cma.gov.uk

Accent3569_Invitation Letter_v2*CH*10.10.24

The letter included an online link and QR code as well as a unique ID code to be entered once the survey is accessed (to prevent multiple entries). A £10 incentive (in the form of a charitable donation or a voucher from a selection of leading retailers) was used to encourage participation.

For those unable or who didn't wish to respond online a freephone number was provided for customers to call and ask to be interviewed by telephone.

The inclusion of the unique ID number meant we could:

- identify who had responded, allowing us to target non-responders with a reminder letter and analyse by sample-based variables such as geographic region.
- prevent fraudulent repeat responses or the sharing of the link (commonly used attempts to "earn" additional incentives).

A contact email was provided in the survey should customers have any queries.

There are some inherent challenges with the PAF approach:

- Predicting survey volumes is difficult due to variable response rates over time and across regions.
- It is almost impossible to manage/manipulate quotas. The methodology is response-driven, and it is not possible to use demographic screening without negatively impacting response rates or increasing costs.

Despite these challenges, “postal to PAF” is a random probability methodology and so is therefore desirable.

This study achieved a statistically robust random sample of UK pet owners.

2.4 Sampling

The letter was targeted at an in-scope adult (aged 18 or older) in a household which has an eligible pet⁶ and who was able to answer questions about the care of that pet including use of veterinary services. If there was more than one person in a household it was requested that the person who most recently took their pet to the vet complete the survey.

The sample was drawn first by using the Office for National Statistics’ (ONS) Postcode Directory User Guide⁷ to define the number of residential properties that exist by region, against Indices of Multiple Deprivation decile.

⁶ An animal such as a dog or a cat, but not a farm or equine animal, that is kept for companionship or protection and habitually resides in the owner’s dwelling

⁷ The ONS Postcode Directory (ONSPD) relates both current and terminated postcodes in the United Kingdom to a range of current statutory administrative, electoral, health and other area geographies. It also links postcodes to pre-2002 health areas, 1991 Census Enumeration Districts (for England and Wales), and both 2001 and 2011 Census Output Areas (OA) and Super Output Areas (SOA). The ONSPD is produced by ONS Geography, who provide geographic support to the ONS and geographic services used by other organisations.

Table 1: Thousands of domestic households by UK region and IMD decile

| Deprived neighbourhoods | North East | North West | Yorkshire and The Humber | East Midlands | West Midlands | East of England | London | South East | South West | Wales | Scotland | Northern Ireland | Total |
|-------------------------|--------------|--------------|--------------------------|---------------|---------------|-----------------|--------------|--------------|--------------|--------------|--------------|------------------|---------------|
| 10% most deprived | 260 | 764 | 479 | 179 | 406 | 107 | 80 | 127 | 127 | 139 | 288 | 82 | 3,040 |
| 10% to 20% | 185 | 432 | 280 | 209 | 339 | 180 | 530 | 210 | 161 | 146 | 285 | 91 | 3,048 |
| 20% to 30% | 160 | 355 | 247 | 230 | 251 | 221 | 648 | 267 | 197 | 146 | 275 | 88 | 3,084 |
| 30% to 40% | 134 | 307 | 201 | 209 | 258 | 287 | 511 | 354 | 337 | 148 | 280 | 89 | 3,117 |
| 40% to 50% | 107 | 271 | 225 | 202 | 275 | 361 | 421 | 390 | 333 | 150 | 278 | 88 | 3,100 |
| 50% to 60% | 87 | 251 | 240 | 221 | 248 | 367 | 390 | 457 | 363 | 159 | 282 | 84 | 3,146 |
| 60% to 70% | 97 | 282 | 250 | 221 | 237 | 319 | 316 | 475 | 343 | 156 | 286 | 88 | 3,069 |
| 70% to 80% | 88 | 297 | 230 | 255 | 235 | 316 | 290 | 518 | 292 | 149 | 278 | 83 | 3,030 |
| 80% to 90% | 97 | 257 | 199 | 255 | 203 | 348 | 272 | 554 | 275 | 148 | 255 | 81 | 2,944 |
| 10% least deprived | 70 | 218 | 182 | 232 | 168 | 338 | 138 | 760 | 239 | 134 | 241 | 78 | 2,798 |
| Total | 1,285 | 3,435 | 2,532 | 2,213 | 2,621 | 2,843 | 3,596 | 4,113 | 2,667 | 1,474 | 2,748 | 851 | 30,378 |

An initial sample size of 65,000 records was envisaged for inclusion in the survey. Sample selections were derived for each region based on the population size of that region. Within each region, sample selections were derived for each Index of Multiple Deprivation (IMD) decile based on the number of postcodes that fall into each IMD decile.

Table 2: Derived sample structure

| Deprived neighbourhoods | North East | North West | Yorkshire and The Humber | East Midlands | West Midlands | East of England | London | South East | South West | Wales | Scotland | Northern Ireland | Total |
|-------------------------|-------------|-------------|--------------------------|---------------|---------------|-----------------|-------------|-------------|-------------|-------------|-------------|------------------|--------------|
| 10% most deprived | 557 | 1635 | 1025 | 383 | 870 | 229 | 172 | 271 | 272 | 297 | 617 | 176 | 6505 |
| 10% to 20% | 396 | 925 | 598 | 448 | 725 | 384 | 1134 | 450 | 345 | 312 | 611 | 194 | 6521 |
| 20% to 30% | 342 | 759 | 529 | 491 | 537 | 474 | 1386 | 571 | 422 | 312 | 589 | 187 | 6600 |
| 30% to 40% | 286 | 657 | 431 | 448 | 552 | 614 | 1094 | 758 | 722 | 317 | 599 | 191 | 6670 |
| 40% to 50% | 230 | 579 | 481 | 432 | 588 | 772 | 901 | 834 | 712 | 321 | 594 | 189 | 6633 |
| 50% to 60% | 186 | 537 | 513 | 473 | 530 | 784 | 834 | 978 | 776 | 339 | 604 | 179 | 6732 |
| 60% to 70% | 208 | 604 | 534 | 473 | 508 | 683 | 675 | 1015 | 733 | 334 | 611 | 188 | 6566 |
| 70% to 80% | 188 | 636 | 492 | 545 | 502 | 675 | 620 | 1109 | 624 | 319 | 595 | 178 | 6484 |
| 80% to 90% | 208 | 549 | 427 | 545 | 435 | 745 | 581 | 1186 | 589 | 316 | 546 | 172 | 6300 |
| 10% least deprived | 149 | 467 | 389 | 497 | 360 | 723 | 296 | 1627 | 512 | 287 | 515 | 166 | 5987 |
| Total | 2749 | 7349 | 5418 | 4735 | 5608 | 6083 | 7694 | 8800 | 5706 | 3155 | 5880 | 1821 | 64998 |

In order to compensate for an expected lower response rate in deprived areas, the derived sample sizes for each region/IMD decile cell were adjusted according to the following protocol.

Table 3: IMD adjustment factor

| IMD Decile | Adjustment factor |
|------------|-------------------|
| 1 | 1.25 |
| 2 | 1.25 |
| 3 | 1.10 |
| 4 | 1.10 |
| 5 | 1.00 |
| 6 | 1.00 |
| 7 | 0.90 |
| 8 | 0.90 |
| 9 | 0.80 |
| 10 | 0.80 |

For example, had the derived sample selection for IMD decile 1 in a particular region been 100 records, the actual volume of sample selected would have been 125 records. This was to compensate for the anticipated lower response rate from recipients of letters in these areas and was calibrated from response rates in a previous survey that used a similar methodology.

This process resulted in the following final sample selection:

Table 4: Final sample structure

| Deprived neighbourhoods | North East | North West | Yorkshire and The Humber | East Midlands | West Midlands | East of England | London | South East | South West | Wales | Scotland | Northern Ireland | Total |
|-------------------------|-------------|-------------|--------------------------|---------------|---------------|-----------------|-------------|-------------|-------------|-------------|-------------|------------------|--------------|
| 10% most deprived | 697 | 2044 | 1281 | 479 | 1087 | 286 | 215 | 339 | 340 | 372 | 771 | 220 | 8132 |
| 10% to 20% | 494 | 1156 | 748 | 560 | 906 | 480 | 1418 | 563 | 431 | 390 | 763 | 243 | 8152 |
| 20% to 20% | 376 | 835 | 582 | 541 | 591 | 521 | 1525 | 628 | 465 | 343 | 648 | 206 | 7260 |
| 30% to 20% | 314 | 723 | 474 | 493 | 608 | 676 | 1203 | 834 | 794 | 349 | 659 | 210 | 7337 |
| 40% to 20% | 230 | 579 | 481 | 432 | 588 | 772 | 901 | 834 | 712 | 321 | 594 | 189 | 6633 |
| 50% to 20% | 186 | 537 | 513 | 473 | 530 | 784 | 834 | 978 | 776 | 339 | 604 | 179 | 6732 |
| 60% to 20% | 187 | 544 | 481 | 426 | 457 | 614 | 608 | 914 | 660 | 300 | 550 | 169 | 5909 |
| 70% to 20% | 170 | 573 | 443 | 491 | 452 | 608 | 558 | 998 | 562 | 287 | 535 | 160 | 5835 |
| 80% to 20% | 166 | 440 | 341 | 436 | 348 | 596 | 465 | 949 | 471 | 253 | 437 | 138 | 5040 |
| 10% least deprived | 119 | 373 | 311 | 397 | 288 | 578 | 237 | 1302 | 409 | 230 | 412 | 133 | 4789 |
| Total | 2939 | 7803 | 5654 | 4727 | 5856 | 5916 | 7964 | 8339 | 5618 | 3184 | 5973 | 1847 | 65819 |

Overall, 65,819 letters were posted on 1 November 2024.

A reminder was sent to those who had not completed on 15 November 2024. The survey closed on 1 December 2024.

During the fieldwork period:

- 3,469 entered the survey (excluding 794 who only clicked the link).
- 777 were excluded as follows:
 - 42 did not agree to the Privacy statement
 - 19 were under 18 years old
 - 267 did not own a relevant pet
 - 314 did not visit a vet practice within last two years or said don't know/prefer not to say
 - 135 had visited a charity vet practice
- 316 dropped out during the survey (71 during scoping)
- 2,376 completed the survey

Participants were given the option of requesting a Computer Assisted Telephone Interview (CATI). Forty-seven such requests were received. Twelve were not eligible to participate in the survey. Sixteen were interviewed. The remaining 19 could not be reached during the survey period despite multiple attempts at various times of the day and days of the week. CATI interviews are included in the bulleted figures above.

Response Rate

The CMA is generally cautious about giving full evidential weight to surveys that achieve a response rate below 5%.⁸

Response rate based purely on the proportion of letters that yielded an interview (i.e. not factoring in eligibility) was 3.7%.

There are no definitive figures on how many pet owners there are (or how many visit a vet), and the survey was not designed to assess these questions.

However, using the (CMA's) working assumption that c57% of UK households have a pet, the response rate including this important scoping criteria would be 6.3%.

This means that even if every single pet owner has visited a vet in the last 2 years, the implied response rate would be more than 5%. If, say, we assume that 60% of pet owners have visited a vet within the last 2 years, the implied response rate would be 10.5%.

The absence of statistics about the proportion of different segments of the population who visited a veterinary practice within the last two years, by region for example, meant that no weighting was applied to the responses. However, it should be noted that the differential proportions of postal invitations sent out to different IMD decile addresses, as described above, constitutes some implied weighting as part of the sample design.

⁸ See [CMA Survey Good Practice Guide](#) para. 4.38.

2.5 Coding and Data Processing

The questionnaire asked for the Vet practice name and address. These were then coded into one of the following by the CMA:

- CVS
- IVC
- Linnaeus
- Medivet
- Pets at Home
- VetPartners
- 'Middle tier' veterinary groups – groups with between 10 and 32 practices
- Smaller groups (less than 10 practices) and standalone practices.

For analysis and reporting the named companies were treated as large vet group practices (LVGs) and middle tier veterinary groups, smaller groups and standalone practices were all treated as independent practices ('independents').

Some questions had an 'other' option at the end of a list of preset response options. 'Other' responses were back coded, either to a preset response option where appropriate, or to new categories if there were several similar responses that did not fit into the preset list.

All data was checked to ensure that it was clean. The quality checks included:

- All verbatims were checked for nonsense or illogical responses
- All verbatims were checked so that no pet names or other disclosive information was included
- Duplicate IP address checks were completed
- All batteries of questions underwent a process of checking for straight-lining; ie the same response ticked across all questions within the battery. These were checked against the rest of the data and respondents were removed if it was clear that they had straight-lined
- All time, day and date type questions were checked for plausibility and consistency.

Tabulations were run on agreed breaks⁹ with the CMA.

Within the tabulations, for each break, significance tests at the 95% confidence level were run on all proportions and means to ascertain whether there were significant differences between the categories in each break, for example, between large vet practice group and independent practices. The significance tests were based on two-sided tests.

⁹ The breaks included practice type, type of animal, length of time with practice, length of time as a pet owner, attitude on the importance of pets healthcare, whether have insurance, whether have pet plans, recency of vet visit, income, deprivation level, region, rural / urban, age, sex, ethnicity

In the questionnaire the vet practice used for analysis and reporting was either their usual vet practice as reported in Q9 or based on the specific question within the modules. This is set out below:

- Vet practice as in Q9 up to and including Q42
- For Q46 to Q55b vet from Q9 or a new vet identified at Q44
- Q56 to Q57 (Regular check up), Q58 to 60 (Referrals) vet practice as in Q9
- Q61 to Q75 either a vet in Q60a/b/c or the Q9 vet
- Q75A to Q85B (Diagnostics) vet from Q9 or Q44 (or 'not known' if neither)
- Q88C to Q90 (Out of hours) vet from Q9 or Q44 (or 'not known' if neither)
- Q91 to Q99 (Medicines) vet from Q9 or Q44 (or 'not known' if neither)
- Q100 to Q107 (After Life Services) vet practice as in Q9
- Q108 to Q115 (Pet Health Plans and Insurance) vet practice as in Q9
- Q116 to Q119C (Complaints) vet practice as in Q9
- Q120 to Q123 (Veterinary Organisations) vet practice as in Q9
- Q124 to Q129 (Views on in-home consultations/ mobile vets/ remote consultations/ telemedicine) vet practice as in Q9
- Q130 to Q130A (Costs and perceptions of costs) vet from Q9 or a new vet identified at Q44
- Rest of questionnaire vet practice as in Q9.

2.6 Questionnaire Development and Cognitive Testing

The survey questionnaire was primarily developed within the CMA. The Accent team provided comments on drafts, particularly where questions or the flow of the questionnaire could be made clearer and easier for the respondent and following cognitive testing.

The survey questionnaire was cognitively tested in October 2024 to ensure accessibility and comprehensibility of the questionnaire as well as checking that the length of the questionnaire was appropriate. An additional important aim of the cognitive testing was to check respondent recall and to assess whether any of the periods asked about in the questionnaire (e.g. last visit within the last two years) needed to be shortened.

Twenty-six participants were recruited through free-find recruitment carried out by our recruitment partner Scout. Quotas were used to ensure participants were a range of genders, ages and social grades. There were also quotas for eligibility for certain modules. All quotas for the modules and genders were met, except for socio economic grade (SEG)¹⁰ DE and 18-29 quotas where one less interview was conducted for each due to participant no-shows.

As well as set quotas, the recruitment agency aimed for a range of locations across three regions (England, Scotland and Wales) and to have a variety of types of pets across the sample.

¹⁰ Approximated Social Grade with its six categories A, B, C1, C2, D and E is a socio-economic classification produced by the ONS (UK Office for National Statistics)

| Factor | Category | Quota | # |
|--------|----------|------------|----|
| Gender | Male | Minimum 10 | 10 |
| | Female | Minimum 10 | 16 |
| AGE | 18-29 | Minimum 6 | 5 |
| | 30-54 | Minimum 6 | 11 |
| | 55+ | Minimum 6 | 10 |
| SEG | AB | Minimum 6 | 10 |
| | C1C2 | Minimum 6 | 11 |
| | DE | Minimum 6 | 5 |

| Module type | Quota | # |
|--------------------|-----------|----|
| Cremation Services | 3-5 | 9 |
| Medicine | 3-5 | 15 |
| Diagnostics | 3-5 | 14 |
| Out of hours | 3-5 | 9 |
| Regular check up | 3-5 | 17 |
| Referrals | 3-5 | 5 |
| Health Plan | Minimum 2 | 6 |
| Pet Insurance | Minimum 2 | 16 |

| Country | # |
|----------|----|
| England | 13 |
| Scotland | 7 |
| Wales | 6 |

Overall, the survey was well received but a small number of recommendations, mainly in the nature of text changes and formatting were raised. These were implemented in the final questionnaire (Appendix B) and a copy of the cognitive report can be found in Appendix C.

Key findings

The key findings were:

- Most participants could recall the name and location of their vet practice immediately although only a few could bring the postcode to mind without checking
- Most participants said that recalling the treatments and services they had used in the last two years was easy
- Participants who answered the cremations section reported that the questions were sensitive and appropriate to the topic although a few found them challenging to complete for emotional reasons
- Most participants believed that the survey was a good length and quick to complete
- When asked how easy/difficult it was to recall information about visiting a vet practice many participants felt that it was easy to recall this information, especially those with only one pet. Those with multiple pets struggled recalling the number of vet visits

- Most participants had not heard of the CMA and the Market Investigation. Of the few that had, none reported that knowledge of it, which was generally limited, impacted their answers.

2.7 Pilot

The initial questionnaire was piloted, with the objectives being to:

- Test the recruitment materials
- Test response rate/other methodological concerns (e.g. £5 incentive)
- Test interview duration

For the pilot 5,000 letters were posted out on 11 October 2024 with a £5 incentive. No reminders were sent.

From the 5,000 letters 291 followed the link although most did not authenticate.

Twenty participants fell out of scope. There were 69 completed interviews by 26 October 2024. The average questionnaire length was 23 minutes with a median length of 20 minutes. The low number of responses was, in part, a reflection of the short period of the pilot, particularly given that the initial contact was by letter using second class post.

Completed pilot questionnaires were not included in the main sample.

Following the pilot a number of changes were made to the questionnaire including new questions. The incentive amount was increased to £10 for the main stage.

3 FINDINGS

3.1 Introduction

This chapter sets out the findings from the research.

The majority of the reporting is on the overall sample and a disaggregation by whether the vet was an independent practice or a large vet group practice (that is one of the following six: CVS Group, IVC Evidensia, Linnaeus, Medivet, Pets at Home and VetPartners). Significant differences at the 95% confidence level between independent practices and a large vet group practices are highlighted in the reporting.

For questions with an 'other (please type in)' response the open responses were back coded if possible and, if not, these were coded to a code frame agreed with the CMA. In the charts and tables these additional codes are preceded with '[other]'.

3.2 Key Demographics

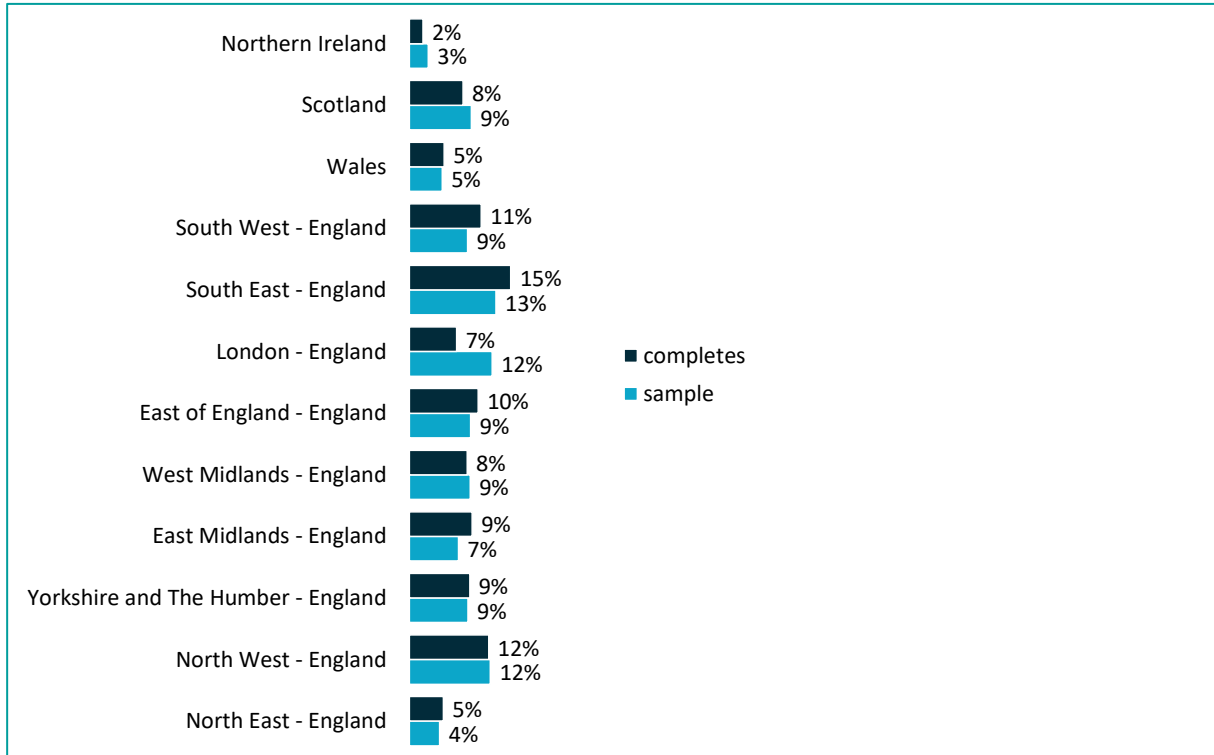
The sample comprised adults with an eligible pet who had used a vet practice. The letter sent to potential participants was targeted at an in-scope adult (aged 18 or older) in a household which had an eligible pet¹¹ and who was able to answer questions about the care of that pet including use of veterinary services. If there was more than one person in a household, it was requested that the person who most recently took their pet to the vet complete the survey.

Region

The survey achieved a good representation across the regions. Participant region had a good match compared to the sample with the exception of the London area which was lower. Data is not available to assess whether or not this is a reflection of fewer households in London being pet owners and visiting a veterinary practice within the last two years.

¹¹ An animal such as a dog or a cat, but not a farm or equine animal, that is kept for companionship or protection and habitually resides in the owner's dwelling

Figure 2: Response by Region – sample vs. completes

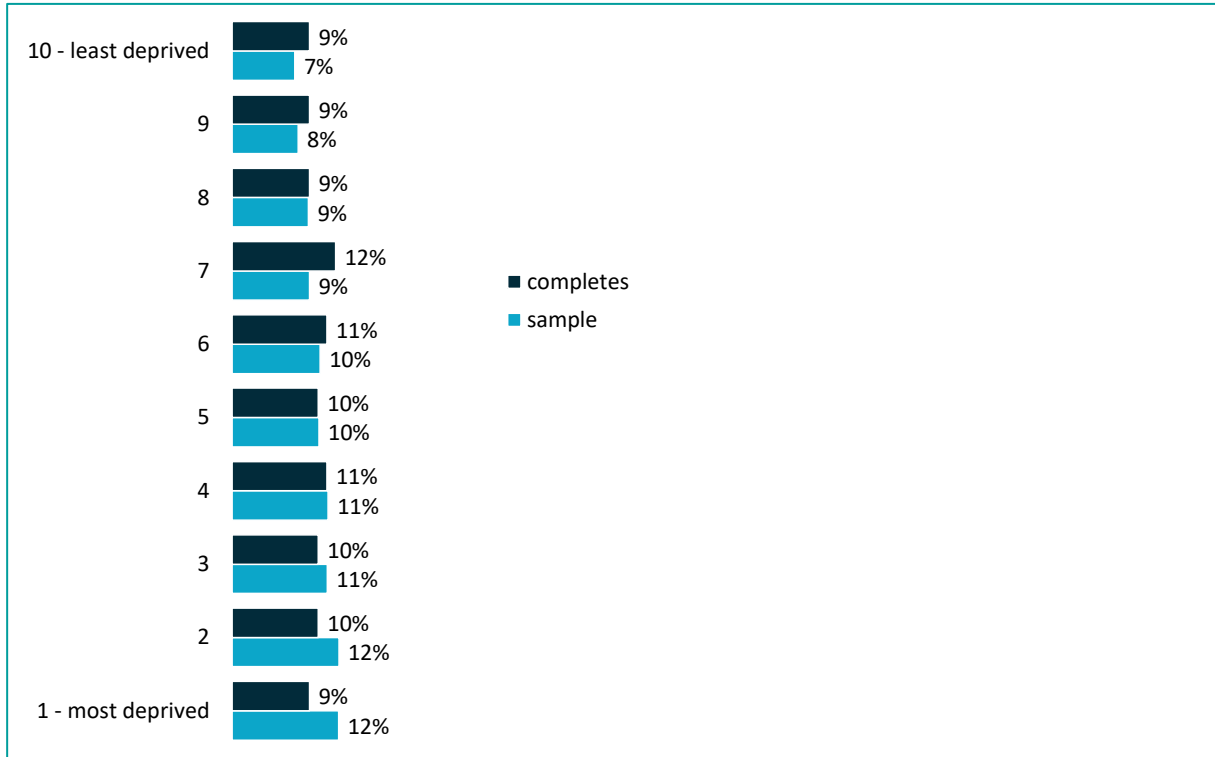


Base: all participants (2,344)

Index of Multiple Deprivation (IMD)

As described above, the most deprived deciles were deliberately over-sampled as they tend to have lower response rates and the least deprived were under-sampled as they tend to have higher response rates. The resultant completes were fairly evenly balanced across deciles. As with regions, we do not have statistics to be able to assess whether or not this reflects the proportion of households in these areas owning a pet and visiting a veterinary practice within the last two years.

Figure 3: Response by IMD - sample vs. completes

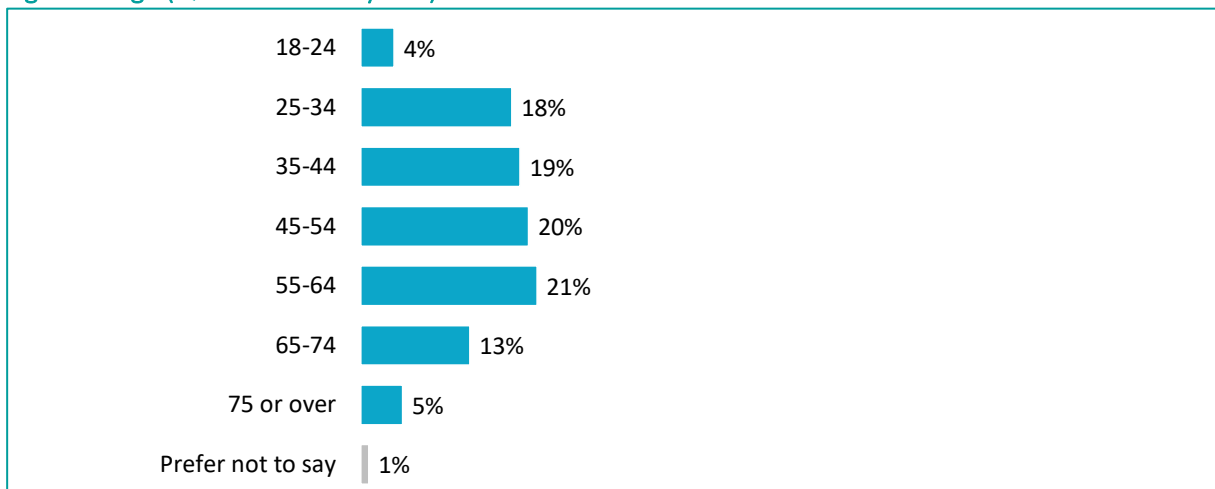


Base: All participants (2,344)

Age

The median age was 45-54 years old.

Figure 4: Age (Q1 How old are you?)

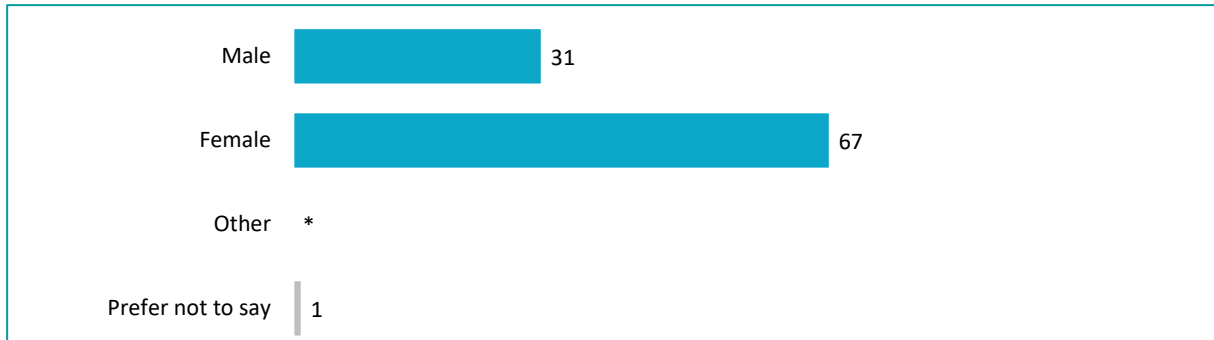


Base: All participants (2,344)

Gender

Two thirds of participants (67%) were female and 31% male.

Figure 5: Gender (Q137 Would you describe yourself as...)



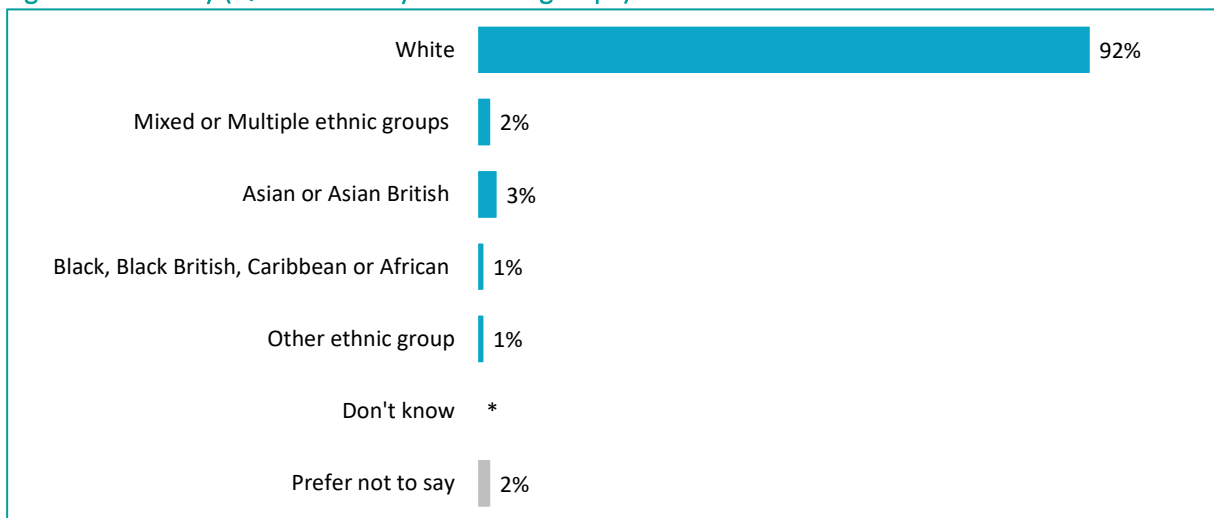
Base: All participants (2,344)

* = Less than 0.5%

Ethnicity

The sample was predominantly White.

Figure 6: Ethnicity (Q138 What is your ethnic group?)



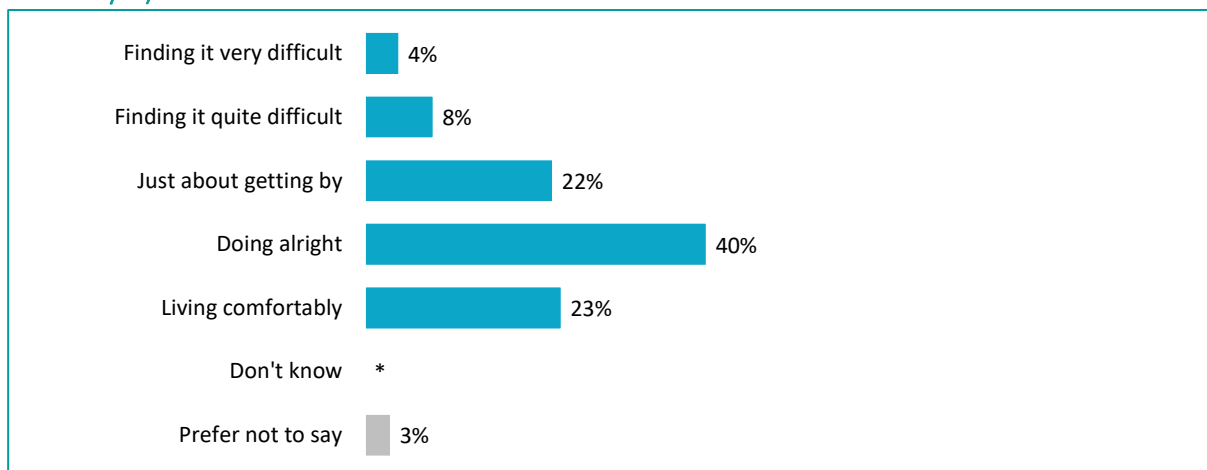
Base: All participants (2,344)

*less than 0.5%

Financial vulnerability

Over a third (34%) were just about getting by or finding it difficult. Forty per cent were doing alright and 23% were living comfortably.

Figure 7: Financial vulnerability (Q139 How well would you say your household is managing financially these days?)



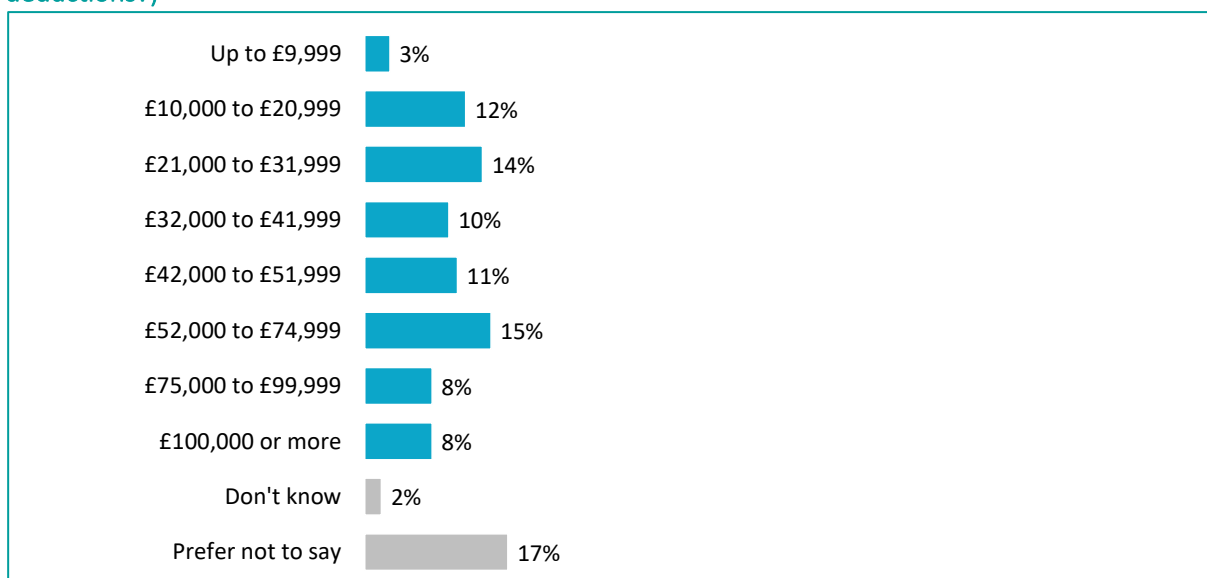
Base: All participants (2,344)

*less than 0.5%

Household income

The median income band was £42,000-£51,999. However, 17% preferred not to say.

Figure 8: Household income (Q139a What is your annual household income, before tax and other deductions?)

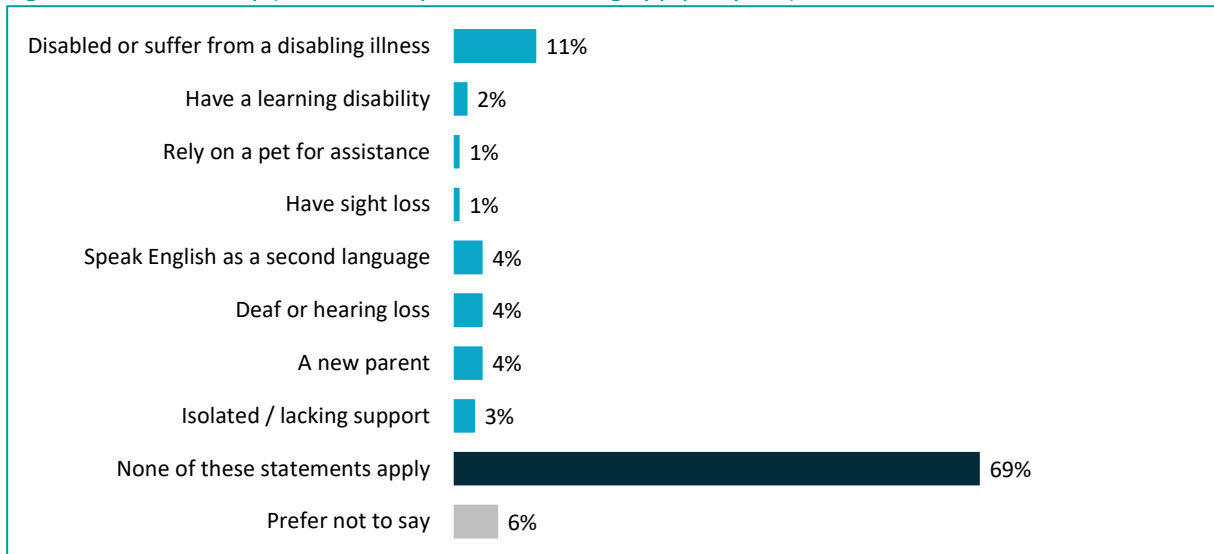


Base: All participants (2,344)

Vulnerabilities

A quarter of the sample had one or more vulnerabilities. However, for 69% none of the statements applied.

Figure 9: Vulnerability (Q140 Do any of the following apply to you?)

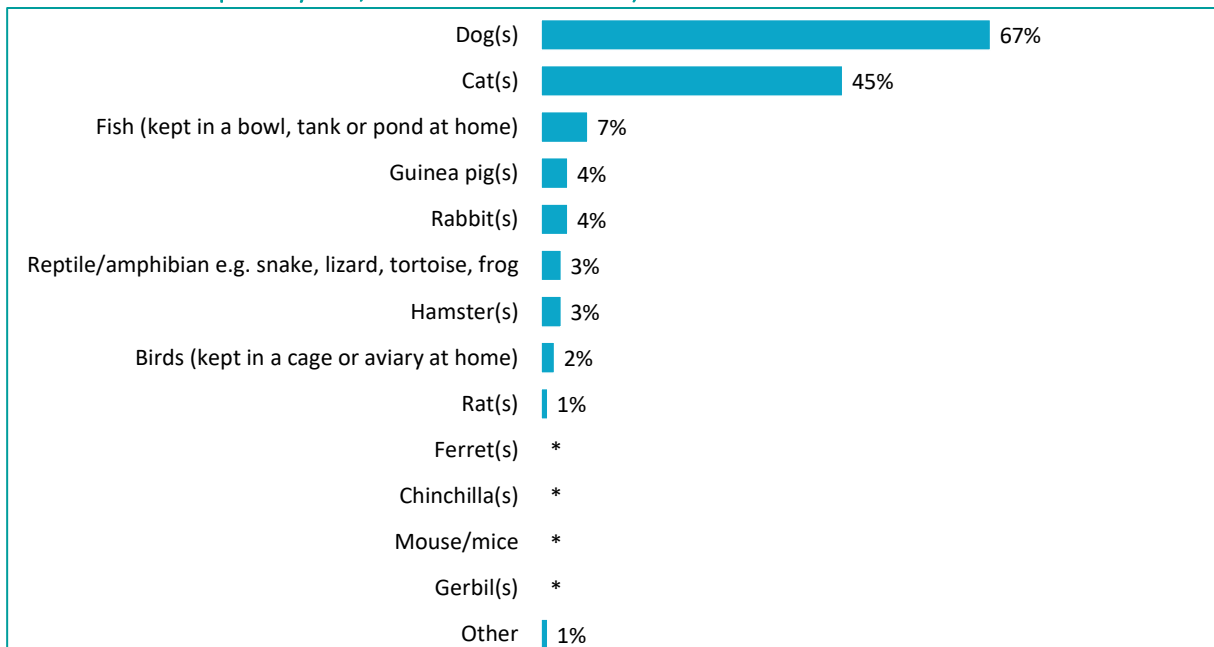


Base: All participants (2,344)

3.3 Type of Pet

Two thirds of the sample (67%) owned a dog or dogs and 45% owned a cat or cats. No other pet was owned by more than 7% of respondents.

Figure 10: type of pets (Q2 Can you tell me which, if any, household pets you currently own, or have owned within the past 2 years, since November 2022)

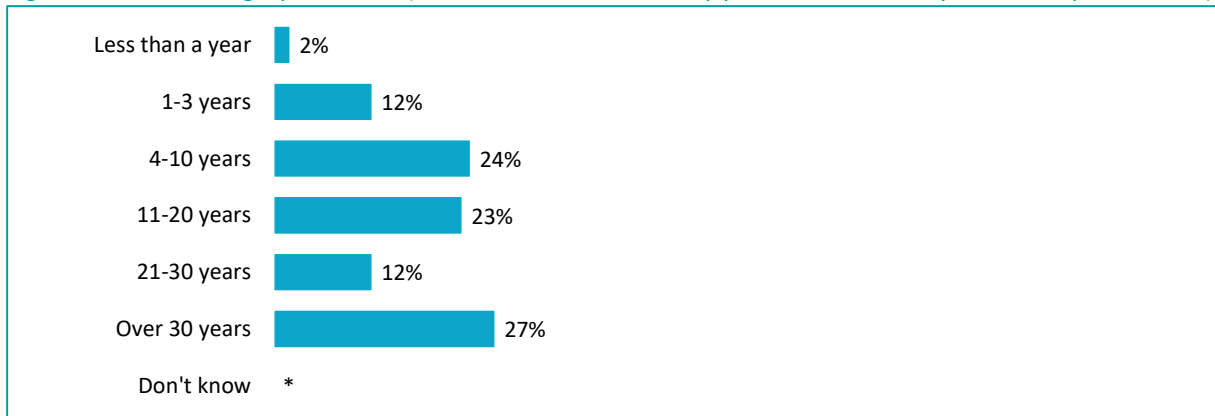


Base: All participants (2,344)

*less than 0.5%

Over a quarter of the sample (27%) has been a pet owner for over 30 years. A further 24% has been pet owner for 4-10 years and another 23% for 11-20 years.

Figure 11: Time being a pet owner (Q4 As an adult, how many years in total have you been a pet owner?)



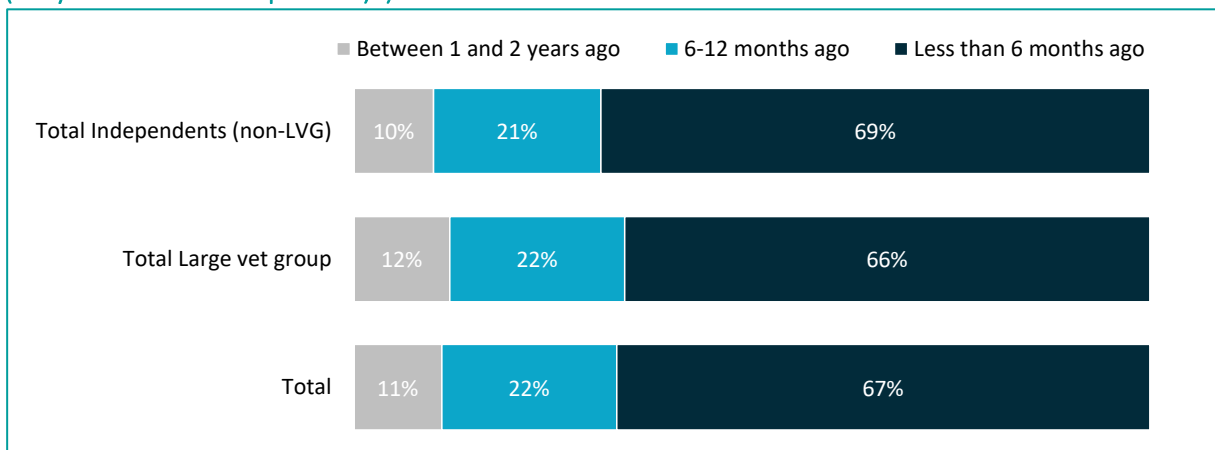
Base: All participants (2,344)

*less than 0.5%

For about two thirds (67%) the most recent visit to the pets was less than six months ago.

Little difference was observed between those who use a large vet group practice and an independent practice.

Figure 12: Last vet visit (Q5 When, if at all, was the last time you personally took your pet(s) to the vet (i.e. you went to a vet practice?)



Base: All participants: 2,344 Total, 731 Total large vet group, 1,061 Independents

* Large vet group (LVG) = CVS, IVC, Linnaeus, Medivet, Pets at Home and VetPartners

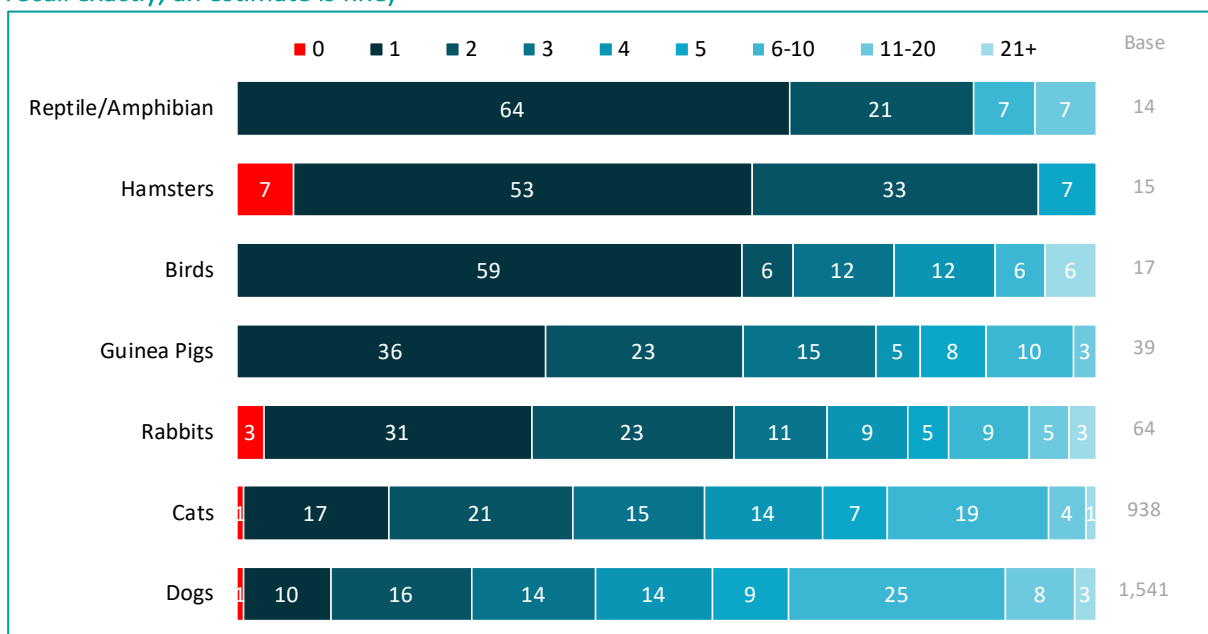
3.4 Choice of Vet Practice

Frequency of taking pets to vets

Pet owners were asked how many times they had taken their pet or pets to the vets in the preceding two years. Dogs and cats were taken to the vets more often than other pets.

Dog owners, who had visited a veterinary practice in the past two years, visited with their dog(s) 5.9 times on average. The equivalent average for cat owners was 4.7 visits and it was 4.0 visits for rabbit owners. A full break down of mean pet visits is shown in Table 5 below.

Figure 13: Frequency of taking pets to vets (Q8 And since November 2022, how many times have you taken your pet(s) to the vets? Please mention all the times you took your pet(s) to the vet even if it was for the same issue. Please type in the total number of vets visits next to each pet type. If you do not recall exactly, an estimate is fine)



*0s in chart are from multiple pet ownership (i.e. they took their dog but not their hamster)

Table 5: Mean frequency of visit over two years by type of pet

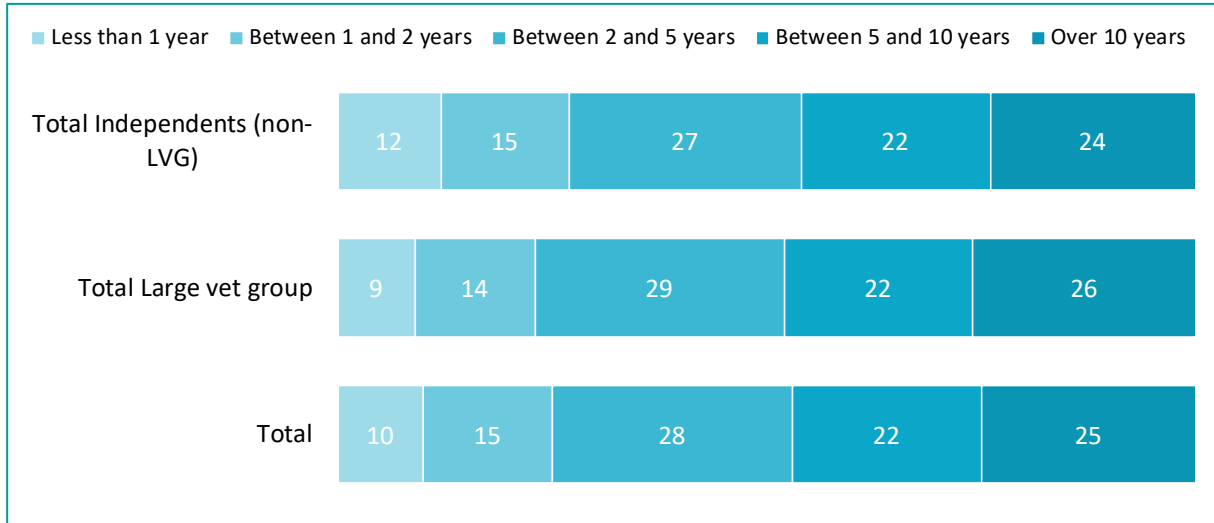
| Type of pet | Mean visit frequency |
|-------------------|----------------------|
| Dogs | 5.9 |
| Cats | 4.7 |
| Rabbits | 4.0 |
| Guinea Pigs | 2.9 |
| Birds | 4.7 |
| Hamsters | 1.5 |
| Reptile/amphibian | 2.9 |

Years spent with a practice

A quarter (25%) of those we spoke to had been with their vet practice for over 10 years and 22% had been with the same practice between 5 to 10 years.

A significantly larger number of pet owners that have had their pets for less than a year take their pets to independent practices (12%) compared to large vet group practices (9%).

Figure 14: Length of time with practice (Q11 How long have you been with this vet practice?)



Base: All participants: 2,344 Total, 1,498 Total large vet group, 820 Independents

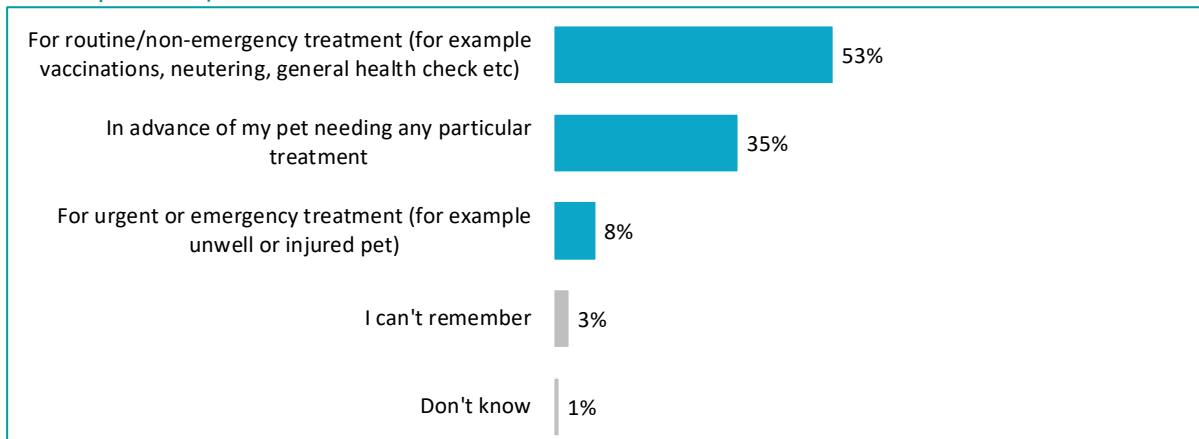
* Large vet group (LVG) = CVS, IVC, Linnaeus, Medivet, Pets at Home and VetPartners

Choosing a vet practice

The sample was asked at which point in their pet ownership they originally chose the vet practice. Over half (53%) of pet owners we spoke to made a decision about which practice to choose when it was time for a routine/non-emergency treatment.

Over a third (35%) chose it in advance of a treatment.

Figure 15: Time of practice choice (Q12 At which point in your pet ownership did you originally choose this vet practice?)

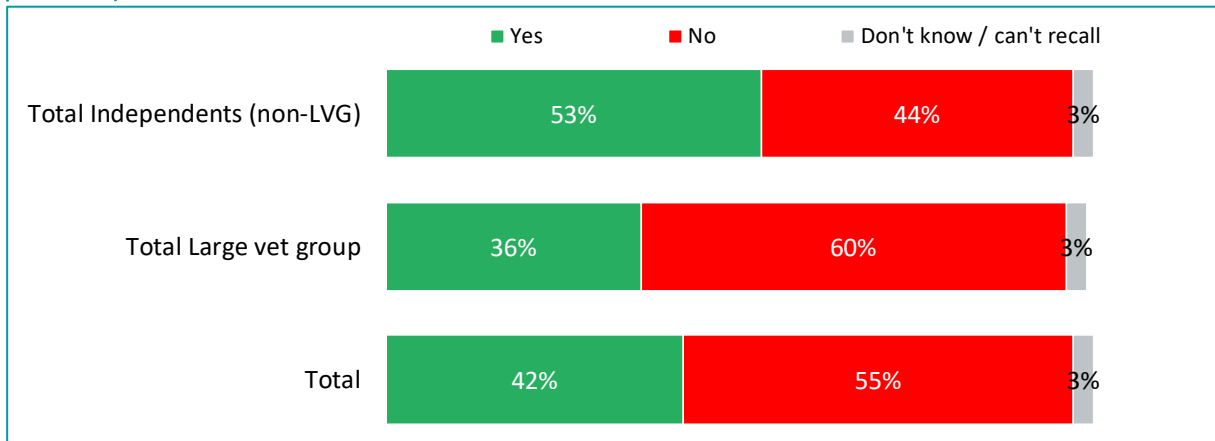


Base: 1,757 who have been with vet practice less than 10 years

Just over two in five pet owners (42%) moved to their current practice from another practice.

A significantly higher proportion of those at an independent practice (53%) moved practices than those at a large vet group practice (36%).

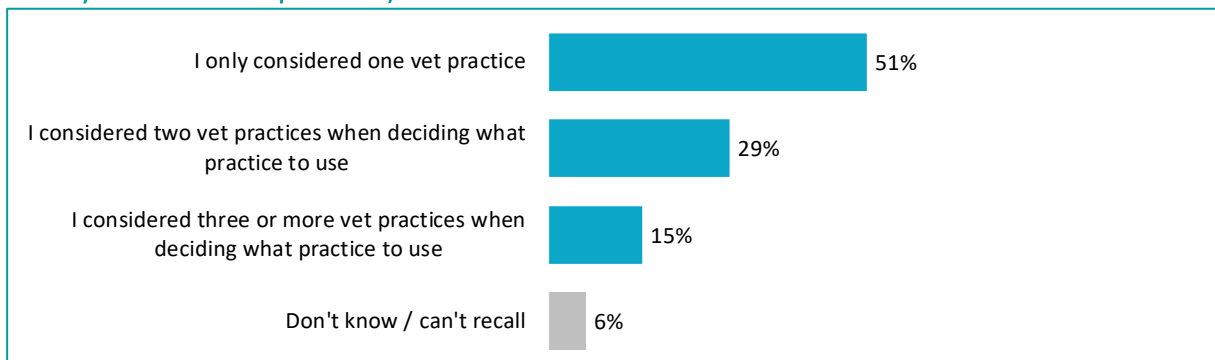
Figure 16: Move from another practice (Q12A Did you move to your current practice from another vets practice?)



Base: Those who have been with vet practice less than 10 years: 1,757 total, 1,113 Total large vet group, 623 Independents

Of those that had been with a practice for less than ten years over half (51%) considered one vet practice.

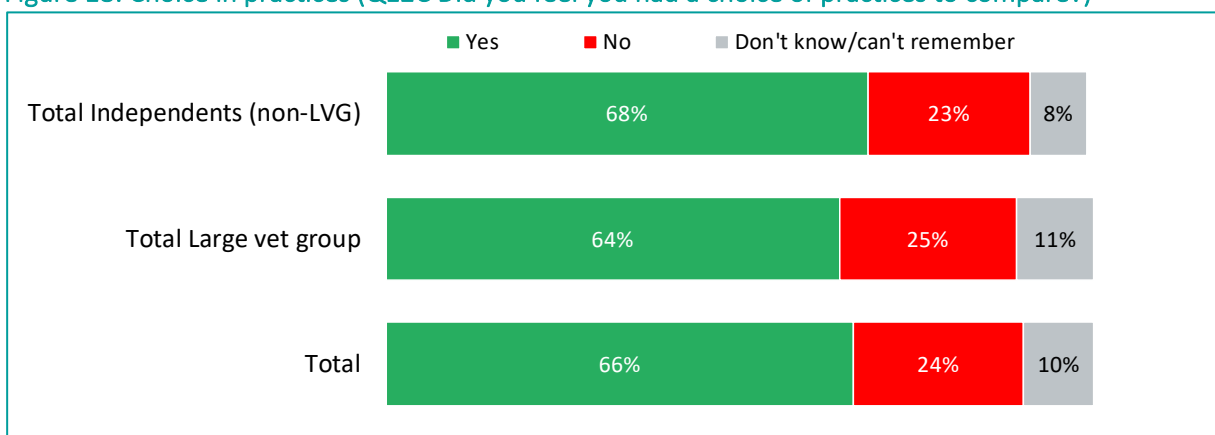
Figure 17: method of choosing a practice (Q12B And which of the following best describes how you chose your current vet practice?)



Base: 1,757 who have been with vet practice less than 10 years

Two thirds (66%) of those that considered a single practice said they felt they had a choice in practices to compare and 24% said they did not.

Figure 18: Choice in practices (Q12C Did you feel you had a choice of practices to compare?)



Base: Those who only considered one vet at Q12B: 896 total, 569 Total large vet group, 319 Independents

Those who originally chose their vet practice in advance of their pet needing any treatment were significantly more likely to say they had a choice of practices to compare (73%) compared to those that went in for a routine/ non urgent (62%) and emergency (61%) treatments.

Those who originally chose their vet practice for urgent or emergency treatment were significantly more likely to say they did not have a choice of practices to compare (32%) compared to those that chose in advance of their pet needing any treatment (19%).

Table 6: Reason for feeling there wasn't a choice (Q12D What was the main reason why you didn't feel that you had a choice?)

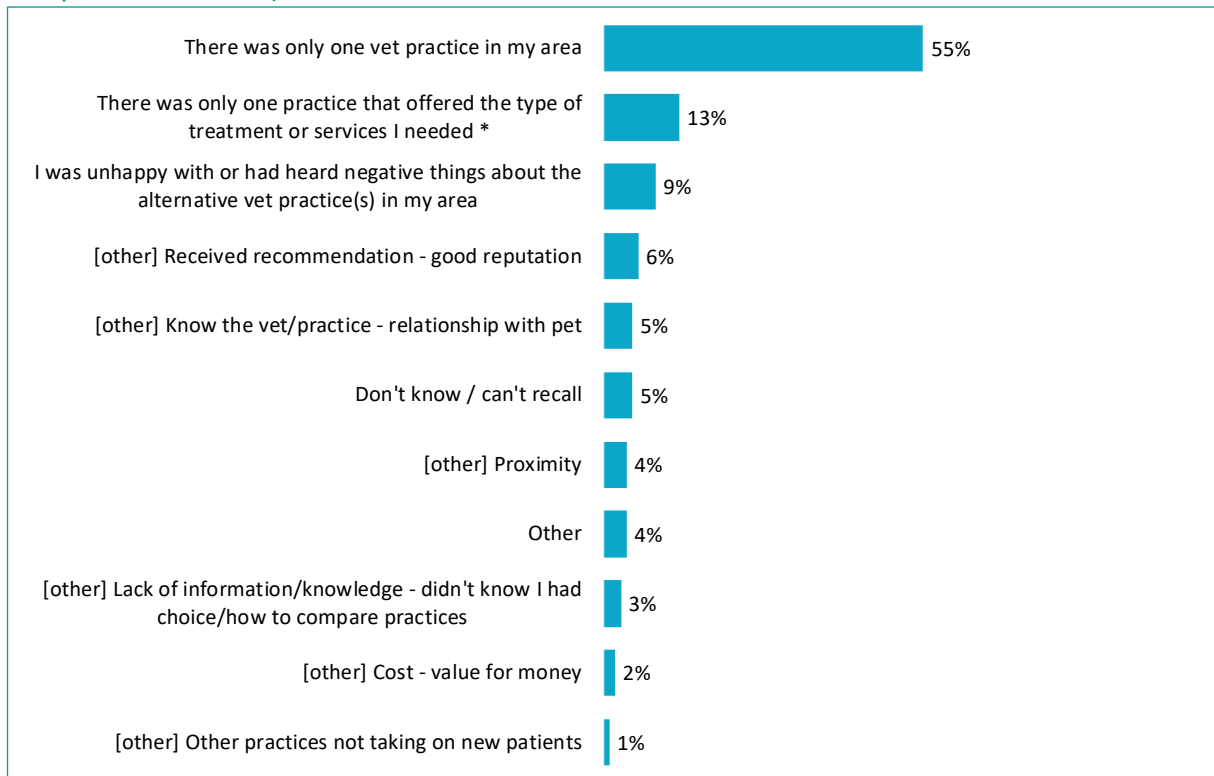
| | In advance of my pet needing any treatment | For routine/non-emergency treatment | For urgent or emergency treatment |
|--|--|-------------------------------------|-----------------------------------|
| Yes | 73% | 62% | 61% |
| No | 19% | 26% | 32% |
| Don't know /can't remember | 8% | 12% | 7% |
| Base: those who felt they did not have a choice at Q12C | 307 | 479 | 74 |

Orange box denotes significant differences

Pet owners who said they did not have a choice of vet practice were asked why.

The lack of any other vet practices in the area was cited as top reason for pet owners feeling they had no choice when selecting a practice. More than half (55%) selected this option.

Figure 19: Reasons for feeling there is no choice (Q12d. What was the main reason why you didn't feel that you had a choice?)



Base: 216 who felt they did not have a choice at Q12C

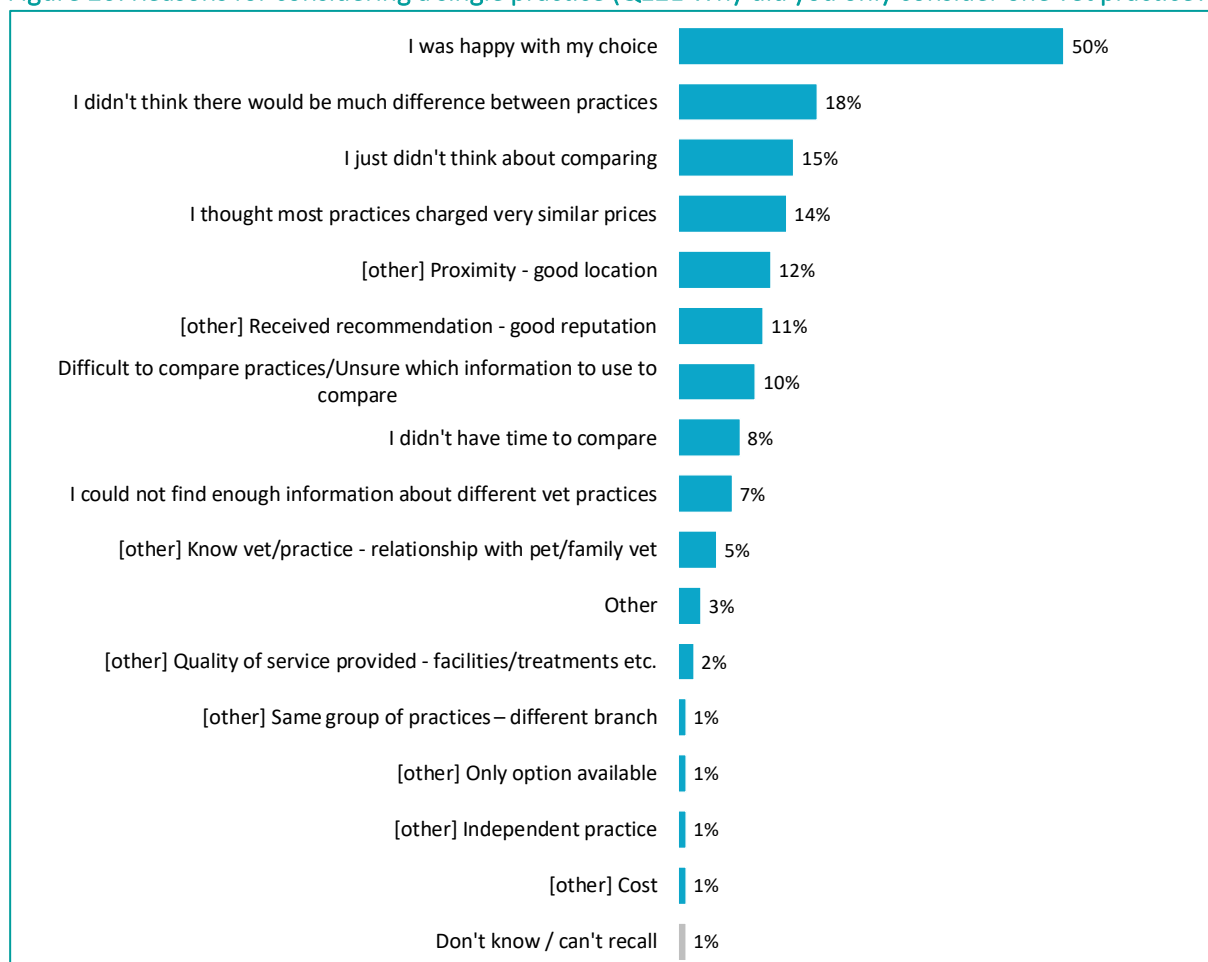
* (for example if your pet needed specialist treatment or you had a type of pet that other vets didn't treat)

Reasons for considering a single practice

The 51% of participants who considered only one practice when choosing a vet were asked why they only considered one.

Half (50%) said they were happy with their choice, 18% felt there was not much between practices and a further 15% just didn't think about comparing.

Figure 20: Reasons for considering a single practice (Q12E Why did you only consider one vet practice?)



Base: 896 who only considered one vet at Q12B

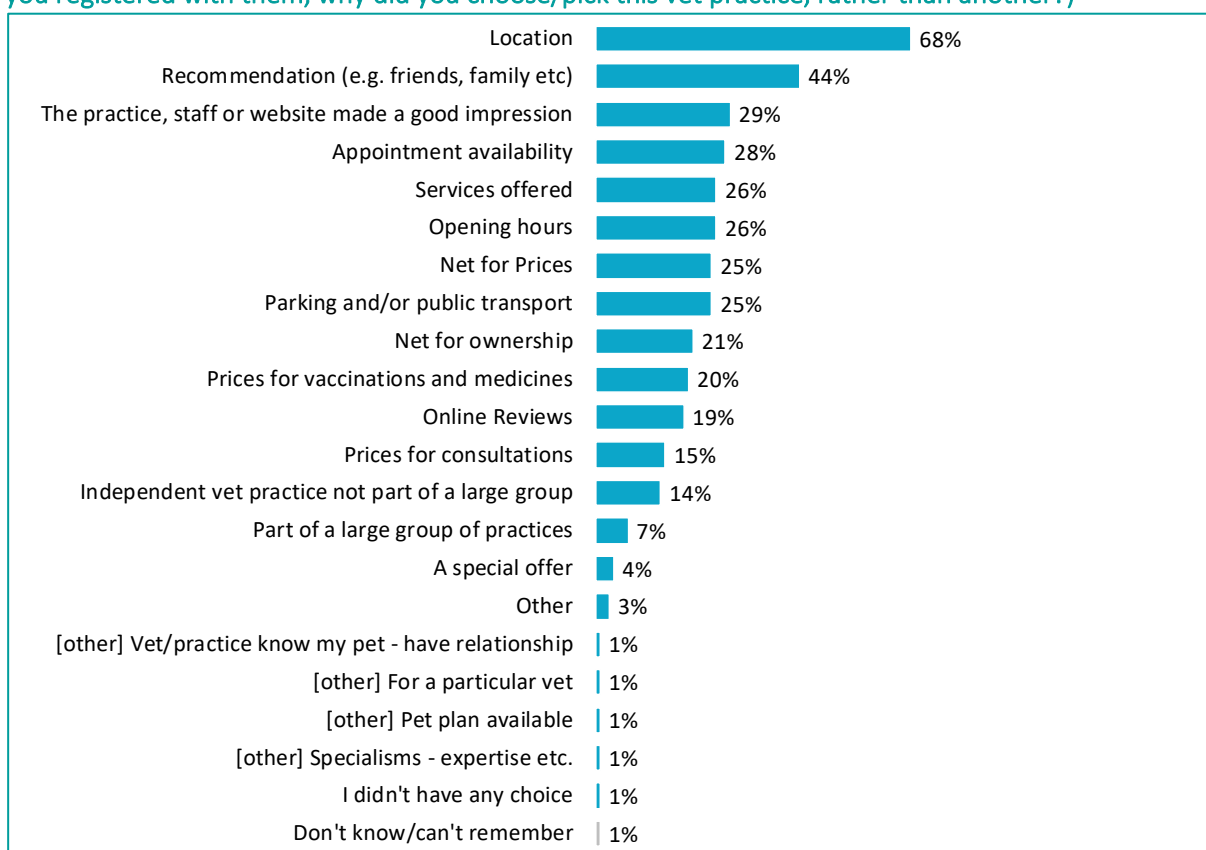
Reasons for choosing vets – all and main

The overall sample of those who have been with their vets for less than 10 years was asked to think back to when they registered with their current practice and indicate why they you chose/picked it rather than another.

The top two reasons mentioned were location (68%) and recommendation (44%). The practice, staff or websites making good impression were mentioned by 29% of participants and 28% mentioned appointment availability.

Overall, each participant mentioned 3.4 factors on average for choosing a vet.

Figure 21: Reason for choice (Q13 Still thinking about your current vet practice, thinking back to when you registered with them, why did you choose/pick this vet practice, rather than another?)



Base: 1,757 who have been with vet practice less than 10 years

When the single main factor was probed location (36%), and recommendations (23%) were again the most mentioned.

The table overleaf shows all the reasons (with price and ownership related reasons netted¹²) and the main reason disaggregated by practice type.

¹² netted = all price related reasons added together and all ownership related reasons added together

Table 7: Main reason for choosing (Q14 And what was the main reason?)

| | All | | Main | | |
|---|-----------------------|------------------------------|--------------|-----------------------|------------------------------|
| | Total large vet group | Total Independents (non-LVG) | Total | Total large vet group | Total Independents (non-LVG) |
| Location | 70% | 65% | 36% | 30% | 39% |
| Recommendation (e.g. friends, family etc) | 40% | 51% | 23% | 20% | 28% |
| The practice, staff or website made a good impression | 26% | 34% | 6% | 5% | 6% |
| Appointment availability | 28% | 26% | 4% | 4% | 3% |
| Opening hours | 28% | 22% | 3% | 3% | 1% |
| Services offered | 26% | 26% | 3% | 4% | 3% |
| Parking and/or public transport | 26% | 23% | 2% | 2% | 1% |
| Net for Prices | 26% | 24% | | | |
| Net for ownership | 15% | 30% | | | |
| Prices for vaccinations and medicines | 21% | 18% | 4% | 5% | 3% |
| Online Reviews | 17% | 22% | 3% | 4% | 3% |
| Prices for consultations | 14% | 15% | 2% | 2% | 1% |
| Independent vet practice not part of a large group | 7% | 28% | 4% | 1% | 9% |
| Part of a large group of practices | 9% | 3% | 1% | 1% | * |
| A special offer | 5% | 3% | 1% | 2% | 1% |
| Other | 3% | 4% | 6% | 5% | 6% |
| Don't know/can't remember | 1% | * | 1% | 1% | 1% |
| I didn't have any choice | 1% | * | 1% | 1% | * |
| [other] Specialisms - expertise etc. | 1% | 1% | * | * | 1% |
| [other] Pet plan available | 1% | 1% | * | * | * |
| [other] For a particular vet | 1% | 1% | * | * | * |
| [other] Vet/practice know my pet - have relationship | 1% | 1% | * | * | * |
| Base | 1,113 | 623 | 1,757 | 1,113 | 623 |

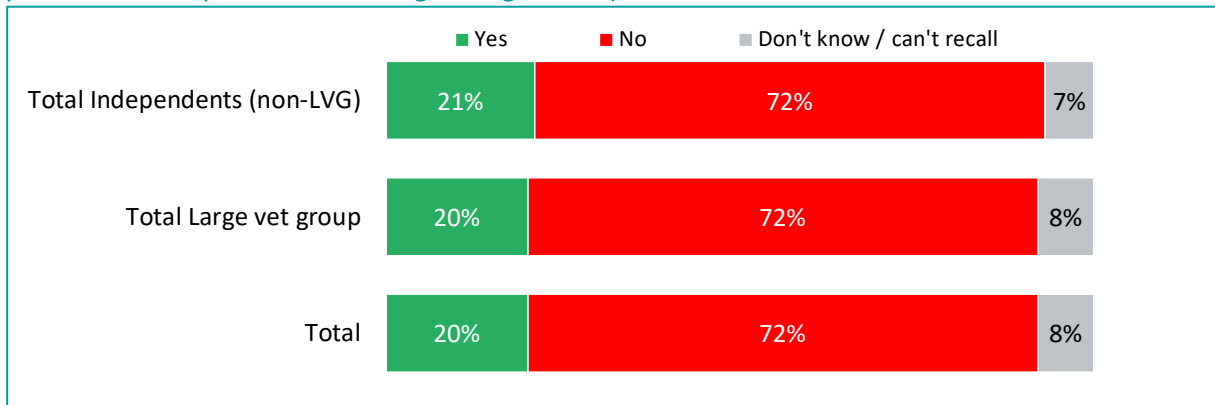
*Less than 0.5%

Orange box denotes significant differences between practice type

Pricing information used when sourcing a practice

A fifth of those who **didn't** mention prices as a factor in choosing a vet found out information about prices before registering.

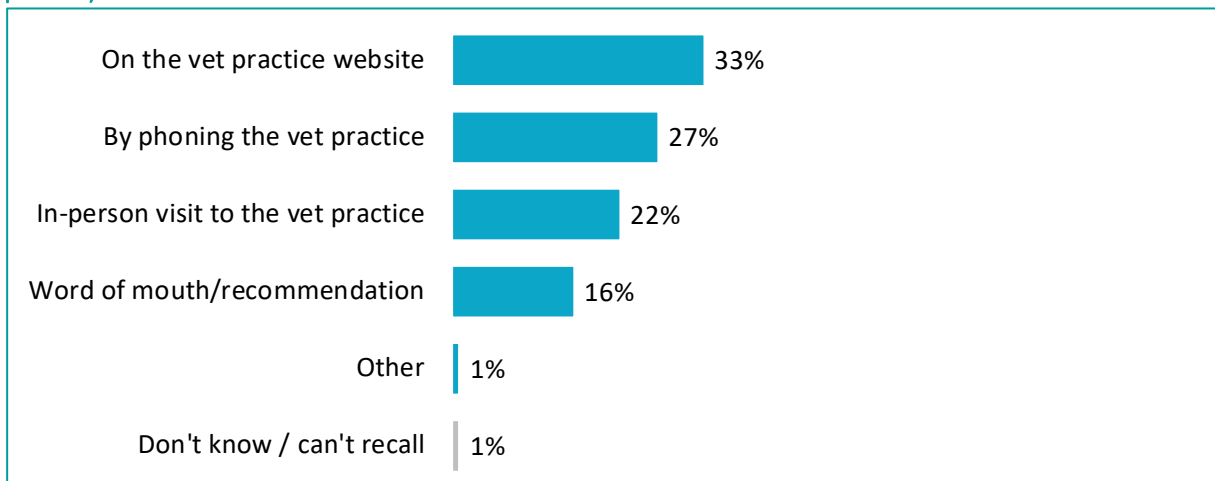
Figure 22: Awareness of about practice prices (Q15 Did you find out information about the prices of your current vet practice before registering with it?)



Base: 1,314 who did not mention 'Prices for consultations' or 'Prices for vaccinations and medicines' at Q13, 1,314 Total, 826 Total large vet group, 475 Independents

The main sources of price information were the practice website (33%), over the phone (27%) and in person visit to practices (22%).

Figure 23: Means of finding out price information (Q16 How did you find out information about the prices?)



Base: 267 who found out information about prices of your current vet practice before registering with it

The 30% of pet owners that mentioned price as a factor when considering a practice were asked how they went about sourcing their information about prices.

Over three in ten (31%) said they sourced prices by phone, 27% via the website, 19% by word of mouth (significantly higher for those at independent vet practices) and 18% through an in-person visit (significantly higher for those in large vet groups).

Table 8: Means of finding out price information (Q17 You said that you considered prices. How did you find out information about the prices of your current vet practice when deciding whether to choose it?)

| | Total | Total large vet group | Total Independents (non-LVG) |
|--|------------|-----------------------|------------------------------|
| By phoning the vet practice | 31% | 28% | 29% |
| On the vet practice website | 27% | 32% | 22% |
| Word of mouth/recommendation | 19% | 14% | 26% |
| In-person visit to the vet practice | 18% | 21% | 18% |
| I didn't find out the prices when deciding | 2% | 1% | 2% |
| Don't know / can't recall | 2% | 3% | 2% |
| Other | 2% | 1% | 2% |
| Base (those who mentioned price at Q13) | 444 | 160 | 164 |

Orange box denotes significant differences between practice type

All those who found out information about prices were asked to explain further what price information they specifically found out about.

Close to three quarters (72%) enquired about vaccinations, 63% about routine consultations and 49% about Flea and/or worming medicines. A further 38% asked about neutering, this was significantly higher among those that belong to a large vet group compared to an independent practice.

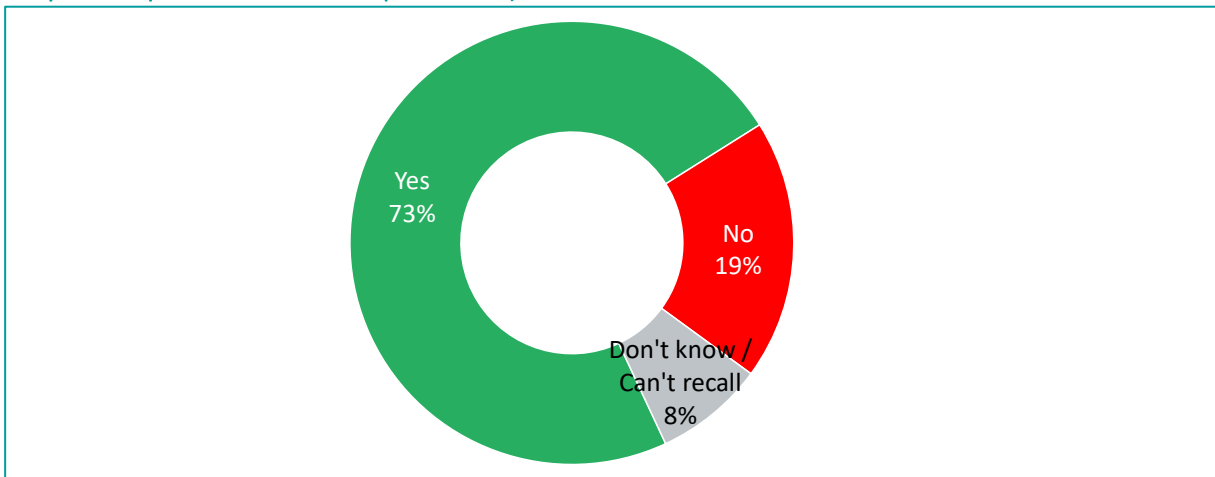
Table 9: Type of price information investigated (Q18 What type of price information did you find out about when choosing your practice?)

| | Total | Total large vet group | Total Independents (non-LVG) |
|---|------------|-----------------------|------------------------------|
| Vaccinations | 72% | 73% | 70% |
| Routine consultation | 63% | 63% | 65% |
| Flea and/or worming medicines | 49% | 50% | 48% |
| Neutering | 38% | 41% | 33% |
| Emergency consultation | 21% | 20% | 21% |
| Prescription | 21% | 23% | 18% |
| Other medicines | 4% | 3% | 5% |
| Other | 2% | 1% | 2% |
| Don't know / Can't recall | 2% | 2% | 2% |
| [other] Pet plan/pet club | 2% | 2% | 2% |
| Base (Those who found out information about the price) | 701 | 446 | 243 |

Orange box denotes significant differences between practice type

Close to three quarters (73%) of those that considered more than one practice compared prices with other practices.

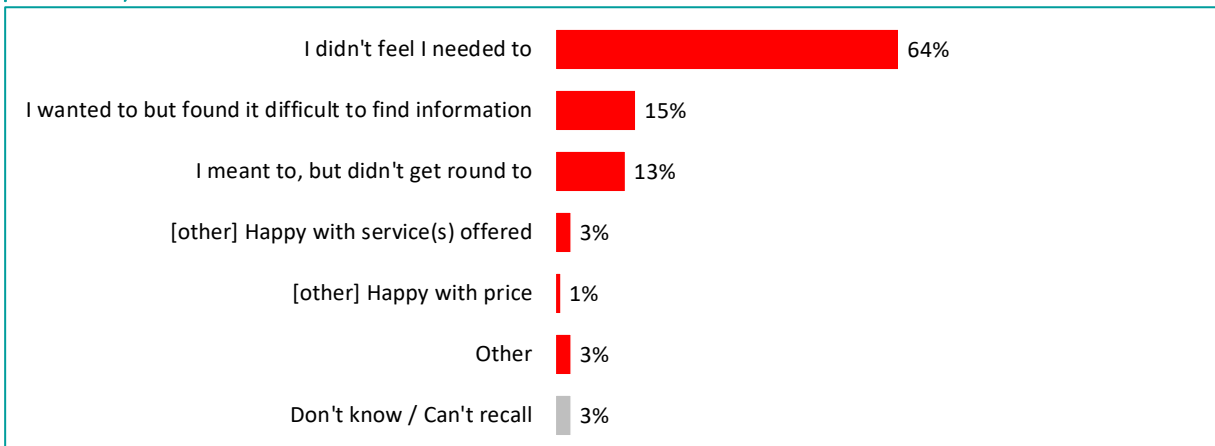
Figure 24: Proportion of pet owners looking at prices (Q19 When looking at prices of your vet practice, did you compare these to other practices?)



Base: 421 who considered more than one vet practice

Of those that **did not** compare prices (19%), 64% said they did not feel a need to. A further 15% stated they wanted to but found it difficult to find the information and 13% wanted to, but never got round to it.

Figure 25: Reasons for not looking at prices (Q19b Why did you not compare prices to any other practices?)

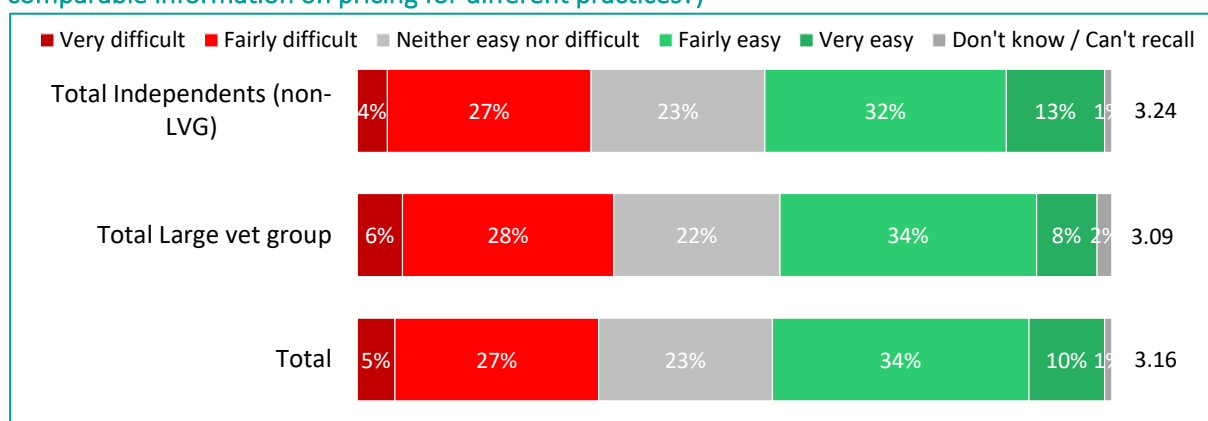


Base: 80 who did you not compare prices to any other practices

Those that **did** look at the prices (73%) were asked how easy or difficult they found it.

Forty-four per cent overall said it was easy and 32% said it was difficult, a positive balance of 12%.

Figure 26: Perceived ease/difficulty of price research (Q20 How easy or difficult was it to find comparable information on pricing for different practices?)



Base: Those who compared prices to other practices: Total 308, Total large vet group 193, Independents 111

Information used when sourcing vet practice

The 26% of pet owners that mentioned **services** as a factor in choosing a vet were asked how they found out information about the services offered.

Over half (54%) mentioned the practice website, a third (33%) word of mouth (significantly higher among those at an independent practice), 29% phone and 26% in person visit.

Table 10: How information was found about the services offered by current vet practice when deciding whether to choose it. (Q21 You said one of the reasons you chose your current vet practice was the services it offered. How did you find out information about the services offered by your current vet practice when deciding whether to choose it?)

| | Total | Total large vet group | Total Independents (non-big 6) |
|--|------------|-----------------------|--------------------------------|
| On the vet practice website | 54% | 55% | 53% |
| Word of mouth/recommendation | 33% | 29% | 41% |
| By phoning the vet practice | 29% | 29% | 28% |
| In-person visit to the vet practice | 26% | 29% | 21% |
| Using the Royal College of Veterinary Surgeons' Find a Vet service | 1% | 1% | 1% |
| Other | 3% | 3% | 3% |
| Don't know / can't recall | * | 1% | 0% |
| Base (Those who compared services to other practices) | 446 | 279 | 163 |

*less than 0.5%

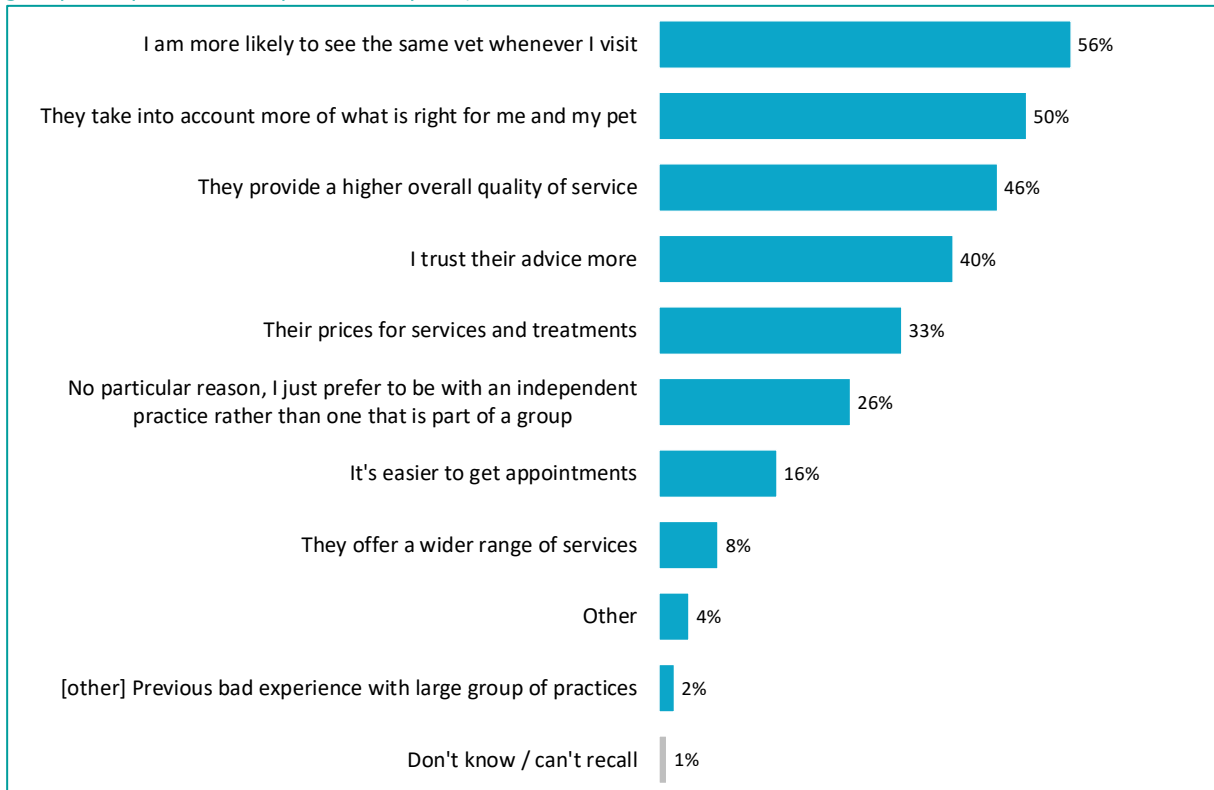
Orange box denotes significant differences between practice type

The 14% who mentioned that they chose their practice because it was an independent practice and were asked why that was important to them.

The top two reasons mentioned were likelihood of seeing the same vet when visiting and the perception that independent practices take account more of what is right for their pet at 56% and 50%, respectively.

The perception that independent practices provide higher quality services (46%), the trust in the advice (40%) and the prices for services (33%) complete the top five reasons for choosing an independent vet practice.

Figure 27: Key factors for choosing an independent practice (Q22. You said one of the reasons you chose your current vet practice was due to it being an independent vet practice that was not part of a large group. Why was this important to you?)

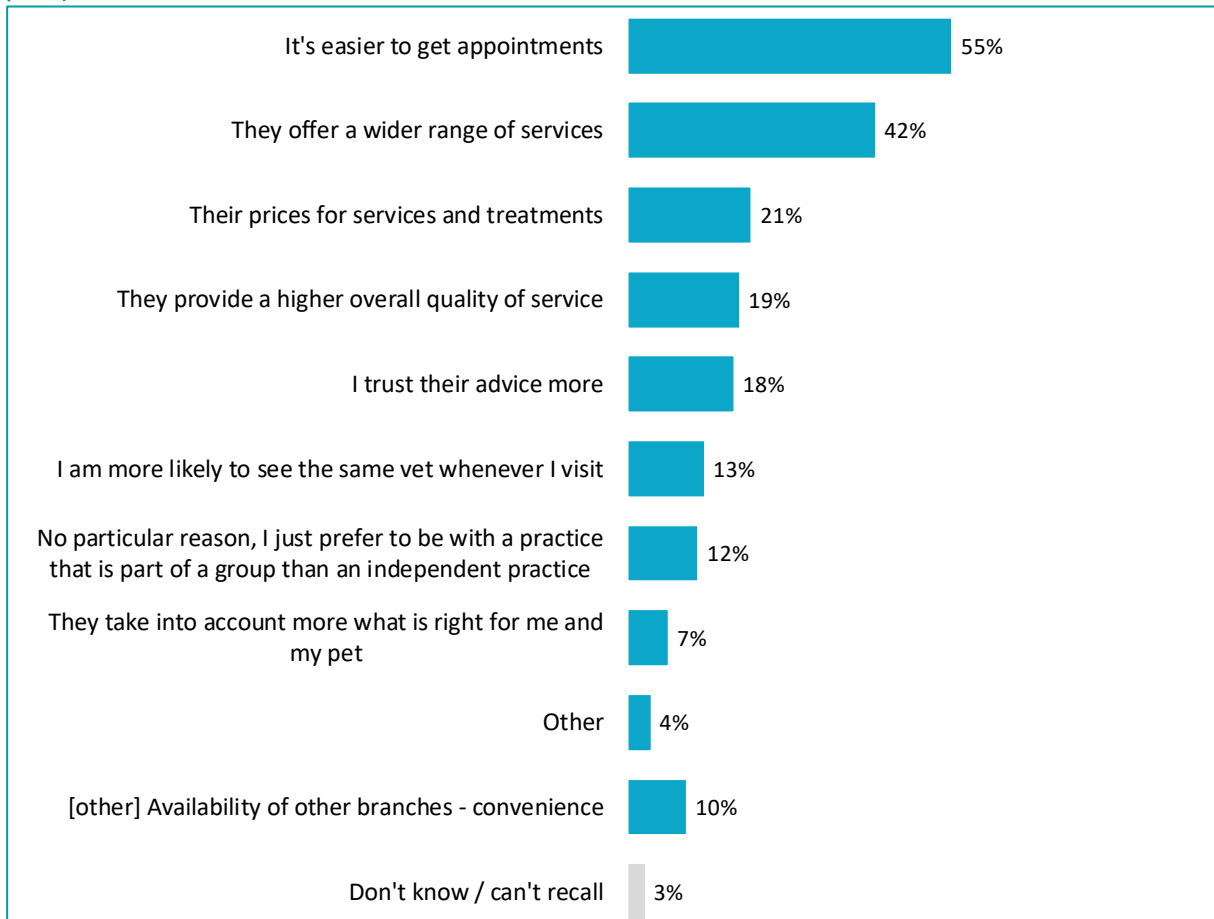


Base: 246 who said one of the reasons was due to it being an independent vet practice that was not part of a large group

The 7% who mentioned that they chose their practice because it was part of a large group of vets were also asked the reasons behind this choice.

Over half (55%) mentioned that it was easier to get appointments, 42% the offer of wider range of services and 21% the prices for services and treatments as their top three reasons. A further 19% mentioned the perceived provision of higher overall quality of service and 18% mentioned trust in their services.

Figure 28: Key factors for choosing a large practice (Q23 You said one of the reasons you chose your current vet practice was because it was part of a large group of practices. Why was this important to you?)

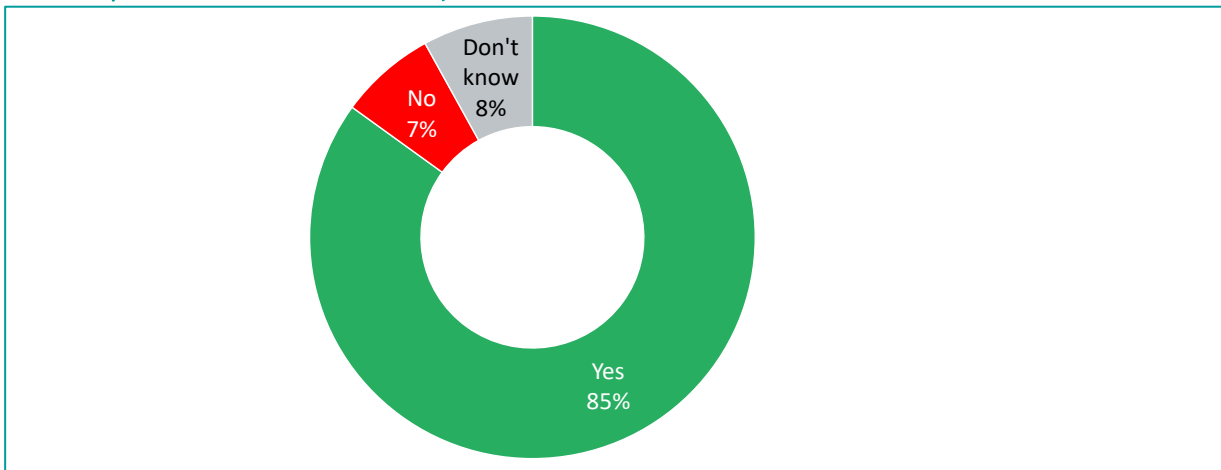


Base: 115 who said one of the reasons was part of a large group of practices

3.5 Perceived ease/difficulty of changing vet practices

All who had been with a vet practice for over ten years, or who had not moved to their current practice from a different practice, were asked if they felt they could change vet practice if they wanted to – 85% answered yes.

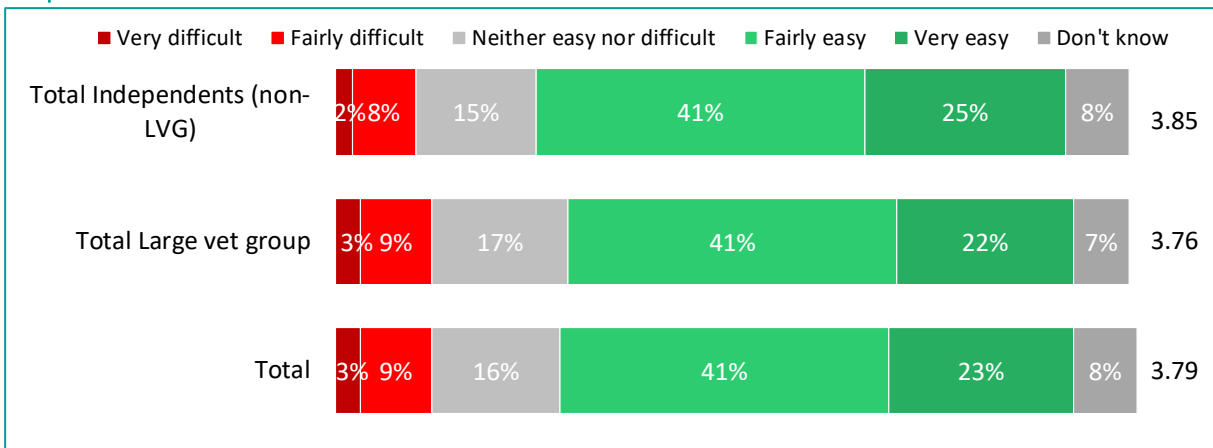
Figure 29: Feeling that practices can be changed (Q29 If you wanted to change vet practices, do you feel that you would be able to do so?)



Base: 1,546 with a vet over 10 years or who did not move to their current practice from another vets practice

On balance, 64% said it would be easy and 12% difficult.

Figure 30: perception of actual change Q30 How easy or difficult do you think it would be to change vet practices?

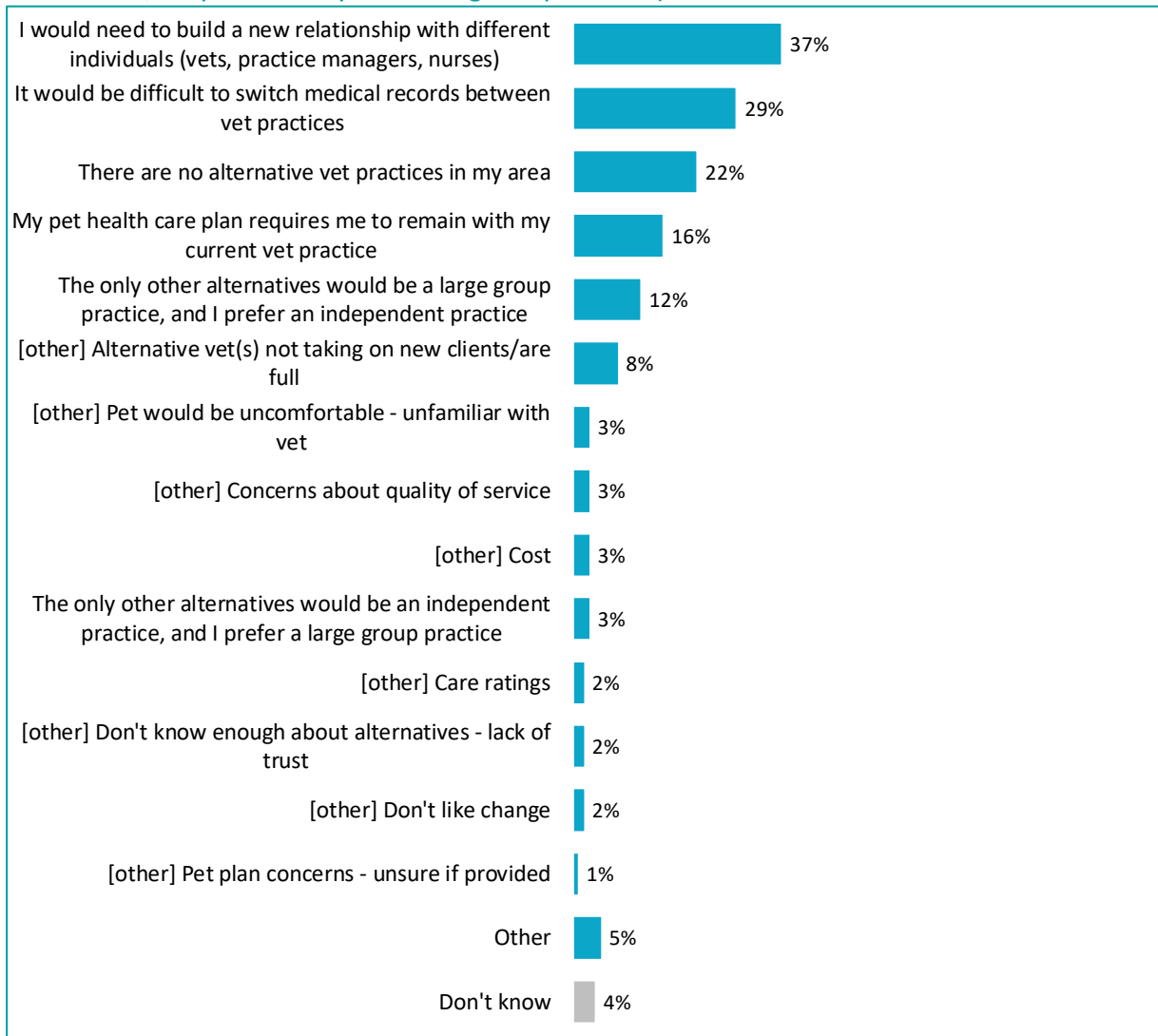


Base: Those with a vet over 10 years or who did not move to their current practice from another vets practice: 1,546 Total, 1,056 Total large vet group, 471 Independents

The 12% who thought it would be difficult or not possible to change vet practices were asked why they said that.

Their top three reasons were concerns over the need to build a new relationship (37%), difficulty switching medical records (29%) and no alternative practices in their area (22%).

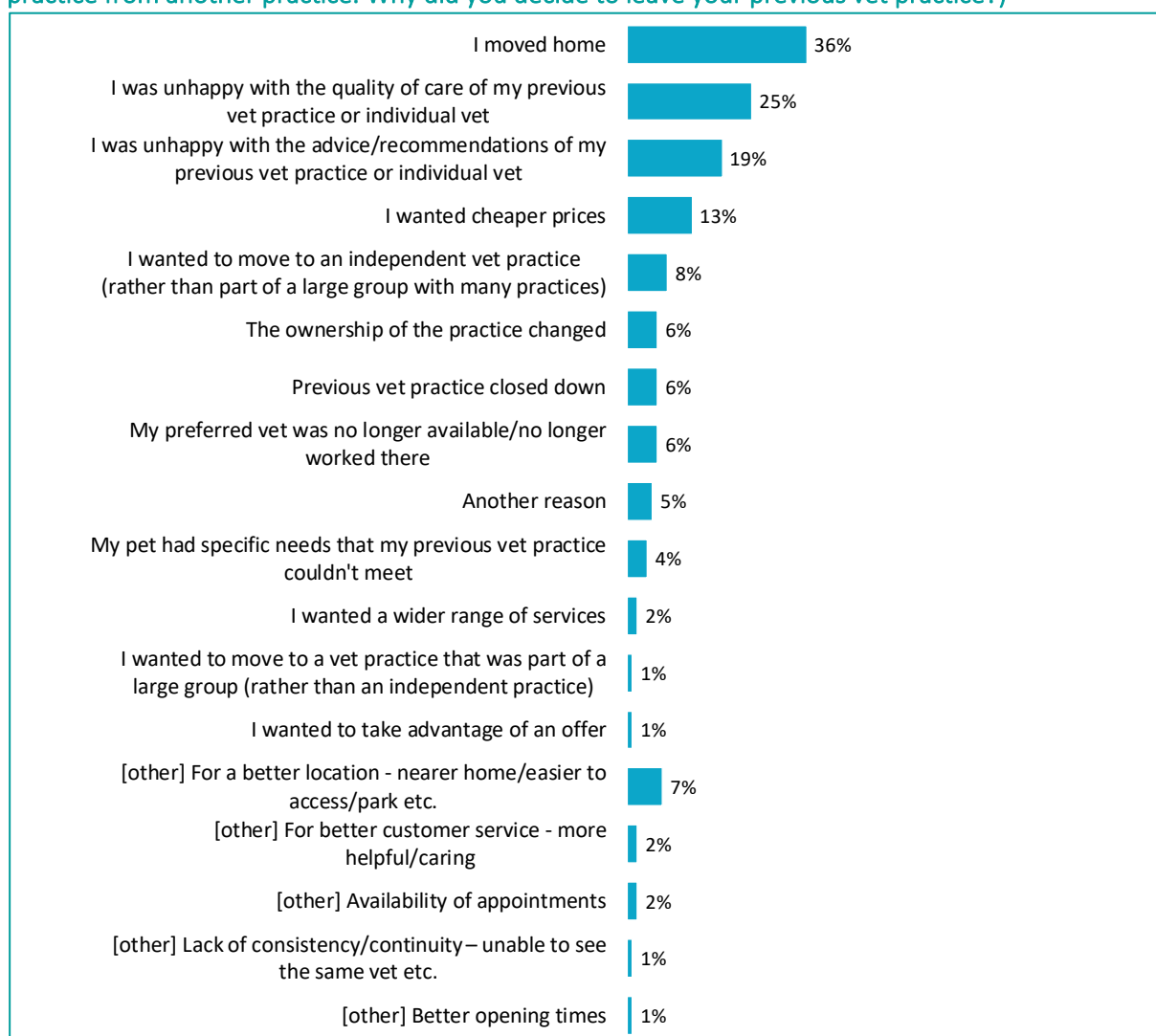
Figure 31: Reasons for thinking it would be difficult to change practices (Q31 Why do you think it would be difficult/not possible for you to change vet practices?)



Base: 219 who thought it would be difficult/not possible to change vet practices

Just over two in five (42%) said they moved their practice. Of these, 36% moved practice because they moved home, 25% because they were unhappy with the quality of care at their old practice and 19% because they were unhappy with the advice offered.

Figure 32: Reasons for moving practices (Q33 You said earlier that you had moved to your current practice from another practice. Why did you decide to leave your previous vet practice?)

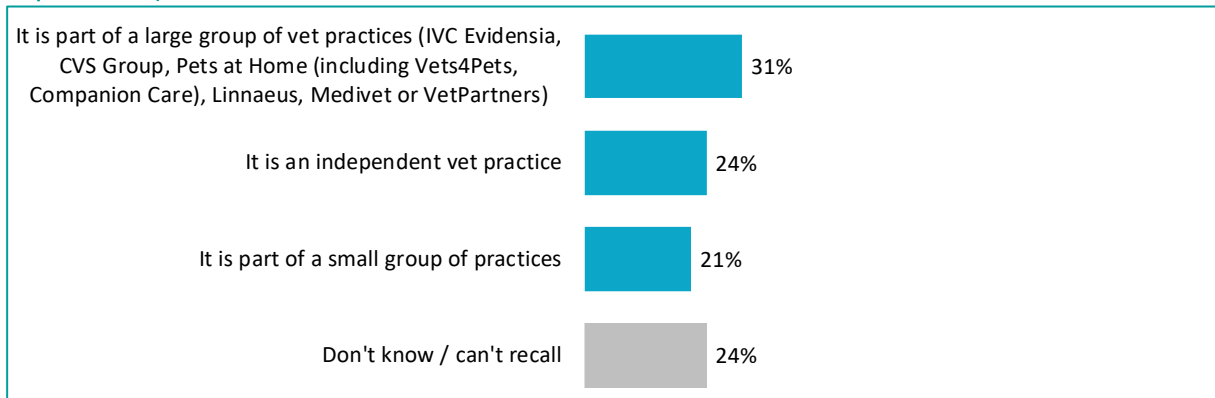


Base: 740 who moved from other vet practice

Awareness of practice ownership

Close to a quarter of pet owners (24%) did not know if their vet was part of a large group of many practices or whether it was an independent vet practice or part of a small group of practices. However, 31% said it was part of a large group, 21% part of a small group and 24% independent.

Figure 33: awareness of practice ownership (Q34 Do you know whether your current vet practice is part of a large group of many practices or whether it is an independent vet practice or part of a small group of practices?)



Base: All participants (2,344)

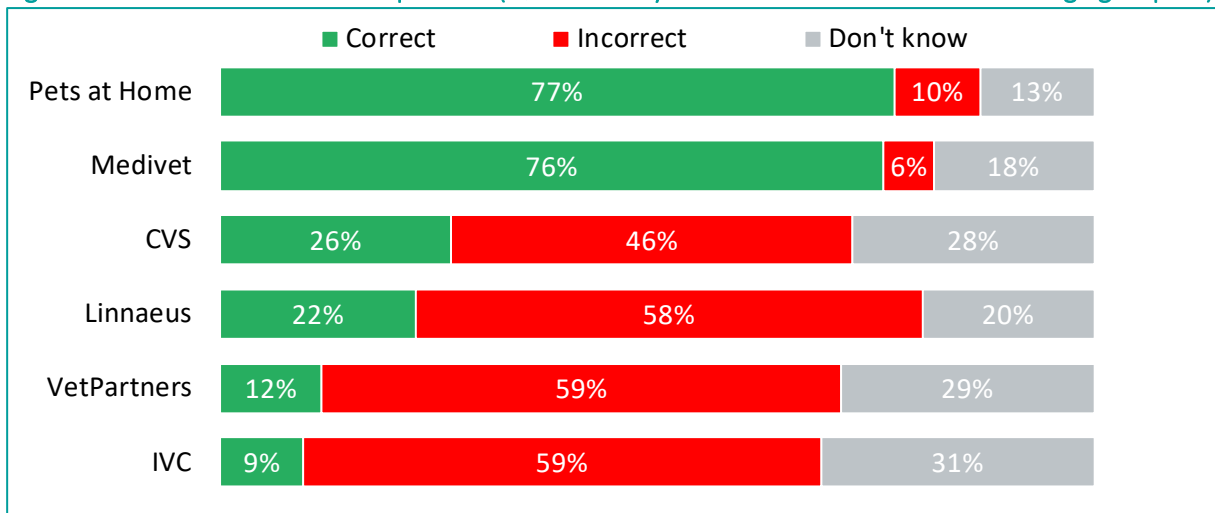
Comparing the perceptions with the vet practice data as coded by the CMA shows that over half (53%) of those at a large vet practice did not know that their vet was part of a large practice.

Figure 34: Perceptions of ownership vs CMA coded data

| | Total large vet group | Total Independents (non-LVG) |
|--|-----------------------|------------------------------|
| It is part of a large group of vet practices | 47% | 3% |
| It is an independent vet practice | 9% | 51% |
| It is part of a small group of practices | 21% | 23% |
| Don't know / can't recall | 23% | 24% |
| Base | 1,498 | 820 |

The awareness of the name of the large group was low apart from Pets at Home (77% correct) and Medivet (76% correct).

Figure 35: Awareness of name of practice (Q35 And do you know what the name of the large group is?)



Base: Coded LVG: Pets at Home 425, Medivet 158, CVS 185, Linnaeus 107, VetPartners 180, IVC 443

Relationship between pet owner and vet

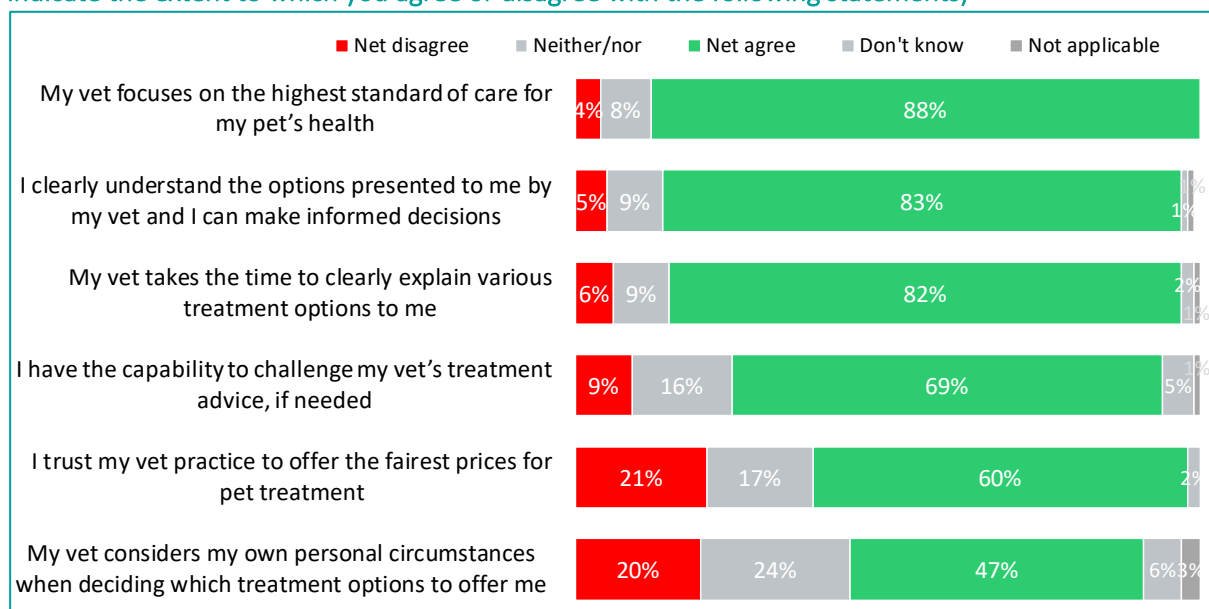
When asked about the relationship with their vet practice, pet owners agreed most with the following three statements:

- My vet focuses on the highest standard of care for my pet’s health (88% agree, 4% disagree)
- I clearly understand the options presented to me by my vet and I can make informed decisions (83% agree, 5% disagree)
- My vet takes the time to clearly explain various treatment options to me (82% agree, 6% disagree).

Pet owners disagreed most with the following two statements:

- I trust my vet practice to offer the fairest price for pet treatment (21% disagree, 60% agree)
- My vet considers my own personal circumstances when deciding which treatment options to offer me (20% disagree, 47% agree).

Figure 36: Agreement with statements (Q36 Still thinking about your current vet practice. Please indicate the extent to which you agree or disagree with the following statements)

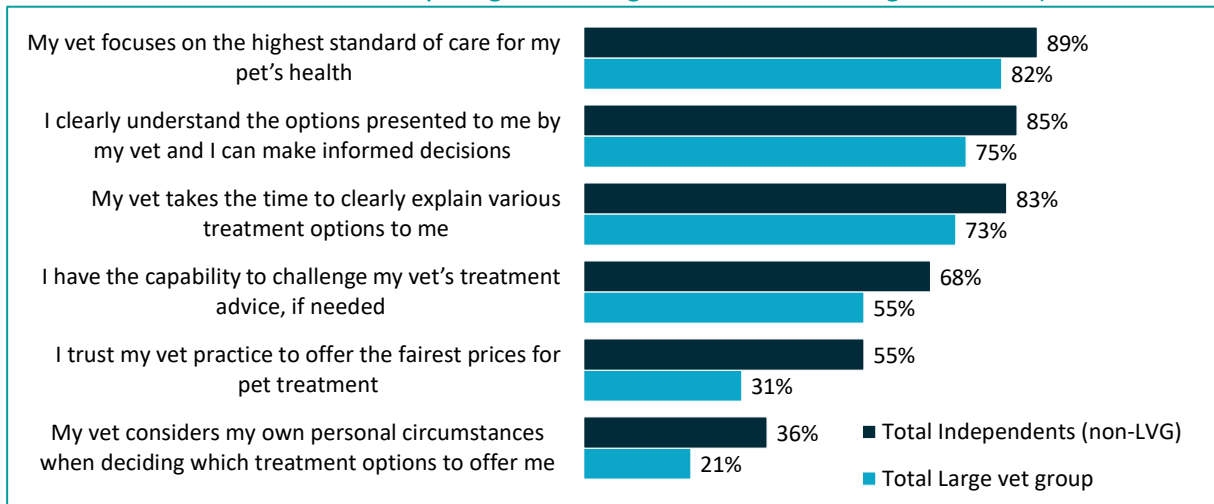


Base: All participants: (2,344)

The net agreement scores (agreement minus disagreement) for Independent and large vet group practices were compared. Independent vets were significantly higher rated for:

- My vet focuses on the highest standard of care for my pet’s health (89% v 82%)
- I clearly understand the options presented to me by my vet and I can make informed decisions (85% v 75%)
- My vet takes the time to clearly explain various treatment options to me (83% v 73%)
- I have the capability to challenge my vet's treatment advice, if needed (68% v 55%)
- I trust my vet practice to offer the fairest prices for pet treatment (55% v 33%)
- My vet considers my personal circumstances (36% v 21%)

Figure 37: Net Agreement Scores by practice type (Q36 Still thinking about your current vet practice. Please indicate the extent to which you agree or disagree with the following statements)



Base: Independent 820, large vet group 1,498

3.6 Recent Visits to the Vets

This section concerns recent visits to the participant's usual vet practice.

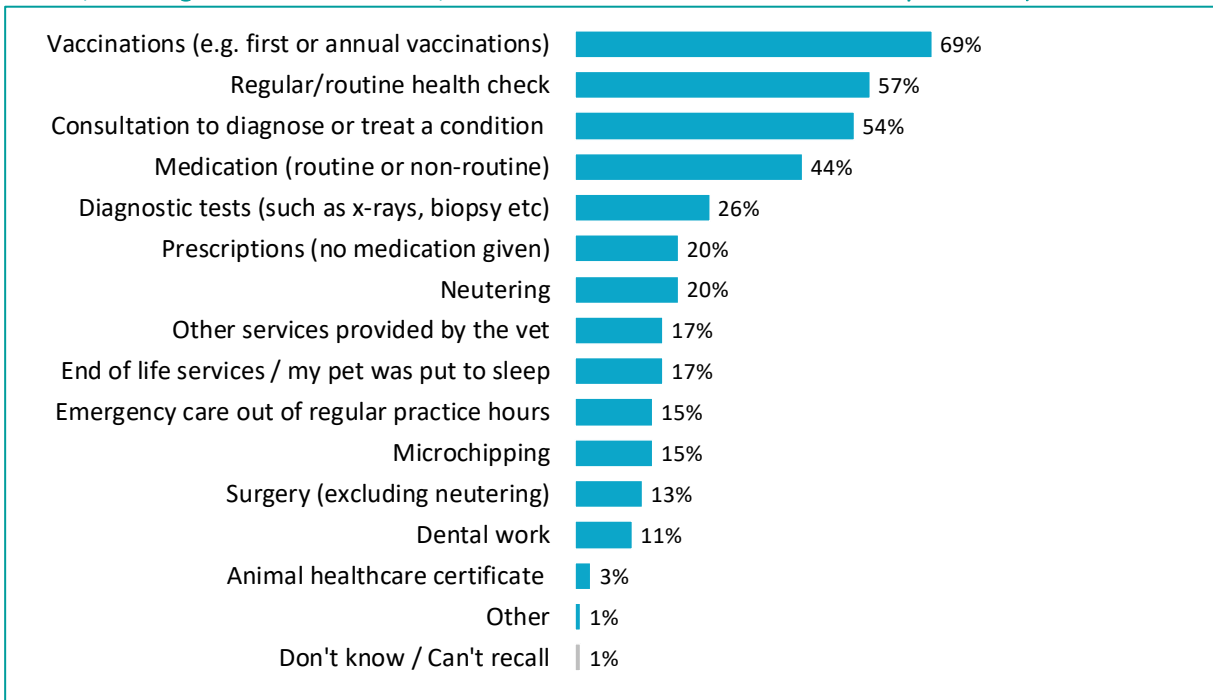
Treatments and services used

The main treatments and services used when visiting a vet practice were vaccinations (69%), regular/routine health checks (57%) and consultations to diagnose or treat a condition (54%).

There was little difference observed between those attending an independent vet practice and a large vet group practice except.

- Vaccinations were significantly higher for Independents: 73% v 67%
- Diagnostic tests were significantly higher for Independents: 30% v 25%

Figure 38: Reasons for visit (Q42 Earlier in this questionnaire, you said you visited vets about # times since #, thinking about all these visits, what treatments and or services have you used?)

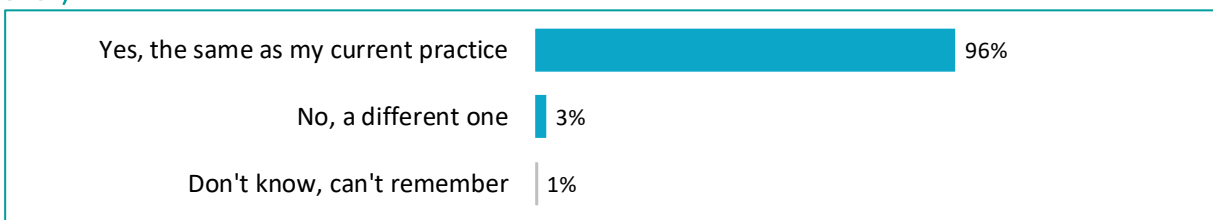


Base: All participants: (2,344)

Pet owners were asked whether the most recent to the vet was to their current practice or a different one.

Almost all (96%) pet owners said the most recent visit was to their current practice.

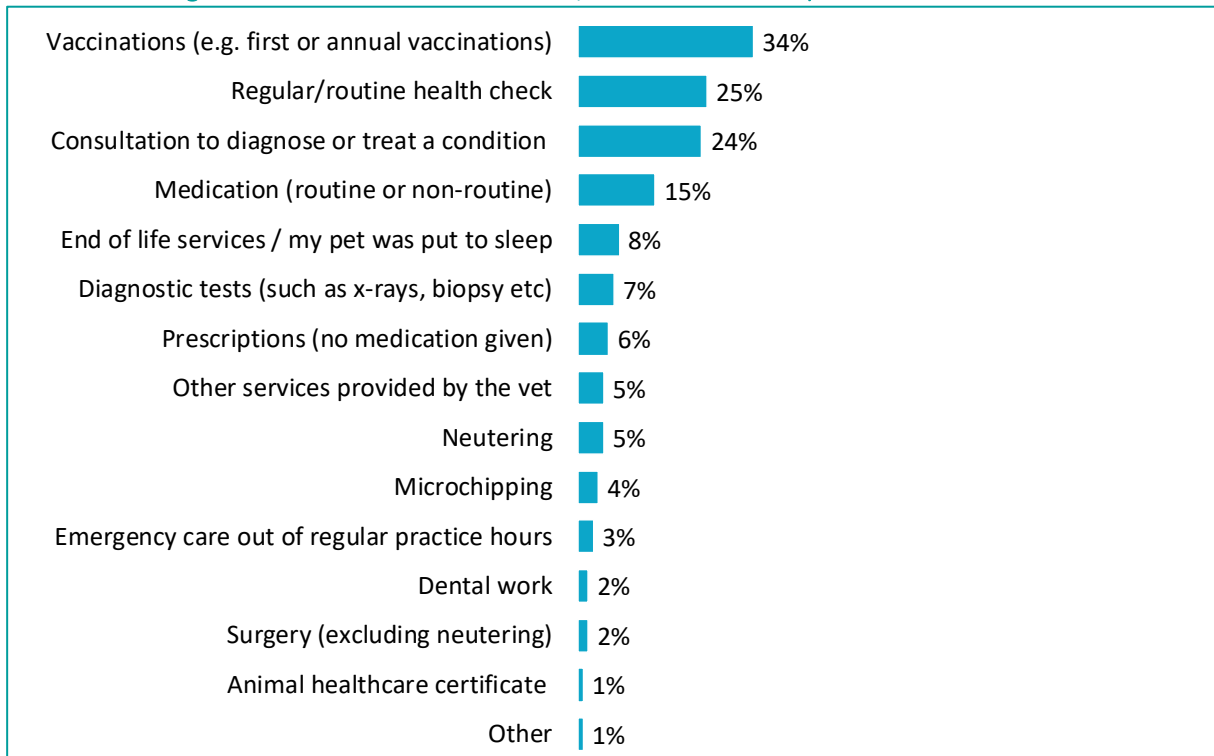
Figure 39: Place of recent visit (Q42A Was this most recent visit to your current practice, or a different one?)



Base: All participants: (2,344)

The main reasons for the most recent visit to the vet practice was for a vaccination (34%), regular/ routine health check (25%) and a consultation to diagnose or treat a condition (24%).

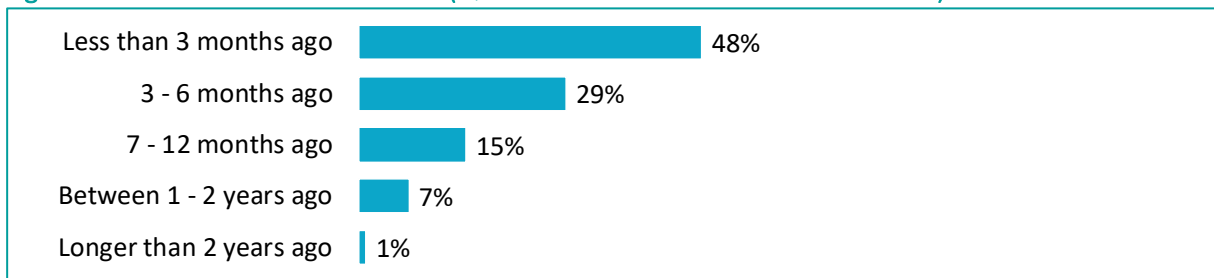
Figure 40: Reasons for recent vet visit (Q46 You said you had visited the vet for the following reason(s) since #. Thinking about the most recent visit to #, what was this for?)



Base: All participants: (2,314)

For almost half of pet owners (48%) the most recent visit was within the last three months and it was between three and six months for a further 29%.

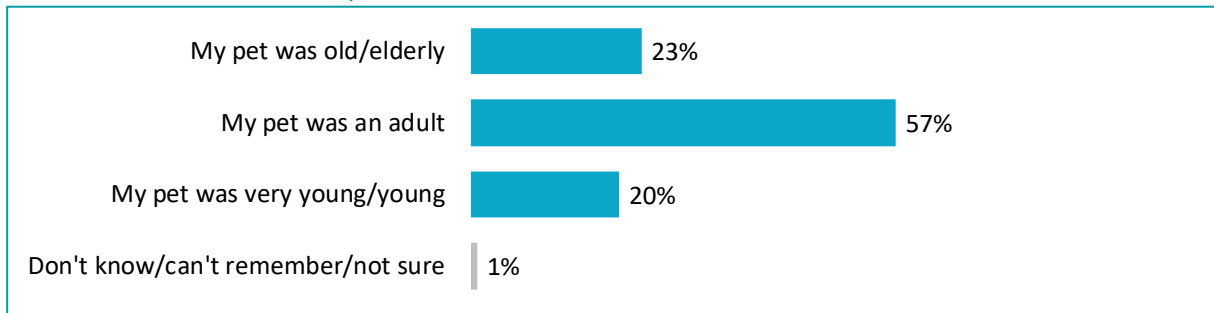
Figure 41: Time of last visit to the vet (Q47 And when was this most recent visit)



Base: All participants: (2,310)

When asked to describe the age of the pet they took to the vet for the most recent visit, over half (57%) of said the pet was an adult, 23% that it was old or elderly and 20% that it was young or very young.

Figure 42: Age of pet at visit (Q48 And which of these best describes the age of the pet you took to the vet for this most recent visit?)

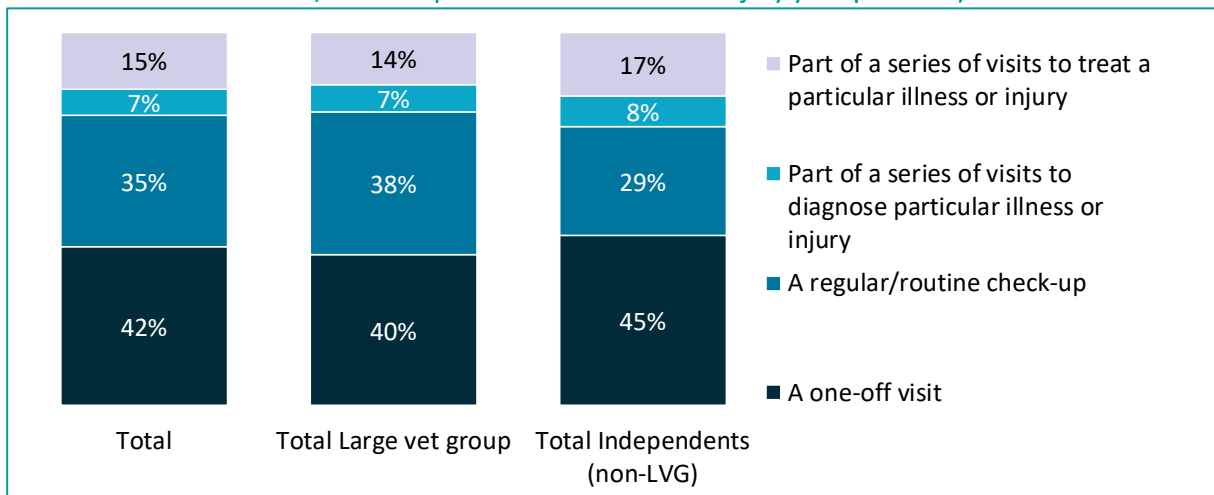


Base: All participants: (2,296)

For 42% of pet owners the visit was a one-off visit. This was significantly higher for those at an Independent practice (45%) compared to those at a large vet group (40%).

For 35% the visit was a regular/routine check-up. This was significantly higher among those at a large vet group (38%) compared to those at an independent practice (28%).

Figure 43: Type of trip (Q49 And was your most recent trip to the vets a one-off visit or was it part of a number of visits to the vet, for example to treat an illness or injury your pet had?)



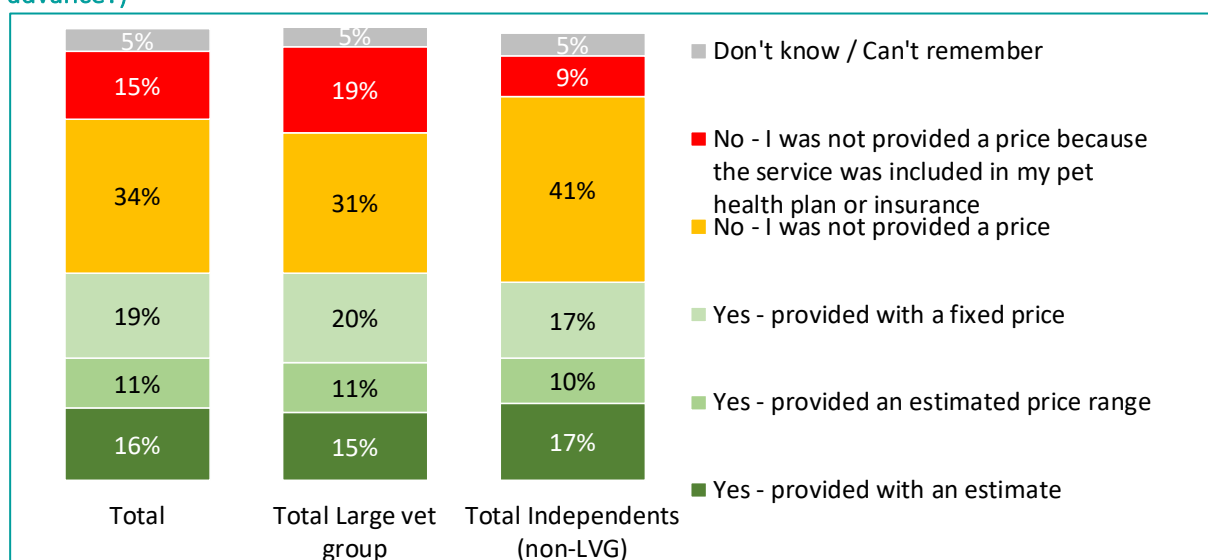
Base: 2,296 Total, 1,452 Total large vet group, 815 Independents

Advance pricing information for the most recent visit

Overall, 34% of pet owners said they were not provided pricing information in advance of the treatment/service. This was significantly higher among those at an independent practice (41%) compared to those at a large vet group (31%).

For 15% they were not provided with pricing information as the service was included in their pet plan or insurance. This was significantly higher among those at a large vet group (19%) compared to those at an independent practice (9%).

Figure 44: Pricing information on most recent visit (Q50 Still thinking about your most recent visit, did the vet practice provide you with any information about the price of the #treatment/service# in advance?)



Base: 2,296 Total, 1,452 Total large vet group, 815 Independents

The 46% who did receive price information in advance were asked how this was provided.

For over two thirds (67%) it was through talking to someone about it. This was significantly higher among those at an Independent practice (73%) compared to those at a large vet group (64%).

For 17% they were provided an itemised pricing list – this was significantly higher among those at a large vet group (20%) compared to those at an independent practice (13%).

Table 11: Mode of providing price information (Q51 And how was this advance pricing information provided?)

| | Total | Total large vet group | Total Independents (non-LVG) |
|--|--------------|-----------------------|------------------------------|
| Someone talked to me about the price | 67% | 64% | 73% |
| An itemised pricing list of the services / treatments was provided | 17% | 20% | 13% |
| A standard price list was in the practice or on their website | 15% | 16% | 13% |
| A written overall price was provided | 10% | 11% | 10% |
| Other | 2% | 1% | 2% |
| None of the above | 1% | 1% | * |
| Don't know / can't remember | 2% | 3% | 1% |
| [other] Part of pet health plan | 1% | 2% | 1% |
| Base (those who received pricing information) | 1,036 | 655 | 361 |

*denotes less than 0.5%

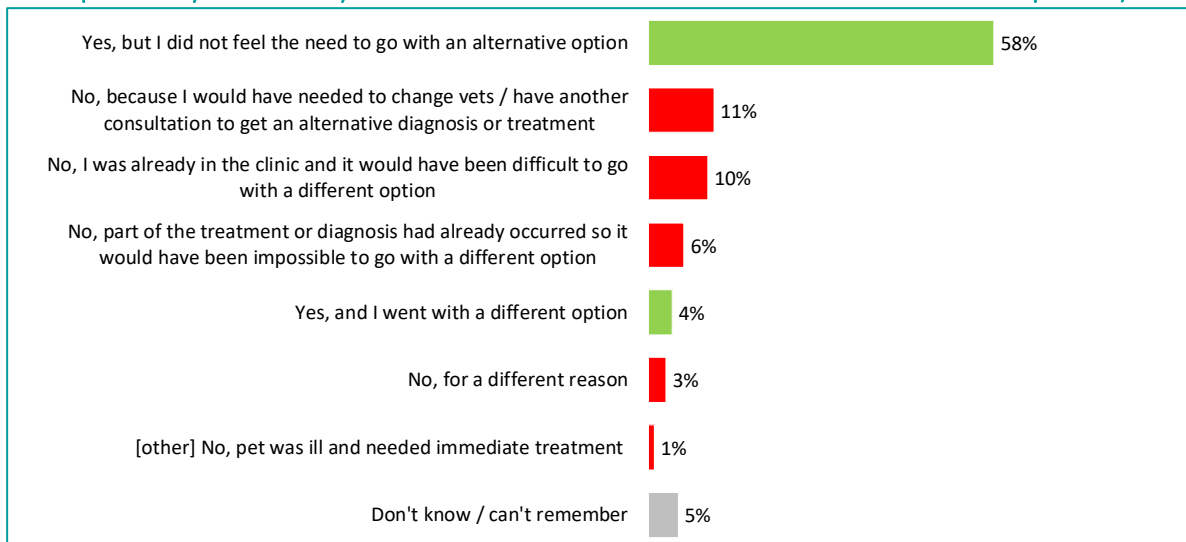
Orange box denotes significant differences between practice type

Overall, 62% of those that received information about pricing said they considered alternative options, but 31% did not.

Once they received the pricing information, 58% said they felt they could decline but did not feel the need to go with an alternative option. This was significantly higher among those at an Independent practice (65%) compared to those at a large vet group (56%).

However, 31% said they did not feel they were able to decline.

Figure 45: Ability to decline service once price was communicated (Q52 Once you received information about price did you feel like you could decline the treatment and consider alternative options?)

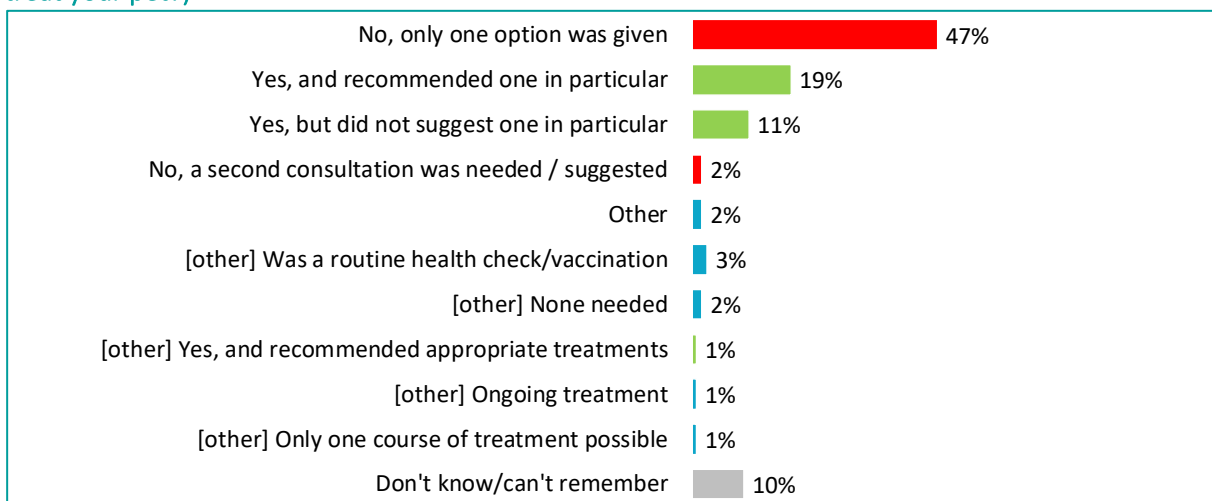


Base: 1,036 who received pricing information

Treatment options for most recent visit

Nearly half (47%) of pet owners were only offered one treatment option and 19% were given alternative options but had one recommended in particular.

Figure 46: Alternative options given (Q52B Did the vet give you any other options of different ways to treat your pet?)



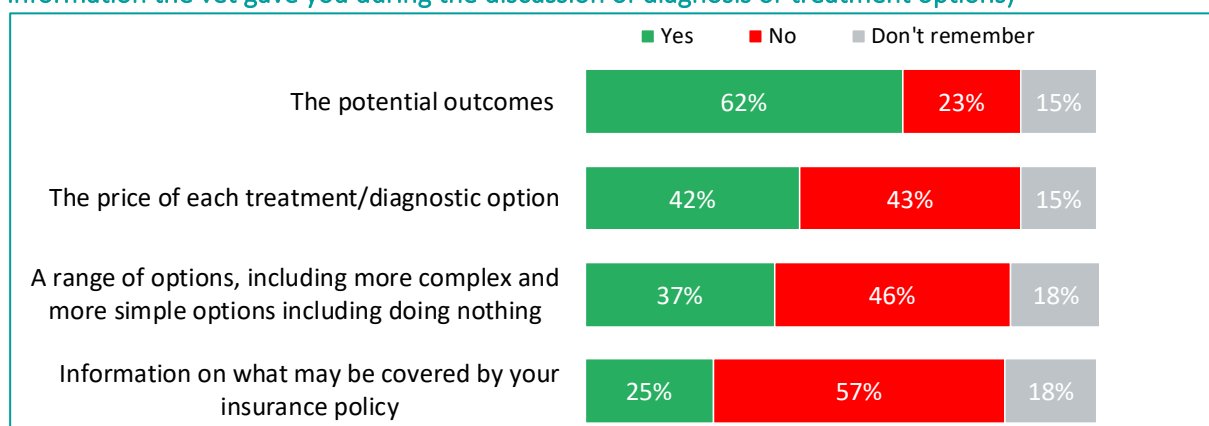
Base: All participants (2,296)

All were asked what type of information the vet gave them during the discussion of diagnosis or treatment options.

The main information the vet gave during the discussion of diagnosis or treatment options was about potential outcomes with 62% mentioning this. This was significantly higher among those at an independent practice (65%) compared to those at a large vet group (60%).

The price (42%), range of options (37%) and information about what is covered by the insurance policy (25%) were also shared.

Figure 47: Type of information shared during diagnosis (Q52C Please indicate which of the below information the vet gave you during the discussion of diagnosis or treatment options)



Base: All participants (2,296)

Treatment options and price paid

Nearly a fifth (17%) did their own research on the treatments offered and/or looked for alternatives which the vet did not suggest.

Three quarters did not do their own research. This was mainly because of trust in their vet. Trust in their vet was significantly higher among those at an independent practice (65%) compared to those at a large vet group (59%).

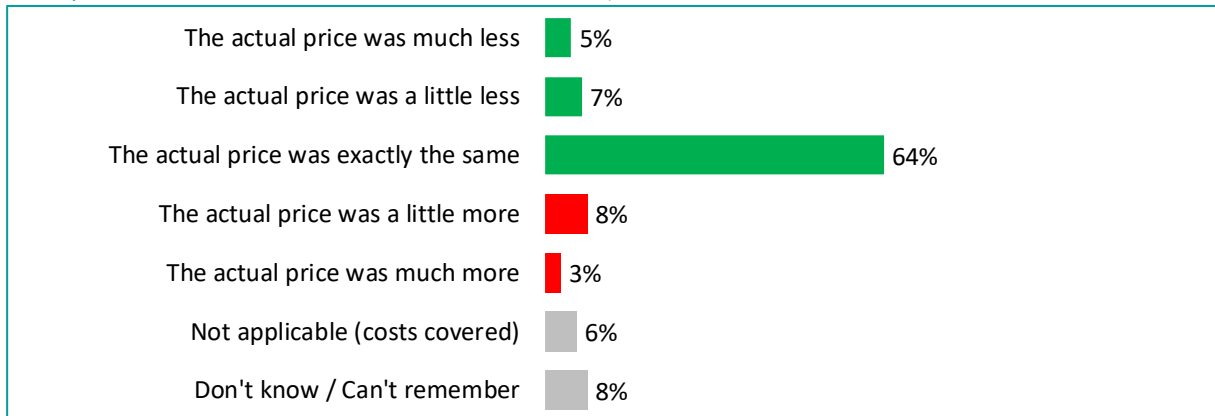
Table 12: Independent research (Q53 Did you do any of your own research on the treatments offered and/or look for alternatives which the vet did not suggest?)

| | Total | Total large vet group | Total Independents (non-LVG) |
|--|--------------|-----------------------|------------------------------|
| Yes, but did not find an alternative | 12% | 12% | 12% |
| Yes, and found an alternative for me/my pet | 5% | 6% | 4% |
| No because I trusted the vet to make the right decision for my pet | 61% | 59% | 65% |
| No, because I was unable to do so | 8% | 9% | 6% |
| No, because I did not realise I could | 6% | 7% | 5% |
| Don't know / Can't remember | 7% | 7% | 7% |
| Base | 2,296 | 1,452 | 815 |

Orange box denotes significant differences between practice type

For those who were given a price in advance of the treatment, the price paid was the same or less for three quarters (75%) and higher for 11%.

Figure 48: Difference in exact price (Q53b How did the actual price you paid compare to the price you were presented with in advance of the treatment?)

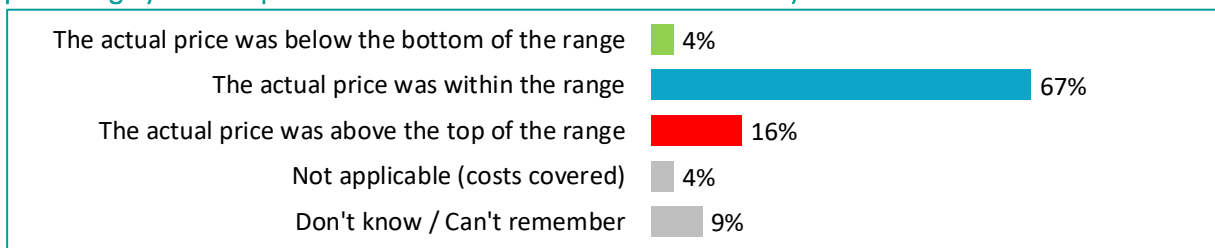


Base: 792 who were provided with an estimate or fixed price

Among those who were given an estimated price range the price paid was the same or within the range for 71% and higher for 16%.

Of the 16% of those whose actual price was above the top range a significantly higher proportion were those that belonged to a large vet group practice (21%) than to an independent practice(6%).

Figure 49: Difference in price from estimate (Q54 How did the actual price you paid compare with the price range you were presented with in advance of the treatment?)



Base: 244 who were provided with an estimated price range

For the overall sample, the price paid for the treatment/service was higher than expected for 38% and lower than expected for 7%.

Of the 36% for whom the price was about what was expected a significantly higher proportion were those that belonged to an independent practice (41%) compared to those that belonged to a large vet group practice (33%).

Of the 29% for whom the price was a lot more than expected a significantly higher proportion were those that belonged to a large vet group practice (22%) than to an independent practice (14%).

Table 13: Expectations of price (Q55 And overall, which of the following best describes what you thought about the price you paid for #treatment/service# compared to what you expected (before receiving any price estimate or information)?)

| | Total | Total large vet group | Total Independents (non-LVG) |
|--|--------------|-----------------------|------------------------------|
| The price was a lot less than I was expecting | 3% | 2% | 5% |
| The price was a little less than I was expecting | 4% | 3% | 5% |
| The price was about what I was expecting | 36% | 33% | 41% |
| The price was a little more than I was expecting | 19% | 19% | 21% |
| The price was a lot more than I was expecting | 19% | 22% | 14% |
| Not applicable, I did not pay for the vet visit | 11% | 13% | 6% |
| I did not have any expectations | 6% | 6% | 6% |
| Don't know / Can't remember | 2% | 2% | 2% |
| Base | 2,296 | 1,452 | 815 |

Orange box denotes significant differences between practice type

The overall sample was asked how satisfied they were overall with the following aspects of the service from the vet practice:

- The information and / or advice received
- The care given to their pet
- The quality of service received
- The outcome of the visit
- The cost of the service.

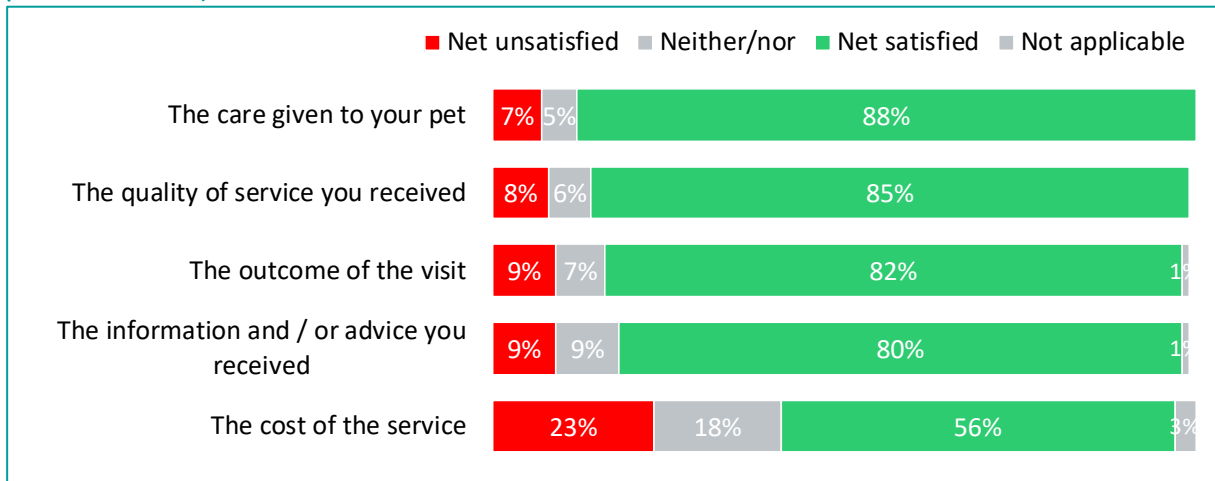
The order of these aspects in the questionnaire was randomised.

Overall, satisfaction with all aspects of the service except price were very high:

- 88% were satisfied with **care given to their pet** –significantly higher for those at an independent practice: 90% v 86%
- 85% were satisfied with **quality of service received** –significantly higher for those at an independent practice: 89% v 83%
- 82% were satisfied with the **outcome of the visit** –significantly higher for those at an independent practice: 86% v 81%
- 80% were satisfied with the **information and/or advice received** –significantly higher for those at an independent practice: 86% v 77%.

Overall, 23% were dissatisfied with **cost** –significantly higher for those at a large vet group practice: 26% v 18%.

Figure 50: Net satisfaction/dissatisfaction with attributes (Q55b On this occasion, how satisfied were you overall with:)



Base: All participants (2,296)

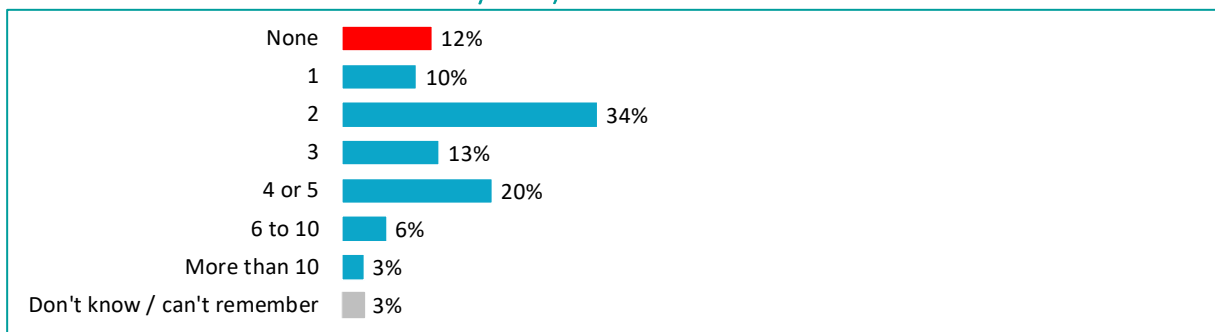
3.7 Treatment Types - Regular check-ups

This section is about regular check-ups. All participants were asked how many, if any, regular check-up visits they had made in total to the vets in the preceding two years.

Overall, 85% had made one or more regular check-up visits to the vets in the preceding two years and 12% had not made any.

The median number of regular check-up visits was **two** (34%) and 29% made over four visits.

Figure 51: Number of visits to the vets (Q56 Roughly how many, if any, regular check-up visits have you made in total to the vets in the last two years?)



Base: All participants (2,344)

Those who used the vets for regular check-ups within the preceding two years were asked to indicate the extent to which they agreed with the following statements regarding their decision to take their pet to regular / routine health checks:

- I have a strong ongoing relationship with my individual vet
- I get reminders from my vet practice to attend regularly
- My insurance covers the (full or partial) price of regular check-ups
- It's part of my Pet Health Plan
- Of financial considerations (i.e. regular check-ups may pick up on potential issues earlier and save money on complex treatments)
- It's the right thing to do for my pet
- My pet has an ongoing medical condition requiring regular checks.

The order of the statements were randomised.

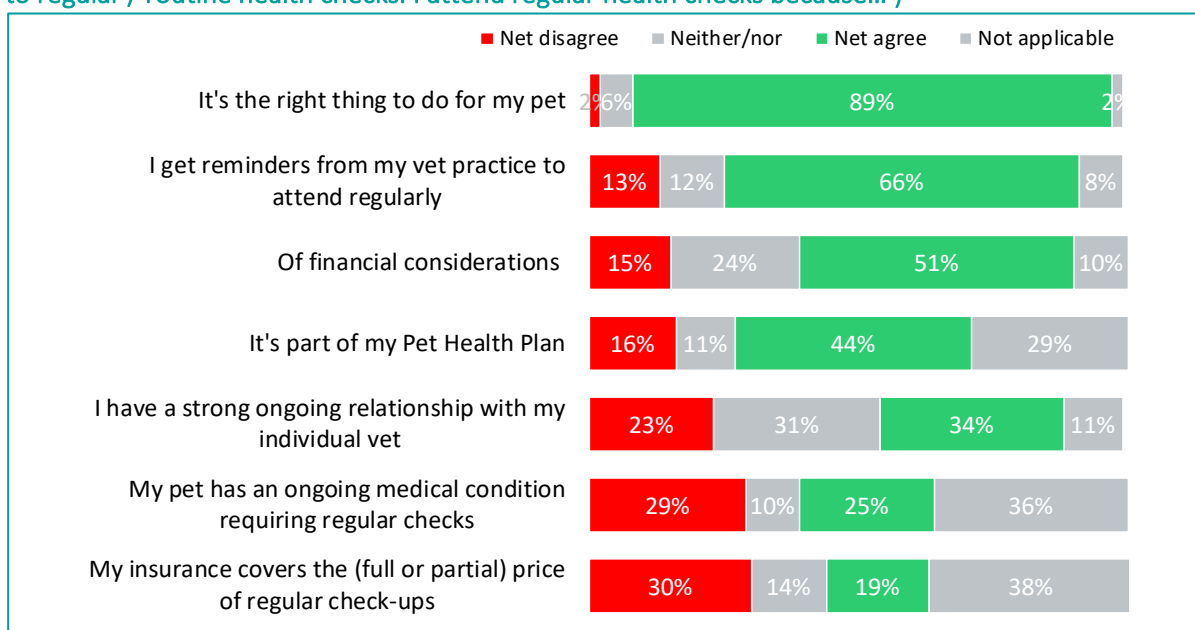
Pet owners agreed most with the following statements about attending regular checks for their pets:

- 89% agreed with 'it is the right thing to do for my pet'
- 66% agreed with 'I get reminders from my vet practice to attend regularly'
- 51% agreed with 'Of financial considerations'
- 44% agreed with 'It's part of my Pet Health Plan' – this was significantly higher for those belonging to a large vet group practice: 50% v 41%.

Pet owners disagreed most with the following statements about attending regular checks for their pets:

- 30% disagreed with 'My insurance covers the (full or partial) price of regular check-ups'
- 29% disagreed with 'My pet has an ongoing medical condition requiring regular checks'.

Figure 52: Net agreement/disagreement with statements about regular check-ups (Q57 Please indicate the extent to which you agree with the following statements regarding your decision to take your pet to regular / routine health checks. I attend regular health checks because...)



Base: all who have had regular check-up visits in the last two years (1,988)

3.8 Treatment Types – Referrals

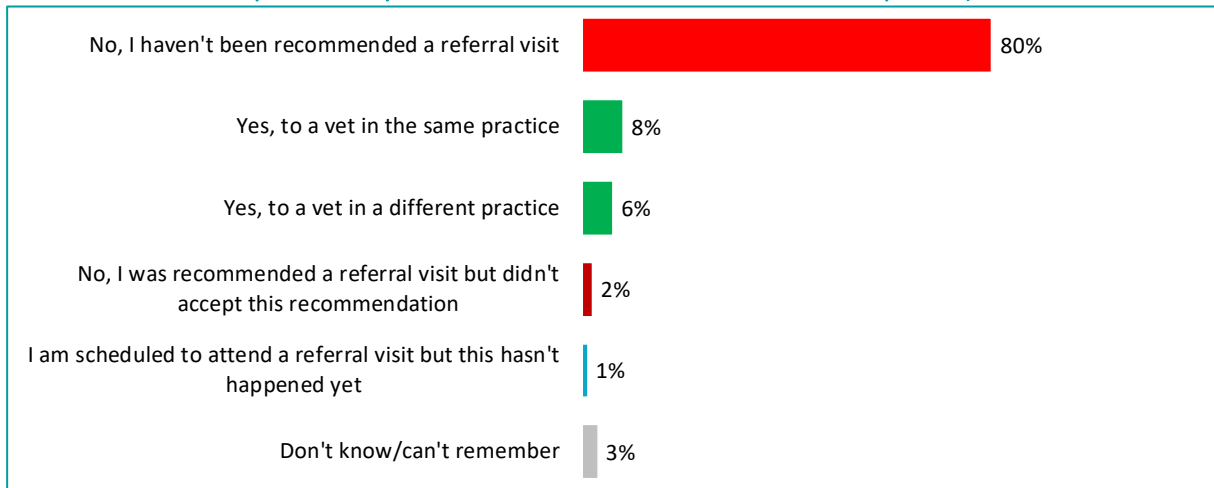
This section concerns referrals. In the questionnaire these were described as follows:

Sometimes your vet will recommend that your pet is seen by another vet (e.g. to receive an expert opinion or a specialist treatment). We refer to these as 'referral visits'

All participants were asked if they had any referral visits to another vet in the preceding two years.

Four fifths were not recommended a referral. Eight per cent were referred to a vet in the same practice and 6% to a vet in a different practice and 2% were recommended a referral visit but did not accept it.

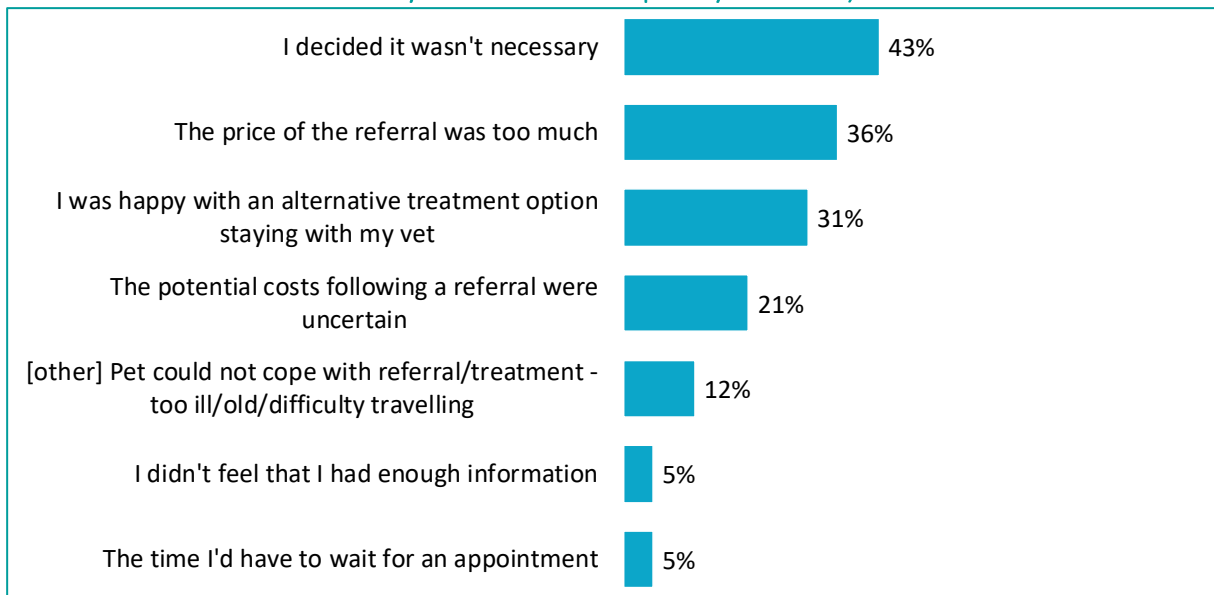
Figure 53: Whether had any referral visits (Q58 Sometimes your vet will recommend that your pet is seen by another vet (e.g. to receive an expert opinion or a specialist treatment). We refer to these as 'referral visits'. Have you had any referral visits to another vet in the last 2 years?)



Base: All participants (2,344)

Of the 2% who said that their vet had recommended a referral that they had not taken up, 43% decided it was not necessary, 36% said the price of the referral was too high and 31% were happy with an alternative treatment. Please note that there was a small base size of 42 for this question and the results should be interpreted with caution.

Figure 54: Reasons why a recommended referral had not been taken up (Q58a You said that your vet had recommended a referral that you had not taken up. Why was that?)



Base: All that have been recommended a referral that you had not taken up (42)

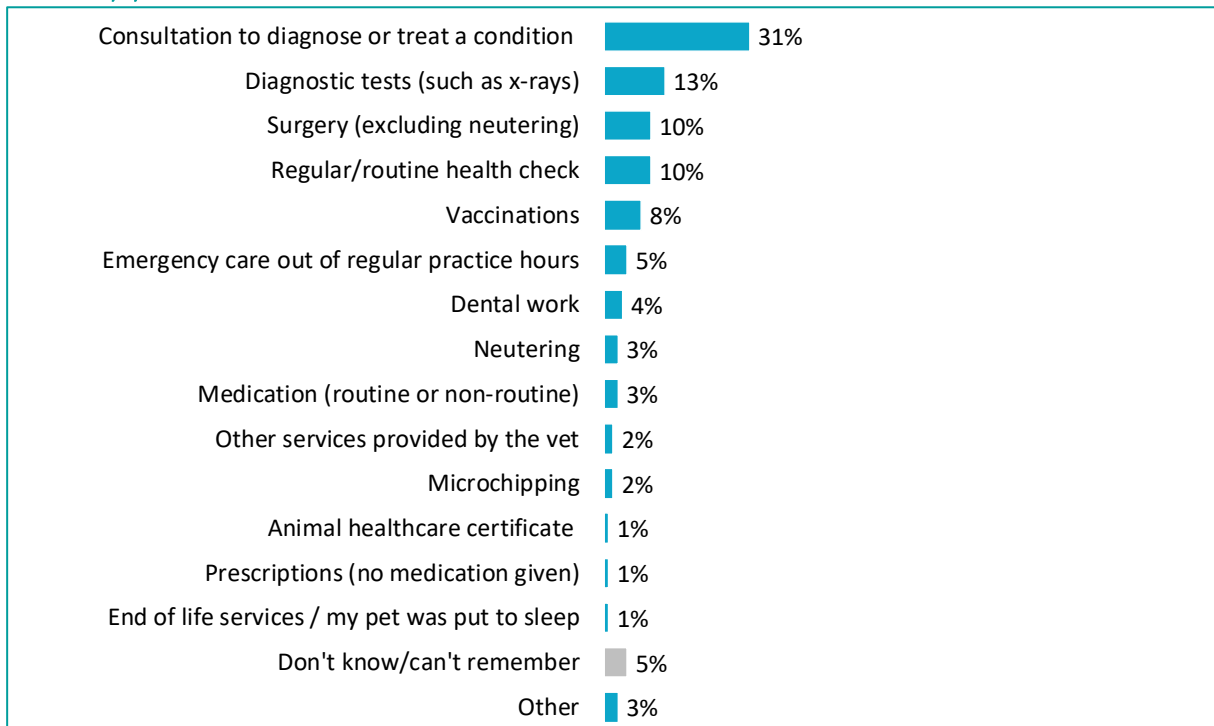
*Low base size, please interpret with caution

Reasons for referrals

Of those that were recommended a referral visit the most recent referrals were mainly for:

- 31% consultation to diagnose or treat a condition
- 13% diagnostic tests
- 10% surgery
- 10% regular/routine health check.

Figure 55: Reasons for referral (Q59 What was this for (please answer about the most recent if more than one)?)

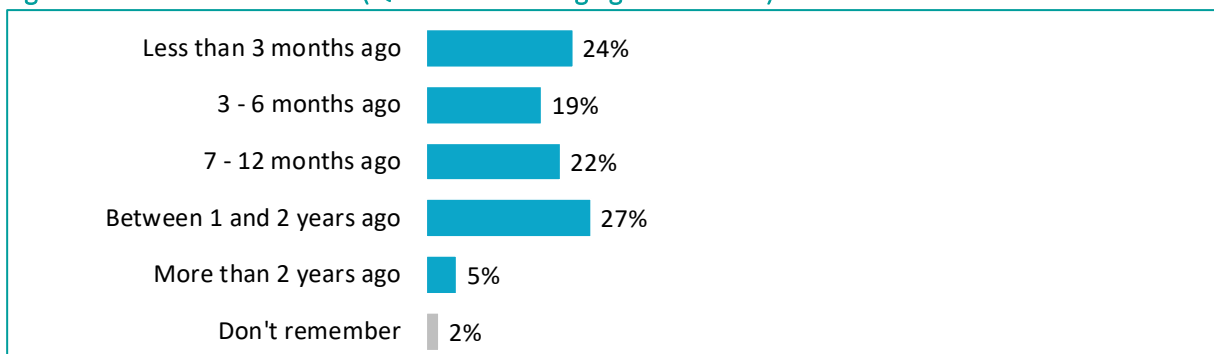


Base: All who were recommended a referral visit (344)

Those who had a referral were asked when the most recent one was.

For 24% the most recent referral was within the last three months, for 19% it was between three and six months and for 22% it was between seven months and a year.

Figure 56: Time of last referral(Q60 And how long ago was that?)



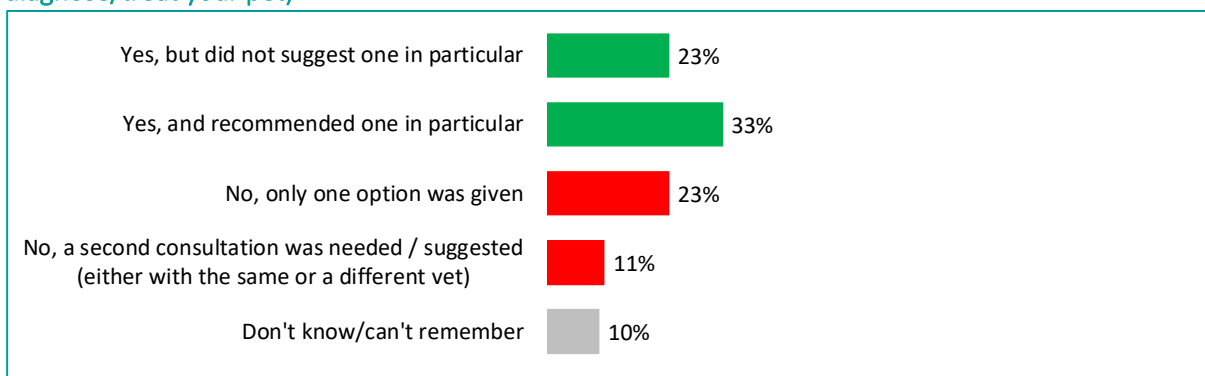
Base: All who were recommended a referral visit (344)

For 86% the referring vet was their current vet and for 10% it was not. 4% did not know.

Participants who had been recommended a referral (17% of the sample) were asked whether their usual vet gave them any options of different ways to diagnose or treat their pet.

Over half (56%) said their usual vet gave them options of different ways to diagnose/treat their pet with 33% saying a particular one was recommended and 23% that no particular one was suggested. Just under a quarter (23%) said only one option was given and 11% said that a second consultation was needed or suggested.

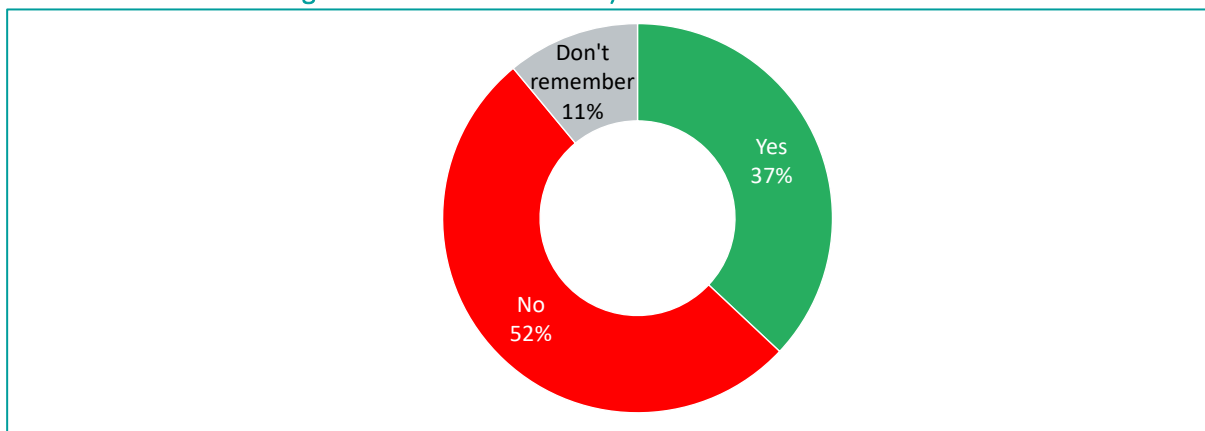
Figure 57: Whether usual vet gave any options of different ways to diagnose/treat their pet (Q61 For the next set of questions we want you to think about when your usual vet recommended that you see another vet. On that occasion, did your usual vet give you any options of different ways to diagnose/treat your pet)



Base: All who were recommended a referral visit including those did not accept the referral (406)

When asked if their vet suggested that their pet needed further care or monitoring before the referral visit 37% said their vet did and 52% said their vet didn't.

Figure 58: Whether further care or monitoring suggested (Q62 Did your vet suggest your pet needed further care or monitoring before the referral visit?)



Base: All who were recommended a referral visit including those did not accept the referral (406)

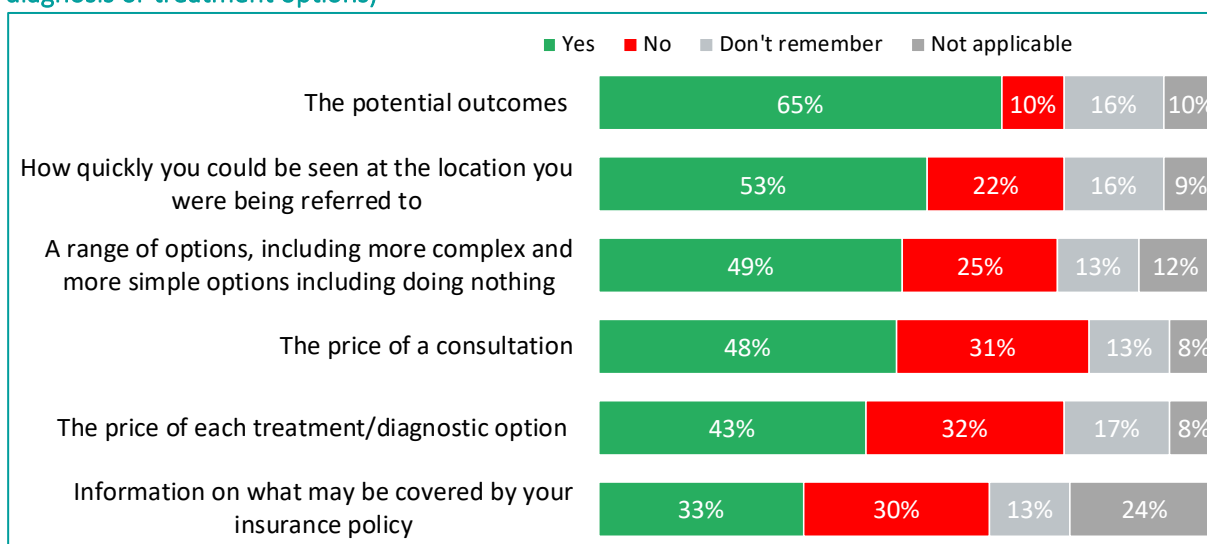
Participants were then asked which of the following types of information their vet gave them during the discussion of diagnosis or treatment options:

- The potential outcomes (e.g. likelihood of success, risks of side effects, any implication for you on aftercare)
- The price of a consultation
- The price of each treatment/diagnostic option
- A range of options, including more complex (e.g. using specialist equipment or complex surgery) and more simple options (e.g. simple surgery such as amputation) including doing nothing
- Information on what may be covered by your insurance policy
- How quickly you could be seen at the location you were being referred to.

The main types of information the vet gave during the discussion of diagnosis or treatment options were:

- potential outcomes (65%). This was significantly higher among those at an independent practice (72%) compared to those at a large vet group practice (61%).
- information about how quickly they would be seen (53%)
- the range of options (49%)
- the price of a consultation (48%).

Figure 59: Information given (Q63 Still thinking about when your usual vet recommended seeing another vet, please indicate which of the below information your vet gave you during the discussion of diagnosis or treatment options)

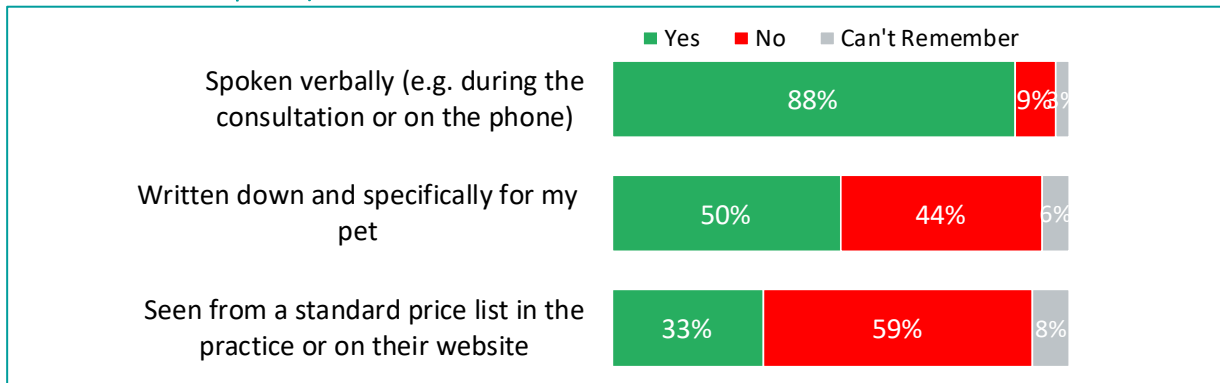


Base: All who were recommended a referral visit including those did not accept the referral (406)

Those who received information on the price of the consultation and/or the price of each treatment/diagnostic option (54% of those who were recommended a referral) were asked how they received the information on price.

It was received verbally for 88% and in written form for 50%.

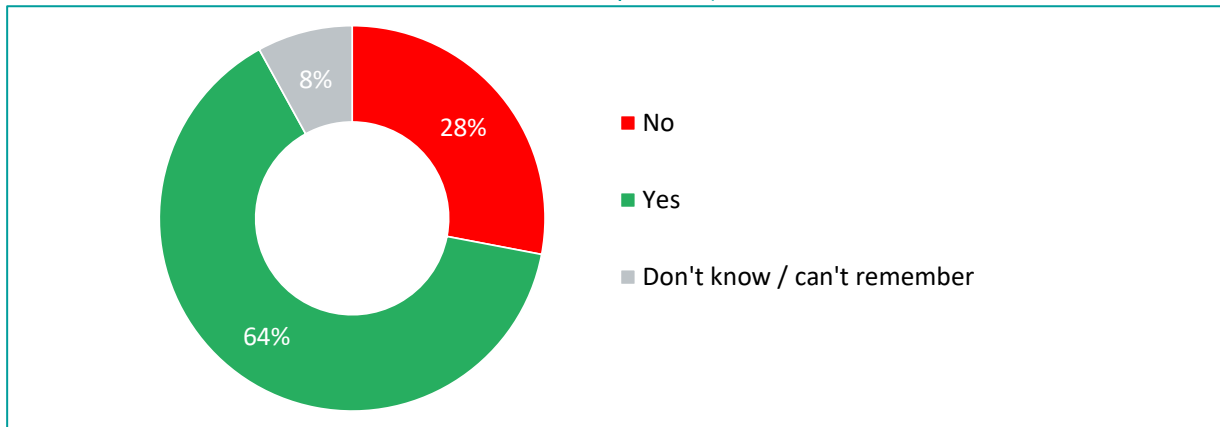
Figure 60: Mode of sharing price information (Q64 And in which of the following ways did you receive the information on price?)



Base: All who received information on price for their referral visit (218)

The same sample were asked if, once they knew the price, they felt like they could decline the referral and consider alternative options. Nearly two thirds (64%) said they felt they could decline the referral and consider alternative options and 28% felt that they could not.

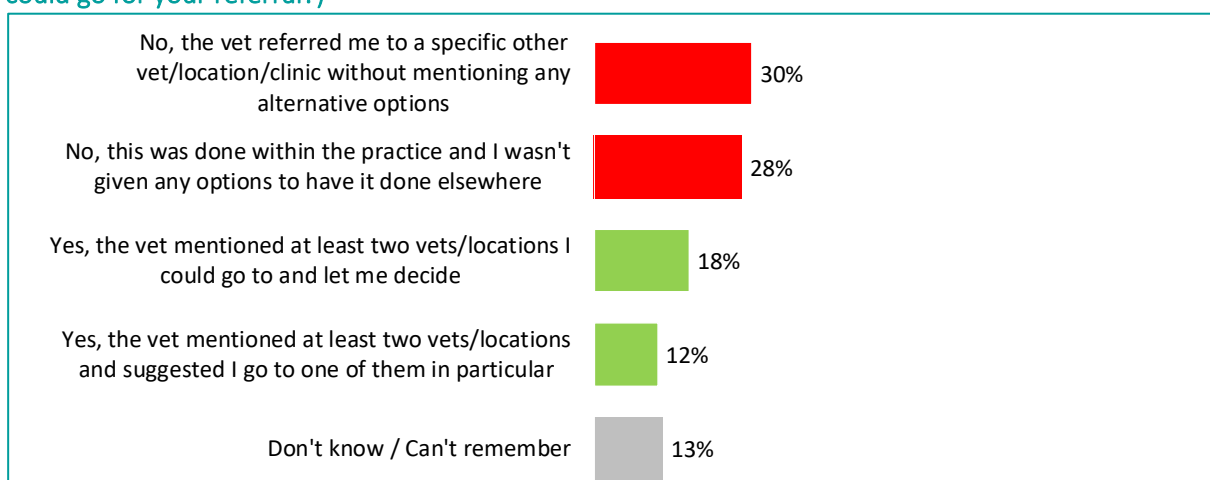
Figure 61: Ability to decline after knowing the price (Q65 Once you knew the price, did you feel like you could decline the referral and consider alternative options?)



Base: All who received information on price (218)

Of those who were recommended a referral visit 30% were given options over where they could go for their referral but 58% were not given any.

Figure 62: Alternative options for the referral (Q66 Did the vet give you any options over where you could go for your referral?)



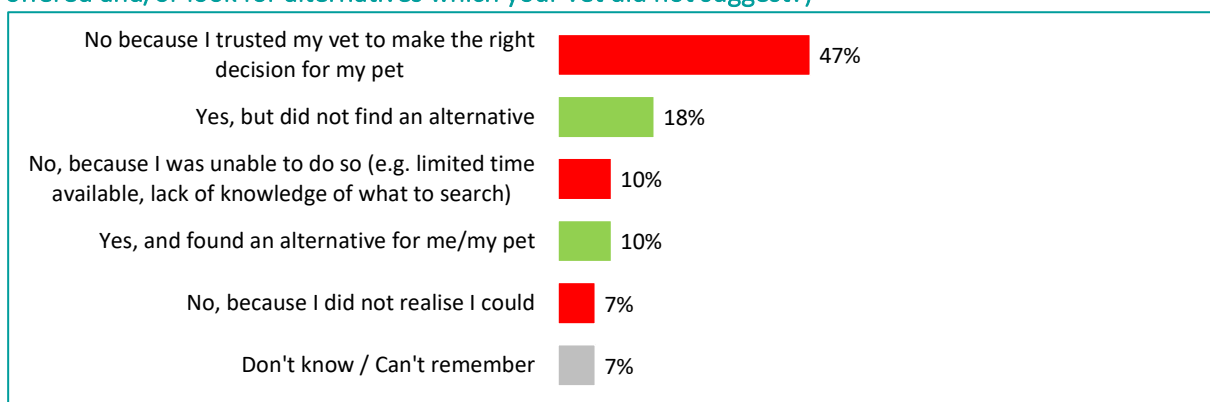
Base: All who were recommended a referral visit including those did not accept the referral (406)

Decisions around recommendations

Those who were recommended a referral visit were asked if they did any of their own research on the treatments offered and/or looked for alternatives which their vet did not suggest.

- 64% did **not** do their own research on the treatments offered and/or look for alternatives which their vet did not suggest
- 28% did do their own research
 - 18% did not find an alternative (significantly higher for those at an independent practice: 25% v 15%)
 - 10% did find an alternative.

Figure 63: Whether did own research (Q67 Did you do any of your own research on the treatments offered and/or look for alternatives which your vet did not suggest?)

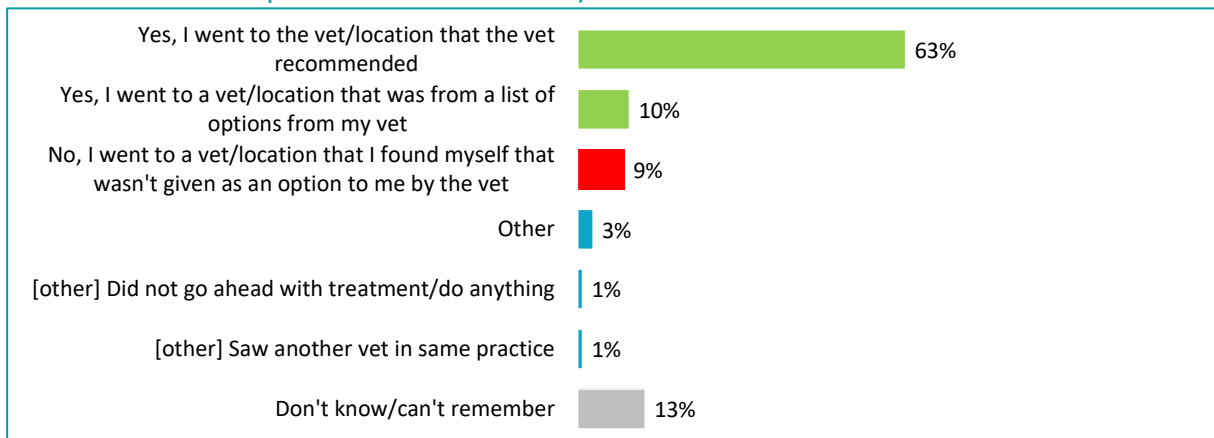


Base: All who were recommended a referral visit (406)

Referrals can be made to another vet within the same practice, or to a different practice. Of those that were recommended a referral, 85% were recommended a location to go for that referral (either within practice or to another practice). These were asked if they accepted the vet’s referral recommendation and proceeded with the referral:

- 63% did and went to the vet/location recommended (significantly higher for those an independent practice: 72% v 59%)
- 10% did and went to a vet/location from a list of options
- 9% did not.

Figure 64: Whether accepted vet’s referral recommendation (Q68 Did you accept the vet’s referral recommendation and proceed with the referral?)



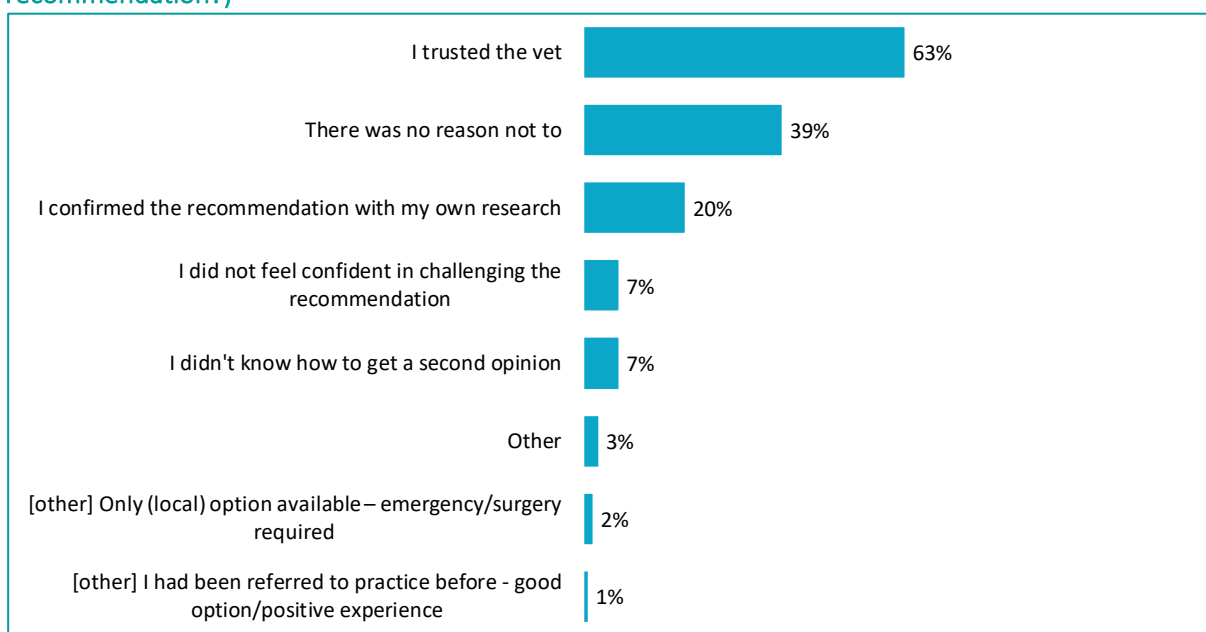
Base: 344 who were recommended a referral visit

Those who then accepted the referral recommended were asked why they accepted that recommendation.

For nearly two thirds (63%) they accepted the vet’s recommendation because they trusted the vet. This was significantly higher among those that belonged to an independent vet practice 83% compared to those at a large vet group practice (50%).

Additionally, 39% accepted their vet’s recommendation as there was no reason not to and 20% confirmed the recommendation with their own research.

Figure 65: Reasons for accepting recommendation (Q69 Why did you accept the vet’s recommendation?)

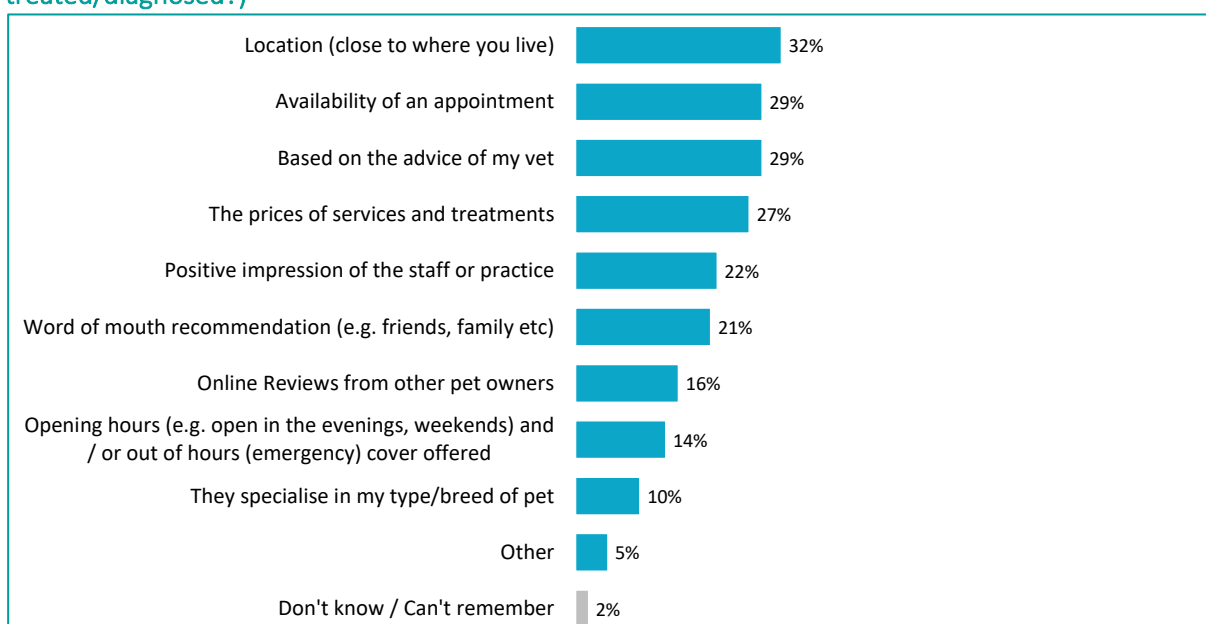


Base: 217 who went to the vet/location that the vet recommended

Those who did not go to the location that the vet recommended were asked how they decided where to go.

Nearly a third (32%) said it was close to where they lived, 29% because of availability of appointments and 29% based on the advice of their vet. Please note that there was a small base size of 63 for this question and the results should be interpreted with caution.

Figure 66: Factors on where to go for referral (Q70 How did you decide where to go to get your pet treated/diagnosed?)



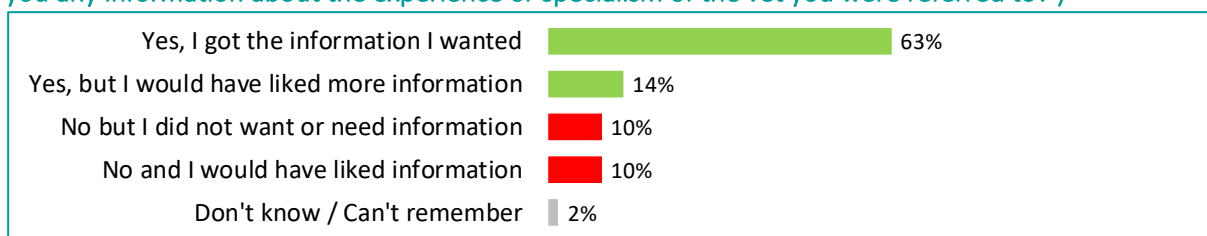
Base: 63 who were recommended a referral visit but didn't go to the recommended referral location

*Low base size, please interpret with caution

Those that accepted the vet’s recommendation (62% of those of those who were recommended a referral) were asked if the vet gave them any information about the experience or specialism of the vet they were referred to.

Nearly two thirds (63%) got the information they wanted, 14% were given information but wanted to know more. However, 20% were not given information.

Figure 67: Information given about experience or specialism of the vet referred to (Q71 Did the vet give you any information about the experience or specialism of the vet you were referred to?)

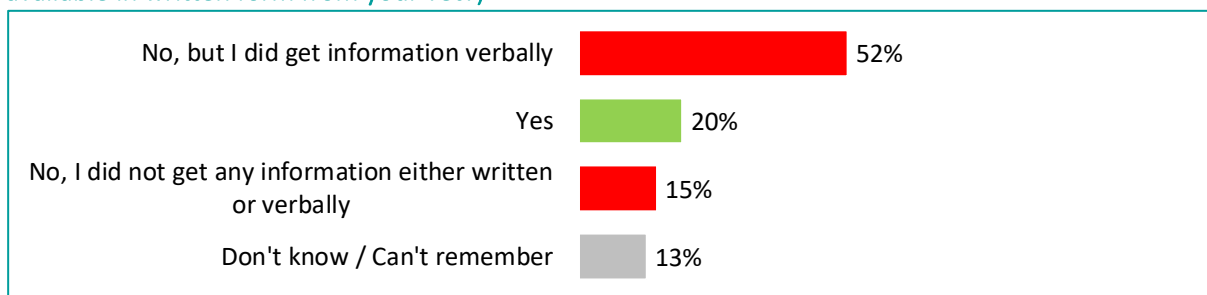


Base: 250 who accepted the vet's referral recommendation

All who were recommended a referral visit were asked if they got any information about the options available in written form from their vet.

A fifth were given information in writing, 52% were not but got the information verbally and 15% didn’t receive it either written or verbally.

Figure 68: Information in writing about options (Q72 Did you get any information about the options available in written form from your vet?)

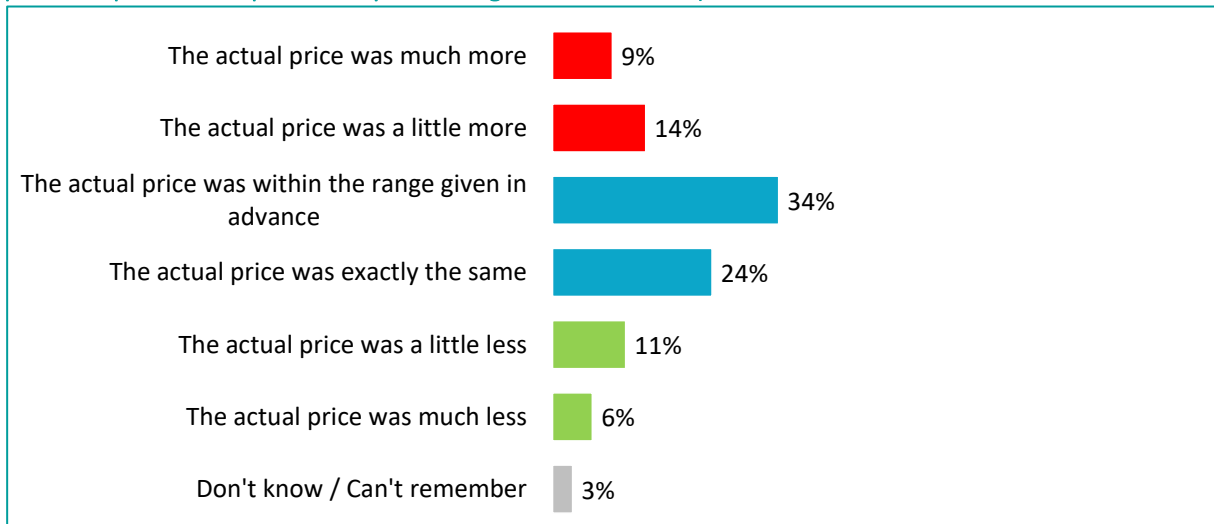


Base: 406 who were recommended a referral visit

Pricing and ownership of referred practice

Those who were recommended a referral visit, given a price and went to the referral (39% of those who were recommended a referral) were asked how the actual price they eventually paid compared to the price that they were given in advance. About six tenths (58%) said the price was as quoted or within the range, 17% said it was lower and 23% higher.

Figure 69: Expectation about the price (Q73 You said you were indicated a price of the referral consultation/ treatment/diagnostics before going ahead with it. How did the actual price you eventually paid compare to the price that you were given in advance?)

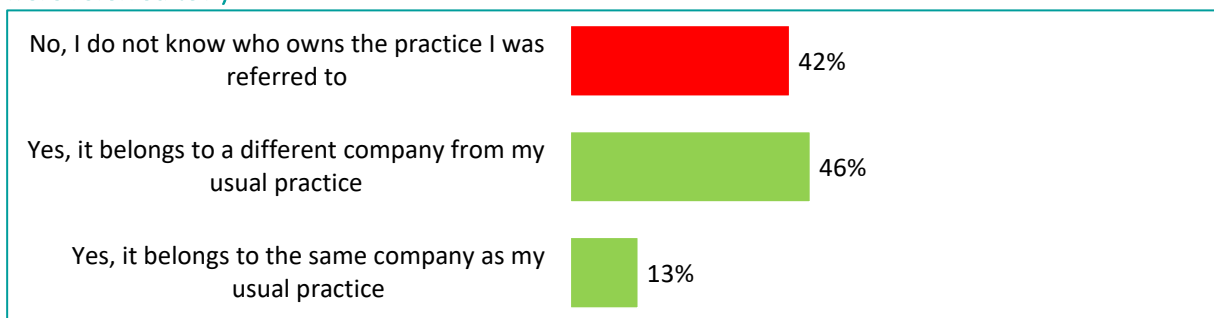


Base: 160 who were recommended a referral visit, given a price and went to the referral

Those whose pet was treated somewhere other than their main practice (37% of those of those who were recommended a referral) were asked if they knew who owned the practice they were referred to.

Over four tenths (42%) did not know who owned the practice they were referred to, 46% said it belonged to a different company and 13% said it belonged to the same company as their main practice. The latter was significantly higher among those referred from a large vet group practice (18%) than at an independent practice (3%).

Figure 70: ownership awareness of the referred practice (Q74 Do you know who owns the practice you were referred to?)



Base: 149 who were treated somewhere other than their main practice

Satisfaction with referral

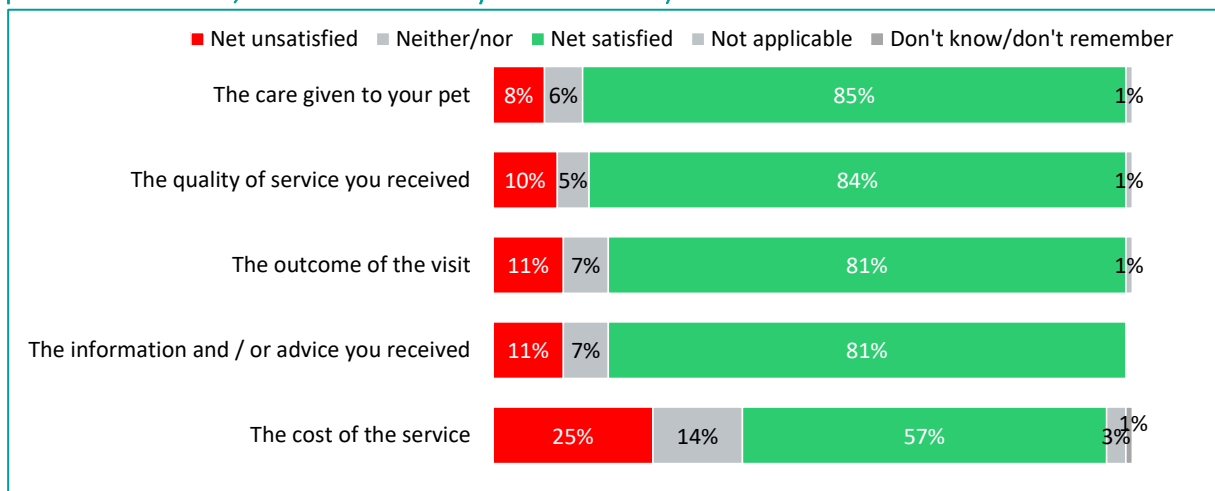
Those who proceeded with a referral (69% of those of those who were recommended a referral) were asked to say how satisfied they were with the following aspects of the referral:

- The information and / or advice you received
- The care given to your pet
- The quality of service you received
- The outcome of the visit
- The cost of the service.

The order of aspects was randomised.

Satisfaction was generally high for all aspects of the referral visit (81%-85% net satisfaction) except cost (57%).

Figure 71: Net satisfaction/dissatisfaction with referral (Q75 Thinking about the visit to the vets your pet was referred to, how satisfied were you overall with)



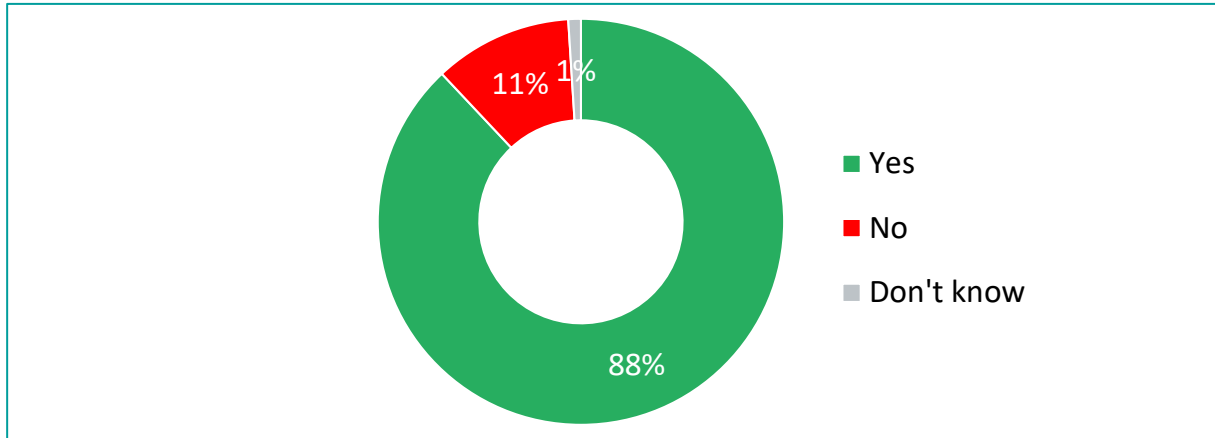
Base: 280 who accepted the vet's referral recommendation

3.9 Diagnostics

This section concerns diagnostic tests such as x-rays, biopsy, urine analysis or blood tests for their pet or pets in the preceding two years. Overall, 41% of the sample were asked about diagnostics tests.

For 88%, the diagnostic test was at their current vet and for 11% it was not.

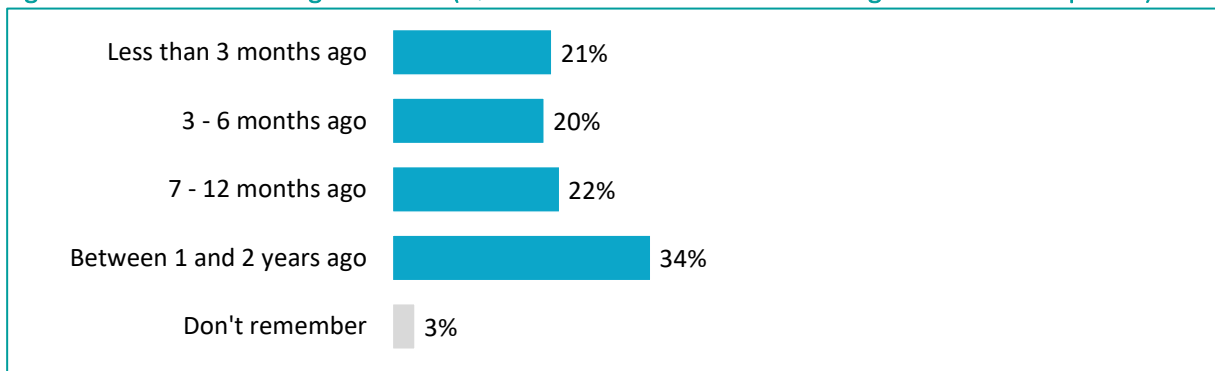
Figure 72: Where diagnostic test was undertaken (Q75b Was this at your current vet's?)



Base: 962 who have had diagnostic tests

The most recent diagnostics test was within the last three months for 21%, between three and six months for 20% and between seven months and a year for 22%.

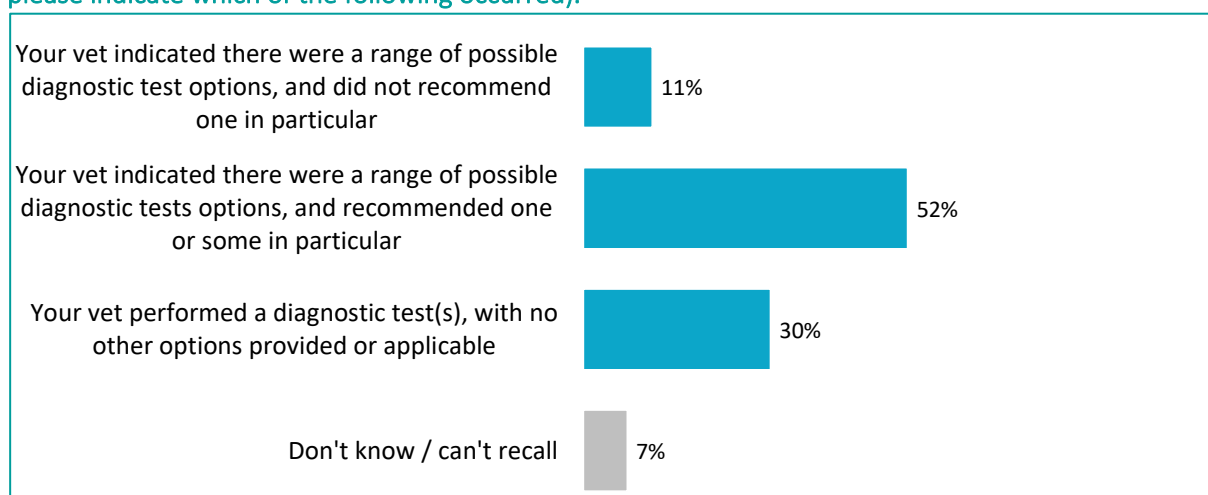
Figure 73: Time of last diagnostic test (Q76 When did the most recent diagnostic test take place?)



Base: 962 who have had diagnostic tests

Participants were asked what occurred before the most recent diagnostic test(s). Over half (52%) said a range of options was indicated and one was recommended, 30% said no options were offered and 11% said a range of options were offered and the vet did **not** recommend one,

Figure 74: Events before diagnostic test (Q77 Before this most recent diagnostic test(s) was performed, please indicate which of the following occurred).



Base: 962 who have had diagnostic tests

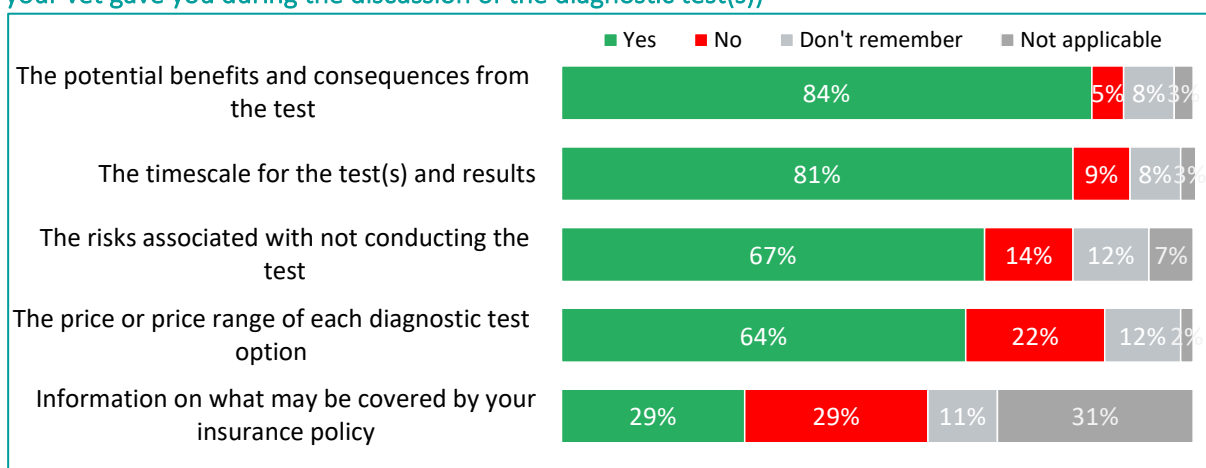
All who were given a range of options (63% of those whose pet had a diagnostic test) were asked to indicate which of the following information their vet gave them during the discussion of the diagnostic test(s):

- The potential benefits and consequences from the test (e.g. likelihood of resolving the issue, risks of side effects, any implication for you on aftercare)
- The risks associated with not conducting the test
- The price or price range of each diagnostic test option
- Information on what may be covered by your insurance policy
- The timescale for the test(s) and results.

The main information the vet gave during the discussion of the diagnosis test(s) were:

- 84% potential benefits and consequences
- 81% timescales for test(s) and results
- 67% risks
- 64% price range – this was significantly higher for those at a large vet group practice: 68% v 58%
- 29% information on insurance cover – this was significantly higher for those at a large vet group practice: 33% v 22%

Figure 75: Information received prior to diagnostic (Q78 Please indicate which of the below information your vet gave you during the discussion of the diagnostic test(s))



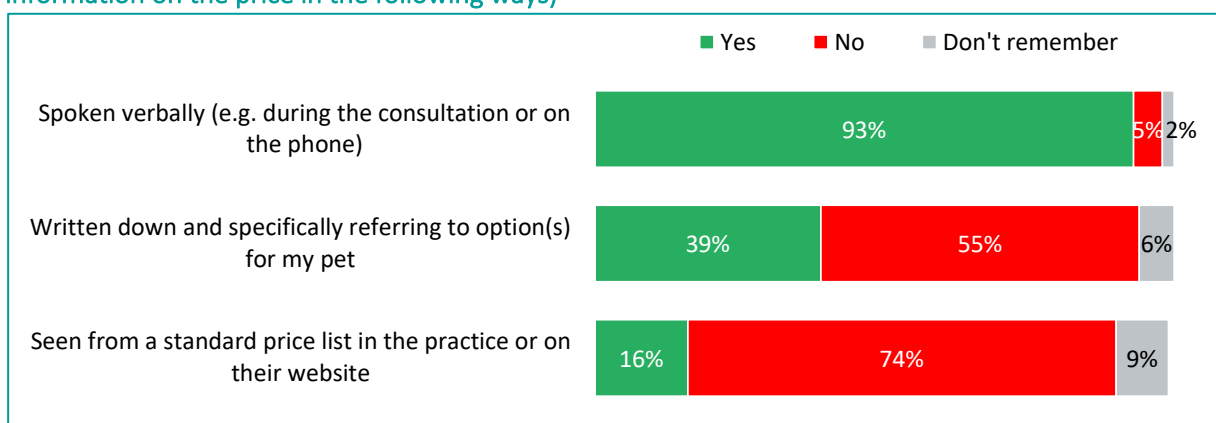
Base: 607 who were given options

The 64% who received information on price were asked which of the following ways they received the information on price:

- Written down and specifically referring to option(s) for my pet (e.g. via email/text, on a consent form or an invoice)
- Seen from a standard price list in the practice or on their website
- Spoken verbally (e.g. during the consultation or on the phone).

Almost all (93%) received the information on price verbally, 39% in writing and 16% got it from a standard price list. The latter was significantly higher among those at a large vet group practice (20%) compared to those at an independent practice (11%).

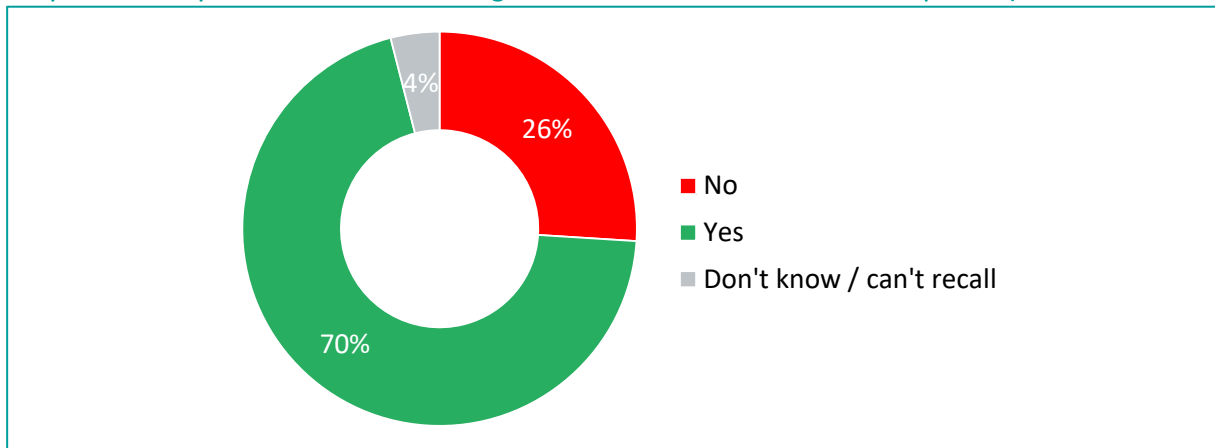
Figure 76: Ways in which information was received (Q79 Please indicate whether you received the information on the price in the following ways)



Base: 389 who were given information on price

The 64% who received information on price were then asked if they felt like they could decline the diagnostic test or consider alternative options. Seven tenths said they felt they could decline the diagnostic tests or consider alternative options once they knew the price and 26% said they felt they could not.

Figure 77: Whether felt they could decline the diagnostic test (Q80 Once you knew the estimated price, did you feel like you could decline the diagnostic test or consider alternative options?)

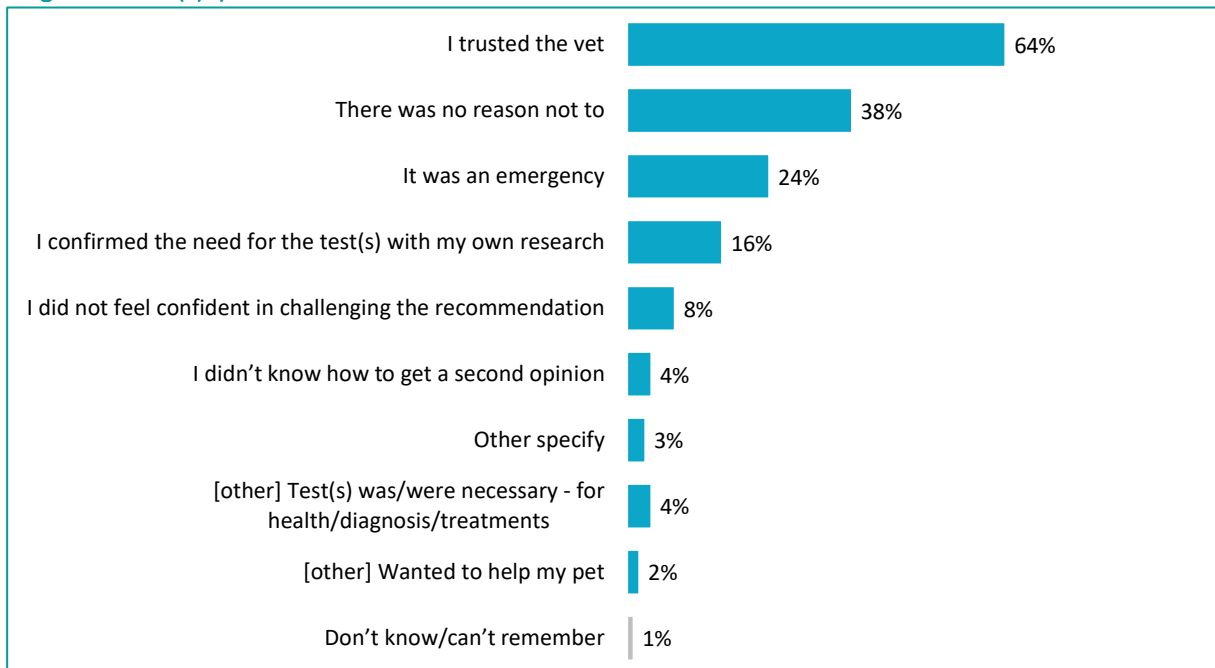


Base: 389 who were given information on price

All who had a diagnostic test were asked why they decided to proceed with the diagnostic test(s).

Nearly two thirds (64%) decided to progress with the diagnostic test because they trusted the vet (significantly higher among those at an independent practice (70%) compared to those at a large vet group practice (60%)), 38% said there was no reason not to and 24% said it was an emergency.

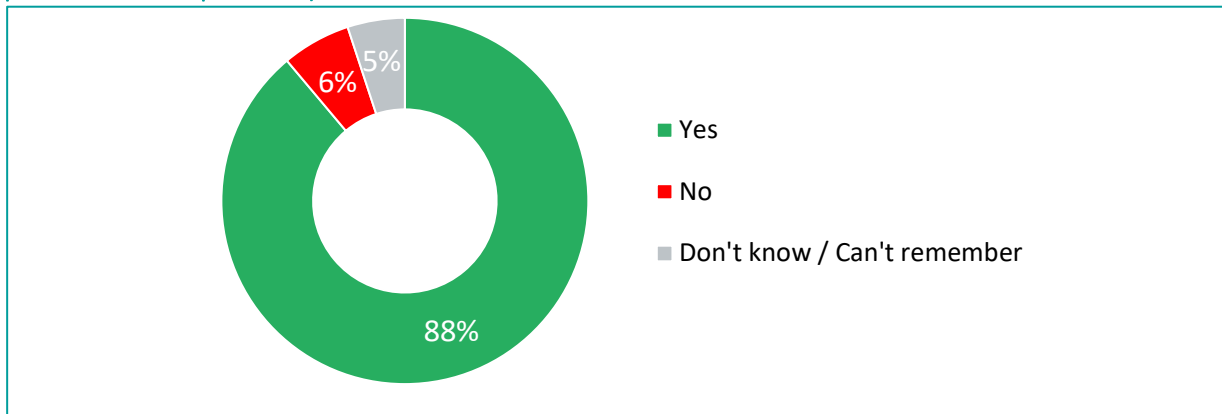
Figure 78: Reason for proceeding with diagnostic test (Q81 Why did you decide to proceed with the diagnostic test(s)?)



Base: 962 who have had diagnostic tests

All who had a diagnostic test were asked whether the diagnostic test(s) took place within the practice. Almost all (88%) said the diagnostic test(s) took place within the practice and 6% said it didn't.

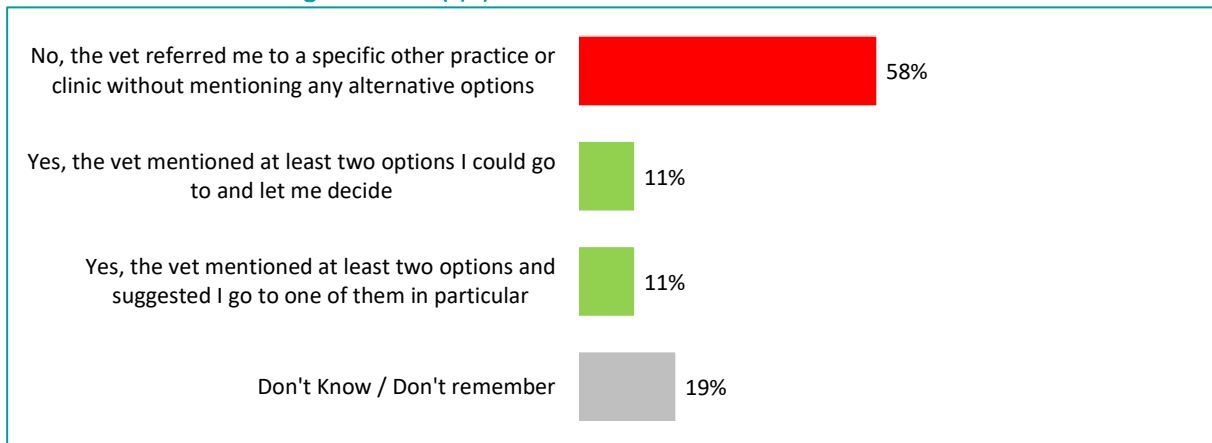
Figure 79: Whether diagnostic test took place within the practice (Q82 Did the diagnostic test(s) take place within the practice?)



Base: 962 who have had diagnostic tests

The 6% who did not have the diagnostic test(s) within the practice were asked if the vet gave them options for where to have the diagnostic test. Over half (58%) said they were not given options for the diagnostic test and 22% said they were. The remaining 19% did not know or recall. Please note that there was a small base size of 62 for this question and the results should be interpreted with caution.

Figure 80: Whether given options for where to have diagnostic test (Q83 Did the vet give you options for where to have the diagnostic test(s)?)

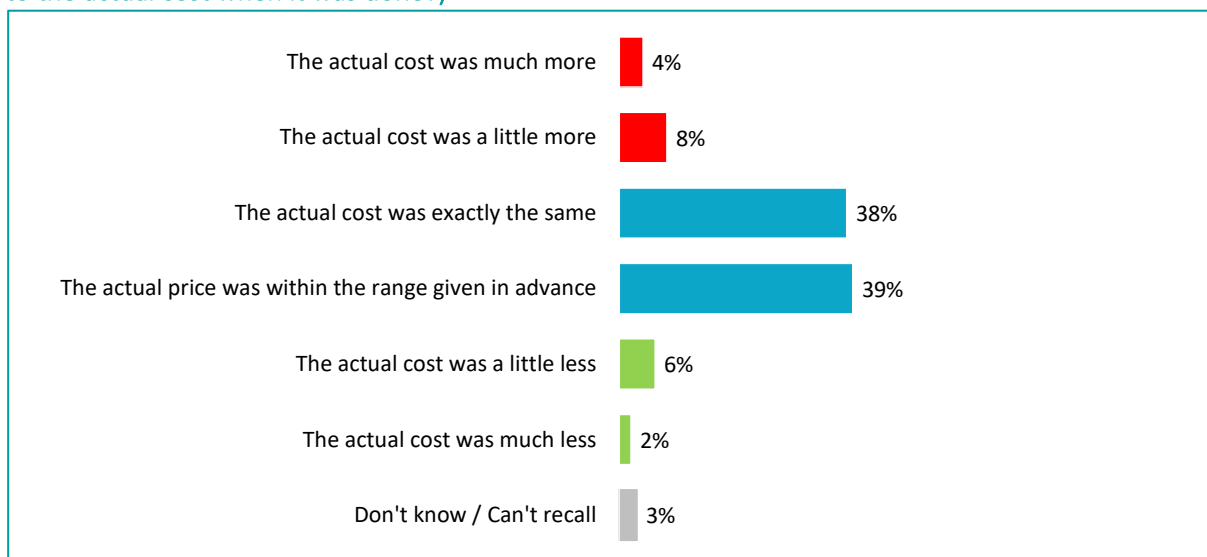


Base: 62 whose diagnostic test did not take place in the practice

*Low base size, please interpret with caution

The 64% who received information on price were asked how the information on price they were given compared to the actual cost when it was done. Over three quarters (77%) said the price was as quoted or within the range, 8% said it was lower and 12% said it was higher.

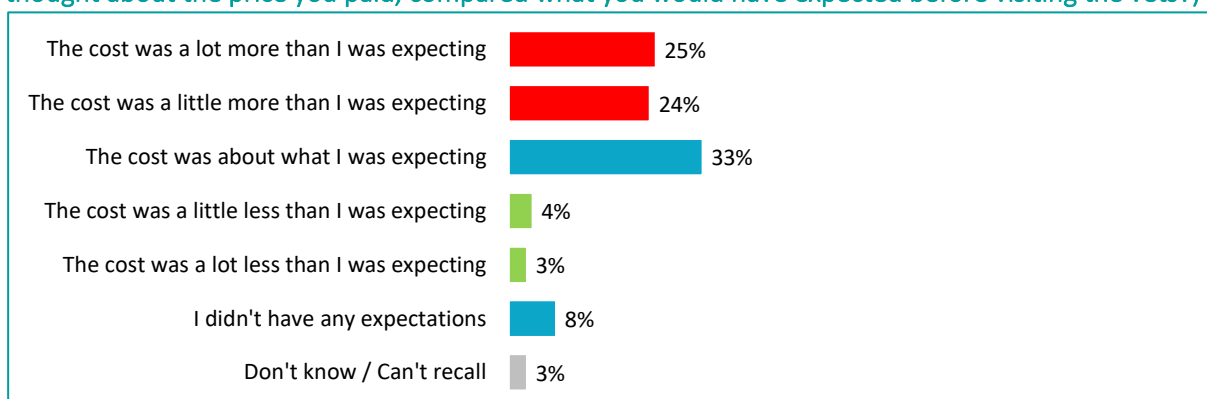
Figure 81: Price information vs actual cost (Q84 How did the price information you were given compare to the actual cost when it was done?)



Base: 389 who were given price

All who had diagnostic tests were asked what they thought about the price they paid compared to what they would have expected before visiting the vet. For 33% the price was about what was expected, for 7% it was lower, for 24% it was a little higher and for a quarter (25%) it was a lot higher. The latter was significantly higher among those at a large vet group practice (29%) compared to those at an independent practice (20%).

Figure 82: Price paid vs expectation (Q85 And overall, which of the following best describes what you thought about the price you paid, compared what you would have expected before visiting the vets?)



Base: 962 who have had diagnostic tests

Satisfaction with Diagnostic Test(s)

The sample who had diagnostic test(s) for their pet(s) were asked for the last occasion how satisfied they were overall with the following aspects:

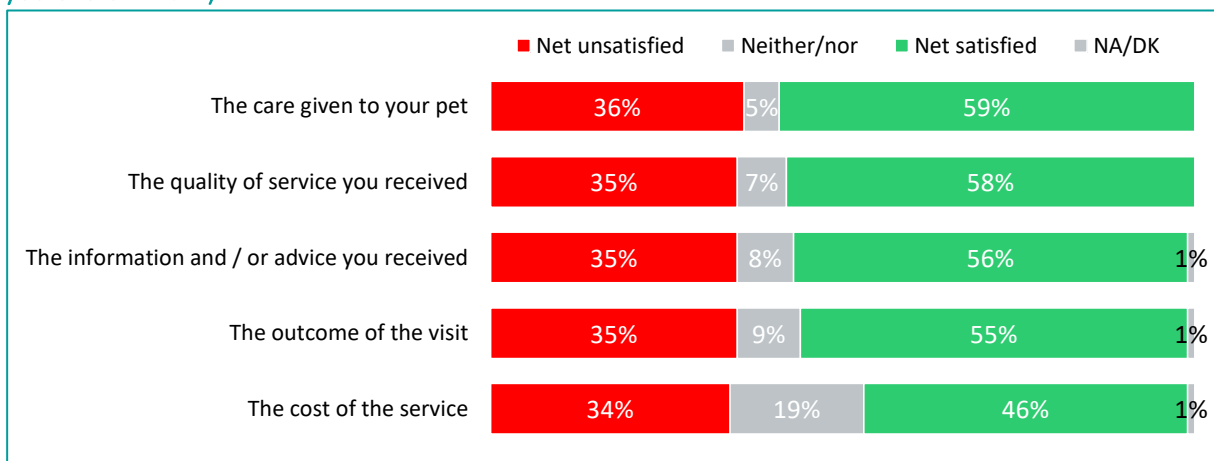
- The information and / or advice you received
- The care given to your pet
- The quality of service you received
- The outcome of the visit
- The cost of the service.

The order of aspects was randomised.

The balance of satisfaction for all five aspects was positive but there were notably high levels of dissatisfaction for each:

- Positive balance of 23% satisfied with care given
- Positive balance of 23% satisfied with quality of service
- Positive balance of 21% satisfied with information/advice given
- Positive balance of 20% satisfied with outcome
- Positive balance of 12% satisfied with cost.

Figure 83: Net satisfaction/dissatisfaction with statements (Q85B On this occasion, how satisfied were you overall with:)



Base: 962 who have had diagnostic tests

3.10 Out-of-hours Care

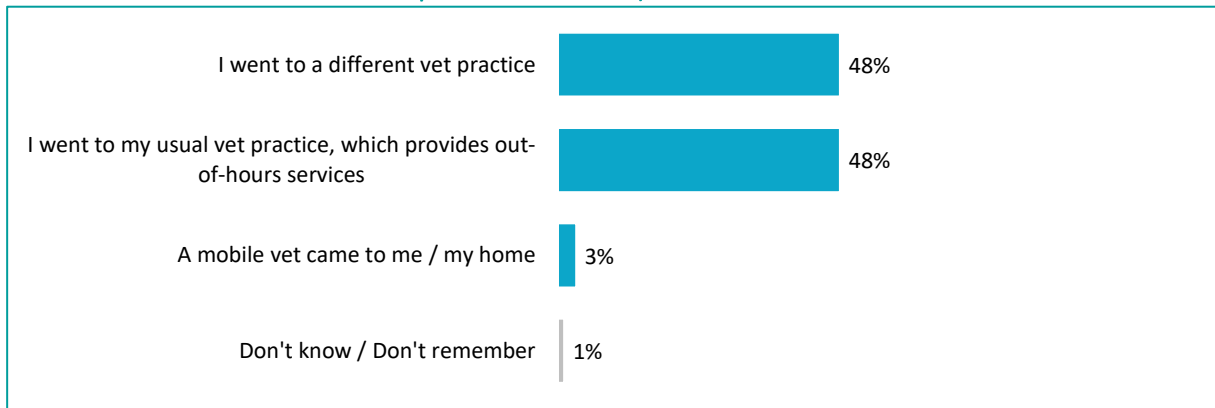
This section concerns out-of-hours care for the participants pet(s) within the preceding two years. Out-of-hours care was described as where their pet needed to be seen by a vet outside the opening hours of their usual vet practice.

Overall, 16% of the sample said their pet had needed out-of-hours services.

No significant differences were observed by those who belong to large vet practices or Independent ones.

Of those that needed out-of-hour services 48% went to a different practice and 48% went to their usual practice.

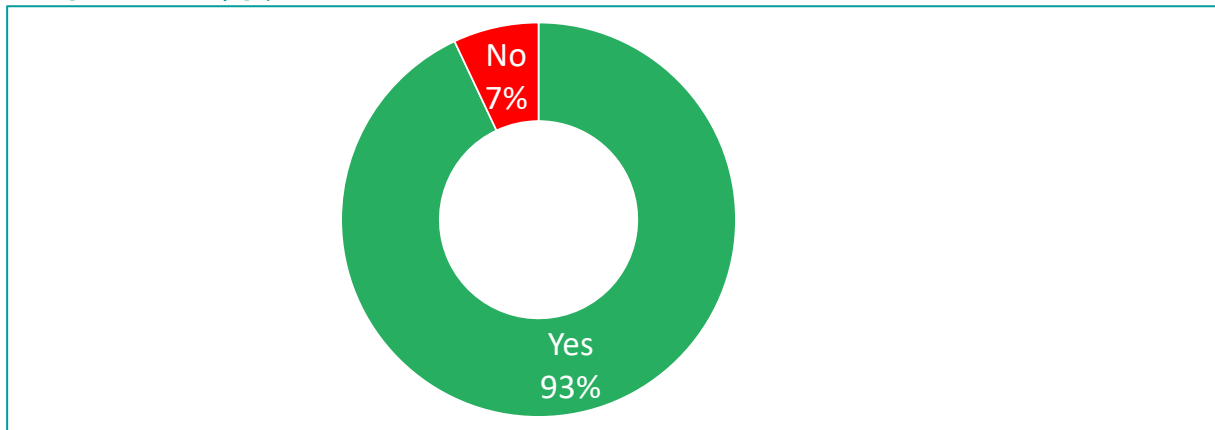
Figure 84: Why used out-of-hours care (Q88 Thinking about your last use of out-of-hours pet care, which of the below best describes where you went for this?)



Base: 386 who used out-of-hours care

The 48% who went to their usual practice were asked whether the out-of-hours appointment was at their usual practice. For 93% the out-of-hours care was at their current vets and for 7% it was not.

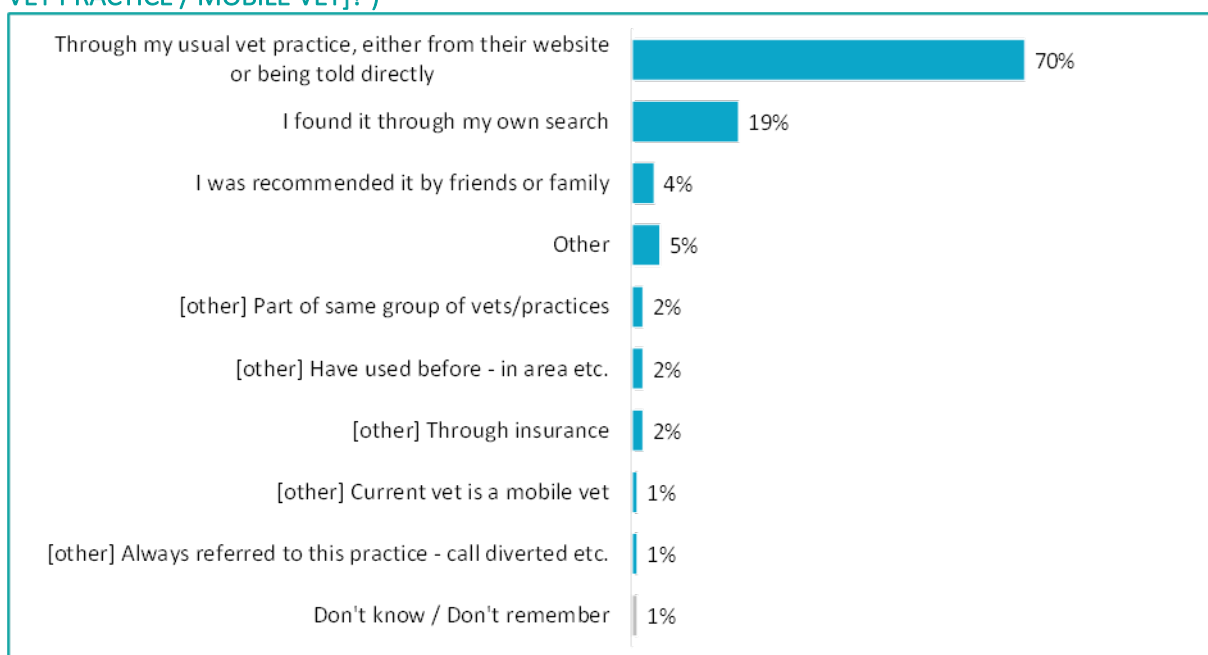
Figure 85: Whether out-of-hours appointments at was usual practice (Q88A Was this at your current vets, [name from q9]?)



Base: 184 who went to their usual vet practice

The 48% who used a different vet or used a mobile vet for out-of-hours care were asked how they found out about it. Seven tenths found out from their usual vet practice and 19% did their own search.

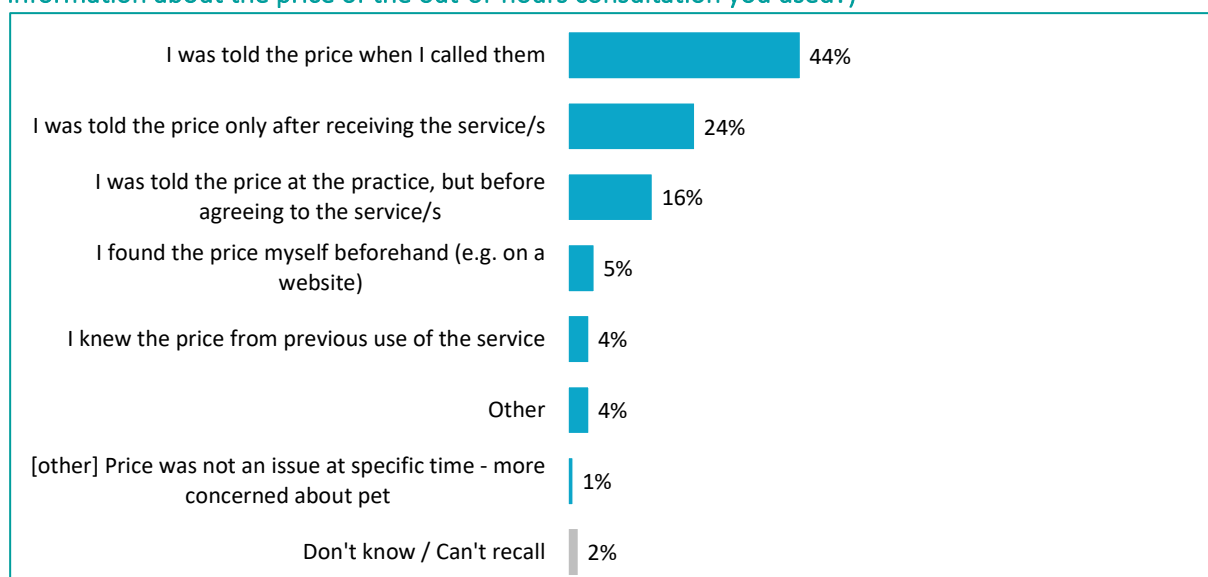
Figure 86: Means of finding out about out-of-hours (Q88C How did you find out about the [DIFFERENT VET PRACTICE / MOBILE VET]?)



Base: 199 who used different/mobile vet for out-of-hours care

All who used an out-of-hours service were asked at what stage they received information about the price of the out-of-hours consultation they used. Forty four per cent were told the price when they called, 24% were told the price only after receiving the service and 16% were told the price at the practice but before agreeing the service.

Figure 87: When price information for out-of-hours service received (Q89 At what stage did you receive information about the price of the out-of-hours consultation you used?)



Base: 386 who used out-of-hours care

The sample who used an out-of-hours service were asked how their visit compared between the out-of-hours veterinary service and their regular vet practice for the following five aspects:

- The care received by my pet
- The quality of the information given to me about the treatment
- The stress I experienced during my visit
- The pressure I felt to make decisions about treatment during my visit
- The confidence about any decisions I had to make.

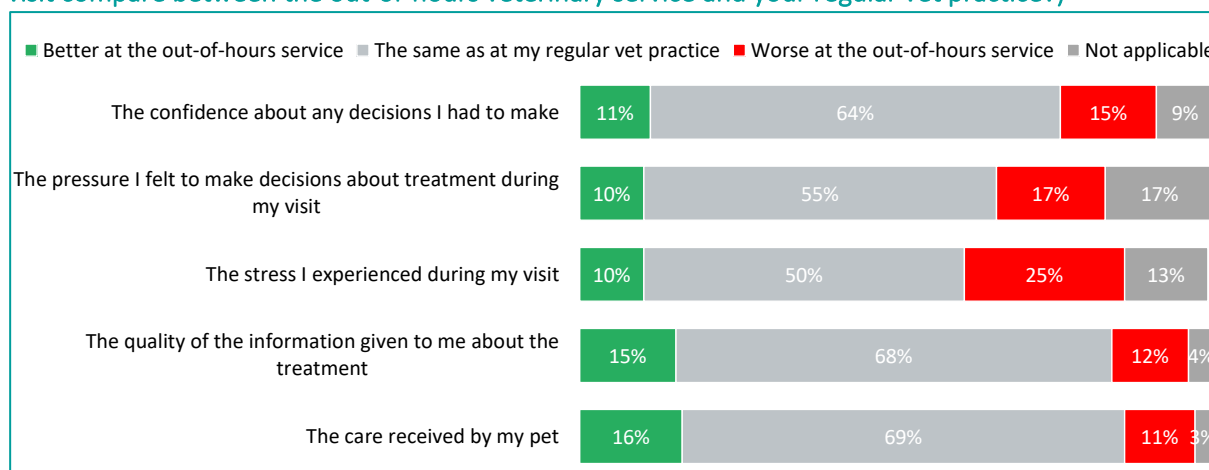
The out-of-hours service was rated **worse** than their regular vet practice for:

- The stress I experienced during my visit (negative balance of 15%)
- The pressure I felt to make decisions about treatment during my visit (negative balance of 7%)
- The confidence about any decisions I had to make (negative balance of 4%)

The out-of-hours service was rated **better** than their regular vet practice for:

- The care received by my pet (positive balance of 5%)
- The quality of the information given to me about the treatment (positive balance of 3%).

Figure 88: Out-of- hours service provided compared to usual (Q90 How did the following aspects of your visit compare between the out-of-hours veterinary service and your regular vet practice?)



Base: 386 who used out-of-hours care

3.11 Medicines

This section concerns medicines.

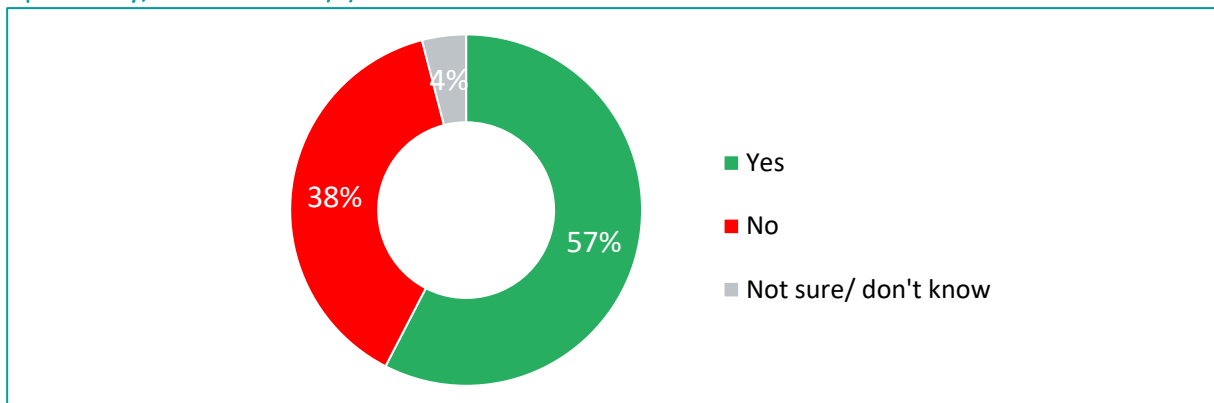
Nearly two thirds of the sample (65%) said their pet had been prescribed medication by their vet practice in the preceding two years. This was significantly higher among those at an independent practice (68%) compared to those at a large vet group practice (64%).

For 96% of the sample whose pet had been prescribed medication, this was prescribed at their current vet and for 4% it was prescribed at a different practice.

All whose pet had been prescribed medication were asked whether they were aware that they could obtain a prescription from their vet practice and get the medication elsewhere (for example a retailer, a pharmacy, or another vet).

Fifty seven per cent were aware of this while 38% were unaware of this.

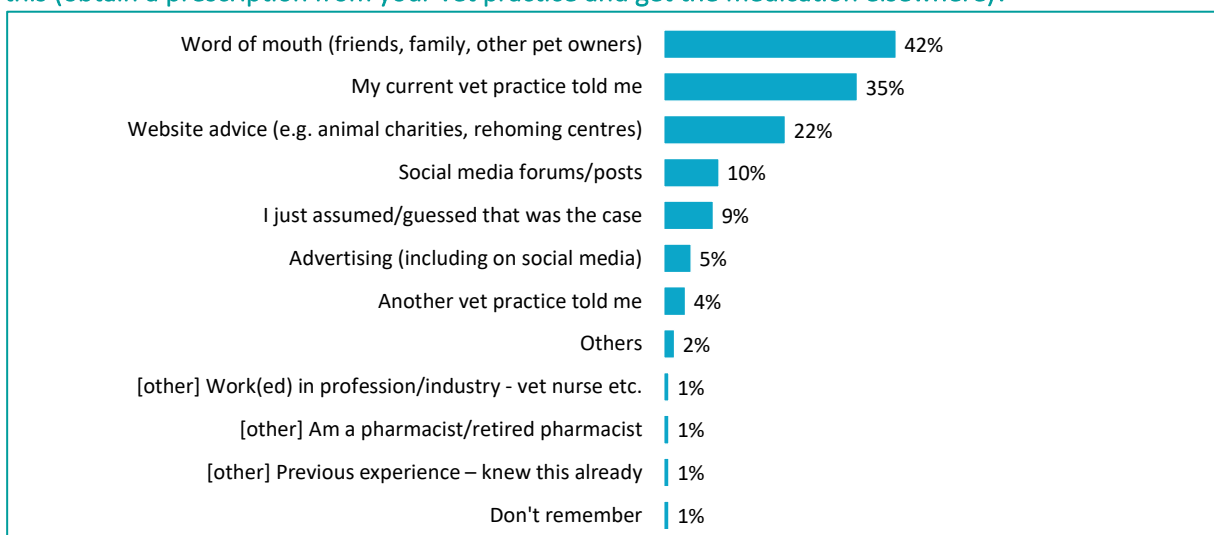
Figure 89: Awareness of obtaining medication through a prescription (Q91 Are you aware that you can obtain a prescription from your vet practice and get the medication elsewhere (for example a retailer, a pharmacy, or another vet)?)



Base: 1,524 whose pet had been prescribed medication

The 57% who were aware that they could obtain a prescription from their vet practice and get the medication elsewhere were asked how they learned about the option. The leading source was ‘word of mouth’ (42%), followed by their current vet told them (35%) and ‘website advice’ (22%).

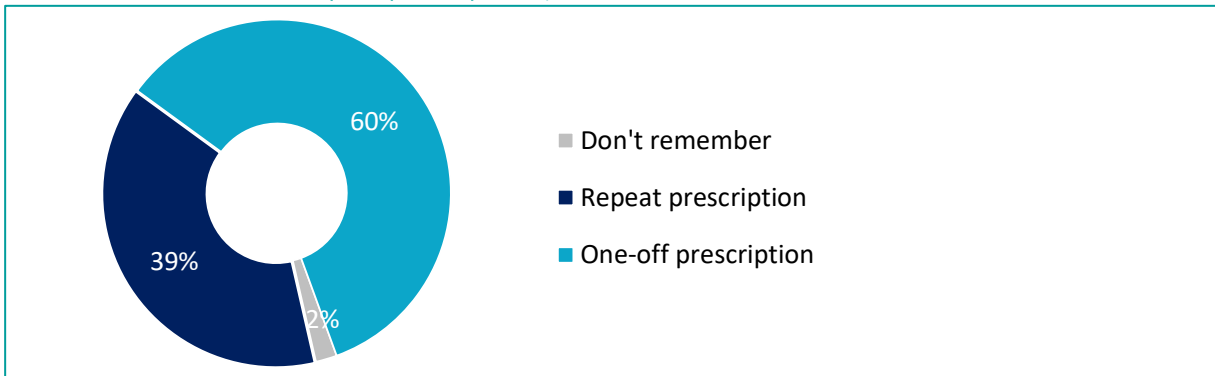
Figure 90: How learnt could get prescription elsewhere (Q91B How did you learn that you could do this (obtain a prescription from your vet practice and get the medication elsewhere)?



Base: 874 who were aware that you can obtain a prescription from your vet practice and get the medication elsewhere

The medication prescribed was one-off for 60% and part of a repeat prescription for 39%.

Figure 91: Frequency of the prescription (Q92 Was the medication your pet was prescribed one-off or did it involve at least one repeat prescription?)

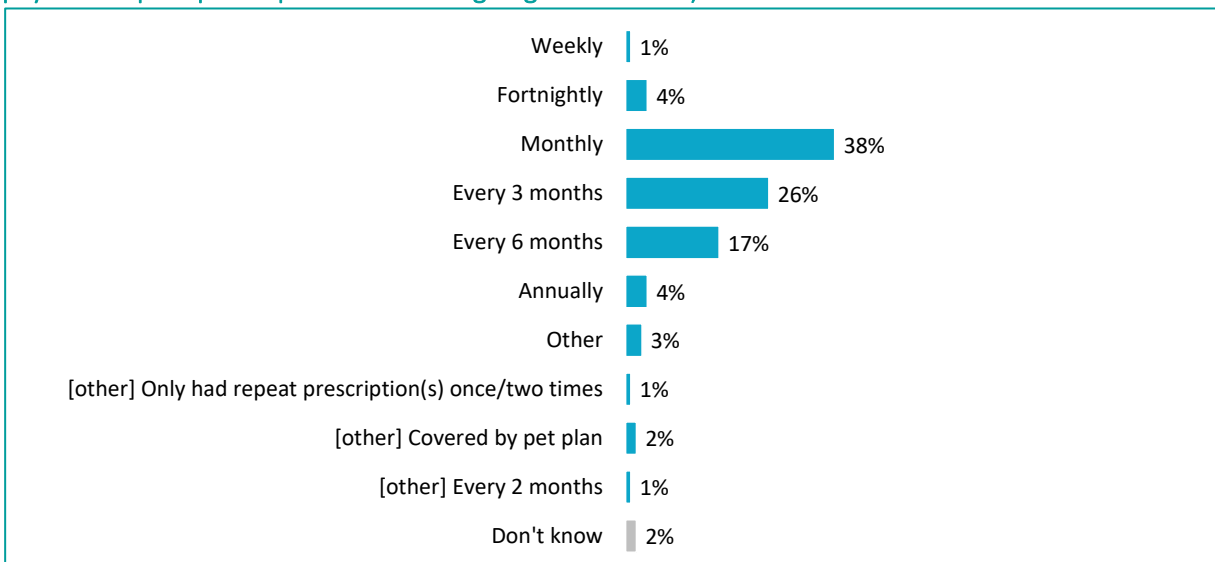


Base 1,524 who's pet had been prescribed medication

Repeat Prescriptions

The 39% who got repeat prescriptions were asked how often they paid for this. There was a wide range of frequencies of payment for repeat prescriptions: 38% paid monthly, 26% every three months and 17% every six months.

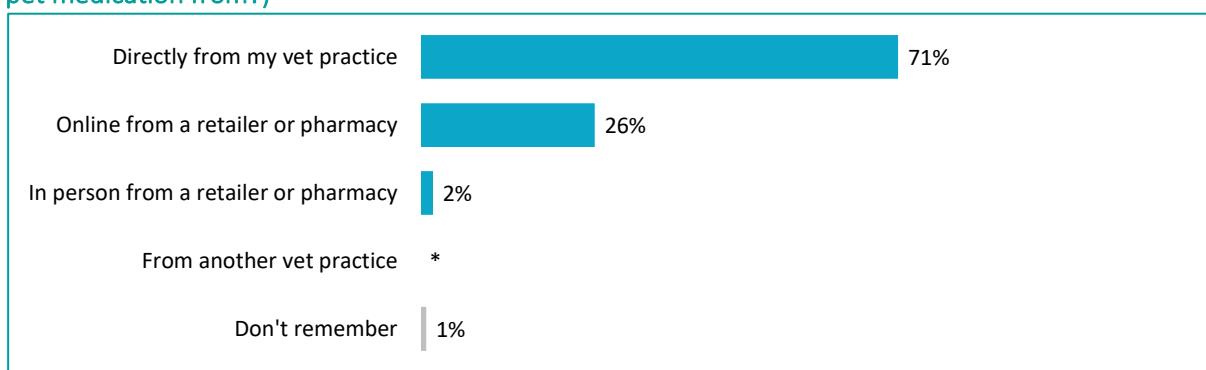
Figure 92: Frequency of paying for a repeat prescription (Q93 On average, how frequently do/did you pay for a repeat prescription for the on-going medication?)



Base: 589 with repeat prescription

The usual source of repeat prescription medication was less likely to be their vet than for one-off medication (71% vs. 88%) and more likely to be purchased online (26% vs. 7%).

Figure 93: Usual place to buy repeat prescription pet medication (Q96 Where do you usually buy your pet medication from?)



Base: 589 with repeat prescription

* = less than 0.5%

One-off prescriptions

The 60% who received one-off prescriptions were asked when the most recent one was purchased. For sixty per cent it was in 2024, for 19% in 2023 and for 7% in 2022. 14% did not recall this information.

Table 14: Most recent time one-off pet medication purchased (Q94 And when was the most recent time you bought a one-off pet medication?)

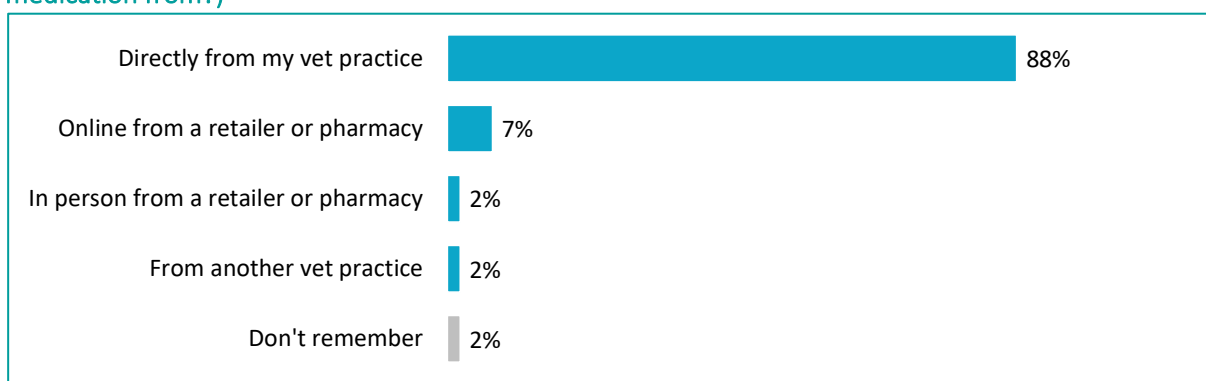
| | 2024 | 2023 | 2022 |
|-----------|------|------|------|
| January | 2% | 1% | 1% |
| February | 3% | 2% | * |
| March | 5% | 1% | 1% |
| April | 4% | 2% | * |
| May | 5% | 2% | 1% |
| June | 6% | 2% | 1% |
| July | 6% | 3% | 1% |
| August | 9% | 2% | 1% |
| September | 9% | 2% | * |
| October | 15% | 1% | * |
| November | 5% | 1% | 1% |
| December | - | 2% | 1% |

Base: 784 who's pet had been prescribed one-off medication

* = less than 0.5%

The usual source of one-off pet medications was more likely to be their vet compared to repeat prescriptions (88% vs. 71%) and less likely to be purchased online (7% vs. 26%).

Figure 94: Place of one-off pet medication purchase (Q95 Where did you buy this one-off pet medication from?)



Base: 911 whose pet had been prescribed one-off medication

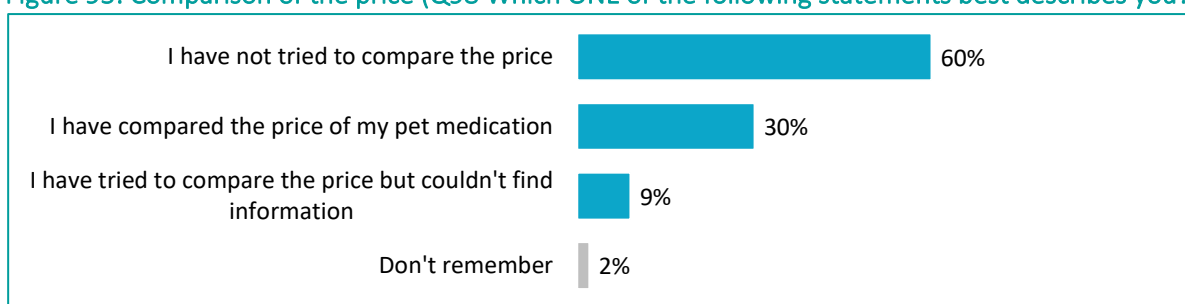
Comparing prices

All whose pet had been prescribed medication were asked which one of the following statements best describes them:

- I have compared the price of my pet medication
- I have tried to compare the price but couldn't find information
- I have not tried to compare the price
- Don't remember.

Sixty per cent said they did not try to compare prices, while 30% did. Another 9% attempted to compare prices but could not find the necessary information. No significant differences were observed between those at an independent practice and those at a large vet group practice.

Figure 95: Comparison of the price (Q98 Which ONE of the following statements best describes you?)



Base: 1,500 who have been prescribed medication

Those who purchased medication from their vet practice (80% who had purchased medicines for their pet) were asked about their reasons for doing so.

- 50% said it was the most convenient option – significantly higher among those at an independent practice (56% vs. 47%).
- 36% trusted that the medication from their vet practice was the most reliable / best quality – significantly higher among those at an independent practice (40% vs. 34%)
- 32% said the vet didn't offer any alternative – significantly higher among those at a large vet group practice (35% vs. 28%)

Table 15: Reasons for buying medication from vet practice (Q99 Why did you choose to buy your medication from your vet practice?)

| | Total | Total large vet group | Total Independents (non-LVG) |
|---|--------------|-----------------------|------------------------------|
| It was the most convenient option | 50% | 47% | 56% |
| I trust that the medication from my vet practice is the most reliable / best quality | 36% | 34% | 40% |
| The vet didn't offer any alternative | 32% | 35% | 28% |
| I needed to purchase it quickly | 31% | 30% | 33% |
| I didn't know how to order from anywhere else | 26% | 29% | 22% |
| I feel most comfortable administering medication bought from my vet practice | 23% | 21% | 24% |
| I don't feel comfortable telling my vet practice that I will purchase medication from elsewhere | 14% | 13% | 16% |
| Only the vet was able to administer the medication | 5% | 5% | 4% |
| Medication from my vet practice was cheaper than ordering from anywhere else | 3% | 3% | 2% |
| Specific prescribed medicine brand not available elsewhere | 2% | 2% | 2% |
| Other | 3% | 2% | 4% |
| Don't know | 1% | 1% | 0% |
| [other] Part of pet plan | 2% | 2% | 2% |
| [other] Cost of prescription outweighs benefit of buying elsewhere | 2% | 2% | 2% |
| Base (Those who bought medication from their vet practice) | 1,222 | 758 | 453 |

Orange box denotes significant differences between practice type

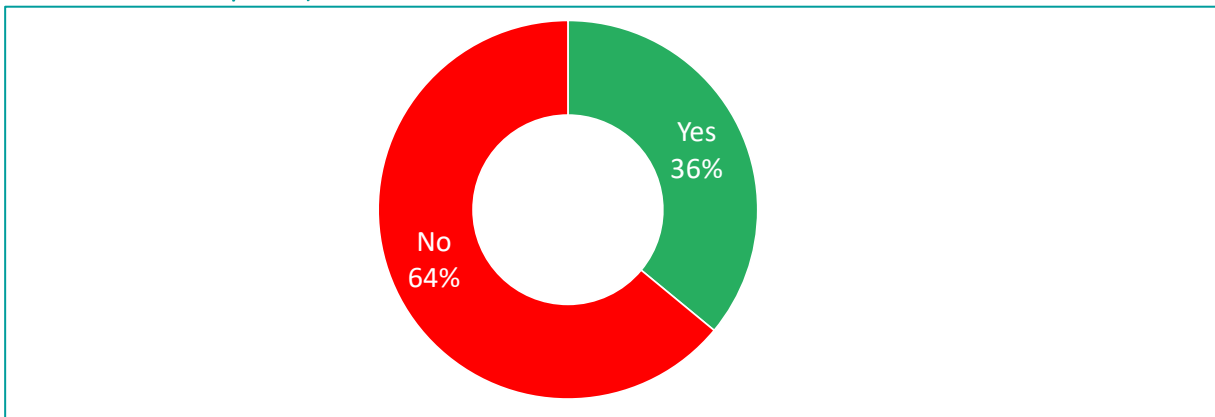
3.12 After Life Services

This section is on after life services. As this is a sensitive topic, the questionnaire asked the participant whether they would prefer not to answer questions about the death of a pet or had not experienced the loss of a pet. This was asked as follows:

The following questions are about the death of a pet. We understand that this may be very upsetting to answer questions about. If you would prefer not to answer these, or have not experienced the loss of a pet, please select 'skip to next section'. Pet bereavement support can be found at Blue Cross – [link <https://www.bluecross.org.uk/pet-bereavement-and-pet-loss>]

Among them, 64% had experienced the death of a pet and were happy to proceed. Of those who chose to proceed, 36% had experienced the death of a pet within the last two years. This represents 23% of the overall sample.

Figure 96: Those who had pet that died within the last two years (Q101 Have you had a pet that died within the last two years?)



Base: 1,491 who proceeded to answer

Participants whose pet had died were asked the month and year of the most recent death. The responses showed that 39% occurred in 2024, 32% in 2023, 22% in 2022 and 7% in 2021.

Table 16: When pet died (Q102 We are sorry for your loss. If you have experienced more than one loss in the last two years, please think about the most recent experience. When did your pet die?)

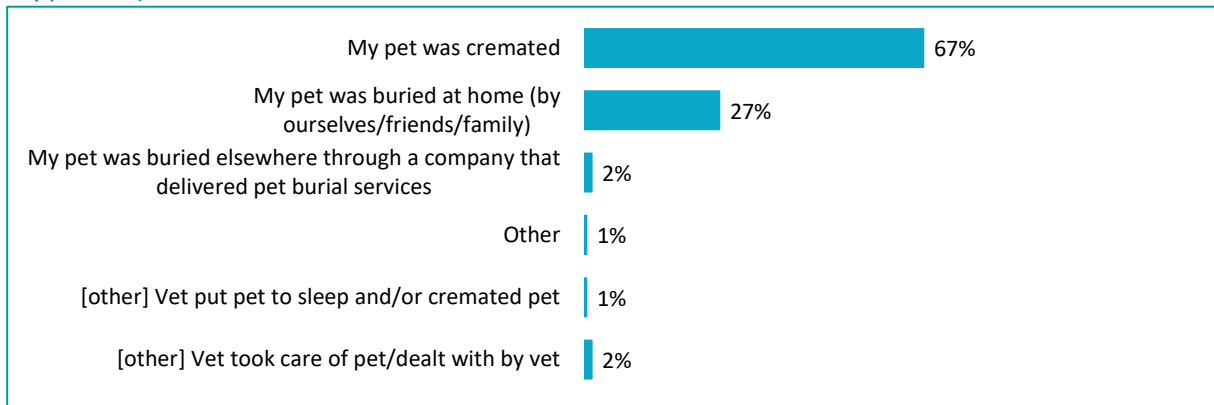
| | 2024 | 2023 | 2022 | 2021 |
|-----------|------|------|------|------|
| January | 2% | 2% | 2% | 1% |
| February | 3% | 2% | 2% | 1% |
| March | 3% | 2% | 2% | 1% |
| April | 4% | 3% | 1% | * |
| May | 4% | 2% | 2% | * |
| June | 3% | 3% | 1% | * |
| July | 4% | 2% | 2% | 1% |
| August | 4% | 3% | 2% | 1% |
| September | 5% | 2% | 1% | 1% |
| October | 4% | 3% | 3% | * |
| November | 2% | 2% | 3% | * |
| December | - | 4% | 3% | 1% |

Base 534 those whose pet died

* less than 0.5%

Among those whose pet had died in the preceding two years (23% of the overall sample), 67% chose to have their pet cremated, while 27% buried their pet at home.

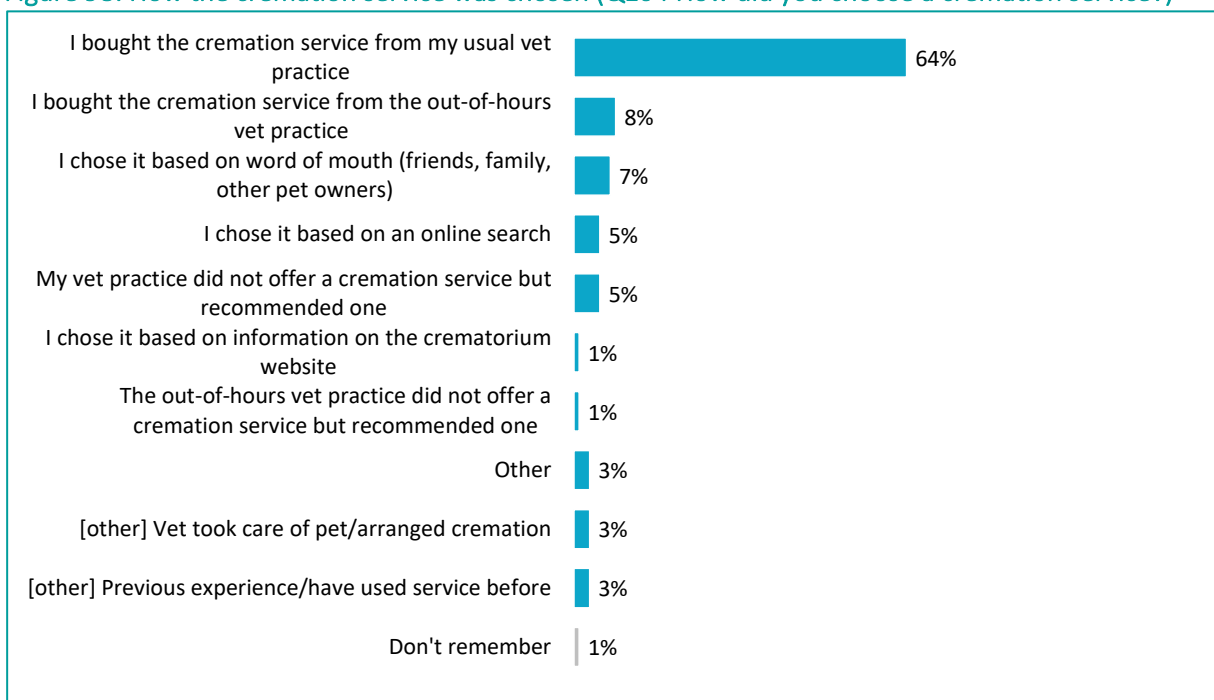
Figure 97: What happened after their pet died (Q103 When your pet died, which of the following happened?)



Base: 534 whose pet died in the last two years

Among the two-thirds who had their pet cremated, 64% purchased the cremation service through their usual vet practice.

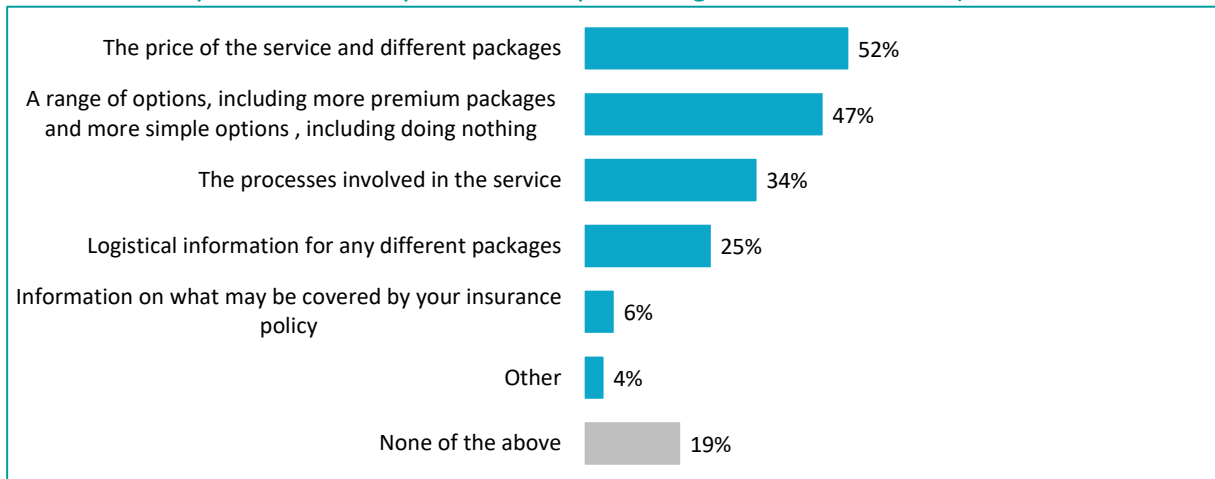
Figure 98: How the cremation service was chosen (Q104 How did you choose a cremation service?)



Base: 355 whose pet was cremated

The two-thirds who had their pet cremated were asked what, if any, information they received from their vet when purchasing the cremation service. Over half (52%) received details about the price and available packages, 47% were informed about the range of options, including doing nothing, and 34% were given information about the process involved in the service.

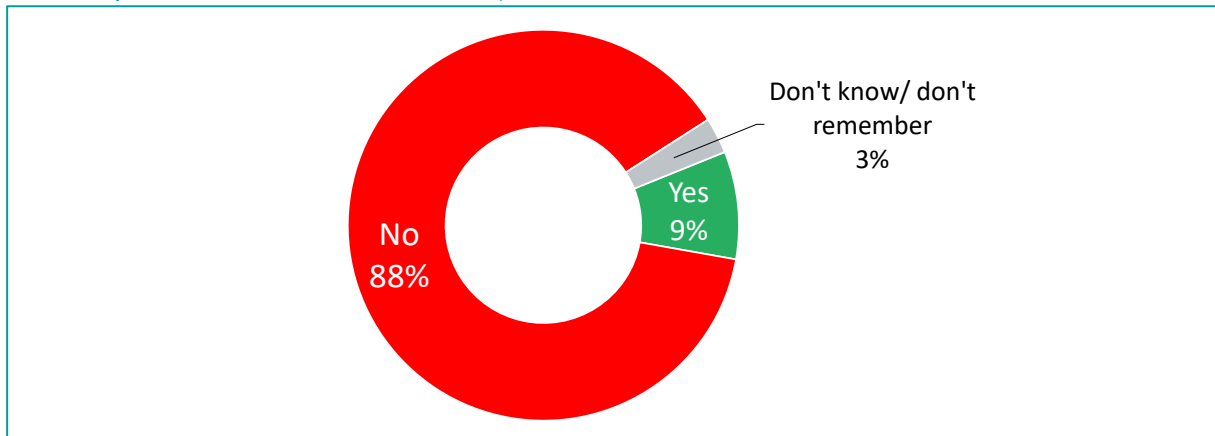
Figure 99: What information was received when purchasing a cremation service (Q105 What, if any, information did you receive from your vet when purchasing a cremation service?)



Base: 355 whose pet was cremated

Just under a tenth (9%) compared different providers of cremation services. Of those who did, 94% were able to find the information they wanted regarding prices and services offered. Please note that this was a small base size of 31 for this question.

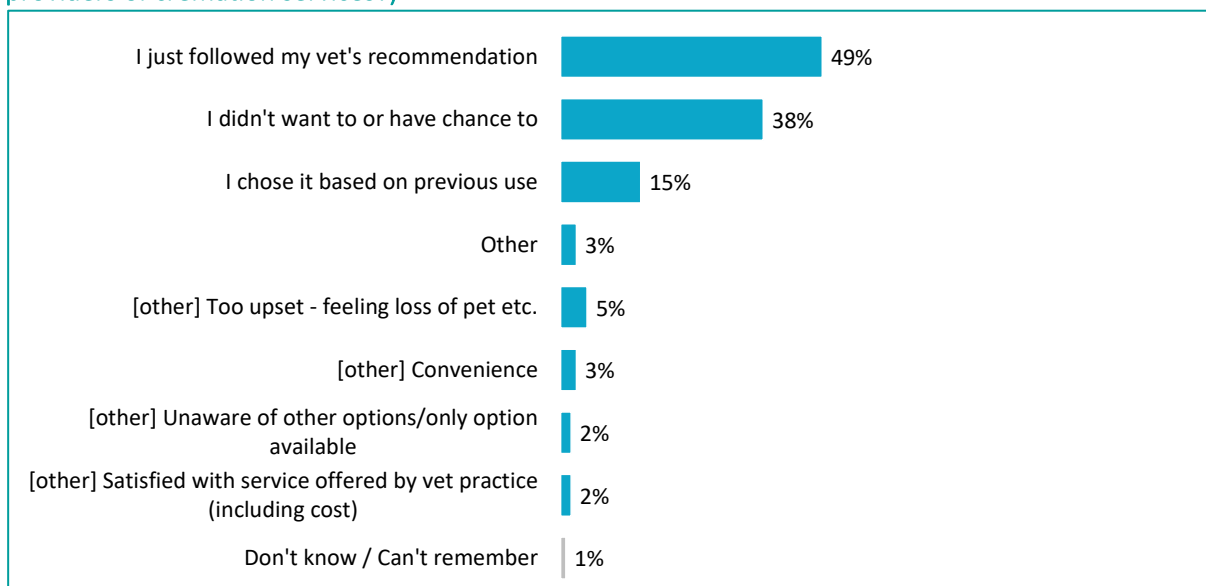
Figure 100: Whether compared different providers of cremation services (Q106 Did you compare different providers of cremation services?)



Base: 355 whose pet was cremated

The 88% who didn't compare different cremation providers were asked why they didn't compare different providers of cremation services. Almost half (49%) said they just went with their vet's advice. Another 38% mentioned they either didn't want to or didn't get the chance to look at other options. Meanwhile, 15% made their choice based on previous use.

Figure 101: Reasons for not comparing different providers (Q106c Why didn't you compare different providers of cremation services?)



Base: 315 who did not compare different providers of cremation services

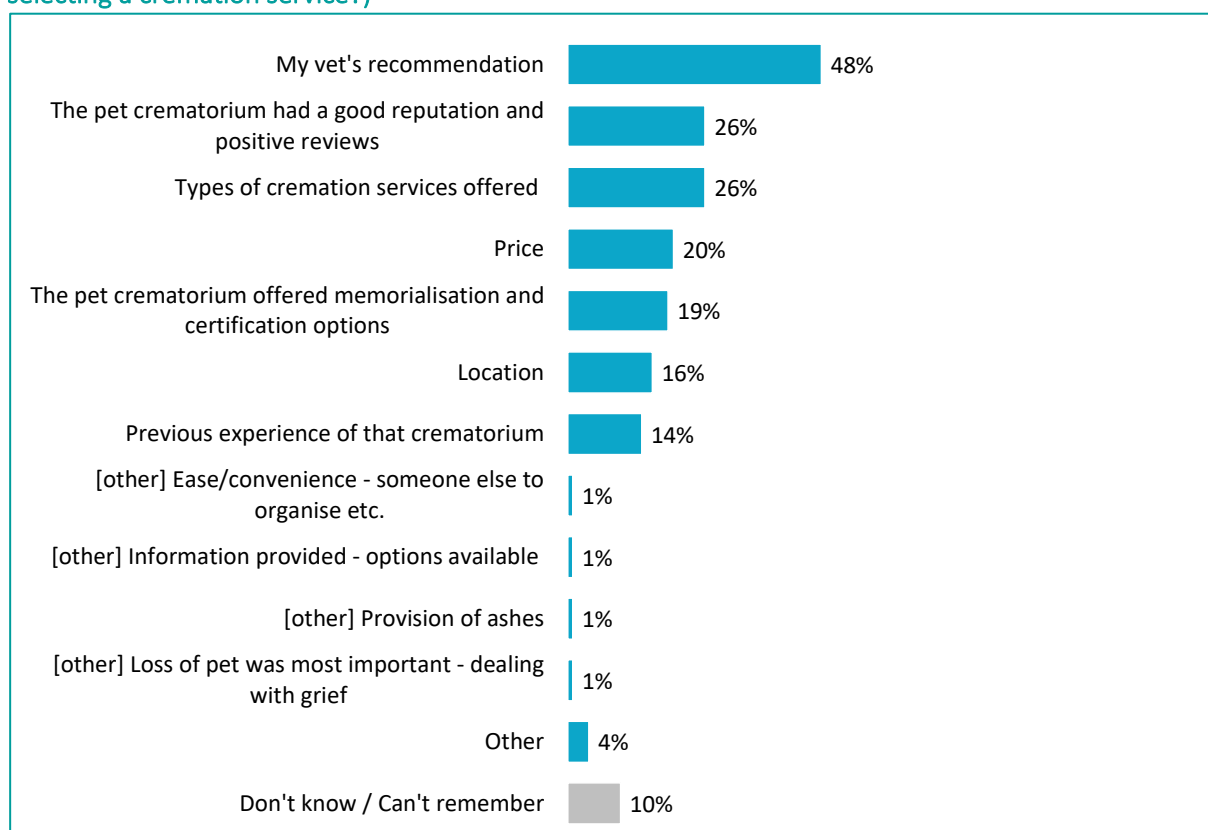
Users of a cremation service were asked which of the following were important factors in choosing a cremation service:

- Location
- Types of cremation services offered (i.e. private, semi-private, or communal cremations)
- Price
- My vet's recommendation
- Previous experience of that crematorium
- The pet crematorium had a good reputation and positive reviews
- The pet crematorium offered memorialisation and certification options
- Other.

The order of the list was randomised.

The most important factors in choosing a cremation service were the vet's recommendation (48%), the crematorium's good reputation (26%) and the types of cremation services offered (26%).

Figure 102: Reasons for selecting a cremation service (Q107 What factors were important to you when selecting a cremation service?)



Base: 355 whose pet was cremated

3.13 Veterinary Services

Pet health plans

Pet health plans were introduced in the questionnaire as follows:

*This section is about buying a **pet health plan**, or **healthcare plan**, from your vet practice in the last 3 years.*

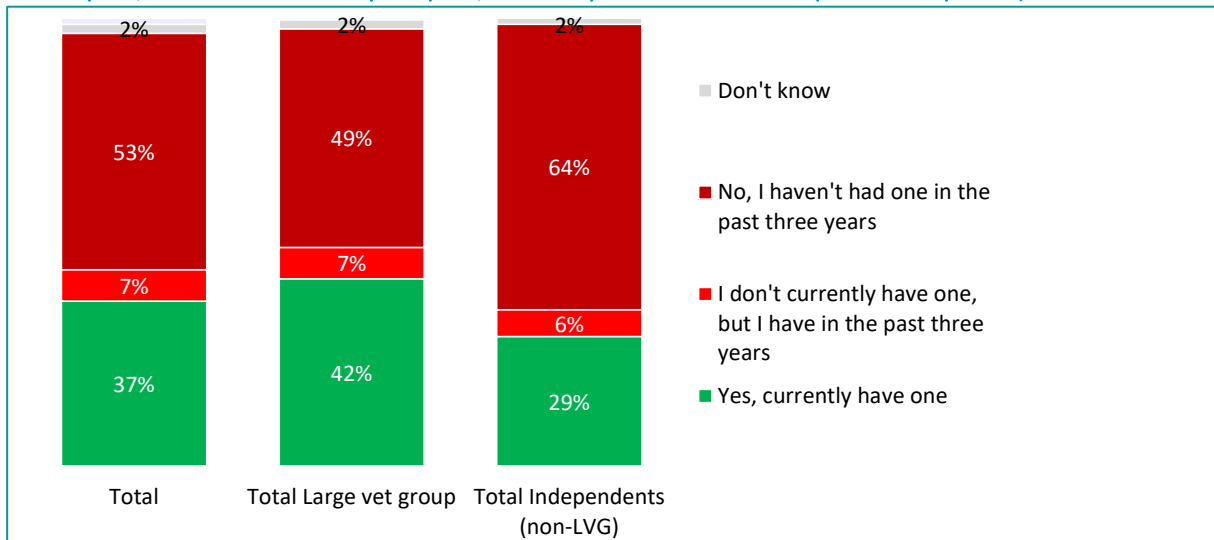
*A **pet health plan** is where you pay your vet practice a monthly or annual fee for a package of routine treatment and services.*

These plans vary as to what they include, but typically include, for example, annual booster vaccinations and flea and worm preventative treatment and may include discounts for other treatment and services if needed.

*This is different to “**pet insurance**”, which we will ask you about separately*

Overall, 37% of the sample had a pet health plan, with uptake significantly higher among those at a large vet group practice (42% compared to 29%). Over half (53%) had not had a health plan in the preceding three years, significantly higher for those at an independent practice (64% compared to 49%).

Figure 103: Whether has or had a pet health plan in past three years (Q108 Do you currently have a pet health plan, for at least one of your pets, or have you had one in the past three years?)

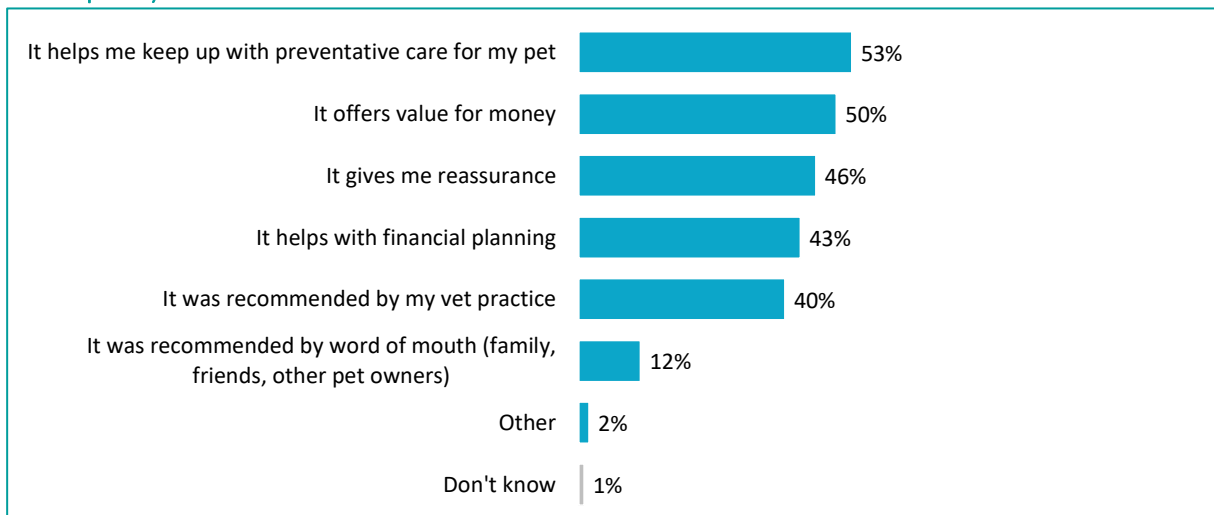


Base: All participants: 2,344 Total, 1,498 Total large vet group, 820 Independents

The 44% who currently have or have had a pet health plan in the preceding three years were asked their reasons for buying a pet health plan.

The main reasons were to maintain preventative care (53%), perceived value for money (50%), reassurance (46%), financial planning (43%) and a recommendation from the veterinary practice (40%).

Figure 104: Reasons for buying a pet health plan (Q109 What were your reasons for buying a pet health plan?)

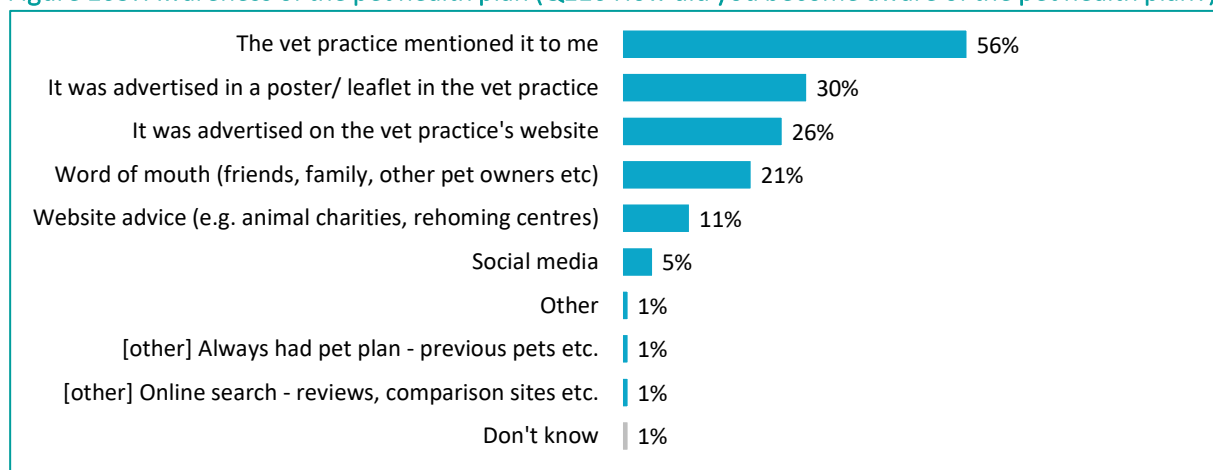


Base: 1,033 who have/had a pet health plan in the past three years

The same sample was asked how they became aware of the pet health plan.

The main reason was that the vet practice mentioned it to them (56%) – significantly higher for those at a large vet group practice (59% compared to 51%). Additionally, 30% noticed advertisements inside the practice, 26% saw it advertised on the practice’s website and 21% heard about it through word of mouth.

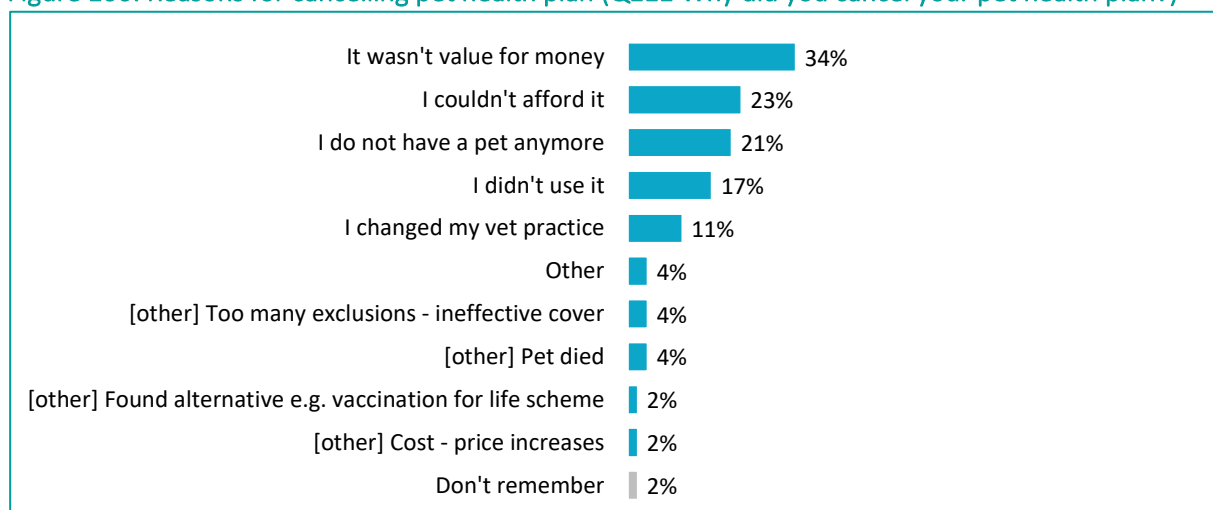
Figure 105: Awareness of the pet health plan (Q110 How did you become aware of the pet health plan?)



Base: 1,033 who have/had a pet health plan in the past three years

The 7% who no longer had a health plan were asked why they cancelled it. The most common reasons were that it was not considered value for money (34%), it became unaffordable (23%), they no longer had a pet (21%), they didn't use it (17%), or they changed veterinary practice (11%). Changing practice was significantly higher among those at an independent practice (23% compared to 6%).

Figure 106: Reasons for cancelling pet health plan (Q111 Why did you cancel your pet health plan?)



Base: 157 who had a pet health plan in the past three years but not now

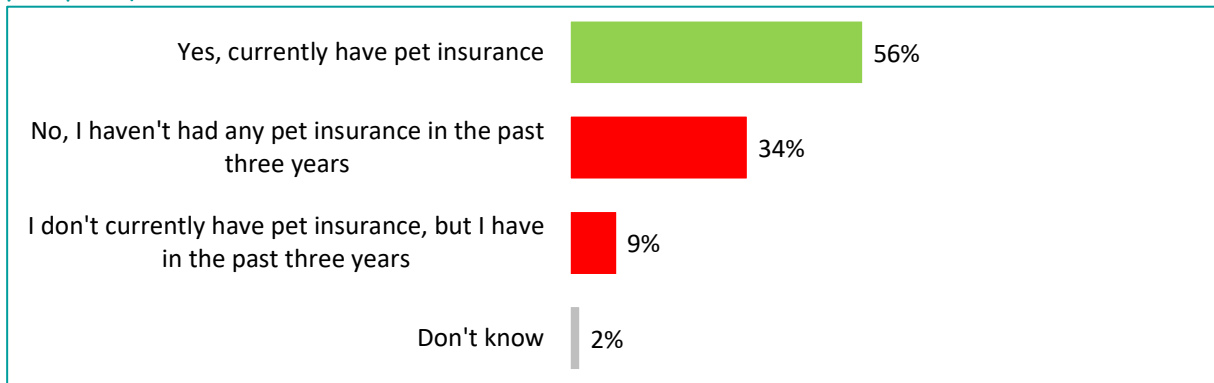
Pet Insurance

Pet Insurance was described in the questionnaire as follows:

Pet insurance is a policy that helps cover the costs of veterinary care and medical expenses for a pet when it becomes sick or injured.

Overall, 56% of the sample currently has pet insurance, while 34% have not had it in the preceding three years, and 9% had it within the preceding three years but no longer do.

Figure 107: Whether has pet insurance (Q112 Do you currently have pet insurance for at least one of your pets?)



Base: All participants: 2,344

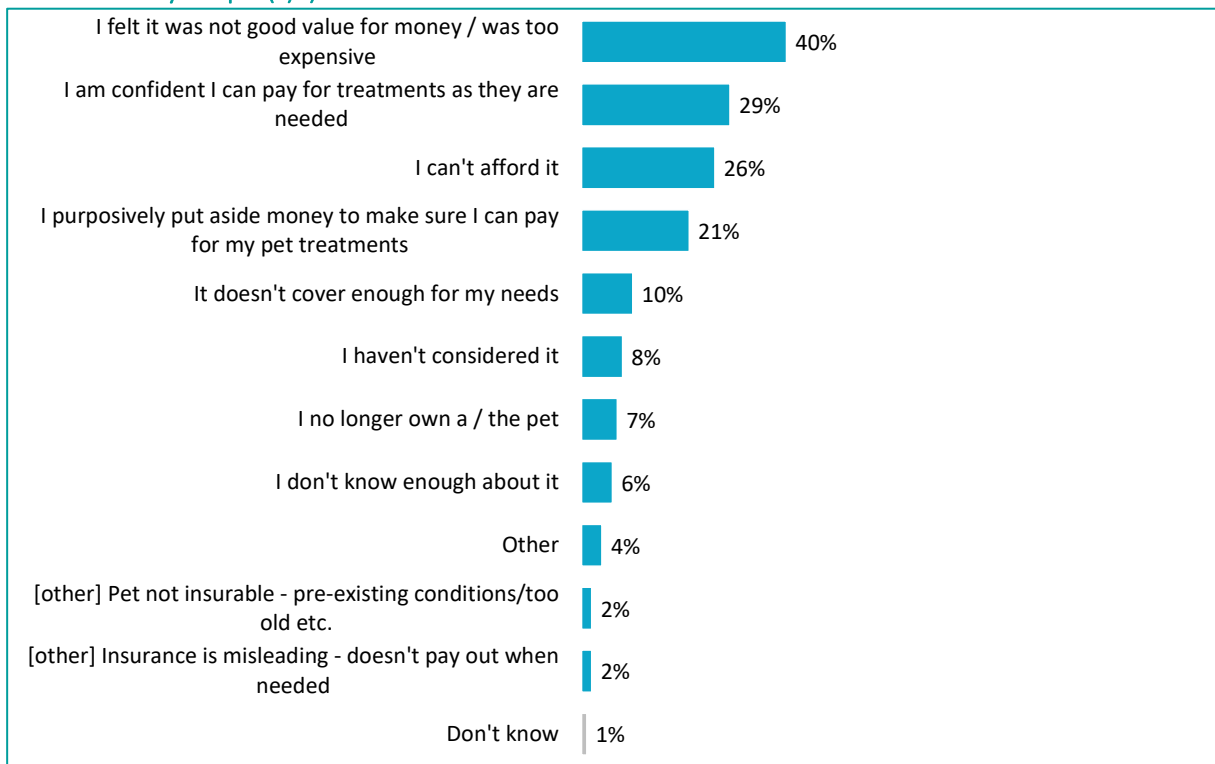
The 43% who did not currently have pet insurance were asked if there was a particular reason why.

The main reasons given were:

- 40% felt it was unnecessary due to poor value or high cost
- 29% were confident they could cover treatment costs
- 26% said they couldn't afford insurance
- 21% set money aside specifically for treatments.

No significant differences were observed by those at a large vet group practice or an independent practice.

Figure 108: Reasons for not having pet insurance (Q113 Is there a particular reason you do/did not have insurance for your pet(s)?)

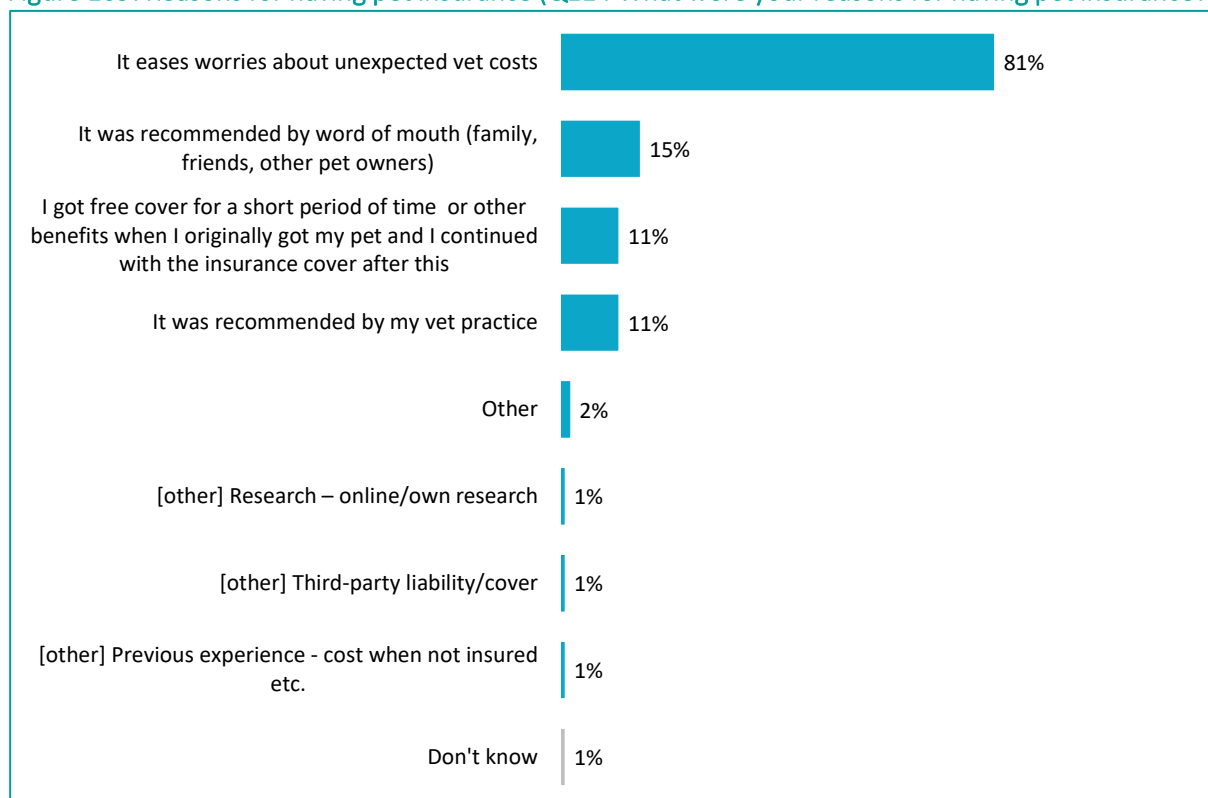


Base: 996 who do not have pet insurance

The 56% with pet insurance were asked why they had pet insurance.

The main reasons given were to ease worries about unexpected veterinary costs (81%), recommendations from family, friends, or other pet owners (15%), and recommendations from a veterinary practice (11%). The latter was significantly higher for those with large vet groups (12% compared to 8%).

Figure 109: Reasons for having pet insurance (Q114 What were your reasons for having pet insurance?)



Base: 1,512 who have pet insurance

Those with pet insurance were then asked how they decided on their insurance plan. Half (50%) conducted online research, 39% used an insurance price comparison website, and 14% relied on word of mouth.

Significantly higher participants at large vet group practices found the insurance plan through their vet practice (9% vs. 5%), via posters or leaflets at the practice (4% vs. 2%), or through social media (5% vs. 3%).

Table 17: How found out about the insurance plan (Q115 How did you find the insurance plan that you took out?)

| | Total | Total large vet group | Total Independents (non-LVG) |
|--|--------------|-----------------------|------------------------------|
| Searched online | 50% | 49% | 53% |
| Insurance price comparison website | 39% | 38% | 41% |
| Word of mouth | 14% | 14% | 14% |
| Website advice | 11% | 10% | 13% |
| Through my vet practice | 8% | 9% | 5% |
| It was advertised in a poster/ leaflet at the vet practice | 4% | 4% | 2% |
| Social media | 4% | 5% | 3% |
| It was advertised on the vet practice's website | 3% | 3% | 2% |
| Other | 4% | 4% | 4% |
| Don't remember | 2% | 2% | 3% |
| Base | 1,512 | 977 | 524 |

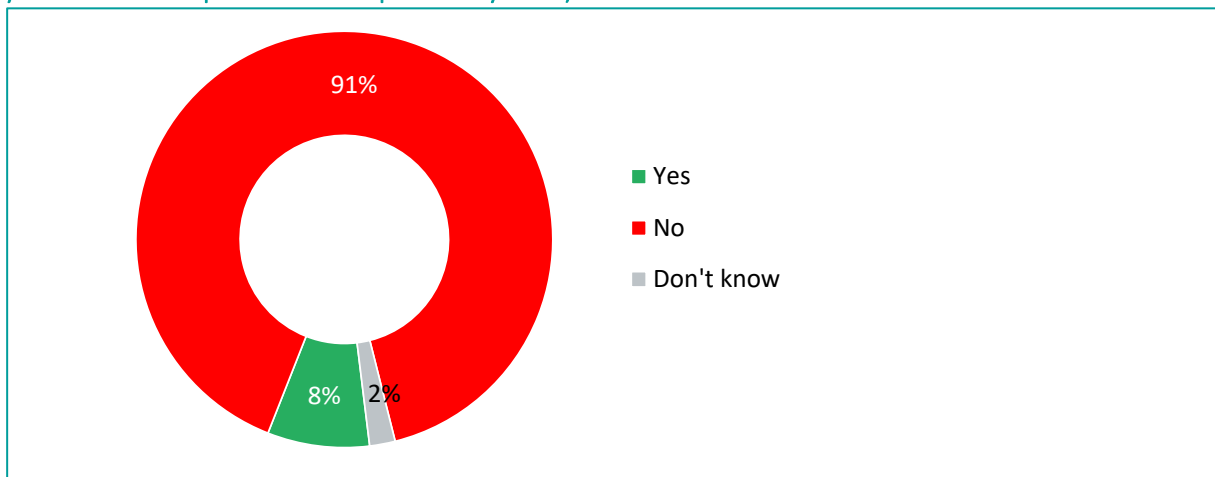
Orange box denotes significant differences between practice type

Complaints

The whole sample were asked if they had thought about making a complaint about their vet or vet’s practice in the past two years.

Eight per cent of the sample had considered making a complaint about their vet practice in the past two years, with this figure significantly higher for those at a large vet group practice (9% compared to 6%).

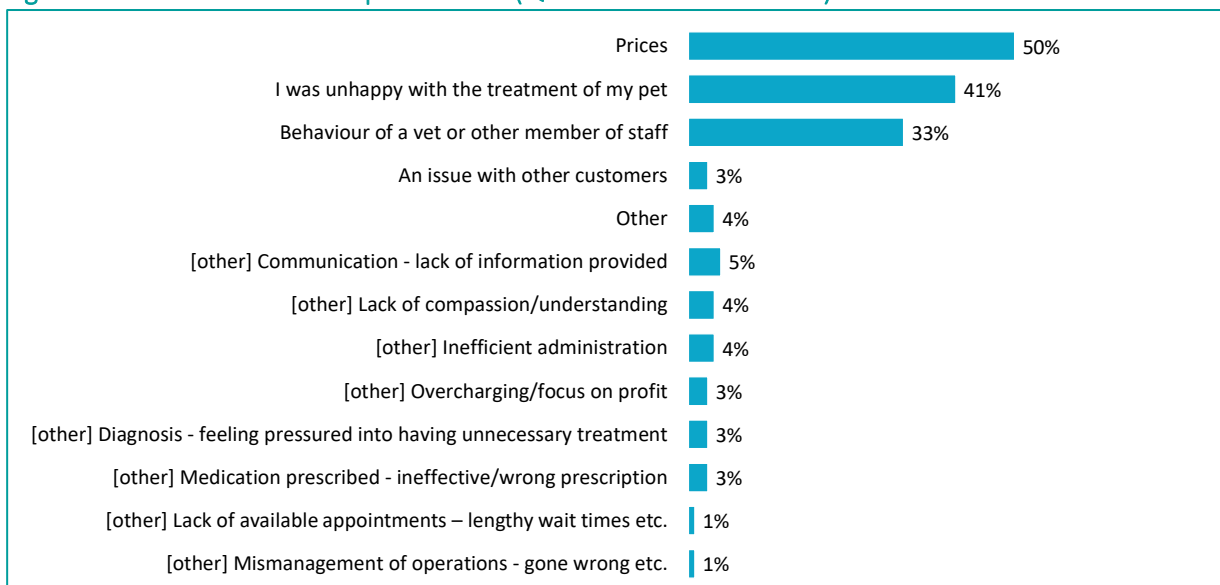
Figure 110: Complaints about vet practice (Q116 Have you thought about making a complaint about your vet or vet’s practice in the past two years?)



Base: All participants: 2,344

When asked what the complaint was about 50% said it was about prices, 41% were unhappy with the treatment of their pet and 33% were concerned with the behaviour of the vet or staff.

Figure 111: What was the complaint about (Q117 What was it about?)



Base: 181 who have thought about making a complaint

The 92% who had not thought about making a complaint about their vet or vet's practice in the past two years were asked what they would be likely to do if there was an issue where they felt they wanted to make a complaint.

- 61% would make the complaint with the vets practice directly (significantly higher for those at an independent practice: 65% vs. 60%).
- 39% said their response would depend on the nature of the complaint
- 26% would research online for the process to make a complaint
- 17% would contact the group who owns the practice, to make a complaint through their system (significantly higher for those at a large vet group practice:19% vs 13%)
- 8% would leave a negative review online (significantly higher for those at a large vet group practice:9% vs 6%).

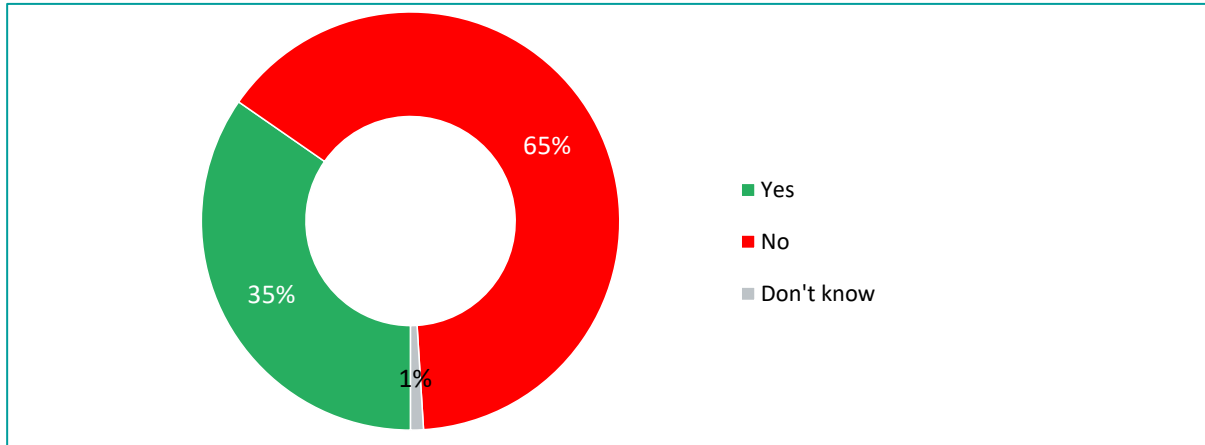
Table 18: What would be done if there was a complaint (Q116A If there was an issue where you felt you wanted to make a complaint, what would you be likely to do?)

| | Total | Total large vet group | Total Independents (non-LVG) |
|--|--------------|-----------------------|------------------------------|
| Make the complaint with the vets practice directly | 61% | 60% | 65% |
| It would depend on the nature of the complaint | 39% | 39% | 40% |
| Research online for the process to make a complaint | 26% | 27% | 23% |
| Contact the group who owns the practices, to make a complaint through their system | 17% | 19% | 13% |
| Leave a negative review online | 8% | 9% | 6% |
| Contact RCVS (Royal College of Veterinary Surgeons) | 6% | 6% | 6% |
| Contact the VCMS (The Veterinary Client Mediation Service) | 4% | 4% | 3% |
| Contact Citizens Advice | 3% | 3% | 3% |
| Not sure | 11% | 11% | 9% |
| Other | 1% | 1% | 1% |
| Base | 2,163 | 1,367 | 771 |

Orange box denotes significant differences between practice type

Of those who thought about making a complaint in the preceding two years, 35% went on to make a complaint.

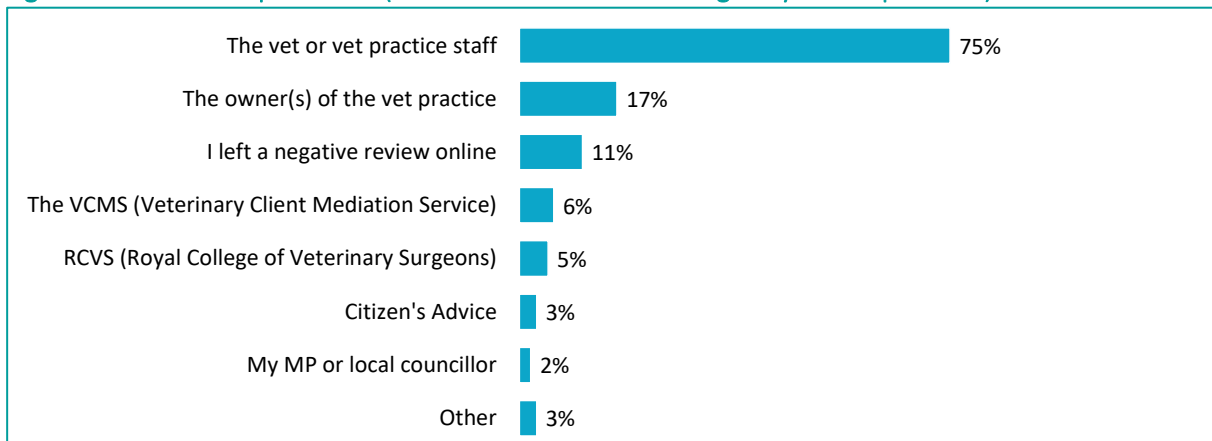
Figure 112: Was the complaint made? (Q117A Did you make the complaint)



Base: 181 who have thought about making a complaint

Those who made a complaint were asked who they complained to. Three quarters of complaints were made to the vet practice staff, 17% were directed to the owner(s) of the practice and 11% left a negative online review. Please note that there was a small base size of 63 for this question and the results should be interpreted with caution.

Figure 113: Who complained to (Q119 Which of the following did you complain to?)

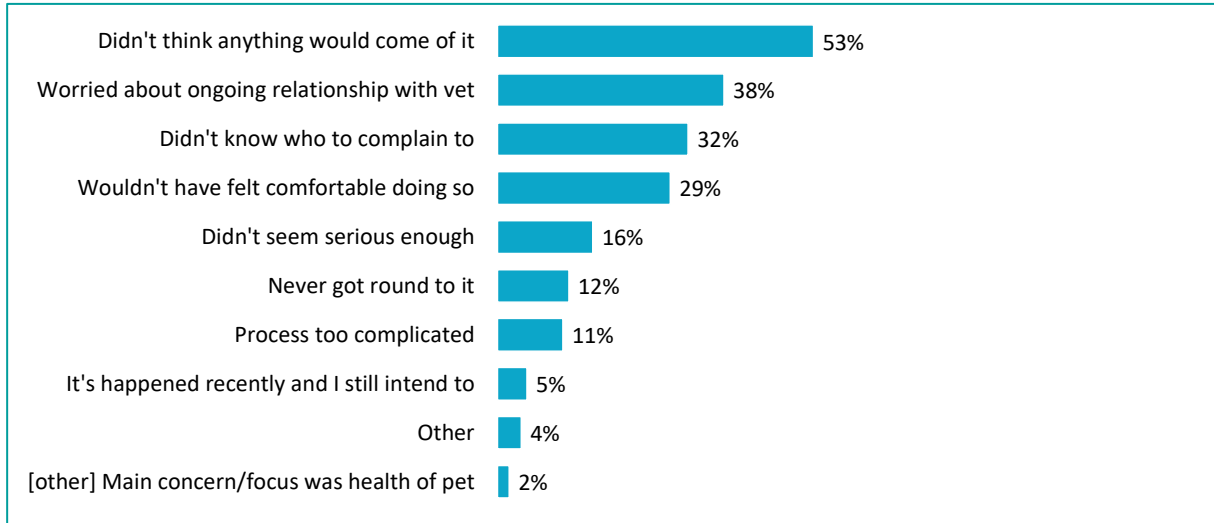


Base: 63 who made a complaint*

*Low base size, please interpret with caution

The 64% who didn't make a complaint were asked why they didn't. Over half (53%) didn't think anything would come of it, 38% were worried about their ongoing relationship with the vet, 32% didn't know who to complain to and 29% didn't feel comfortable doing so.

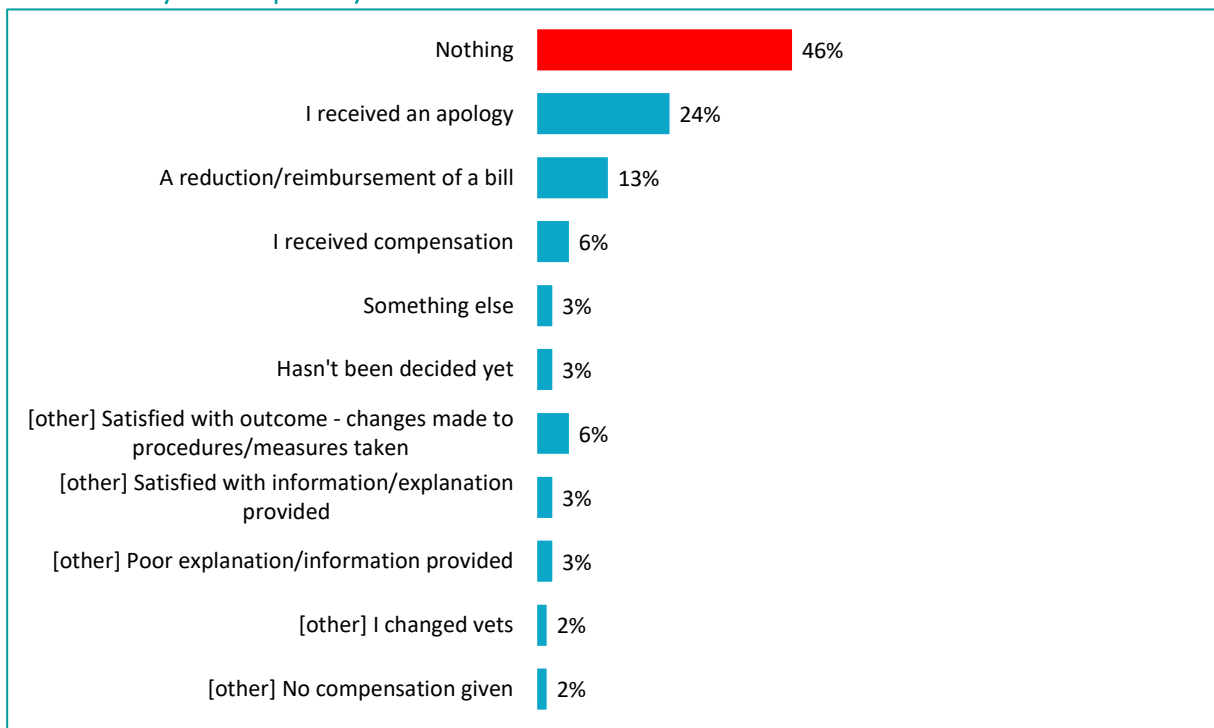
Figure 114: Reasons for not making a complaint (Q118 Why didn't you make a complaint?)



Base: 112 who did not make a complaint

For nearly half of those who made a complaint (46%), nothing happened as a result; 24% received an apology and 13% received a reduction or reimbursement. Please note that there was a small base size of 63 for this question and the results should be interpreted with caution.

Figure 115: What happened after the complaint was raised (Q118c Which of the following has happened as a result of your complaint?)

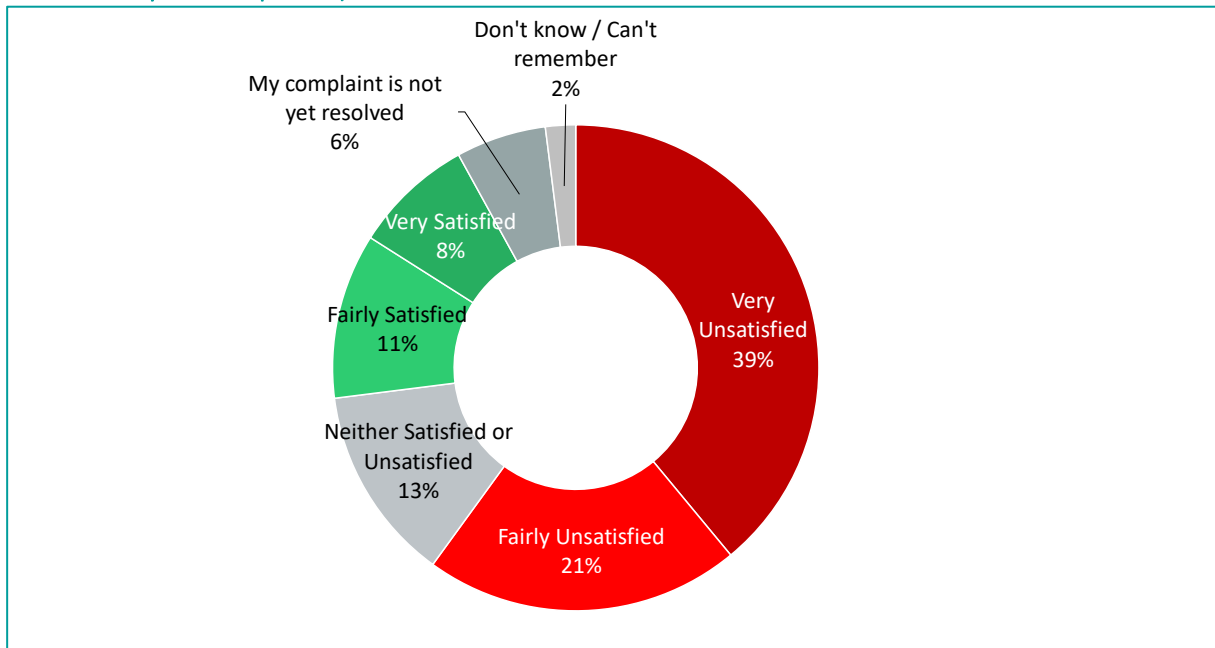


Base: 63 who made a complaint*

*Low base size, please interpret with caution

Among those who made a complaint, 60% were unsatisfied and 19% were satisfied with the outcome of the complaint. 6% said it had not been resolved yet. Please note that there was a small base size of 63 for this question and the results should be interpreted with caution.

Figure 116: Satisfaction with the outcome of the complaint (Q118d How satisfied were you with the outcome of your complaint?)

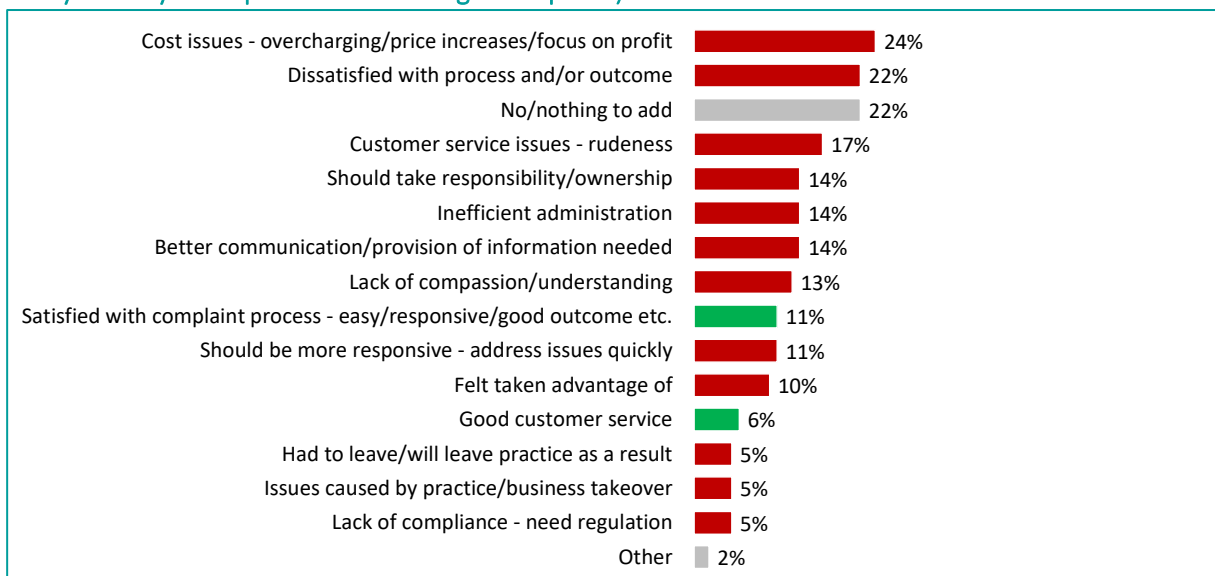


Base: 63 who made a complaint*

*Low base size, please interpret with caution

Those who made a complaint were also asked if there was anything else they would like to share about their experience. This was an open-ended question, and the responses were coded into a code frame. The majority of responses were negative, with 24% related to cost issues, 22% expressing dissatisfaction with the complaint process, and 17% highlighting problems with customer service. Please note that there was a small base size of 63 for this question and the results should be interpreted with caution.

Figure 117: Additional feedback on the complaint process (Q119C Is there anything else you would like to say about your experience of making a complaint)



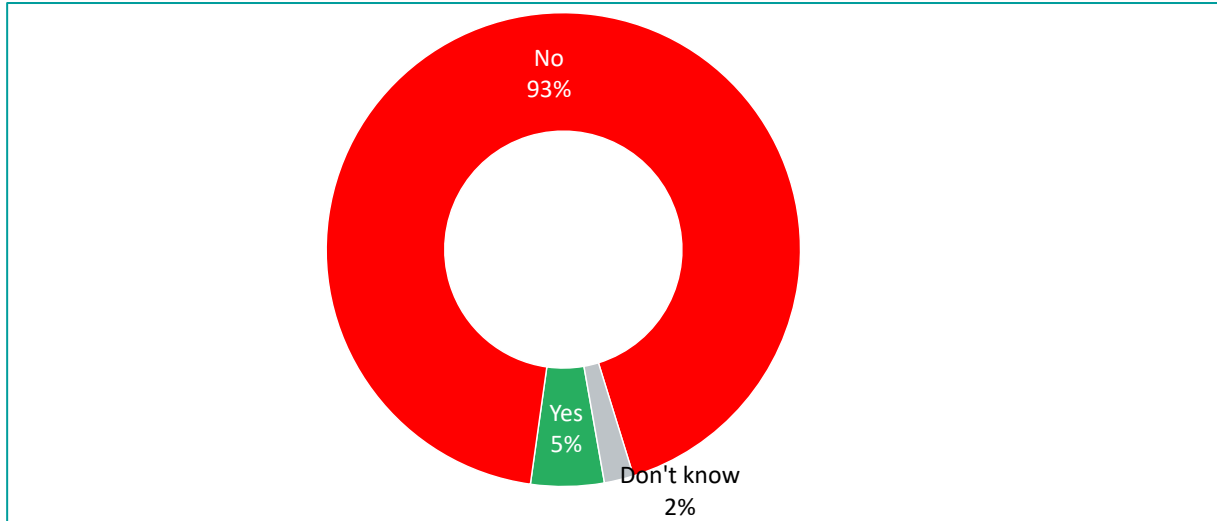
Base: 63 who made a complaint*

*Low base size, please interpret with caution

Veterinary Organisations

Before this survey, 5% of the whole sample were familiar with The Veterinary Client Mediation Service (VCMS) .

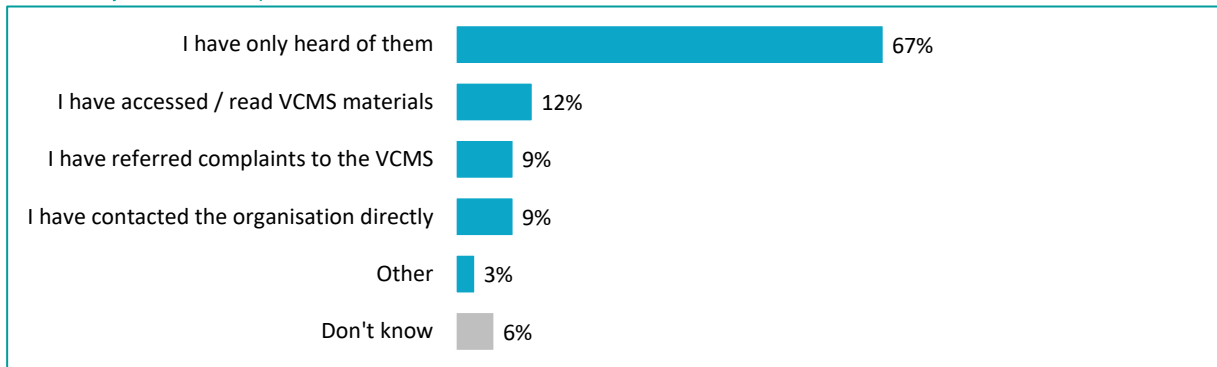
Figure 118: Familiarity with the VCMS (Q120 Before this survey, were you familiar with the VCMS (The Veterinary Client Mediation Service?))



Base: All participants: 2,344

For those who had heard of the VCMS 67% said they had only heard of them and had not engaged with them or their materials.

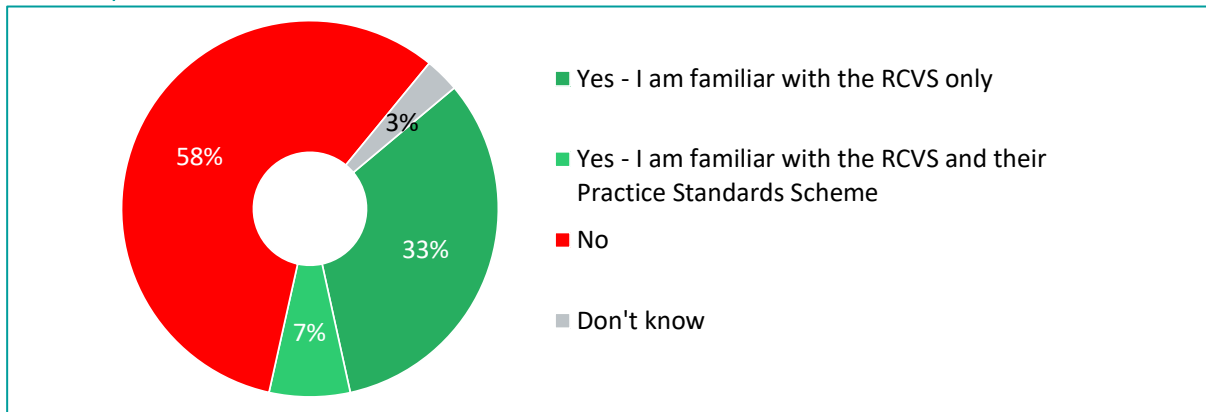
Figure 119: Reasons for being familiar with VCMS (Q121 Which of the following relates to your familiarity with VCMS)



Base: 116 who had heard of VCMS

Before this survey, 33% were familiar with the Royal College of Veterinary Surgeons (RCVS) and 7% were familiar with their Practice Standards Scheme.

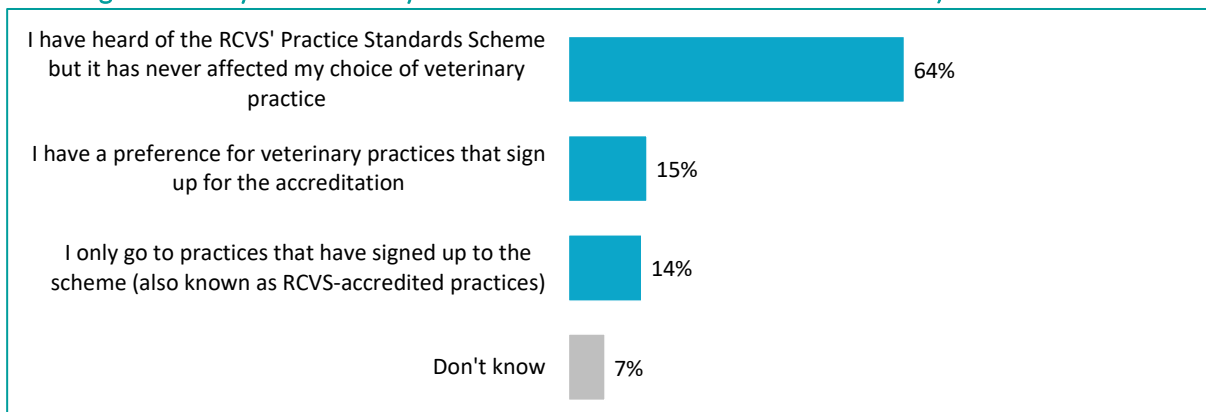
Figure 120: Familiarity with the RCVS and/or their Practice Standards Scheme (Q122 Before this survey, were you familiar with the RCVS (Royal College of Veterinary Surgeons) and/or their Practice Standards Scheme?)



Base: All participants: 2,344

For those who had heard of the RCVS' Practice Standards Scheme 64% said they had heard of it but that it did not affect their choice of practice.

Figure 121: Aspects of familiarity with the RCVS's Practice Standards Scheme (Q123 Which of the following relates to your familiarity with the RCVS' Practice Standards Scheme?)

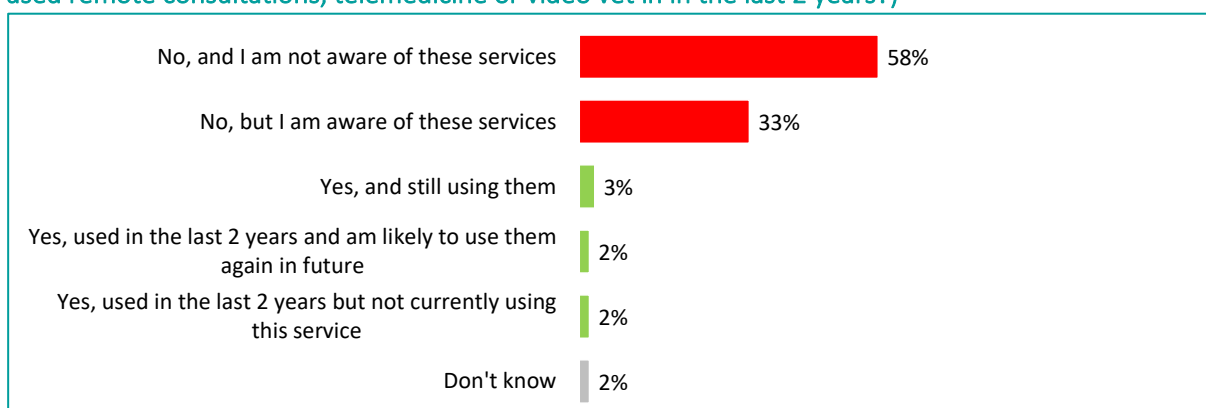


Base: 164 who had heard of RCVS Practice Standards Scheme

Views on in-home consultations/ mobile vets/ remote consultations/ telemedicine

The overall sample was asked if they had used remote consultations, telemedicine, or video vet services in the past two years. Over half (58%) had not used them and were unaware of the services, 33% had not used them but were aware and 7% were using or had used them.

Figure 122: Use of remote consultations, telemedicine or video vet in the last 2 years (Q124 Have you used remote consultations, telemedicine or video vet in in the last 2 years?)



Base: All participants: 2,344

The 7% who were using or had used remote consultations, telemedicine, or video vet services in the past two years were asked what influenced their decision to use the service. Over a quarter (27%) said it suited their work and personal time commitments, 21% noted it was included in their pet insurance and 13% cited the location of their in-person practice as a factor.

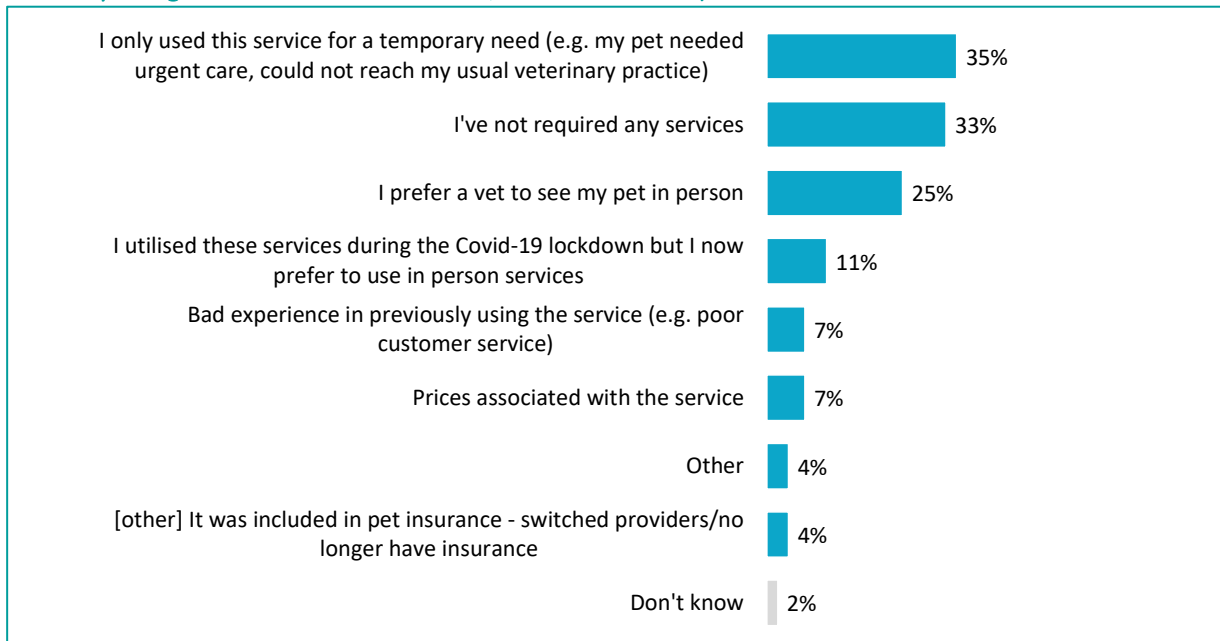
Figure 123: Reasons for using remote consultations, telemedicine or video vet (Q125 What made you decide to use these services?)



Base: 168 who have used remote consultations, telemedicine or video vet in the last 2 years

Those who no longer use remote consultations or telemedicine services were asked why they no longer used them. Over a third (35%) said that they only used it for a temporary need, 33% stated that it was no longer required and 25% preferred to see a vet in person. Please note that there was a small base size of 57 for this question and the results should be interpreted with caution.

Figure 124: Reasons for not using remote consultations and/or telemedicine (Q126 Why are you not currently using remote consultations and/or telemedicine?)

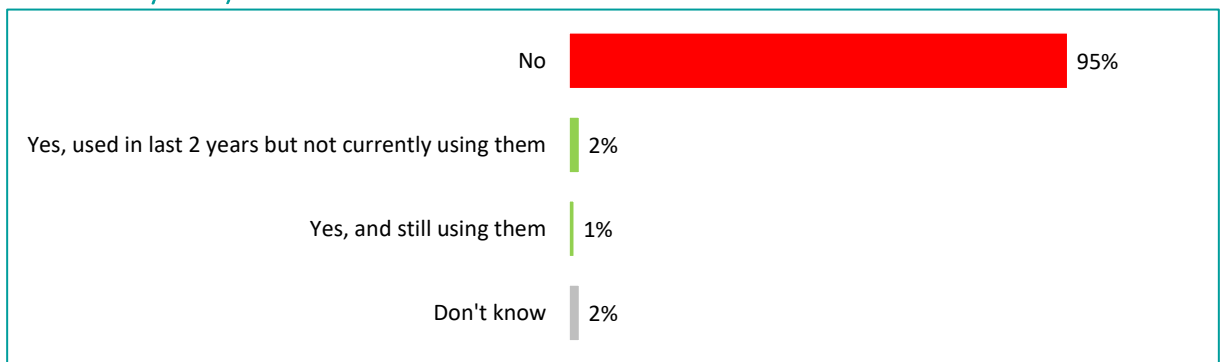


Base: 57 who are no longer using remote consultations, telemedicine or video vet services

*Low base size, please interpret with caution

The overall sample was asked if they had used in-home consultations or mobile vets (where a vet visits the pet at home) in the preceding two years. Almost all (95%) had not used this service.

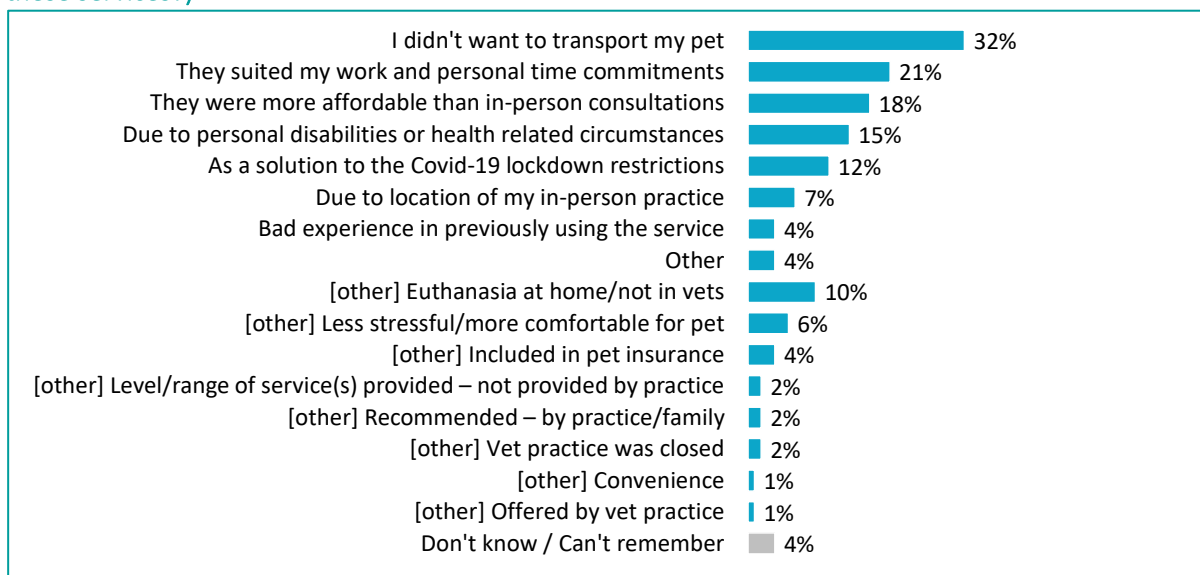
Figure 125: Use of in-home consultations / mobile vets (where a vet visits your pet at home) in the last 2 years (Q127 Have you used in-home consultations / mobile vets (where a vet visits your pet at home) in the last 2 years?)



Base: All participants: 2,344

The 3% who had used in-home consultations or mobile vets in the past two years were asked what influenced their decision to use these services: 32% said they didn't want to transport their pet, 21% noted it suited their work and personal time commitments and 18% found it more affordable than in-person visits. Please note that there was a small base size of 82 for this question and the results should be interpreted with caution.

Figure 126: Reasons for using in-home consultations / mobile vets (Q128 What made you decide to use these services?)

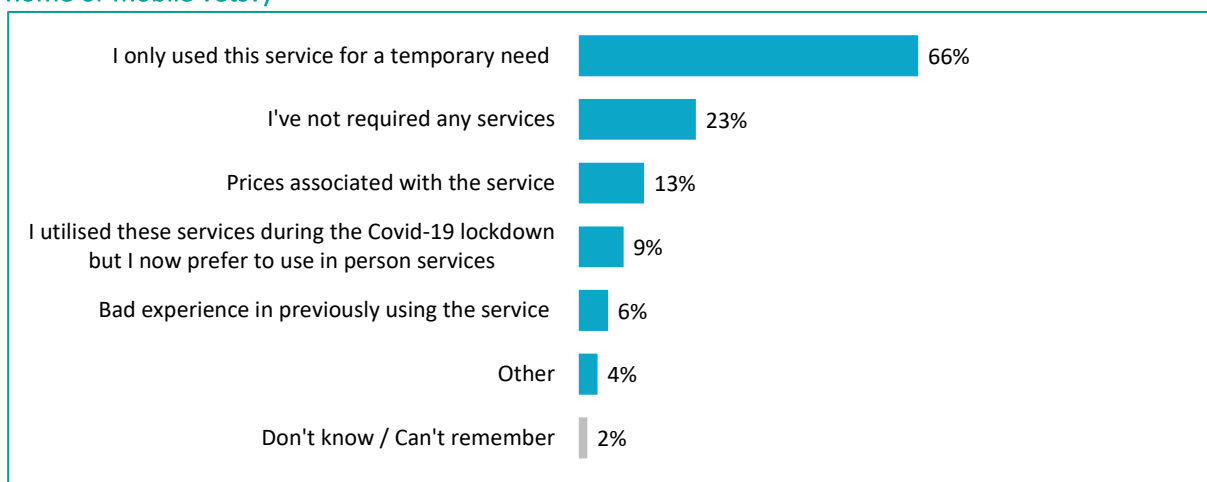


Base: 82 who have used remote consultations, telemedicine or video vet services

*Low base size, please interpret with caution

The 2% who had used in-home consultations or mobile vets in the past two years but no longer did so were asked why they stopped. Two thirds said they only used the service for a temporary need, 23% stated it was no longer required and 13% cited prices as a reason. Please note that there was a small base size of 53 for this question and the results should be interpreted with caution.

Figure 127: Why stopped using in home or mobile vets (Q129 What factors made you stop using in home or mobile vets?)



Base: 53 who are no longer using in-home consultations / mobile vets services

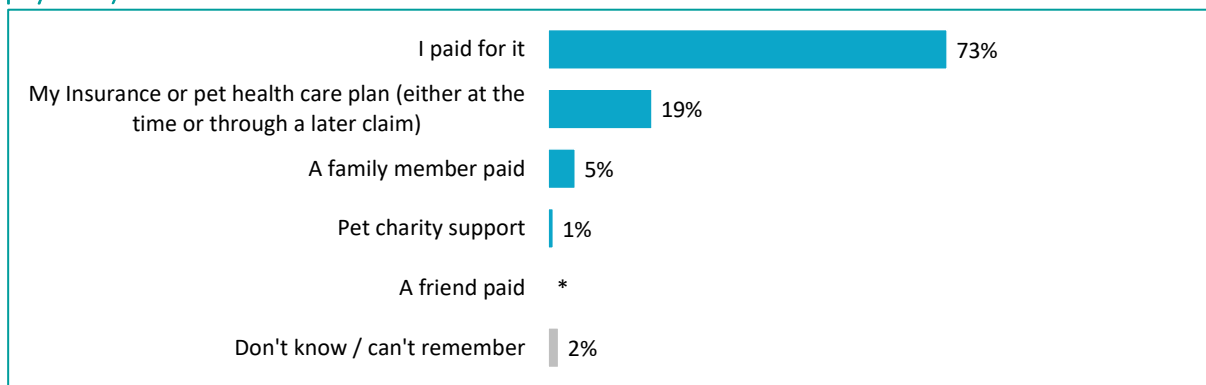
*Low base sizes, interpret with caution

Costs and perceptions of costs

The whole sample was asked to think about their most recent visit to the vets and asked who paid for it. Nearly three quarters (73%) said they paid themselves, which was significantly higher for those at an independent practice (79% compared to 70%). Nearly a fifth (19%) said that the

payment was covered by insurance or a health care plan (significantly higher for those at a large vet group practice: 22% compared to 14%).

Figure 128: Who paid in the most recent visit to the vets (Q130 Thinking again about the most recent visit to the vets, who paid for it? (If the payment was split, please answer for the majority of the payment))

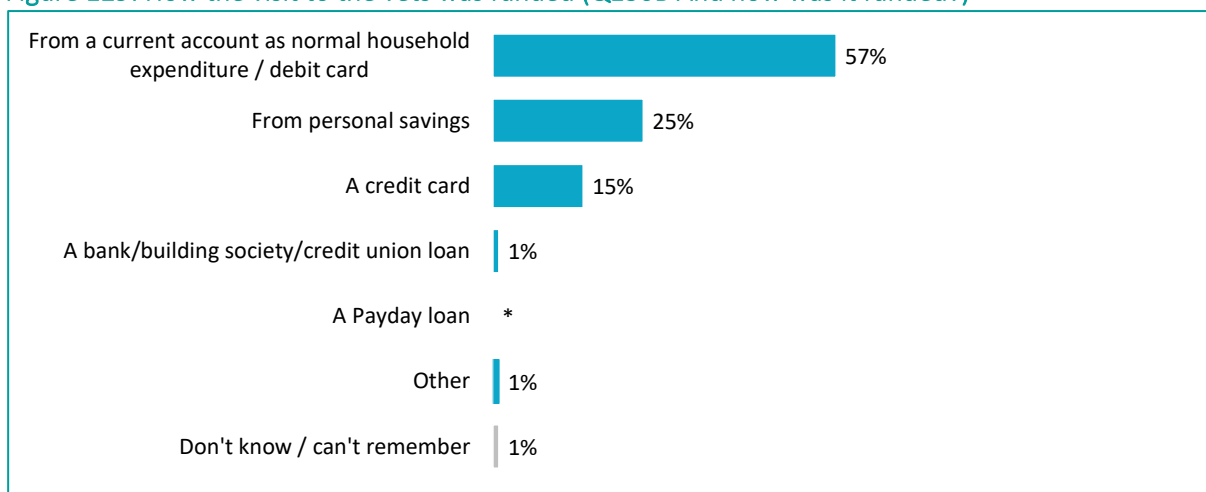


Base: All participants: 2,344

*= less than 0.5%

The 73% who said they paid for their most recent vet visit were asked how they funded it. Over half (57%) used their current account (significantly higher for those at an independent practice: 61% compared to 54%). A quarter used personal savings (significantly higher for those at a large vet group practice: 27% compared to 21%) and 15% used a credit card.

Figure 129: How the visit to the vets was funded (Q130B And how was it funded?)



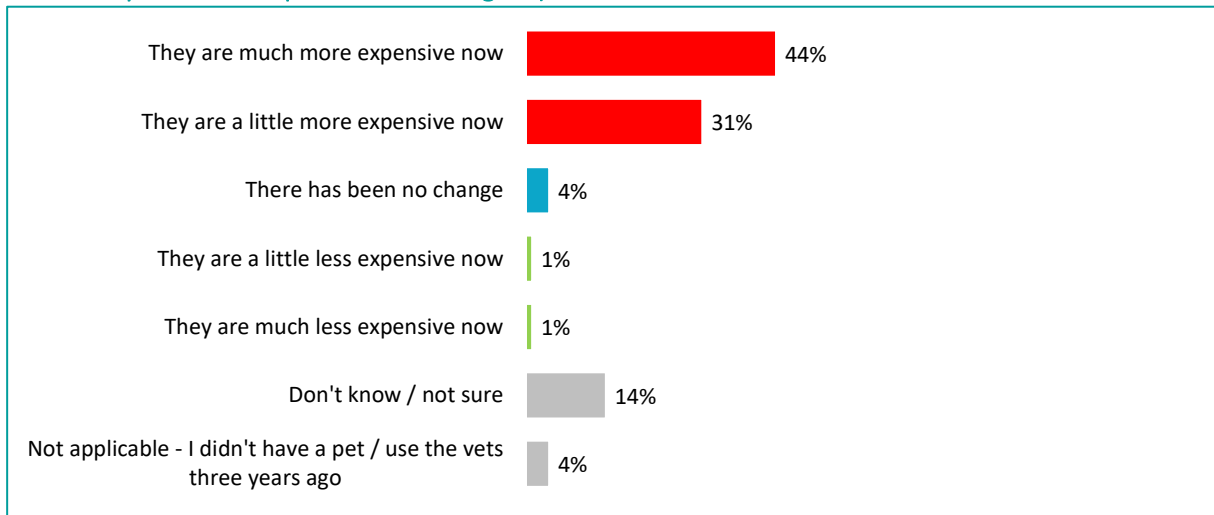
Base: 1,836 who paid for the most recent visit

*= less than 0.5%

Costs and quality compared to three years ago

The whole sample was asked to what extent they thought that vet prices had changed compared to three years ago. Forty four per cent said prices were much more expensive now (significantly higher for those at a large vet group practice: 47% compared to 39%). Thirty one per cent said prices were a little more expensive (significantly higher for those at an independent practice: 34% compared to 29%).

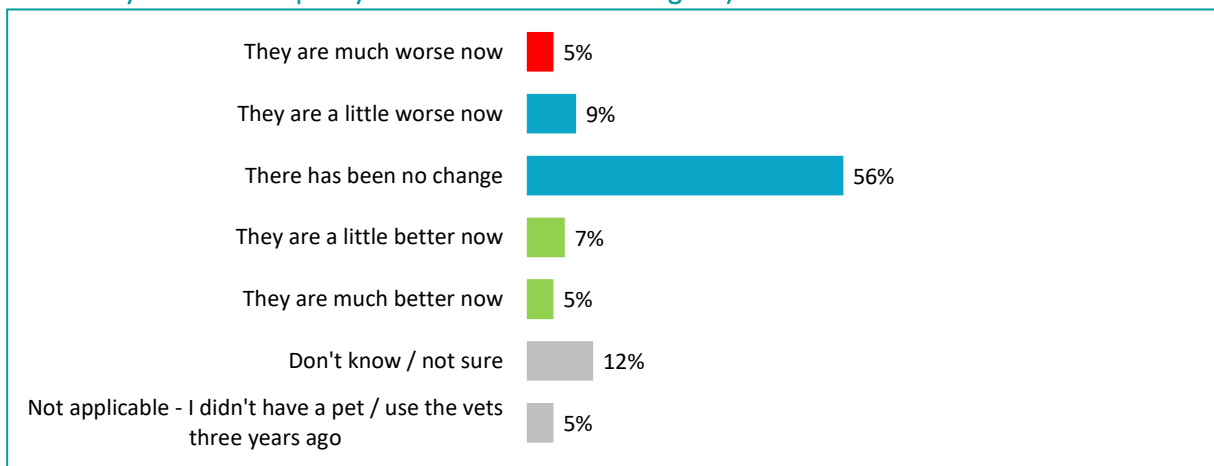
Figure 130: Vet price now vs vet price three years ago (Q131 Compared to three years ago, to what extent do you think vet prices have changed?)



Base: All participants: 2,344

The whole sample was then asked to what extent they thought the quality of vet services had changed compared to three years ago. Five per cent said services were much worse now (significantly higher for those at a large vet group practice: 6% compared to 2%). Nine per cent said services were a little worse (again significantly higher for those at a large vet group practice: 11% compared to 6%). Seven per cent said services were a little better (significantly higher for those at an independent practice: 8% compared to 6%).

Figure 131: Quality of vet services now and three years ago (Compared to three years ago, to what extent do you think the quality of vet services have changed?)



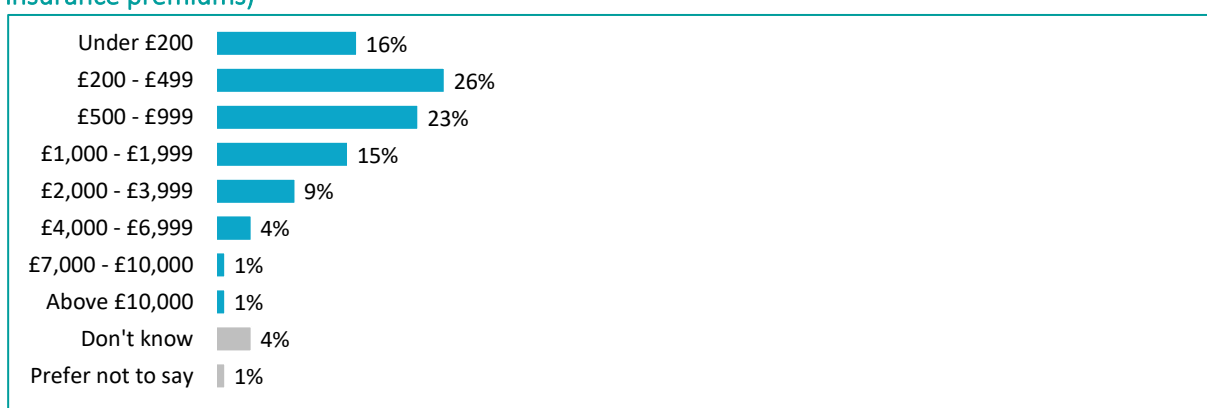
Base: All participants: 2,344

Spend on vet services and how much paid by insurance

The whole sample was asked how much they spent in total on vet services over the last two years:

- 16% spent less than £200
- 26% spent £200-£499
- 23% spent £500-£999
- 30% spend over £1,000

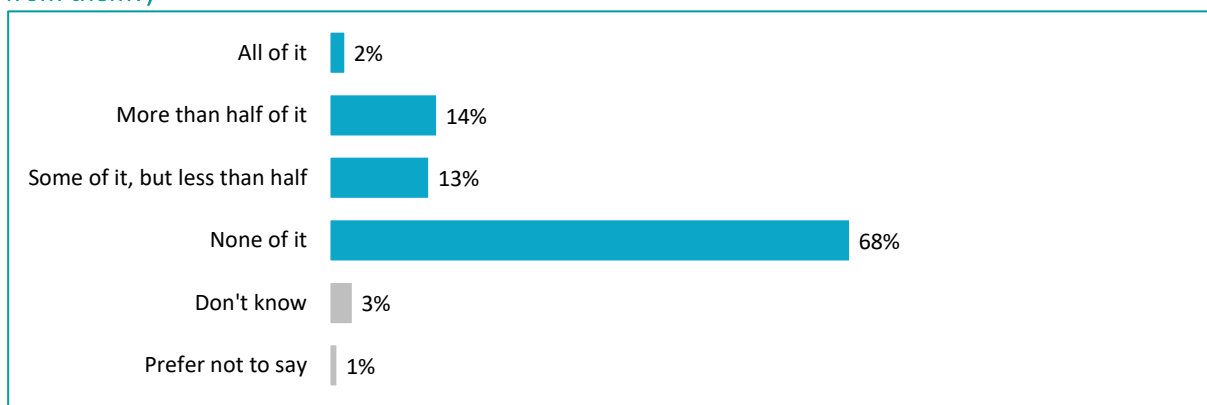
Figure 132: Spending in total on vet services over the last two years (Q133 Approximately how much have you spent in total on vet services over the last two years? Please include expenditure on pet health care plans and the cost of any services or treatment paid for by insurance, but don't include the cost of insurance premiums)



Base: All participants: 2,344

The 95% who provided a cost estimate were asked approximately how much of this was paid for by insurance (either directly billed to the insurance company or reclaimed from them). Sixty eight per cent said none of it was covered, 14% said more than half was covered, and 13% said less than half was covered.

Figure 133: How much of the total spend was paid for by insurance (Q133A And approximately how much of this was paid for by insurance (either directly billed to your insurance company, or reclaimed from them?))



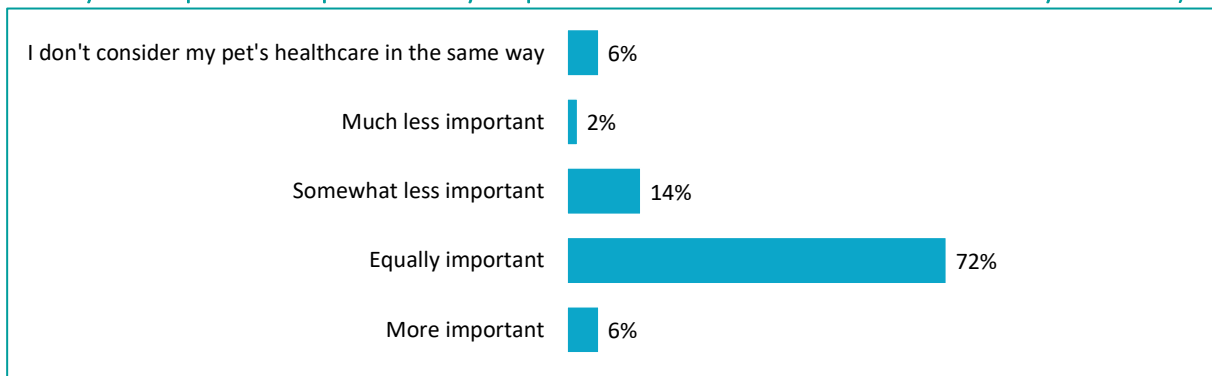
Base: 2,217 who gave an approximate spend

3.14 Pet Ownership

Importance of pet’s healthcare and financing pet care

When asked how they would compare the importance of their pet’s healthcare to that of a family member, 72% said it was equally important, 14% said it was somewhat less important, and 6% said it was more important (significantly higher for those at a large vet group practice: 7% compared to 5%).

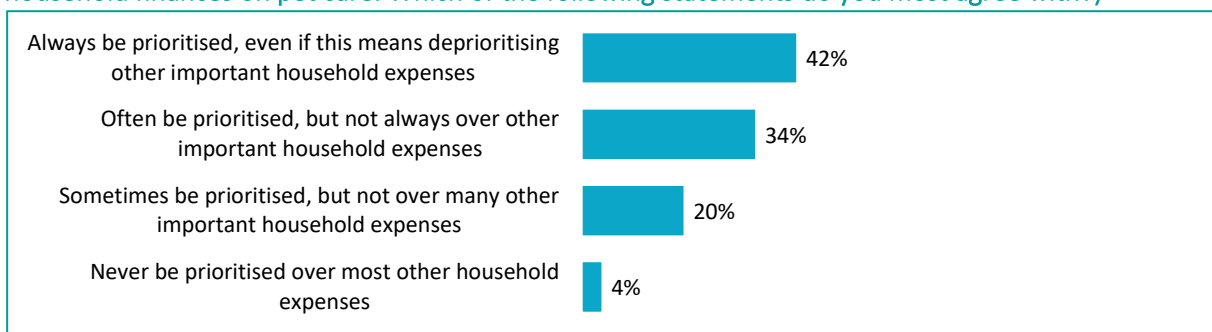
Figure 134: The importance of pet’s healthcare compared to a family member’s healthcare (Q134 How would you compare the importance of your pet’s healthcare to the healthcare of a family member?)



Base: All participants: 2,344

Participants were shown a series of statements about choices in household finances for pet care and asked which they agreed with. Forty two per cent said pet care should always be prioritised, even if it means deprioritising other important household expenses. Thirty four per cent said it should often be prioritised, but not always over other important household expenses (significantly higher for those at an independent practice: 37% compared to 33%).

Figure 135: Household finances on pet care (Q131A Pet owners make choices about how to spend household finances on pet care. Which of the following statements do you most agree with?)



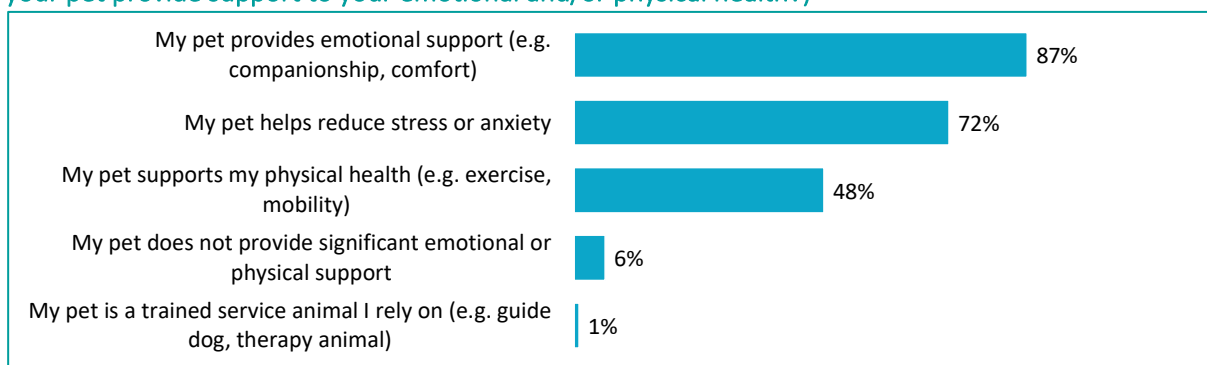
Base: All participants: 2,344

Emotional support

The whole sample was asked in what ways, if any, did their pet provide support to their emotional and/or physical health. For 87%, the participants’ pet provided emotional support (e.g. companionship, comfort) – significantly higher for those at an independent practice: 89% compared to 86%. For 72%, their pet helped reduce stress or anxiety, and for 48%, their pet

supported their physical health – significantly higher for those at an independent practice: 52% compared to 46%.

Figure 136: Emotional support and/or physical health support from pet (Q135 In what ways, if any, does your pet provide support to your emotional and/or physical health?)



Base: All participants: 2,344

Final comments

All were asked if there was any additional information they would like to provide in relation to their experience with vets. This was an 'open' question and the responses have been coded to a code frame.

The main responses were concerned with cost issues, for example overcharging or a focus on profit with 42%. Just over a quarter (26%) were positive about the vets and/or staff and 19% mentioned good customer service.

Figure 137: Additional information in relation to experience with vets (Q136 Finally, is there any additional information you would like to tell us about in relation to your experiences with vets before we finish the survey?)



Base: All participants: 2,344



APPENDICES

Appendix A

Additional Information



Validation, Verification and Monitoring

Our research is subjected to rigorous quality control procedures to ensure accuracy and reliability.

Data Verification

- Thoroughly review all questionnaires for completion before analysis.
- Verify the accuracy of frequencies, data tabulations, and raw data.

CAPI Validation

- Validate 10% of face-to-face interviews through a combination of methods (telephone, online and SMS).

CATI Validation

- Listen in on 5% of telephone interviews to ensure quality.

Data Validation – All Quantitative Responses

- Subject all interviews to a computer edit with appropriate logic checks to enhance data accuracy.
- Subject all responses to a thorough 100% manual edit, conducted by trained coders.
- Utilise SPSS for a detailed analysis of standard questions.

Data Monitoring

- Conduct meticulous report edits to ensure data accuracy.
- Identify and rectify missing values.
- Apply forced edits for logical consistency and verify its effectiveness through subsequent data runs.
- Develop and present a comprehensive client-approved codeframe for open or 'other' questions

Tabulations and Data Outputs Verification

- Perform various checks, including accuracy of tables, abbreviations, base size, cross breaks, derived data, subgroups, net totals, weighting, frequencies, spelling, and statistical analysis.

Appendix B

Questionnaire



Vets Customer survey



Competition & Markets Authority

This survey is designed to get your views on veterinary services. It is being undertaken by Accent, an independent research agency on behalf of the CMA (Competition and Markets Authority).

Anyone completing the full survey (which will take about 20 minutes, depending on your answers) will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to the RSPCA. Details on how to claim your voucher are given at the end of the survey.

Before you start the survey though, we need to ask you a number of questions to check that you are eligible to take part in this research.

Taking part in this survey is entirely voluntary as explained in our letter sent to you by post, which also contained other important information that we encourage you to read.

As the CMA and Accent Research will be processing your data, you have certain rights over that data, including the right to complain. The CMA is the data controller. For more information about your rights, please see the CMA's privacy notice at www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter. Accent Research (www.mrs.org.uk/researchcompany/accent) will keep your data until the final determination of the CMA's investigation and will then delete it.

It might be helpful to look at communications (letters, emails, bills) with your vet to answer some of the more factual questions.

QA Please enter the **Unique ID** that is printed on the top right of your letter.

Please enter the **PIN** number that is printed on the top right of your letter.

Screener and profiling questions

Q0 Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **THANK AND CLOSE**

Q1. How old are you?

[SINGLE CODE]
 Less than 18[THANK AND CLOSE]
 18-24
 25-34
 35-44
 45-54
 55-64
 65-74
 75 or over
 Prefer not to say

We will now ask some questions about household pets. By household pets we mean small animals such as dogs, cats, rabbits, guinea pigs, hamsters etc. and **not** large animals, such as horses, ponies, cows, sheep and goats, or chickens.

Q2. Can you tell me which, if any, household pets you currently own, or have owned within the past 2 years [add in ('since month/year')]?

[MULTI CODE]

Cat(s)
 Dog(s)
 Rabbit(s)
 Guinea pig(s)
 Gerbil(s)
 Hamster(s)
 Rat(s)
 Mouse/mice
 Fish (kept in a bowl, tank or pond at home)
 Birds (kept in a cage or aviary at home)
 Reptile/amphibian e.g. snake, lizard, tortoise, frog
 Chinchilla(s)
 Ferret(s)
 Other [please specify]
 I haven't owned any pets in the past 2 years [thank and close]

[IF ONLY CODE 9, THANK AND CLOSE]

Q3. And how many of each of these pet(s) have you had in the past 2 years [add in ('since month/year')]?

[SHOW LIST OF THOSE SELECTED FROM Q2 WITH DROP DOWN NUMBER]

Q4. *As an adult*, how many years **in total** have you been a pet owner?

[SINGLE CODE]
 Less than a year
 1-3 years
 4-10 years
 11-20 years
 21-30 years
 Over 30 years
 Don't know

The following questions relate to your use of vets. We are interested in your own personal experience, there are no wrong or right answers. As a reminder, all responses are kept anonymous.

Q5. When, if at all, was the last time you **personally** took your pet(s) to the vet (i.e. you went to a vet practice)?

[SINGLE CODE, ROTATE SCALE]

Never

More than 5 years ago

Between 3 and 5 years ago

Between 2 and 3 years ago

Between 1 and 2 years ago

6-12 months ago

Less than 6 months ago

Don't know/prefer not to say [THANK AND CLOSE]

Q6. [IF NOT TAKEN PET TO VET IN LAST 2 YEARS (CODES 1-4)]
Why have you not visited a vet in the last few years? Select all that apply

[MULTI-CODE, RANDOMISE RESPONSES]

I did not feel that my pet needed it during this period

I don't trust the veterinary sector

I have had bad experiences with vets previously

Visiting the vet is too expensive

My pet finds visits to the vets too stressful

I contacted my vets and didn't need to visit in person

Animals are able to recuperate naturally, without much human intervention

My pet(s) was taken to the vets by someone else

I found information I needed online

I had an online consultation

A mobile vet visited me

Other [please specify]

Don't know/prefer not to say

[THANK AND CLOSE ALL THOSE WHO HAVE NOT USED VET IN LAST 2 YEARS]

Q7. **SKIP IF ONLY ONE CODE SELECTED AT Q2** Since [insert month for last 24 months] which of these pet(s) [PULL IN PETS FROM Q2] have you used a vet for?

Cat(s)

Dog(s)

Rabbit(s)

Guinea pig(s)

Gerbil(s)

Hamster(s)

Rat(s)

Mouse/mice

Fish (kept in a bowl, tank, or pond at home)

Birds (kept in a cage or aviary at home)

Reptile/amphibian e.g. snake, lizard, tortoise

Chinchilla(s)

Ferret(s)

Other [please specify]

[IF ONLY 9 THANK AND CLOSE]

Q8. And **since [insert month for last 24 months]**, how many times have you taken your pet(s) to the vets? Please mention all the times you took your pet(s) to the vet even if it was for the same issue. Please type in the total number of vets visits next to each pet type. If you do not recall exactly, an estimate is fine.

[ONLY SHOW PETS SELECTED AT Q7]

Cat(s)

Dog(s)

Rabbit(s)

Guinea pig(s)
 Gerbil(s)
 Hamster(s)
 Rat(s)
 Mouse/mice
 Fish (kept in a bowl, tank or pond at home)
 Birds (kept in a cage or aviary at home)
 Reptile/amphibian e.g. snake, lizard, tortoise, frog
 Chinchilla(s)
 Ferret(s)
 Other [please specify]

Your Veterinary Practice

The following questions will ask you about your current vet practice. By this we mean the vet you would normally take your pet to rather than, for example, a specialist vet you have visited for a specific reason. If you are currently registered with more than one vet practice, for example for different animals, please answer in relation to the vet practice that you would use most frequently. If you no longer have a pet, please answer in relation to the vet practice you used most recently when you had a pet.

Q9. What is the name, location and (if known) postcode of your current vet practice?

Your practice will not know that you have participated in this survey

Name of vet practice _____

Location (please be as specific as you can e.g. local area if within a large town or city) _____

Postcode (if known) _____

Q10. And is this a charity vet practice, for example run by an organisation such as the PDSA or RSPCA which help with the full or partial costs of treatment?

Yes [THANK AND CLOSE]

No

Don't know

QSCOPED

[IF IN SCOPE] Thank you, you are eligible to take part in the full survey, and we would be very grateful if you would complete it. Upon completion of the survey you will become eligible for the £10 high street voucher.

[IF NOT IN SCOPE] Thank you, due to the responses you have given, we have established that you are not eligible to take part in the full survey. Thank you again for your interest in the survey.

Q11. How long have you been with this vet practice?

Less than 1 year

Between 1 and 2 years

Between 2 and 5 years

Between 5 and 10 years

Over 10 years [GO TO Q29]

IF Q11 = 1,2,3 or 4 (same filter for the rest of this section)

Q12. At which point in your pet ownership did you originally choose this vet practice? [SINGLE CODE,]

In advance of my pet needing any particular treatment

For routine/non-emergency treatment (for example vaccinations, neutering, general health check etc)

For urgent or emergency treatment (for example unwell or injured pet)

I can't remember

Don't know

[ASK ALL]

Q12A Did you move to your current practice from another vets practice? [SINGLE CODE]

Yes

No

Don't know / can't recall

[ASK ALL]

Q12B And which of the following best describes how you chose your current vet practice?

[SINGLE CODE]

[SINGLE CODE, ROTATE ORDER 1-3]

I considered three or more vet practices when deciding what practice to use

I considered two vet practices when deciding what practice to use

I only considered one vet practice

Don't know / can't recall

[IF Q12B=3 ONLY CONSIDERED ONE]

Q12C Did you feel you had a choice of practices to compare?

[SINGLE CODE, ROTATE ORDER 1-2]

Yes

No

Don't know/can't remember

[IF Q12C = 2 NO]

Q12D What was the main reason why you didn't feel that you had a choice?

[MULTICODE, RANDOMISE 1-3]

There was only one vet practice in my area

I was unhappy with or had heard negative things about the alternative vet practice(s) in my area

There was only one practice that offered the type of treatment or services I needed (for example if your pet needed specialist treatment or you had a type of pet that other vets didn't treat)

Other (specify)

Don't know / can't recall

[IF Q12B=3]

Q12E Why did you only consider one vet practice? Select all that apply.

[MULTICODE, RANDOMISE 1-7]

I could not find enough information about different vet practices

I didn't think there would be much difference between practices

I thought most practices charged very similar prices

Difficult to compare practices/Unsure which information to use to compare

I didn't have time to compare

I just didn't think about comparing

I was happy with my choice

Other (specify)

Don't know / can't recall

Q13. Still thinking about your current vet practice [or pipe in Vet name from q9], thinking back to when you registered with them, why did you [choose this vet practice, rather than another vets?/ Q12B=3, pick this vet practice?]

Please select **all** that you considered when making your decision.

[MULTI CODE, RANDOMISE, FIX 20-22]

Location

Parking and/or public transport

Recommendation (e.g. friends, family etc)

Online Reviews

Opening hours

Appointment availability

Prices for consultations

Prices for vaccinations and medicines

Services offered

A special offer

Part of a large group of practices

Independent vet practice not part of a large group
 The practice, staff or website made a good impression
 Other (specify)
 Don't know/can't remember
 I didn't have any choice

[IF MORE THAN ONE RESPONSE AT Q13]

Q14. And what was the **main** reason? [SINGLE CODE, SHOW ALL THOSE SELECTED AT Q13]

Don't remember
 Don't know

[IF NOT 'Prices for consultations' or 'Prices for vaccinations and medicines' AT Q13]

Q15. Did you find out information about the prices of your current vet practice before registering with it?

Yes
 No
 Don't know / can't recall

[IF Q15 = 1, YES]

Q16. How did you find out information about the prices? [SINGLE CODE, RANDOMISE 1-4]

On the vet practice website
 Word of mouth/recommendation
 By phoning the vet practice
 In-person visit to the vet practice
 Don't know / can't recall
 Other, please specify

[IF 'Prices for consultations' or 'Prices for vaccinations and medicines' AT Q13]

Q17. You said that you considered prices. How did you find out information about the prices of your current vet practice when deciding whether to choose it? [SINGLE CODE, RANDOMISE 1-4]

On the vet practice website
 Word of mouth/recommendation
 By phoning the vet practice
 In-person visit to the vet practice
 I didn't find out the prices when deciding
 Don't know / can't recall
 Other, please specify

[IF Q15 = 1, OR Q17 = 1,2,3,4,6,7]

Q18. What type of price information did you find out about when choosing your practice? **Please select all that apply.** [MULTICODE, RANDOMISE 1-6]

Routine consultation
 Vaccinations
 Neutering
 Emergency consultation
 Prescription
 Flea and/or worming medicines
 Other medicines
 Other (specify)
 Don't know / Can't recall

[(IF Q15 = 1, OR Q17 = 1,2,3,4,6,7). DON'T ASK IF Q12B =3 ONLY CONSIDERED ONE PRACTICE]]

Q19. When looking at prices of your vet practice, did you compare these to other practices?

[SINGLE CODE]

Yes

No

Don't know / Can't recall

[IF Q19 = 2, NO]

Q19b Why did you not compare prices to any other practices?

I didn't feel I needed to

I meant to, but didn't get round to

I wanted to but found it difficult to find information

Other (specify)

Don't know / Can't recall

[IF Q19 = 1, YES – DID COMPARE WITH AT LEAST ONE OTHER PRACTICE]

Q20. How easy or difficult was it to find comparable information on pricing for different practices?

[SINGLE CODE, ROTATE SCALE 1-5]

Very easy

Fairly easy

Neither easy nor difficult

Fairly difficult

Very difficult

Don't know / Can't recall

[IF 'SERVICES OFFERED' AT Q13]

Q21. You said one of the reasons you chose your current vet practice was the services it offered. How did you find out information about the services offered by your current vet practice when deciding whether to choose it?

[RANDOMISE 1-5, MULTI-CODE]

On the vet practice website

Word of mouth/recommendation

By phoning the vet practice

Using the Royal College of Veterinary Surgeons' Find a Vet service

In-person visit to the vet practice

Other, please specify

Don't know / can't recall

[IF 'BECAUSE IT WAS AN INDEPENDENT VETS PRACTICE THAT WAS NOT PART OF A LARGE GROUP' Q13]

Q22. You said one of the reasons you chose your current vet practice was due to it being an independent vet practice that was not part of a large group. Why was this important to you?

[RANDOMISE 1-8, MULTI-CODE]

I am more likely to see the same vet whenever I visit

No particular reason, I just prefer to be with an independent practice rather than one that is part of a group

I trust their advice more

They take into account more what is right for me and my pet

It's easier to get appointments

They provide a higher overall quality of service

They offer a wider range of services

Their prices for services and treatments

Other, please specify

Don't know / can't recall

[IF 'BECAUSE IT WAS PART OF A LARGE GROUP Q13]

Q23. You said one of the reasons you chose your current vet practice was because it was part of a large group of practices. Why was this important to you?

[RANDOMISE 1-8, MULTI-CODE]

I am more likely to see the same vet whenever I visit

No particular reason, I just prefer to be with a practice that is part of a group than an independent practice

I trust their advice more

They take into account more what is right for me and my pet

It's easier to get appointments

They provide a higher overall quality of service

They offer a wider range of services

Their prices for services and treatments

Other, please specify

Don't know / can't recall

Q24. DELETED

Q25. DELETED

Q26. DELETED

Q27. DELETED

Q28. DELETED

[IF Q11 = 5 'OVER 10 YEARS' OR IF 12A=NO]

Q29. If you wanted to change vet practices, do you feel that you would be able to do so?

[SINGLE CODE]

Yes

No

Don't know

[IF Q29=1, Yes]

Q30. How easy or difficult do you think it would be to change vet practices?

Very easy

Fairly easy

Neither easy nor difficult

Fairly difficult

Very difficult

Don't know

[IF Q29 = 2 or Q30 = 4, 5 DIFFICULT

Q31. Why do you think it would be [DIFFICULT (Q30=4,5) / NOT POSSIBLE (Q29=2)] for you to change vet practices? [MULTICODE, RANDOMISE 1-6]

There are no alternative vet practices in my area

My pet health care plan requires me to remain with my current vet practice

I would need to build a new relationship with different individuals (vets, practice managers, nurses)

It would be difficult to switch medical records between vet practices

The only other alternatives would be a large group practice, and I prefer an independent practice

The only other alternatives would be an independent practice, and I prefer a large group practice

Other, please specify

Don't know

Q32. DELETED

Q33. [IF Q12A = 1, YES, CHANGED PRACTICE]

You said earlier that you had moved to your current practice from another practice. Why did you decide to leave your previous vet practice?

[MULTICODE, RANDOMISE 1-12]

I moved home

I was unhappy with the quality of care of my previous vet practice or individual vet

My preferred vet was no longer available/no longer worked there

I wanted a wider range of services

Previous vet practice closed down

I wanted cheaper prices

I wanted to take advantage of an offer

My pet had specific needs that my previous vet practice couldn't meet

The ownership of the practice changed

I wanted to move to an independent vet practice (rather than part of a large group with many practices)

I wanted to move to a vet practice that was part of a large group (rather than an independent practice)

I was unhappy with the advice/recommendations of my previous vet practice or individual vet

Another reason (specify)

Don't know / can't recall

Awareness of practice ownership

[ASK ALL]

Q34. Do you know whether your current vet practice is part of a large group of many practices or whether it is an independent vet practice or part of a small group of practices? [SINGLE CODE]

It is part of a large group of vet practices (IVC Evidensia, CVS Group, Pets at Home, (including Vets4Pets, Companion Care), Linnaeus, Medivet or VetPartners)

It is an independent vet practice

It is part of a small group of practices

Don't know / can't recall

[IF Q34 = 1, PART OF A LARGE GROUP]

Q35. And do you know what the name of the large group is? [SINGLE CODE, RANDOMISE 1-6]

IVC Evidensia

CVS Group, also known as the Vet Collection

Pets at Home (includes Vets4Pets and Companion Care)

Linnaeus

Medivet

VetPartners

Other (please specify)

Don't know / can't recall

Relationship between pet owner and vet

[ASK ALL] FLIP SCALE ORDER BETWEEN PARTICIPANTS

Q36. Still thinking about your current vet practice [or pipe in Vet name from q9] Please indicate the extent to which you agree or disagree with the following statements.

- My vet focuses on the highest standard of care for my pet's health.
- I trust my vet practice to offer the fairest prices for pet treatment.
- My vet considers my own personal circumstances when deciding which treatment options to offer me (e.g. any factors affecting my financial circumstances, personal health, ability to travel)

- My vet takes the time to clearly explain various treatment options to me
- I clearly understand the options presented to me by my vet and I can make informed decisions
- I have the capability to challenge my vet's treatment advice, if needed.

Completely disagree
 Somewhat disagree
 Neither agree nor disagree
 Somewhat agree
 Completely agree
 Don't know
 Not applicable

Recent visits to the vets

Q42. Earlier in this questionnaire, you said you visited vets about [X] times since [insert month for last 24 months], thinking about **all** these visits, what treatments and or services have you used? **Please select all that apply.** [MULTICODE, RANDOMISE 1-13]

Regular/routine health check
 Consultation to diagnose or treat a condition (e.g. if your pet was unwell or injured)
 Medication (routine or non-routine)
 Vaccinations (e.g. first or annual vaccinations)
 Microchipping
 Surgery (excluding neutering)
 Neutering
 Diagnostic tests (such as x-rays, biopsy, urinalysis and blood tests)
 Emergency care out of regular practice hours
 End of life services / my pet was put to sleep
 Prescriptions (no medication given, just the prescription)
 Dental work
 Animal healthcare certificate (previously called pet passport)
 Other services provided by the vet (e.g. Nail clipping, pet weight management advice)
 Other, please explain:
 Don't know / Can't recall

For the following set of questions we would like you to think about your **most recent visit** to your usual veterinary practice. By this we mean the vet you would normally take your pet to rather than, for example, a specialist vet you have visited or been referred to for a specific reason. If you no longer have a pet, please answer in relation to the vet practice you used most recently when you had a pet.

Q42A (Q43)¹³. Was this most recent visit to your current practice, [pipe in name from q9 above], or a different one?

Yes, the same as my current practice
 No, a different one
 Don't know, can't remember.

[IF Q42A(Q43) = no, a different one]

Q42B(Q44)What is the name, location and (if known) postcode of the vet practice you most recently visited?

Name of vet practice _____

¹³ Highlighted question numbers in brackets (Q43) are shown when there are discrepancies between the CMA questioning and the Accent programmed questioning which arose during the design stage.

Location (please be as specific as you can e.g. local area if within a large town or city) _____

Postcode (if known) _____

[IF Q42 = 1 – 15]

Q43. (Q46) You said you had visited the vet for the following reason(s) since [insert month for last 24 months]. Thinking about the most recent visit to [INSERT VET PRACTICE FROM Q9/Q42B(Q44)], what was this for?

SHOW ALL OF THOSE SELECTED AT Q42 [MULTICODE]

[copy from Q42]

None in the last two years to this vet

Other, please explain:

Don't know / Can't remember

[IF Q43(Q46)= All EXCEPT 'NONE IN THE LAST TWO YEARS TO THIS VET']

Q44. (Q47) And when was this most recent visit [SINGLE CODE]

Less than 3 months ago

3 – 6 months ago

7-12 months ago

Between 1- 2 years ago

Longer than 2 years ago

Don't remember

[IF Q44(Q47)=1,2,3,4,6]

Q45. (Q48) And which of these best describes the age of the pet you took to the vet for this most recent visit? [SINGLE CODE]

My pet was very young/young

My pet was an adult

My pet was old/elderly

Don't know/can't remember/not sure

[IF Q44(Q47)=1,2,3,4,6]

Q46. (Q49) And was your most recent trip to the vets a one-off visit or was it part of a number of visits to the vet, for example to treat an illness or injury your pet had? [SINGLE CODE]

A one-off visit

A regular/routine check-up

Part of a series of visits to **diagnose** particular illness or injury

Part of a series of visits to **treat** a particular illness or injury

Don't know / Can't remember

Most recent vet visit

[IF Q44(Q47)=1,2,3,4,6]

Q47. (Q50) Still thinking about your most recent visit, did the vet practice provide you with any information about the price of the [TEXT FILL FROM Q43(Q46)] **in advance**?

Yes – provided with an estimate

Yes - provided an estimated price range

Yes – provided with a fixed price

No – I was not provided a price

No – I was not provided a price because the service was included in my pet health plan or insurance

Don't know / Can't remember

[IF Q47(Q50)=1-3]

Q48. (Q51) And *how* was this advance pricing information provided? **Please select all that apply**

[MULTICODE, RANDOMISE 1-4]

A written overall price was provided

An itemised pricing list of the services / treatments was provided

Someone talked to me about the price

A standard price list was in the practice or on their website

Other [Please specify]

None of the above

Don't know / can't remember

IF Q47(Q50) = 1,2,3 PROVIDED WITH AN ESTIMATE OR A FIXED PRICE]

Q49. (Q52) Once you received information about price did you feel like you could decline the treatment and consider alternative options? [SINGLE CODE, ROTATE ORDER, FIX 'NO FOR ANOTHER REASON' BELOW OTHER NO RESPONSEs]

No, part of the treatment or diagnosis had already occurred so it would have been impossible to go with a different option

No, I was already in the clinic and it would have been difficult to go with a different option (e.g. due to time being needed to search for alternatives)

No, because I would have needed to change vets / have another consultation to get an alternative diagnosis or treatment option

No, for a different reason (specify)

Yes, and I went with a different option

Yes, but I did not feel the need to go with an alternative option

Don't know / can't remember

[IF Q44(Q47)=1,2,3,4,6]

Q52B Did the vet give you any other options of different ways to treat your pet? [SINGLE CODE]:

Yes, but did not suggest one in particular

Yes, and recommended one in particular

No, only one option was given.

No, a second consultation was needed / suggested (either with the same or a different vet)

Other (please describe)

Don't know/can't remember

Q49B (Q52c)[IF Q44(Q47)=1,2,3,4,6] Please indicate which of the below information the vet gave you during the discussion of diagnosis or treatment options [MATRIX STYLE QUESTION, SINGLE CODE EACH]:

- The potential outcomes (e.g. likelihood of success, risks of side effects, any implication for you on aftercare)
- A range of options, including more complex (e.g. using specialist equipment or complex surgery) and more simple options (e.g. simple surgery such as amputation) including doing nothing
- The price of each treatment/diagnostic option
- Information on what may be covered by your insurance policy
 - Yes
 - No
 - Don't remember

Q50. (Q53)[IF Q44 (Q47)= 1,2,3,4,6] Did you do any of your own research on the treatments offered and/or look for alternatives which the vet did not suggest? [SINGLE CODE, ROTATE 1-2 AND 3-5]

Yes, and found an alternative for me/my pet

Yes, but did not find an alternative

No, because I did not realise I could

No because I trusted the vet to make the right decision for my pet
 No, because I was unable to do so (e.g. limited time available, lack of knowledge of what to search)
 Don't know / Can't remember

[IF 47(Q50)= 1,3 PROVIDED WITH AN ESTIMATE OR A FIXED PRICE]

Q50Ab (Q53b) How did the actual price you paid compare to the price you were presented with in advance of the treatment? [SINGLE CODE, ROTATE SCALE ORDER]

The actual price was much less
 The actual price was a little less
 The actual price was exactly the same
 The actual price was a little more
 The actual price was much more
 Not applicable (costs covered by insurance/ Health Care Plan)
 Don't know / Can't remember

[IF Q47(Q50)=2 PROVIDED WITH AN ESTIMATED PRICE RANGE]

Q51. (Q54) How did the actual price you paid compare with the price range you were presented with in advance of the treatment? [SINGLE CODE, ROTATE SCALE ORDER]

The actual price was below the bottom of the range
 The actual price was within the range
 The actual price was above the top of the range
 Not applicable (costs covered by insurance/Health Care Plan)
 Don't know / Can't remember

Q52.

Q53.

Q54.

[IF Q44(Q47)=1,2,3,4,6]

Q55. And overall, which of the following best describes what you thought about the price you paid for [TEXT FILL FROM Q43(Q46)] compared to what you expected (before receiving any price estimate or information)? [SINGLE CODE, ROTATE SCALE ORDER]

The price was a lot less than I was expecting
 The price was a little less than I was expecting
 The price was about what I was expecting
 The price was a little more than I was expecting
 The price was a lot more than I was expecting
 Not applicable, I did not pay for the vet visit
 I did not have any expectations
 Don't know / Can't remember

[IF Q44(Q47) = 1,2,3,4,6]

Q55b On this occasion, how satisfied were you overall with: [SINGLE CODE EACH. RANDOMISE STATEMENTS]

- The information and / or advice you received
- The care given to your pet
- The quality of service you received
- The outcome of the visit
- The cost of the service
 - Very satisfied
 - Fairly satisfied

Neither satisfied or unsatisfied
 Fairly unsatisfied
 Very unsatisfied
 Not applicable
 Don't know / don't remember

Regular check up

ALL

Q56. Roughly how many, if any, regular check-up visits have you made in total to the vets in the last two years? [SINGLE CODE, ROTATE SCALE ORDER]

None

1

2

3

4 or 5

6 – 10

More than 10

Don't know / can't remember

[IF q56 = code 2-7 (1 OR MORE)] (script excluded DKs as well)

Q57. Please indicate the extent to which you agree with the following statements regarding your decision to take your pet to regular / routine health checks.

I attend regular health checks because ...

[SINGLE CODE FOR EACH, RANDOMISE STATEMENTS]

- I have a strong ongoing relationship with my individual vet
 - I get reminders from my vet practice to attend regularly
 - My insurance covers the (full or partial) price of regular check-ups
 - It's part of my Pet Health Plan
 - Of financial considerations (i.e. regular check-ups may pick up on potential issues earlier and save money on complex treatments)
 - It's the right thing to do for my pet
 - My pet has an ongoing medical condition requiring regular checks
- Completely disagree
 Somewhat disagree
 Neither agree nor disagree
 Somewhat agree
 Completely agree
 Not applicable

Referrals

ASK ALL

Q58. Sometimes your vet will recommend that your pet is seen by another vet (e.g. to receive an expert opinion or a specialist treatment). We refer to these as 'referral visits'. Have you had any referral visits to another vet **in the last 2 years?** [MULTI-CODE]

Yes, to a vet in the same practice

Yes, to a vet in a different practice

I am scheduled to attend a referral visit but this hasn't happened yet

No, I was recommended a referral visit but didn't accept this recommendation **EXCLUSIVE**

No, I haven't been recommended a referral visit **EXCLUSIVE GO TO Q75A**

Don't know/can't remember **EXCLUSIVE GO TO Q75A**

[ASK IF Q58 = 4]

Q58A You said that your vet had recommended a referral that you had not taken up. Why was that? [MULTI-CODE]

- The price of the referral was too much
- The potential costs following a referral were uncertain
- The time I'd have to wait for an appointment
- I was happy with an alternative treatment option staying with my vet
- I didn't feel that I had enough information
- I decided it wasn't necessary
- Other (please specify)
- Don't know/can't remember

[IF Q58=1,2]

Q59. What was this for (please answer about the most recent if more than one)?

[INSERT RESPONSE LIST – ALL OF CODES 1-15 TICKED IN Q42]

- Other (please specify)
- Don't know/can't remember

If Q58=1,2

Q60. And how long ago was that? [SINGLE CODE]

- Less than 3 months ago
- 3 - 6 months ago
- 7 - 12 months ago
- Between 1 and 2 years ago
- More than 2 years ago
- Don't remember

For the next set of questions we want you to think about the most recent time your usual vet recommended that you see another vet.

[IF Q58=1,2]

Q60A Was your usual vet on that occasion your current vet, [name from q9]?

- Yes
- No
- Don't know

[IF Q60A NO AND Q42A(Q43)=NO]

Q60B Was your usual vet on that occasion the vet you last visited, [name from q42B(Q44)]?

- Yes
- No
- Don't know

[IF q60a = no AND (IF ASKED) Q60B = No]

Q60C What is the name, location and (if known) postcode of the vet practice?

Name of vet practice _____

Location (please be as specific as you can e.g. local area if within a large town or city) _____

Postcode (if known) _____

[IF Q58=1,2,3,4]

Q61. For the next set of questions we want you to think about when your usual vet recommended that you see another vet. On that occasion, did your usual vet give you any options of different ways to diagnose/treat your pet? [SINGLE CODE]:

Yes, but did not suggest one in particular

Yes, and recommended one in particular

No, only one option was given.

No, a second consultation was needed / suggested (either with the same or a different vet)

Don't know/can't remember

[IF Q58 = 1,2,3,4]

Q62. Did your vet suggest your pet needed further care or monitoring before the referral visit?

Yes

No

Don't remember

[IF Q58= 1,2,3,4]

Q63. Still thinking about when your usual vet recommended seeing another vet, please indicate which of the below information your vet gave you during the discussion of diagnosis or treatment options [MATRIX STYLE QUESTION, SINGLE CODE EACH]:

- The potential outcomes (e.g. likelihood of success, risks of side effects, any implication for you on aftercare)
- The price of a consultation
- The price of each treatment/diagnostic option
- A range of options, including more complex (e.g. using specialist equipment or complex surgery) and more simple options (e.g. simple surgery such as amputation) including doing nothing
- Information on what may be covered by your insurance policy
- How quickly you could be seen at the location you were being referred to

Yes

No

Don't remember

Not applicable

[IF Q63, 2 or 3= i YES - PROVIDED WITH PRICE]

Q64. And in which of the following ways did you receive the information on price? [MATRIX STYLE QUESTION, SINGLE CODE EACH]

- Written down and specifically for my pet (e.g. via email/text, on a consent form or an invoice)
- Seen from a standard price list in the practice or on their website
- Spoken verbally (e.g. during the consultation or on the phone)

Yes

No

Can't Remember

[IF Q63=2 or 3= i YES - PROVIDED WITH PRICE]

Q65. Once you knew the price, did you feel like you could decline the referral and consider alternative options? [SINGLE CODE, ROTATE 1-2]

No

Yes

Don't know / can't remember

[IF Q58, 1,2,3,4]

Q66. Did the vet give you any options over where you could go for your referral? [SINGLE CODE, ROTATE SCALE]

- No, this was done within the practice and I wasn't given any options to have it done elsewhere
- No, the vet referred me to a specific other vet/location/clinic without mentioning any alternative options
- Yes, the vet mentioned at least two vets/locations I could go to and let me decide
- Yes, the vet mentioned at least two vets/locations and suggested I go to one of them in particular
- Don't know / Can't remember

[IF Q58 = 1,2,3,4]

Q67. Did you do any of your own research on the treatments offered and/or look for alternatives which your vet did not suggest? [SINGLE CODE, ROTATE 1-5]

- Yes, and found an alternative for me/my pet
- Yes, but did not find an alternative
- No, because I did not realise I could
- No because I trusted my vet to make the right decision for my pet
- No, because I was unable to do so (e.g. limited time available, lack of knowledge of what to search)
- Don't know / Can't remember

[IF Q58 = 1,2]

Q68. Did you accept the vet's referral recommendation and proceed with the referral? [SINGLE CODE]

- Yes, I went to the vet/location that the vet recommended
- Yes, I went to a vet/location that was from a list of options from my vet
- No, I went to a vet/location that I found myself that wasn't given as an option to me by the vet
- Other (specify)
- Don't know/can't remember

[IF Q68 = 1]

Q69. Why did you accept the vet's recommendation? [MULTICODE, RANDOMISE 1-5]

- I trusted the vet
- There was no reason not to
- I didn't know how to get a second opinion
- I did not feel confident in challenging the recommendation
- I confirmed the recommendation with my own research
- Other (specify)
- Don't know / Can't remember

[IF Q68= 2,3]

Q70. How did you decide where to go to get your pet treated/diagnosed? **Please select all that apply** [MULTICODE, RANDOMISE 1-9]

- Location (close to where you live)
- Word of mouth recommendation (e.g. friends, family etc)
- Based on the advice of my vet
- Online Reviews from other pet owners
- Opening hours (e.g. open in the evenings, weekends) and / or out of hours (emergency) cover offered
- Availability of an appointment
- They specialise in my type/breed of pet
- Positive impression of the staff or practice
- The prices of services and treatments
- Other (specify)
- Don't know / Can't remember

[IF Q68=1,2]

Q71. Did the vet give you any information about the experience or specialism of the vet you were referred to? [SINGLE CODE]

- Yes, I got the information I wanted
- Yes, but I would have liked more information
- No and I would have liked information
- No but I did not want or need information
- Don't know / Can't remember

[IF Q58=1,2,3,4]

Q72. Did you get any information about the options available in written form from your vet? [SINGLE CODE]

- Yes
- No, but I did get information verbally
- No, I did not get any information either written or verbally
- Don't know / Can't remember

[IF Q58=1 or 2 AND Q63 i=2 or 3 = Yes and Q68 = 1,2,3]

Q73. For the following questions, think about once you went for the referral for [PULL FROM LIST IN Q59].

You said you were indicated a price of the referral consultation/treatment/diagnostics before going ahead with it. How did the actual price you eventually paid compare to the price that you were given in advance? [SINGLE CODE, ROTATE SCALE ORDER]

- The actual price was much less
- The actual price was a little less
- The actual price was exactly the same
- The actual price was within the range given in advance
- The actual price was a little more
- The actual price was much more
- Don't know / Can't remember

[IF Q58=2 - TREATED SOMEWHERE OTHER THAN MAIN PRACTICE]

Q74. Do you know who owns the practice you were referred to? [SINGLE CODE]

- Yes, it belongs to the same company as my usual practice
- Yes, it belongs to a different company from my usual practice
- No, I do not know who owns the practice I was referred to

[ASK IF Q68 =1, 2,3]

Q75. Thinking about the visit to the vets your pet was referred to, how satisfied were you overall with: [SINGLE CODE EACH. RANDOMISE STATEMENTS]

- The information and / or advice you received
- The care given to your pet
- The quality of service you received
- The outcome of the visit
- The cost of the service
 - Very satisfied
 - Fairly satisfied
 - Neither satisfied or unsatisfied
 - Fairly unsatisfied
 - Very unsatisfied

Not applicable
Don't know / don't remember

Diagnostics

[IF Q42 DOES NOT INCLUDE 8 (Diagnostic tests)]

Q75A Thinking now about all the times that you have visited vets in the last two years, [has your pet/have any of your pets] had any diagnostic tests (such as x-rays, biopsy, urine analysis or blood tests)?

Yes
No
Don't know

[IF Q42 = 8 DIAGNOSTICS OR Q75A = YES]

Intro text: You said your pet has had a diagnostic test, such as an x-ray, biopsy, urinalysis or blood test, in the last 24 months. For the next set of questions we want to ask you about the most recent visit to a vets in which your pet had a diagnostic test.

Q75B Was this at your current vets, [name from q9]?

Yes
No
Don't know

[IF Q75B=NO AND Q42A(Q43)=NO]

Q75C Was it at [name at Q42B(Q44)]?

Yes
No
Don't know

Q76. When did the most recent diagnostic test take place? [SINGLE CODE]

Less than 3 months ago
3 - 6 months ago
7 - 12 months ago
Between 1 and 2 years ago
Longer than 2 years ago
Don't remember

Q77. Before this most recent diagnostic test(s) was performed, please indicate which of the following occurred [SINGLE CODE]:

Your vet indicated there were a range of possible diagnostic test options, and did not recommend one in particular
Your vet indicated there were a range of possible diagnostic tests options, and recommended one or some in particular
Your vet performed a diagnostic test(s), with no other options provided or applicable
Don't know / can't recall

[IF Q77=1 or 2, gave options]

Q78. Please indicate which of the below information your vet gave you during the discussion of the diagnostic test(s) [MATRIX STYLE QUESTION, SINGLE CODE EACH]:

- The potential benefits and consequences from the test (e.g. likelihood of resolving the issue, risks of side effects, any implication for you on aftercare)
- The risks associated with not conducting the test

- The price or price range of each diagnostic test option
- Information on what may be covered by your insurance policy
- The timescale for the test(s) and results
 - Yes
 - No
 - Don't remember
 - Not applicable

[IF Q78 3 = i YES Gave the price]

Q79. Please indicate whether you received the information on the price in the following ways:
[MATRIX STYLE QUESTION, SINGLE CODE EACH]

- Written down and specifically referring to option(s) for my pet (e.g. via email/text, on a consent form or an invoice)
- Seen from a standard price list in the practice or on their website
- Spoken verbally (e.g. during the consultation or on the phone)
 - Yes
 - No
 - Can't Remember

[IF Q78 3 = i YES]

Q80. Once you knew the estimated price, did you feel like you could decline the diagnostic test or consider alternative options? [SINGLE CODE, ROTATE 1-2]

- No
- Yes
- Don't know / can't recall

[IF Q42 = 8 DIAGNOSTICS OR Q75A = YES]

Q81. Why did you decide to proceed with the diagnostic test(s)? Please select all that apply
[MULTICODE, ROTATE 1-6]

- I trusted the vet
- It was an emergency
- There was no reason not to
- I didn't know how to get a second opinion
- I did not feel confident in challenging the recommendation
- I confirmed the need for the test(s) with my own research
- Other (specify)
- Don't know / Don't remember

[IF Q42 = 8 DIAGNOSTICS OR Q75A = YES]

Q82. Did the diagnostic test(s) take place within the practice?

- Yes
- No
- Don't know / Can't remember

[IF Q82=2 No, the diagnostic test did not take place in the practice]

Q83. Did the vet give you options for where to have the diagnostic test(s)? [SINGLE CODE]

- No, the vet referred me to a specific other practice or clinic without mentioning any alternative options
- Yes, the vet mentioned at least two options I could go to and let me decide
- Yes, the vet mentioned at least two options and suggested I go to one of them in particular
- Don't Know / Don't remember

[IF Q78 - 3 = i YES Given price]

Q84. How did the price information you were given compare to the actual cost when it was done? [SINGLE CODE, ROTATE SCALE ORDER]

- The actual cost was much less
- The actual cost was a little less
- The actual cost was exactly the same
- The actual price was within the range given in advance
- The actual cost was a little more
- The actual cost was much more
- Don't know / Can't recall

[IF Q42 = 8 DIAGNOSTICS OR Q75A = YES]

Q85. And overall, which of the following best describes what you thought about the price you paid, compared what you would have expected before visiting the vets? [SINGLE CODE, ROTATE SCALE ORDER]

- The cost was a lot less than I was expecting
- The cost was a little less than I was expecting
- The cost was about what I was expecting
- The cost was a little more than I was expecting
- The cost was a lot more than I was expecting
- I didn't have any expectations
- Don't know / Can't recall

[ASK Q42 = 8 DIAGNOSTICS OR Q75A = YES]

Q85B On this occasion, how satisfied were you overall with: [SINGLE CODE EACH. RANDOMISE STATEMENTS]

- The information and / or advice you received
- The care given to your pet
- The quality of service you received
- The outcome of the visit
- The cost of the service
 - Very satisfied
 - Fairly satisfied
 - Neither satisfied or unsatisfied
 - Fairly unsatisfied
 - Very unsatisfied
 - Not applicable
 - Don't know / don't remember

Out of hours

[Ask All]

Q86. [Dummy questions to correct routing for subsequent questions]

Q87. Has your pet needed out-of-hours care in the past two years? By out-of-hours care we mean where your pet needed to be seen by a vet outside the opening hours of your usual vet practice [SINGLE CODE]

- Yes
- No [close on this section]
- Don't know [close on this section]

[IF Q87=1 used OoH care]

Q88. Thinking about your last use of out-of-hours pet care, which of the below best describes where you went for this? [SINGLE CODE]

- I went to my usual vet practice, which provides out-of-hours services
- I went to a different vet practice
- A mobile vet came to me / my home
- Don't know / Don't remember

[IF Q88=1]

Q88A Was this at your current vets, [name from q9]?

- Yes
- No
- Don't know/can't remember

[IF Q88A = NO AND Q42A(Q43) =NO]

Q88B Was it at [name from Q42B(Q44)]?

- Yes
- No
- Don't know/can't remember

[IF Q88 =2 or 3]

Q88C How did you find out about the [DIFFERENT VET PRACTICE / MOBILE VET]? [MULTICODE]

- Through my usual vet practice, either from their website or being told directly
- I found it through my own search
- I was recommended it by friends or family
- Other (specify)
- Don't know / Don't remember

[IF Q87=1 used OoH care]

Q89. At what stage did you receive information about the price of the out-of-hours consultation you used?

- I found the price myself beforehand (e.g. on a website)
- I was told the price when I called them
- I was told the price at the practice, but before agreeing to the service/s [ONLY INCLUDE IF Q88=1 or 2]
- I was told the price only after receiving the service/s
- I knew the price from previous use of the service
- Other (specify)
- Don't know / Can't recall

[IF Q87=1]

Q90. How did the following aspects of your visit compare between the out-of-hours veterinary service and your regular vet practice? [matrix style question]

- The care received by my pet
- The quality of the information given to me about the treatment
- The stress I experienced during my visit
- The pressure I felt to make decisions about treatment during my visit
- The confidence about any decisions I had to make
- Better at the out-of-hours service
 - The same as at my regular vet practice
 - Worse at the out-of-hours service
 - Not applicable

Don't know

Medicines

[Ask All]

Q90b Has your pet been prescribed medication by your vet practice in the past 2 years?

Yes

No [close on this section GO TO Q100]

Don't know/ can't recall [close on this section/GO TO Q100]

Q90C Was this at your current vets, [name from Q9]?

Yes

No

Don't know/can't remember

[IF Q90C=NO AND Q42A(Q43) = NO]

Q90D Was this at [name from Q42b(Q44)]?

Yes

No

Don't know

Q91. Are you aware that you can obtain a prescription from your vet practice and get the medication elsewhere (for example a retailer, a pharmacy, or another vet)?

Yes

No

Not sure/ don't know

[IF Q91=1]

Q91b How did you learn that you could do this (obtain a prescription from your vet practice and get the medication elsewhere)? Please select all that apply.

My current vet practice told me

Another vet practice told me

Word of mouth (friends, family, other pet owners)

Website advice (e.g. animal charities, rehoming centres)

Social media forums/posts

Advertising (including on social media)

I just assumed/guessed that was the case

Others, please specify

Don't remember

[IF Q90B = 1]

Q92. Was the medication your pet was prescribed one-off or did it involve at least one repeat prescription?

One-off prescription

Repeat prescription

Don't remember

[q92=2 REPEAT PRESCRIPTION]

Q93. On average, how frequently do/did you pay for a repeat prescription for the on-going medication?

Weekly
 Fortnightly
 Monthly
 Every 3 months
 Every 6 months
 Annually
 Other, please specify
 Don't know

[IF q92=1 the medication is a one-off]

Q94. And when was the most recent time you bought a one-off pet medication? (if you can't remember exactly, please estimate to the closest month)

[INCLUDE DROP DOWN LIST OF MONTHS AND YEARS]

Don't remember

[IF q92=1 the medication is a one-off]

Q95. Where did you buy this one-off pet medication from?

Directly from my vet practice
 From another vet practice
 In person from a retailer or pharmacy
 Online from a retailer or pharmacy
 Don't remember

[if q92=2 REPEAT PRESCRIPTION]

Q96. Where do you usually buy your pet medication from?

Directly from my vet practice
 From another vet practice
 In person from a retailer or pharmacy
 Online from a retailer or pharmacy
 Don't remember

Q97. [DELETED]

[If Q92=1 or 2]

Q98. Which ONE of the following statements best describes you?

I have compared the price of my pet medication
 I have tried to compare the price but couldn't find information
 I have not tried to compare the price
 Don't remember

[If Q95=1 or Q96=1]

Q99. Why did you choose to buy your medication from your vet practice? Please select all that apply. MULTICODE RANDOMISE 1-10

I needed to purchase it quickly
 The vet didn't offer any alternative
 It was the most convenient option
 I didn't know how to order from anywhere else
 Only the vet was able to administer the medication
 I trust that the medication from my vet practice is the most reliable / best quality
 I don't feel comfortable telling my vet practice that I will purchase medication from elsewhere
 Specific prescribed medicine brand not available elsewhere

Medication from my vet practice was cheaper than ordering from anywhere else
 I feel most comfortable administering medication bought from my vet practice
 Other (please specify)
 Don't know

After life services

[ASK ALL]

Q100. The following questions are about the death of a pet. We understand that this may be very upsetting to answer questions about. If you would prefer not to answer these, or have not experienced the loss of a pet, please select 'skip to next section'. Pet bereavement support can be found at Blue Cross – [link <https://www.bluecross.org.uk/pet-bereavement-and-pet-loss>]

Proceed with these questions
 Skip to next section

[IF Q100=1 PROCEED WITH THESE QUESTIONS]

Q101. Have you had a pet that died within the last two years?

Yes
 No [Skip to next section]

[IF Q101 - YES]

Q102. We are sorry for your loss. If you have experienced more than one loss in the last two years, please think about the most recent experience.

When did your pet die? (if you can't remember exactly please estimate to the closest month)

[INCLUDE DROP DOWN LIST OF MONTHS AND YEARS COVERING THE PAST 3 YEARS]

Q103. When your pet died, which of the following happened?

My pet was buried at home (by ourselves/friends/family)
 My pet was buried elsewhere through a company that delivered pet burial services
 My pet was cremated
 Other, please specify
 Don't remember

[IF Q103 = 3, MY PET WAS CREMATED OTHERS GO TO PET HEALTH PLANS INTRO]

Q104. How did you choose a cremation service?

[SINGLE CODE RANDOMISE 1-7]
 I bought the cremation service from my usual vet practice
 My vet practice did not offer a cremation service but recommended one
 I bought the cremation service from the out-of-hours vet practice
 The out-of-hours vet practice did not offer a cremation service but recommended one
 I chose it based on word of mouth (friends, family, other pet owners)
 I chose it based on an online search
 I chose it based on information on the crematorium website
 Other, please specify
 Don't remember

Q105. What, if any, information did you receive from your vet when purchasing a cremation service?

[MULTI-CODE RANDOMISE 1-5]

A range of options, including more premium packages (e.g. individual, memorials) and more simple options (e.g., communal), including doing nothing and opting for home burial
 The price of the service and different packages
 Logistical information (such as timings and location) for any different packages
 Information on what may be covered by your insurance policy
 The processes involved in the service
 Other [please specify]
 None of the above

Q106. Did you compare different providers of cremation services?

[SINGLE CODE]

Yes

No

Don't know/ don't remember

[IF Q106=1 – did compare]

Q106b Were you able to find the information you wanted on prices and services offered?

Yes

No

Don't know / Can't remember

[IF Q106 = 2 – did not compare]

Q106c Why didn't you compare different providers of cremation services? Please select all that apply. MULTICODE

I didn't want to or have chance to

I chose it based on previous use

I just followed my vet's recommendation

Other (please specify)

Don't know / Can't remember

IF Q103 = 3]

Q107. What factors were important to you when selecting a cremation service? Please select all that apply.

[MULTI CODE, RANDOMISE 1-7]

Location

Types of cremation services offered (i.e. private, semi-private, or communal cremations)

Price

My vet's recommendation

Previous experience of that crematorium

The pet crematorium had a good reputation and positive reviews

The pet crematorium offered memorialisation and certification options

Other (specify)

Don't know / Can't remember

Pet health plans

This section is about buying a **pet health plan, or healthcare plan**, from your vet practice in the last 3 years.

A pet health plan is where you pay your vet practice a monthly or annual fee for a package of routine treatment and services.

These plans vary as to what they include, but typically include, for example, annual booster vaccinations and flea and worm preventative treatment and may include discounts for other treatment and services if needed.

This is different to “pet insurance”, which we will ask you about separately.

[ASK ALL]

Q108. Do you currently have a **pet health plan** [INSERT IF OWNER OF MULTIPLE PETS Q2/Q3], for at least one of your pets, or have you had one in the past three years?

- Yes, currently have one
- I don't currently have one, but I have in the past three years
- No, I haven't had one in the past three years
- Don't know

[IF Q108 = 1 OR 2]

Q109. What were your reasons for buying a pet health plan? **Please select all that apply**

[MULTI-CODE, RANDOMISE 1-6]

- It offers value for money
- It helps with financial planning
- It gives me reassurance
- It was recommended by my vet practice
- It was recommended by word of mouth (family, friends, other pet owners)
- It helps me keep up with preventative care for my pet
- Other, please specify
- Don't know

Q110. How did you become aware of the pet health plan? **Please select all that apply**

[MULTI-CODE RANDOMISE 1-6]

- The vet practice mentioned it to me
- It was advertised in a poster/ leaflet in the vet practice
- It was advertised on the vet practice's website
- Word of mouth (friends, family, other pet owners etc)
- Social media
- Website advice (e.g. animal charities, rehoming centres)
- Other, please specify
- Don't know

Q111. [IF Q108 = 2 (don't have but used to)]: Why did you cancel your pet health plan?

[MULTI-CODE RANDOMISE 1-5]

- It wasn't value for money
- I didn't use it
- I couldn't afford it
- I do not have a pet anymore
- I changed my vet practice
- Other, please specify
- Don't remember

Insurance

[ASK ALL]

We will now ask you about **Pet Insurance**.

Pet insurance is a policy that helps cover the costs of veterinary care and medical expenses for a pet when it becomes sick or injured.

Q112. Do you currently have pet insurance **[INSERT IF OWNER OF MULTIPLE PETS Q2/Q3]**, for at least one of your pets, or have you had pet insurance in the past 3 years?

- Yes, currently have pet insurance
- I don't currently have pet insurance, but I have in the past three years
- No, I haven't had any pet insurance in the past three years
- Don't know

[IF Q112 = 2 or 3]

Q113. Is there a particular reason you do/did not have insurance for your pet(s)?

[MULTI-CODE RANDOMISE 1-8]

- I felt it was not good value for money / was too expensive
- It doesn't cover enough for my needs
- I purposely put aside money to make sure I can pay for my pet treatments
- I am confident I can pay for treatments as they are needed
- I don't know enough about it
- I haven't considered it
- I can't afford it
- I no longer own a / the pet
- Other, please specify
- Don't know

[IF Q112 = 1 or 2]

Q114. What were your reasons for having pet insurance? **Please select all that apply**

[MULTI-CODE RANDOMISE 1-4]

- It eases worries about unexpected vet costs
- It was recommended by my vet practice
- I got free cover for a short period of time (e.g. a few months) or other benefits when I originally got my pet and I continued with the insurance cover after this
- It was recommended by word of mouth (family, friends, other pet owners)
- Other, please specify
- Don't know

[IF Q112 = 1 or 2]

Q115. How did you find the insurance plan that you took out?

[MULTI-CODE, RANDOMISE 1-8]

- Through my vet practice
- Insurance price comparison website (e.g. Compare the market or GoCompare)
- Searched online
- It was advertised in a poster/ leaflet at the vet practice
- It was advertised on the vet practice's website
- Word of mouth (friends, family, other pet owners etc)
- Social media
- Website advice (e.g. animal charities, rehoming centres)
- Other, please specify
- Don't remember

Complaints

[ASK ALL]

Q116. Have you thought about making a complaint about your vet or vet's practice in **the past two years?**

- Yes
- No
- Don't know

[IF Q116 = 2, 3]

Q116A If there was an issue where you felt you wanted to make a complaint, what would you be likely to do? Please select all that apply [MULTICODE RANDOMISE 1-8]

- Make the complaint with the vets practice directly
- Contact Citizens Advice
- Contact the group who owns the practices, to make a complaint through their system
- Contact RCVS (Royal College of Veterinary Surgeons)
- Contact the VCMS (The Veterinary Client Mediation Service)
- Leave a negative review online
- Research online for the process to make a complaint
- It would depend on the nature of the complaint
- Not sure
- Other, please specify

[IF Q116 = YES]

Q117. What was it about? [MULTICODE RANDOMISE 1-4]

- I was unhappy with the treatment of my pet
- Behaviour of a vet or other member of staff
- Prices
- An issue with other customers
- Other specify
- Don't remember

[IF Q116 = YES]

Q117A Did you make the complaint?

- Yes
- No
- Don't know

[IF Q117A = NO]

Q118. (Q117b) Why didn't you make a complaint? Please select all that apply. [MULTICODE RANDOMISE 1-8]

- Didn't seem serious enough
- Didn't know who to complain to
- Wouldn't have felt comfortable doing so
- It's happened recently and I still intend to
- Never got round to it
- Worried about ongoing relationship with vet
- Didn't think anything would come of it
- Process too complicated
- Other (specify)
- Don't know / Don't remember

[IF Q117A = YES]

Q119. (Q118) Which of the following did you complain to? **Select all that apply**

[MULTICODE RANDOMISE 1-7]

- The vet or vet practice staff
- The owner(s) of the vet practice
- RCVS (Royal College of Veterinary Surgeons)
- The VCMS (Veterinary Client Mediation Service)
- Citizen's Advice
- My MP or local councillor
- I left a negative review online
- Other (specify)
- Don't remember

[IF Q117A = YES]

Q119A(Q118C) Which of the following has happened as a result of your complaint? [MULTICODE
RANDOMISE 1-5]

- Hasn't been decided yet
- I received compensation
- A reduction/reimbursement of a bill
- I received an apology
- Nothing
- Something else (specify)
- Don't know/Don't remember

[IF Q119A(Q118c) = 2,3,4,5,6]

Q119B(Q118d) How satisfied were you with the outcome of your complaint?

- Very Satisfied
- Fairly Satisfied
- Neither Satisfied or Unsatisfied
- Fairly Unsatisfied
- Very Unsatisfied
- My complaint is not yet resolved
- Don't know / Can't remember

[IF Q117A = YES]

Q119C Is there anything else you would like to say about your experience of making a complaint?
[OPEN QUESTION]

Veterinary Organisations

[ALL]

Q120. Before this survey, were you familiar with the VCMS (The Veterinary Client Mediation Service)?

- Yes
- No
- Don't know

[IF Q120 = YES – Have heard of VCSM]

Q121. Which of the following relates to your familiarity with VCMS (**please select any that apply**)
MULTICODE

- I have only heard of them
- I have contacted the organisation directly
- I have accessed / read VCMS materials
- I have referred complaints to the VCMS
- Other (please specify)
- Don't know

Q122. Before this survey, were you familiar with the RCVS (Royal College of Veterinary Surgeons) and/or their Practice Standards Scheme? SINGLE CODE

- Yes – I am familiar with the RCVS only
- Yes – I am familiar with the RCVS and their Practice Standards Scheme
- No
- Don't know

[IF Q122 = 2 – Have heard of the RCVS and their Practice Standards Scheme]

Q123. Which of the following relates to your familiarity with the RCVS' Practice Standards Scheme? SINGLE CODE

- I have heard of the RCVS' Practice Standards Scheme but it has never affected my choice of veterinary practice
- I have a preference for veterinary practices that sign up for the accreditation
- I only go to practices that have signed up to the scheme (also known as RCVS-accredited practices)
- Don't know

Views on in-home consultations/ mobile vets/ remote consultations/ telemedicine

The next section is about remote consultations and telemedicine – this could include online consultations or mobile vets.

[ASK ALL]

Q124. Have you used remote consultations, telemedicine or video vet in in the last 2 years? [SINGLE CODE]

- Yes, and still using them
- Yes, used in the last 2 years but not currently using this service
- Yes, used in the last 2 years and am likely to use them again in future
- No, but I am aware of these services [close this section]
- No, and I am not aware of these services [close this section]
- Don't know [close this section]

[IF Q124 = 1,2 OR 3]

Q125. What made you decide to use these services? [MULTICODE RANDOMISE 1-6]

- They suited my work and personal time commitments
- As a solution to the Covid-19 lockdown restrictions
- They were more affordable than in-person consultations
- Due to personal disabilities or health related circumstances
- Due to the location of my in-person practice
- Bad experience in previously using the in-person practice
- Other, please specify
- Don't know

[If Q124 = 2 - Not currently using]

Q126. Why are you not currently using remote consultations and/or telemedicine? [MULTICODE, RANDOMISE 1-6]

- I only used this service for a temporary need (e.g. my pet needed urgent care, could not reach my usual veterinary practice)
- I utilised these services during the Covid-19 lockdown but I now prefer to use in person services
- Prices associated with the service
- Bad experience in previously using the service (e.g. poor customer service)
- I prefer a vet to see my pet in person

I've not required any services
 Other, please specify
 Don't know

[ASK ALL]

Q127. Have you used in-home consultations / mobile vets (where a vet visits your pet at home) in the last 2 years? [SINGLE CODE]

Yes, and still using them
 Yes, used in last 2 years but not currently using them
 No [Close this section]
 Don't know [close this section]

[IF Q127 = 1 OR 2]

Q128. What made you decide to use these services? [MULTICODE RANDOMISE 1-7]

They suited my work and personal time commitments
 As a solution to the Covid-19 lockdown restrictions
 They were more affordable than in-person consultations
 Due to personal disabilities or health related circumstances
 Due to location of my in-person practice
 Bad experience in previously using the service
 I didn't want to transport my pet
 Other, please specify
 Don't know / Can't remember

[If Q124= 2- used in past but not currently]

Q129. What factors made you stop using in home or mobile vets? [MULTICODE RANDOMISE 1-5]

I only used this service for a temporary need (e.g. my pet needed urgent care, could not reach my usual veterinary practice)
 I utilised these services during the Covid-19 lockdown but I now prefer to use in person services.
 Prices associated with the service
 Bad experience in previously using the service (e.g. poor customer service)
 I've not required any services
 Other, please specify
 Don't know / Can't remember

Costs and perceptions of costs

Q130. Thinking again about the most recent visit to the vets, who paid for it? (If the payment was split, please answer for the majority of the payment) SINGLE CODE

I paid for it
 A family member paid
 A friend paid
 Pet charity support
 My Insurance or pet health care plan (either at the time or through a later claim)
 Don't know / can't remember

[ASK IF Q130 = 1, 2, 3]

Q130B And how was it funded? SINGLE CODE

From personal savings
 From a current account as normal household expenditure / debit card
 A credit card

A bank/building society/credit union loan
 A Payday loan
 Other (specify)
 Don't know / can't remember

[ASK ALL]

Q131. Compared to three years ago, to what extent do you think **vet prices** have changed?

[SINGLE CODE, ROTATE SCALE]

They are much less expensive now
 They are a little less expensive now
 There has been no change
 They are a little more expensive now
 They are much more expensive now
 Don't know / not sure
 Not applicable – I didn't have a pet / use the vets three years ago

Q132. Compared to three years ago, to what extent do you think the **quality of vet services** have changed?

[SINGLE CODE, ROTATE SCALE]

They are much better now
 They are a little better now
 There has been no change
 They are a little worse now
 They are much worse now
 Don't know / not sure
 Not applicable – I didn't have a pet / use the vets three years ago

Q133. Approximately how much have you spent in total on vet services over **the last two years**?

Please include expenditure on pet health care plans and the cost of any services or treatment paid for by insurance, but don't include the cost of insurance premiums.

Under £200
 £200 - £499
 £500 - £999
 £1,000 – £1,999
 £2,000 - £3,999
 £4,000 - £6,999
 £7,000 - £10,000
 Above £10,000
 Don't know
 Prefer not to say

[IF Q133 = 1,2,3,4,5,6,7,8]

Q130A (Q133a) And approximately how much of this was paid for by insurance (either directly billed to your insurance company, or reclaimed from them?)

All of it
 More than half of it
 Some of it, but less than half
 None of it
 Don't know
 Prefer not to say

ASK ALL

Thank you for your responses so far. We'll now ask a few questions to get your reflections on pet ownership more generally. These are just to understand your perspectives, so please answer based on how you think and feel.

Q134. How would you compare the importance of your pet's healthcare to the healthcare of a family member? [SINGLE CODE]

- More important
- Equally important
- Somewhat less important
- Much less important
- I don't consider my pet's healthcare in the same way

Q131A (Q134A) Pet owners make choices about how to spend household finances on pet care. Which of the following statements do you most agree with?

[SINGLE CODE]

Pet care costs should...

- Always be prioritised, even if this means deprioritising other important household expenses
- Often be prioritised, but not always over other important household expenses
- Sometimes be prioritised, but not over many other important household expenses
- Never be prioritised over most other household expenses

Q135. In what ways, if any, does your pet provide support to your emotional and/or physical health? (Select all that apply) MULTICODE (cannot select 5 and another response)

- My pet provides emotional support (e.g. companionship, comfort)
- My pet helps reduce stress or anxiety
- My pet supports my physical health (e.g. exercise, mobility)
- My pet is a trained service animal I rely on (e.g. guide dog, therapy animal)
- My pet does not provide significant emotional or physical support

Q136. Finally, is there any additional information you would like to tell us about in relation to your experiences with vets before we finish the survey? [Free text]

No thanks

About you

We will now ask you a few questions about you and your household. These will only be used to ensure we have spoken to a wide range of customers. All responses you give will be kept strictly confidential and reporting of results will be aggregated, anonymised, and we will not otherwise disclose any personal information. We also offer a 'prefer not to answer' option for personal questions, which will enable you to proceed to the next question.

Q137. Would you describe yourself as...

- Male
- Female
- Other
- Prefer not to say

Q138. What is your ethnic group?

White Includes British, Northern Irish, Irish, Gypsy, Irish Traveller, Roma or any other White background

Mixed or Multiple ethnic groups Includes White and Black Caribbean, White and Black African, White and Asian or any other Mixed or Multiple background

Asian or Asian British Includes Indian, Pakistani, Bangladeshi, Chinese or any other Asian background

Black, Black British, Caribbean or African Includes Black British, Caribbean, African or any other Black background

Other ethnic group Includes Arab or any other ethnic group

Don't know

Prefer not to say

Q139. How well would you say your household is managing financially these days?

Living comfortably

Doing alright

Just about getting by

Finding it quite difficult

Finding it very difficult

Don't know

Prefer not to say

Q139a What is your annual household income, before tax and other deductions?

Up to £9,999

£10,000 to £20,999

£21,000 to £31,999

£32,000 to £41,999

£42,000 to £51,999

£52,000 to £74,999

£75,000 to £99,999

£100,000 or more

Don't know

Prefer not to say

Q140. Do any of the following apply to you?. Please select all that apply

We would like to collect this to ensure that people with a variety of particular needs are represented in the study, but you do not have to answer if you do not wish to. This information will not be shared with any third party. [RANDOMISE ROWS]

Disabled or suffer from a disabling illness

Have a learning disability

Rely on a pet for assistance

Have sight loss

Speak English as a second language

Deaf or hearing loss

A new parent

Isolated / lacking support

None of these statements apply

Prefer not to say

Q141. Finally, do you or does anyone in your immediate family work in the veterinary industry?

I do

Someone else in my family does

No

Prefer not to say

Q142. We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks of the close of the survey, estimated to be end of December 2024.

This can be sent as an Amazon, Marks & Spencer or One4All voucher. Alternatively, we can donate your incentive to the RSPCA. Which would you prefer?

Amazon voucher
M&S Voucher
One4All voucher
Donation to the RSPCA

If you have any queries about your incentive, please contact us on 0131 220 8770.

INCEMAIL: To what email address would you like us to send the voucher?

Your email address will only be used for the purposes of administering your incentive and will not be shared with any third party.

Please confirm email

Q143. Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes
No

Q144. Ask if = "Yes" Following this phase of the research we may wish to conduct a longer, more in depth, telephone/Zoom interview with a selection of participants (to discuss some of the issues raised in more detail). In principle, would you be prepared to take part in such an interview? You would be financially compensated for your time.

Yes
No

Q145. Ask if = "Yes". Thank you. Please leave your contact details to enable us to approach you, if selected.

Name
Phone number
email address

Thank you. This research was conducted under the terms of the MRS¹⁴ code of conduct and is completely confidential.

¹⁴ Market Research Society



Appendix C

Cognitive Report



Cognitive Interview Report

Final Report

October 2024

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1. INTRODUCTION

1.1 Objectives

Cognitive testing was conducted to ensure accessibility and comprehensibility of the questionnaire as well as checking that the length of the questionnaire is appropriate. This process is important as the material includes topics that may be unfamiliar to some members of the public, and could be challenging both emotionally and in terms of recall.

Cognitive interviews involve taking a participant through the research materials to probe for levels of comprehension and response to the survey materials.

1.2 Methodology

The interviews took place on Zoom from 3rd – 11th October 2024.

Participants were sent a link to the questionnaire and asked to complete it on their own. Moderators were available to answer questions if the issues at hand prevented progression to the next stage of the survey. Moderators watched participants complete the survey, noting any issues participant had with data entry or if a particular question took longer than others to answer.

At certain points in the survey, participants were asked to pause and moderators probed their thoughts on the questions, particularly around clarity of language, ease of completion and any difficulties with recall of information.

The interviews lasted approximately 45 minutes.

1.3 Sample

Twenty-six participants were recruited through free-find recruitment carried out by our recruitment partner Scout. Quotas were used to ensure participants were a range of genders, ages and social grades. There were also quotas for eligibility for certain modules. All quotas for the modules and genders were met however the Socio-economic groups¹⁵ DE and 18-29 quotas were narrowly under target due to participant no-shows.

As well as set quotas, the recruitment agency aimed for a range of locations across three regions (England, Scotland and Wales) and to have a variety of types of pet across the sample.

A sample breakdown can be found in Tables 1 to 4 below.

¹⁵ Approximated Social Grade with its six categories A, B, C1, C2, D and E is a socio-economic classification produced by the ONS (UK Office for National Statistics)

Table 1: Gender, age and Socio-economic group (SEG) quotas

| Factor | Category | Quota | Recruited |
|--------|----------|------------|-----------|
| Gender | Male | Minimum 10 | 10 |
| | Female | Minimum 10 | 16 |
| AGE | 18-29 | Minimum 6 | 5 |
| | 30-54 | Minimum 6 | 11 |
| | 55+ | Minimum 6 | 10 |
| SEG | AB | Minimum 6 | 10 |
| | C1C2 | Minimum 6 | 11 |
| | DE | Minimum 6 | 5 |

Table 2: Module type quotas

| Module type | Quota | Recruited |
|--------------------|--------|-----------|
| Cremation Services | 3-5 | 9 |
| Medicine | 3-5 | 15 |
| Diagnostics | 3-5 | 14 |
| Out of hours | 3-5 | 9 |
| Regular check up | 3-5 | 17 |
| Referrals | 3-5 | 5 |
| Health Plan | Min. 2 | 6 |
| Pet Insurance | Min. 2 | 16 |

Table 3: Pet type breakdown

| Pet Type | Recruited |
|------------|-----------|
| Cat | 11 |
| Dog | 19 |
| Rat | 1 |
| Guinea Pig | 1 |
| Hamster | 3 |
| Rabbit | 2 |
| Bird | 3 |
| Reptile | 1 |
| Fish | 3 |

Table 4: Region breakdown

| Region | Recruited |
|----------|-----------|
| England | 13 |
| Scotland | 7 |
| Wales | 6 |

2. Findings

2.1 Screener and profiling questions (Q1 – Q8)¹⁶

Findings

Overall

Most participants found this section easy to complete and raised no issues with the clarity of the language.

“Language was 100% clear”
Cognitive Interview Participant

Q2 – Can you tell me which, if any, household pets you currently own or have owned within the past 2 years since October 2022?

One participant praised the fact that they could select only the pets they did own rather than having to record a zero against every pet they did not own.

Q3 – And how many of each of these pet(s) have you had in the past 2 years since October 2022?

One participant expressed confusion over whether to include their current litter of puppies for this question or not.

One participant criticised the wording of this question, believing it could be simplified and that the number 2 would be better expressed as ‘two’.

“I just feel like it's a bit clunky.”
Cognitive Interview Participant

One participant entered the age of their pets before realising, without moderator help, that the number of pets was required instead.

Q4 – As an adult, how many years in total have you been a pet owner?

A few participants did not answer this question as intended as they missed the ‘as an adult’ part of the question and gave an answer that included their childhood.

One participant was unable to accurately answer this question as there is no option for “under a year”.

For one participant, this question caused confusion and required re-reading. They suggested re-wording to ‘in your lifetime how many pets have you owned’.

¹⁶ Please note that the references to question numbers may not align to the final questionnaire

Another participant noted that this question was challenging to answer as they had not consistently owned pets as an adult.

Recommendations

- Add an option for under a year
- Highlight 'as an adult' using italics or bolding

Q8 – And since October 2022, how many times have you taken your pet(s) to the vets?

When participants initially read this question, several uttered phrases such as 'oh my goodness'. Many participants admitted that they were estimating the answer they gave, particularly those who go regularly to the vets.

"Difficult to say how many times I've taken them to the vet, I wouldn't know the exact amount."

Cognitive Interview Participant

"As a 71-year-old I will struggle to remember every time I've taken the dog to the vet."

Cognitive Interview Participant

That being said, most participants did not suggest changing this question. One noted that it would be easier to answer this question with a shorter timeframe.

"I just think since 2022 is quite a long time frame to remember."

Cognitive Interview Participant

One participant felt that removing 'since October 2022' and simply saying in the last two years would be preferable as they found the timescale confusing.

"I had to think about October 2022."

Cognitive Interview Participant

A few participants requested response codes for groups of numbers e.g. 1-4 to save time or make this question easier to answer. One participant suggested including a 'don't remember' option and providing guidance for whether it was acceptable to estimate the answer.

One participant misread October 2022 as October 2024 and only recorded one vet visit, later realising their mistake at Q42. They suggested highlighting the date in bold to make it clearer.

"I didn't see that, I thought it was October this year, so that will have been wrong."

Cognitive Interview Participant

One participant required clarification from the moderator to understand whether the answer should be a combined total for all their pets of the same type or for each pet

individually. They would have preferred to work out an answer for each pet rather than a combined total.

“That probably could have just been a little bit clearer just to say it would be the combined amount if it's all the same type.”

Cognitive Interview Participant

Recommendations

- Consider adding a note saying participants can estimate if they are unsure
- Consider changing format to groups of numbers rather than requiring a free text response
- Make October 2022 bold

2.2 Your veterinary practice (Q9 – Q33)

Overall

Participants found this section straightforward for the most part with few difficulties either with the clarity of questions or recalling the information other than their vet practice's postcode.

“I remember everything about my dogs. They're like children to me. I don't forget anything about my visit to the vets.”

Cognitive Interview Participant

“I understood everything that was being asked”

Cognitive Interview Participant

One participant felt that some of the questions had too many similar choices and could have their options reduced. That being said, they found the section easy to complete and noted that people have different circumstances. Another participant found this section generally repetitive.

One participant mentioned that it was challenging to remember the details for this section, for example whether they found out information on prices before they chose their vet practice, although they did not feel changes were required.

“It's just recalling the things because it's been quite a while. Easy to answer the questions not so easy to recall the length of time.”

Cognitive Interview Participant

Praise for this section was focused on the multiple choice format of the questions, the flow of this section and the inclusion of their vet practice's name in the question wording.

“Those are pretty easy actually. I like the kind of way they included your practice's name in the question.”

Cognitive Interview Participant

Q9 – What is the name, location and (if known) postcode of your current vet practice?

Most participants could recall the name and location of their vet practice immediately although only a few could bring the postcode to mind without checking. To find the postcode, several participants used Google and did so without difficulty. A few participants asked moderators if a postcode was required whereas some participants progressed without entering a postcode and clarifying with the moderators as to whether this was permitted.

“I don’t know if many people know their vet’s postcode off by heart.”

Cognitive Interview Participant

Some participants mentioned that a map would be useful but many believed it was not necessary. One participant felt a map could help those who are new to a vet practice whilst another believed a map would help if the CMA want exact information but otherwise the existing format was fine.

“I probably would have gone and looked on a map to get the postcode etc.”

Cognitive Interview Participant

Many participants suggested this question could have a format where you start typing the name of your vet practice or the area you live in and suggestions are offered of an address on that basis. However, most of these participants were also happy to Google the address with some stating that that would be their first instinct in answering this question.

One participant believed that the second sentence in the question – *If you use more than one vet practice for example for different pets, please choose the one you use most frequently* – was too wordy and could just say choose the practice you use most frequently.

Q11 – How long have you been with this vet practice?

One participant selected over ten years for this question but noted that they were no longer with the practice as their pet had died.

Q12 – And which of the following best describes the circumstances around which you originally chose this vet practice?

This question caused confusion for several participants, possibly because of its wording and the rotation of the answer codes which led participants to misunderstand its purpose (of asking at what point in the pet ownership was the decision made to choose a vet practice). The randomisation of the response codes was perceived to have worsened this.

One participant found this question challenging to answer as they had re-homed their pet from a friend and continued using their choice of vet practice rather than choosing their own, and focussed on that.

Another participant described this question as ‘difficult’ because they moved vet practices mid-treatment and struggled to know which option to choose as a result.

“Yeah, it’s quite a difficult one to choose an option for.”

Cognitive Interview Participant

One participant thought this question had no relevant options as they chose their practice based on location and only understood the question’s purpose with moderator help. They suggested moving Q13 to before this one to reduce confusion.

“It’s not really clear in the question.”

Cognitive Interview Participant

Q13 – Still thinking about your current vet practice (that you use or used the most) [name of vet], thinking back to when you registered with them, why did you choose this vet practice?

One participant felt that there were too many options for this question and suggested removing some of the options, for example through grouping similar options.

“This one I thought there were loads of options on there, that was quite a lot to choose from.”

Cognitive Interview Participant

One participant praised the inclusion of the ‘other’ option as they had an answer that did not fit with the existing response options.

Q14 – And what was the main reason you chose that vet practice?

A few participants did not realise this question was single select and tried to choose two options. One fixed their error quickly without moderator guidance whereas another participant took time to realise it was not a repeat of Q13.

“I’ve just answered this question”

Cognitive Interview Participant

Q17 – You said that you considered lower/good prices, how did you find out information about the prices of your current vet practice when deciding whether to choose it?

One participant’s initial reaction was that they did not say this, noting when asked for clarification that the wording had changed from Q13 and they had not said it.

“I don’t know what that means, I don’t think it’s the same wording as before, so it threw me”

Cognitive Interview Participant

Q20 – How easy or difficult was it to find comparable information on pricing for different practices?

One participant expressed doubt about whether they were answering this question as intended as they were comparing prices between their old and new practice only rather than between two possible new practices.

Q27 – You said you didn't compare practices when you were originally choosing one. Why was this?

One participant felt that the following answer codes – *I thought most practices charged very similar prices* and *Difficult to compare practices/Unsure which information to use to compare* – were too similar.

Q28 – Did you move to your current practice from another practice?

One participant struggled to answer this question as they were with a particular vet practice with one of their pets who then passed away. They had to use a different vet practice with their new pet but intend to move back to their original vet practice soon.

Q29 – If you wanted to change vet practices, do you feel that you would be able to do so?

A few participants noted that they had not changed vet practice before and therefore were unsure how easy it would be to switch.

Q31 – Why do you think it would it be not possible for you to change vet practices?

One participant found this question hard to answer because they believed they would never change vet practices.

Q32 – Why did you decide to leave your previous vet practice?

One participant suggested formatting this question as an open text question rather than presenting a long list of options.

One participant noted that this question was challenging to answer emotionally because of the circumstances of the move but did not feel the question should be changed.

One participant suggested adding a response code for their previous vet was not in a convenient location.

Recommendations

- Change the question wording and answer codes for Q12 to make it clear what the question is asking

2.3 Awareness of practice ownership (Q34 – Q35)

Q34 – Do you know whether your current vet practice is part of a large group of many practices or whether it is an independent vet practice?

A few participants were unsure of the answer to this question.

“I just feel like I don't know what my vet is actually”

Cognitive Interview Participant

One participant initially missed that there was a response code for small group of practices which is the answer they felt was correct.

Recommendations

- Separate out independent and small group of practices into separate codes
- Add small group of practices to question wording

2.4 Relationship between pet owner and vet (Q36)

Q36 – Please indicate the extent to which you agree or disagree with the following statements

The majority of participants described this question and its statements as clear, easy to answer and not in need of any changes.

“I understand everything I've just read easily.”

Cognitive Interview Participant

“All statements link to my own experience, so they're all relevant and easy to understand”

Cognitive Interview Participant

“No changes, to my knowledge its perfect.”

Cognitive Interview Participant

Some participants took longer to answer the personal circumstances statement. This statement provoked the most comment with participants noting predominantly that this was not relevant for them or that they were not sure what their vet practice would do if it was relevant. Furthermore, one participant believed that this statement was too wordy although they were not sure what text could be removed as they felt it was all needed.

“I don't know how to answer that one really”

Cognitive Interview Participant

“I wouldn't think considering my personal circumstances would be a factor.”

Cognitive Interview Participant

A few participants expressed difficulties identifying which vet practice they should be referring to as they had recently moved practices or used more than one vet practice. Adding to this confusion was the pluralisation of vets in the question statements. This was also criticised by one participant for making the statements harder to read.

“It makes it a bit more clunky and a bit more like harder to read”

Cognitive Interview Participant

One participant praised the addition of a ‘don’t know’ option.

Individual participants made the following suggestions:

- Make the statements shorter and more direct
- Simplify the statements for those who struggle with reading
- Change focus of question to the last time they went to the vets rather than giving an overall picture as experiences may vary over the course of more than one visit
- Replace the word ‘capability’ with a different phrasing
- Remove statement ‘*I clearly understand the options presented to me by my vet(s) and I can make informed decisions*’ and replace with question asking ‘did you understand the options presented’ only for those who agreed with the statement ‘*My vet(s) takes the time to clearly explain various treatment options to me*’
- Switch the ordering of the agree and disagree options as they believe that the new order would be more typical and initially answered incorrectly based on this assumption.

One participant expressed their general dislike of multiple choice questions.

Recommendations

- Clarify which vet practice this question refers to and, if it’s the practice in Q9, use that name in the wording of the question

2.5 Recent visits to the vets (Q42)

Q42 – You said you had used a vet [X] times since [insert month for last 24 months], thinking about all of the times you have used a vet in this period, what treatments and or services have you used?

Most participants described recalling the treatments and services they had used in the last two years as easy. One participant stated that particular details like names of medication would be challenging to recall but the reasons for the visits were easy to remember. Another participant noted that although they have difficulty remembering the number of visits, they are familiar with which services they have used.

“It’s easy enough for me because it does play a big part of my life.”

Cognitive Interview Participant

“Never an issue, you do remember because they’re part of the family. Dog owners remember things.”

Cognitive Interview Participant

Several participants mentioned that they found this question easy as they had not had many vet visits with one suggesting more visits could make it harder to answer within a set timeframe. Another participant noted that this question may be more challenging for those with multiple pets.

“Quite easy because for my dog he hasn’t really had that many health issues like there was only one main one.”

Cognitive Interview Participant

“Fairly easy, because, to be honest, it’s been mostly routine.”

Cognitive Interview Participant

One participant struggled initially with figuring out which services they had used since October 2022 and which were from before that time as they had been frequent visitors to their vet practice around that time. However, they were satisfied after a few minutes with their answers to the question. Another participant found it challenging to remember the year in which treatments happened and would prefer a five year timeframe.

“Because I don’t have any of the paperwork I can’t remember.”

Cognitive Interview Participant

“Even now I am just remembering things happening, but I can’t remember the year.”

Cognitive Interview Participant

The overwhelming majority of participants expressed no issues with the inclusion of end-of-life services in this question. Many of them noted that end of life services are an important service offered by vets and a part of pet ownership. One participant expressed support for the wording chosen for this option.

“I think that’s fine, would be surprised if it wasn’t”

Cognitive Interview Participant

“Quite important to include it.”

Cognitive Interview Participant

“I think it’s something that needs to be there.”

Cognitive Interview Participant

One participant was upset after discussing end of life services but did not suggest it should be removed as an option. Another participant suggested that this option could be hidden for those who say they still have a pet earlier in the survey.

Several participants praised the formatting, particularly the explanations included for this question for making it clear what each service entailed. The explanation for prescriptions was singled out by a few participants who had initially selected this option and then deselected it after reading the explanation that it meant a prescription without medication.

"I like how they have in brackets some of the stuff that isn't included in what the option is, because sometimes you just forget or you just don't know."

Cognitive Interview Participant

"It was good, I like the list. I think where it's all been split out it was like a prompt."

Cognitive Interview Participant

Individual participants made the following suggestions for this question:

- Clarify where to include non-surgical sedation
- Clarify where to include hormone implants
- Simplify the question to 'is he having the same treatment each time you go'.
- Alphabetical ordering or ordering by severity of treatment, for example starting with routine health checks and vaccinations with the more unusual services at the bottom
- Moving 'other services' to the bottom so that the rest of the options can be seen first
- Replacing for example with e.g.
- Change frame of reference to last few visits rather than last two years
- Include options for emergency care during working hours and emergency surgery

Recommendations

- No recommendations for this question although we would note that a few participants did not select 'medication' and therefore were not shown the medications section despite mentioning later that they had purchased medication for their pets or having said they were eligible for the medications module during recruitment.

2.6 Treatment options – most recent treatment journey (Q46 – Q49)

Q46 –You said you had visited the vet for the following reasons since [insert month for last 24 months]. Thinking about the most recent visit to [INSERT VET PRACTICE FROM Q9], what was this for?

Most participants found this easy to answer, especially as many of them had had recent visits to vet practices. A few participants noted that if they had had their last vet visit longer ago then it would have been more challenging. One participant specified that although their visit was within the last three months they could recall if their last visit was up to a year and a half ago.

"Easy because it was only two weeks ago."

Cognitive Interview Participant

"If it was longer it might be harder to remember."

Cognitive Interview Participant

A few participants struggled with recalling the details of their most recent visit with one explaining that they were better with remembering general experiences rather than a specific visit.

“Slightly harder because it was pretty recent but it wasn’t like that recent.”

Cognitive Interview Participant

One participant considered this question repetitive as they did not realise it was asking about the most recent visit.

One participant noticed the order of response codes was different in this question compared to Q42 and suggested keeping the ordering consistent. They also suggested adding ‘a series of vaccinations’ as a response code.

One participant asked for clarification on whether they could select both vaccination and regular health check but answered their own query before moderator input by spotting the instruction to please select all that apply.

Q47 – And when was this most recent visit?

One participant found it difficult to remember the date of their last visit as it was several months ago.

“I had to think about it, but then I remembered it was near my birthday, so it was quite convenient else I probably wouldn't have known.”

Cognitive Interview Participant

Q48 – And which of these best describes the age of the pet you took to the vet for this most recent visit to the vets?

Several participants criticised this question for being vague or subjective, asking, for example, is a one year old cat very young or an adult or is a thirteen year old cat an adult or elderly? They considered it challenging to answer as a result. A few suggested using age bands instead.

“That question is a bit vague. It depends what you would class as old or elderly.”

Cognitive Interview Participant

“I don't know if you say she's old. It's a difficult one.”

Cognitive Interview Participant

“An age category might be more helpful.”

Cognitive Interview Participant

One participant was unsure how to answer this question as they had two pets with differing ages visiting the vet at the same time for their last visit. They also misread the middle option as being for elderly pets at first glance.

One participant did not read the question properly at first and thought it was still asking about a two-year timeframe. As such, they asked if they could include two pets of different ages. Once the correct timeframe was given, they suggested having 'most recent visit' in bold or capital letters.

"Because the questions have been about within the last 2 years, even though it's the most recent I didn't know when you meant within the last 2 years, or whether it was the very last one."

Cognitive Interview Participant

One participant found the wording of this question confusing because it begins with 'and'. Another participant described the wording as 'clunky' and criticised the rhyming of pet and vet. They suggested re-phrasing the question to what age was the dog when last taken to vet.

"The rhyming's put me off there."

Cognitive Interview Participant

Q49 – And was your most recent trip to the vets a one-off visit or was it part of a number of visits to the vet, for example to treat an illness or injury your pet had?

A few participants criticised the 'both of the above' option as there are more than two options this could refer to. They suggested clarifying which options this refers to.

"Both of the above? There's three."

Cognitive Interview Participant

Several participants felt they did not have a clear option to select for this question for the following reasons:

- Last visit was a yearly health check
- Last visit was for annual vaccinations
- Last visit was part of a series of visits to monitor an illness/injury

"It was her annual booster vaccination which I guess would be a regular appointment rather than a one-off visit. But it's not diagnosing an illness or an injury, and it's not treating an illness or an injury."

Cognitive Interview Participant

Recommendations

- Keep the ordering of codes consistent for Q42 and Q46
- Remove 'but I wouldn't class as old/elderly' from the response code for 'my pet was an adult' in Q48, and reconsider wording/intent of the question.
- Revise the response codes for Q49 to remove "both of the above" and add an option for regular/routine health check

2.7 Most recent vet visit (Q50 – Q55b)

Overall

Most participants found the purpose of the most recent vet visit easy to recall with a few more challenged by remembering the details. One participant noted that they struggled with remembering information on the prices.

“I think it’s pretty straight forward.”

Cognitive Interview Participant

“Easy to answer for me”

Cognitive Interview Participant

One participant suggested replacing the pricing questions with ‘are the prices any different to your previous visits’.

Q50 – Do you remember whether the vet practice provided you with any information about the price of the [TEXT FILL FROM Q46] in advance?

A few participants did not know the answer to this question as they did not remember, including one participant whose last vet visit was the same day as the cognitive interview.

“I don’t think I even asked about money, it just needed to be done.”

Cognitive Interview Participant

Conversely, one participant felt that the price easy to remember.

“I found the price aspect quite straight forward to remember.”

Cognitive Interview Participant

Q51 – When it came to information about prices, how was this provided?

One participant was unclear about whether the question referred to prices given before or after treatment.

“Is this before the procedures, or after that? Could do with being a little bit clearer.”

Cognitive Interview Participant

One participant felt that this question was more about the pricing options than identifying the method of receiving pricing information and so chose the ‘other’ option.

Q52 – Once you received information about price did you feel like you could decline the treatment and consider alternative options?

One participant initially misunderstood this question and struggled to provide an answer but was able to after re-reading the question and the response codes.

Q55 – And overall, which of the following best describes what you thought about the price you paid for [TEXT FILL FROM Q46] compared to what you expected (before receiving any price estimate or information)?

One participant criticised the wording of this question for being too long, leading them to zone out and read it less carefully than other questions. They had selected three different options for the purpose of the visit which did significantly increase the length of the question.

Q55b – On this occasion, how satisfied were you overall with...

A few participants noted that the ordering of negative and positive options had switched compared to previous questions, leading to initial data entry errors.

“The only thing that I would change is just to make this bit match the format of the previous question”

Cognitive Interview Participant

One participant felt the phrasing of the statement ‘the outcome of the visit’ was unfortunate as their visit had been for end-of-life services. They suggested re-wording to ‘the service provided’.

“It’s hard to say we were satisfied.”

Cognitive Interview Participant

One participant praised the statements for covering all the experiences involved with going to the vet.

“I feel like all of these options, outline or summarise the overall experience of going to the vet, so I think, yeah, everything’s covered here.”

Cognitive Interview Participant

Recommendations

- Make ‘in advance’ bold for Q50
- Clarify whether Q51 refers to prices given before or after treatment
- Revise ordering of options from negative to positive so that it’s consistent with other questions

2.8 Regular check-up (Q56 – Q57)

Q56 – You said you have taken your pet to the vet for a regular / routine health check. In general, how often do you attend regular check-ups?

A few participants flagged that they have more than one pet with different schedules for regular check-ups and therefore were either not sure how to answer or assumed they should go for the response which was accurate for the majority of their pets.

One participant struggled with this question as they usually asked the vet if there's a problem with their pet that's not an emergency and seemed unsure of what was meant by a regular check-up.

Q57 – Please indicate the extent to which you agree with the following statements regarding your decision to take your pet to regular/routine health checks.

Many participants completed this question without issue.

“I feel like they're all kind of obvious or clear statements. So, yeah, pretty easy.”

Cognitive Interview Participant

A few participants suggested that the statement ‘*of financial considerations...*’ was harder than the other statements to understand because of its wording and required re-reading. One participant requested removing the words ‘of financial considerations’ and retaining the rest of the statement.

“I just had to read it two or three times to understand what it was saying.”

Cognitive Interview Participant

One participant expressed confusion over the following statements:

- *My insurance covers the (full or partial) price of regular check-ups* – noted that insurance does not typically cover regular check-ups
- *It's part of my Pet Health Plan* – not clear what ‘it’s’ refers to
- *It's the right thing to do for my pet* – not clear what ‘it’s’ refers to

One participant requested a not applicable option as they did not have a pet health plan so that statement was not relevant to them. A few other participants also did not feel that particular statement was applicable for them.

One participant noted that the agree/disagree options were not in the same order as they had been for some of the previous questions and that this was confusing.

One participant suggested adding a question at this stage asking if you attend regular check-ups as they noted that they only selected that option at Q42 as they once had to book a regular check-up to receive medication but do not routinely attend them.

Recommendations

- Provide guidance for Q56 for those with multiple pets on different regular check-up schedules
- A N/A option was added for Q57 during the cognitive interviewing to address this

- Keep the ordering of the negative and positive categories consistent across the questionnaire

2.9 Referrals (Q58 – Q75)

Overall

Only a minority of participants completed this section. Most of the participants were clear on what is meant by referrals but had not had a recent referral visit. One participant said that referral could confuse some people but not those who are pet owners.

“Depends on the person who’s answering them because the word referral to some might stump them but if they’ve got animals and go to a vet they’d understand.”

Cognitive Interview Participant

“Yes, when it’s more specialist and you need to go to someone else.”

Cognitive Interview Participant

When questioned, most participants understood which visit to the vets the questions were related to. However, there was one participant who struggled with the similar wording of questions across the sections.

“I did find it confusing.”

Cognitive Interview Participant

One participant found this section more challenging than the previous sections as they were not sure how to answer questions such as Q64.

Q58 – Sometimes your vet will recommend that your pet is seen by another vet (e.g. to receive an expert opinion or a specialist treatment). We refer to these as ‘referral visits’. Have you had any referral visits to another vet in the last 2 years?

Many participants found it easy to recall whether they had had a referral visit or not. One participant explained that it was easy for them as they are better at remembering the long term than the short term. Another participant noted that they had no issues but could see that it might be challenging for those with multiple pets.

“Easy because I just had one once.”

Cognitive Interview Participant

“It was easy because I would remember if something was up with my animals.”

Cognitive Interview Participant

One participant initially missed that the timescale for this question was in the last two years and began the section on the basis of a referral visit that was more than two years ago.

Once they realised their mistake, they suggested it would have been clearer to begin the question with 'in the last two years...'

One participant selected 'yes' for this question and then later realised that they had been given a referral but not had a referral visit, requiring them to go back and change their answer to this question.

Q59 – What was this for (please answer about the most recent if more than one)?

One participant had to use the 'other' option for this question as their referral was for both medication and vaccinations and they were unable to select both options.

Q60 – And how long ago was that?

For one participant, this question felt repetitive as they believed they had already answered it previously. They suggested changing the wording of similar questions to make it clearer which visit the questions were referring to.

"I feel like I've answered that already."

Cognitive Interview Participant

Q61 – For the next set of questions we want you to think about when your usual vet recommended that you see another vet. On that occasion, did your vet give you any options of different ways to treat your pet?

One participant did not like this question, finding it confusing.

One participant was unsure how to accurately answer this question as they noted that they were happy with their vet and did not ask for recommendations for other vets.

Q63 – Please indicate which of the below information your vet gave you during the discussion of diagnosis or treatment options

A few participants were unclear which vet this question was referring to, their usual vet or the specialist vet that they had been referred to. They suggested making this clearer in the question wording. One participant believed some of the options would only be known by the specialist vet, for example the price of treatment.

"The wording on this question isn't clear whether it's the vet that has referred me to the specialist, or whether it's the specialist vet."

Cognitive Interview Participant

"Are we still talking about my vet here?"

Cognitive Interview Participant

In Q63, one participant suggested clarifying whether the price of consultation had to be a specific figure or if they could select 'yes' having only been given an estimate.

Q64 – Please indicate whether you received the information on the price in the following ways?

One participant labelled this question ‘vague’ and was unclear whether this referred to before the referral or after the consultation. Their answer differed depending on which was correct.

“That’s a bit vague. Does it mean the first time we spoke about it? Or does it mean after we’d had the consultation?”

Cognitive Interview Participant

One participant found this question difficult to answer as they were given the information verbally but felt there was a difference between a verbal conversation with lots of detail and the conversation they had which was very rushed.

Q67 – Did you do any of your own research on the treatments offered and/or look for alternatives which your vet did not suggest?

One participant stated that the option they chose – *No, because I was unable to do so (eg limited time available, lack of knowledge of what to search)* – was only partially correct as they agreed with the lack of knowledge of what to search but disagreed that they had limited time available.

“Looks like limited time like not bothered because you’re too busy but that was purely because I didn’t know what I was looking for.”

Cognitive Interview Participant

Q68 – Did you accept the vet’s referral recommendation and proceed with the referral?

One participant believed that there was no option for them to choose for this question as they did not proceed with the referral.

Recommendations

- Clarify whether Q63 refers to the usual vet making the referral or the specialist vet
- Clarify whether Q64 refers to before or after the referral and which vet
- Keep ordering of negative and positive categories consistent with the rest of the questionnaire

2.10 Diagnostics (Q76 – Q85b)

Overall

Most participants were able to recall details of their most recent diagnostic visit, especially if it was not too long ago. One participant struggled to recall information about pricing but

noted that they do not generally pay attention to prices. A different participant found it challenging to recall details as their diagnostics visit was more than a year ago.

“A bit more difficult because it was over a year ago. Couldn't really recall much of the information.”

Cognitive Interview Participant

Q77 – Before this most recent diagnostic test(s) was performed, please indicate which of the following occurred

For this question, one participant raised an issue that selecting ‘*your vet performed a diagnostic test(s), without giving other test options*’ felt to them like it implied poor service when in their situation there were no other available test options at that stage.

Q81 – Why did you decide to proceed with the diagnostic test(s)?

A few participants were initially unsure how to answer this question, either because they had not proceeded with all the recommended diagnostic tests or because they did not see the instruction ‘select all that apply’. One participant noted that it was challenging to tailor a survey to each individual.

“It's difficult to tailor these things to an individual, isn't it? Because they didn't just offer me one option or test.”

Cognitive Interview Participant

One participant felt that the following response codes were too similar:

- *I didn't know how to get a second opinion*
- *I did not feel confident in challenging the recommendation*
- *There was no reason not to*

One participant suggested adding a response code for ‘it was an emergency’.

Q82 – Did the diagnostic test(s) take place within the practice?

One participant noted that they would not have remembered this information if they had not had access to their receipts.

“Quite easy, except whether the diagnostic was at the clinic, if I didn't have the receipt in front of me, I would've not known it was in-house”

Cognitive Interview Participant

Q85 – And overall, which of the following best describes what you thought about the price you paid, compared to what you expected (before receiving any price estimate or information)?

One participant asked for confirmation that this question related to the diagnostics visit.

“Does this mean for the diagnostics?”

Cognitive Interview Participant

One participant answered this question incorrectly, reporting verbally that the price was better than expected before selecting more than expected.

Q85B – On this occasion, how satisfied were you overall with:

One participant queried whether this question was about the diagnostics visit.

One participant noted that the agree/disagree options were not in the same order as they had been for some of the previous questions and that this was confusing.

“Like the positives on the left hand side and the negatives on the right whereas last time it was like switched over.”

Cognitive Interview Participant

Recommendations

- Keep ordering of negative and positive categories consistent with the rest of the questionnaire

2.11 Out of hours (Q87 – Q90)

Q87 – Has your pet needed out-of-hours care in the past two years? By out-of-hours care we mean where your pet needed to be seen by a vet outside the opening hours of your usual vet practice?

Most participants reported that it was easy to recall whether their pet needed out of hours care, especially as those situations were emergencies and therefore more vivid in their memories.

“Pretty easy, because I guess it was more of a pressured environment and like more vivid. So you kind of remember more details.”

Cognitive Interview Participant

One participant struggled with recalling the information for this section as their experience resulted in the death of a pet. They suggested no changes were necessary and that their difficulty was because of the emotions triggered by the questions.

One participant asked for confirmation on whether the out of hours section was about the last two years.

Q88 – Thinking about your last use of out-of-hours pet care, which of the below best describes where you went for this?

One participant was unsure whether they had answered this question correctly as they had a vet practice with two locations. They selected ‘I went to my usual vet practice, which provides out-of-hours services’ but had attended the location which is not their usual one as that does not provide out of hours services.

Q90 – How did the following aspects of your visit compare between the out-of-hours veterinary service and your regular vet practice?

A few participants noticed that there was a duplicate code for this question.

One participant struggled with answering this question, feeling that the statement *‘the confidence about any decisions I had to make’* did not make sense for this scale and should be removed while the statements *‘the stress I experienced during my visit’* and *‘the pressure I felt to make decisions about treatment during my visit’* should be part of a separate question with a rating scale of ‘less’ and ‘more’ rather than ‘better’ and ‘worse’.

A different participant was also unsure how to answer this question as they were referred back to their usual vet with no treatments/services offered by the out of hours vet during the appointment.

“It’s hard to answer it whether it was better or worse, because nothing really happened.”

Cognitive Interview Participant

Recommendations

- Remove duplicate code for Q90

2.12 Medicines (Q91 – Q99)

Overall

Participants who answered this section did not report any confusion with the language around medicines, prescriptions and one-offs. A few noted that they were familiar with the language with regard to human health.

“No, although I did think at the start, when you see the word ‘prescription’ it feels like a repeat thing, but it can be a one-off, and I thought it explained that quite clearly.”

Cognitive Interview Participant

Some participants who had indicated before the interview that they would be eligible for this section and/or had regular visits to the vets were not shown the questions for this section as they had not ticked ‘medication’ at Q42. To increase the chances of eligible participants completing this section, a question asking participants if their pets have been prescribed medication in the last two years could be included at this stage of the questionnaire.

Some participants struggled to recall certain details for this section although several others found it straightforward, especially if it was a medication their pet had had for a long time, recently or their pet had few health issues.

“Very easy [...] I think just because we’ve had it fairly recently.”

Cognitive Interview Participant

“Oh, fairly easy, because we've just got the one cat, and, to be honest, she doesn't need things all of the time.”

Cognitive Interview Participant

One participant stated that they struggled remembering details such as the name of the medication but could recall why their pet needed medication. Another participant had had several one-off medications within the eligible timeframe which made it harder for them to remember accurate details.

“Not great because it was a year and a half ago.”

Cognitive Interview Participant

One participant felt that this section was generally unclear for their particular experience. They were unsure whether prescription was the correct word for their medication which involved regular injections.

One participant suggested the questions for this section should be focused on your experience of medication in general rather than a specific example of purchasing medication.

Q91 – Are you aware that you can ask a vet for a prescription to get prescribed the medication elsewhere?

One participant was unclear what was meant by ‘elsewhere’ in the question wording and asked for clarification.

Q94 – And when was the most recent time you bought a one-off pet medication? (if you can't remember exactly, please estimate to the closest month)

Some participants struggled to provide an accurate answer for this question. One suggested changing to ‘in the last six months have you bought a one-off pet medication’ rather than requiring the exact month.

“Very hard, I can't remember that at all. I've gone with what I thought it was for last prescription.”

Cognitive Interview Participant

One participant suggested adding confirmation that this question includes medication given to pets during a vet appointment as well as ones you buy and administer after the appointment.

Q99 – What was the main reason you chose to buy your medication from your vet practice?

One participant requested the addition of an option for ‘Only the vet was able to administer the medication.’

Recommendations

- Include question giving participants additional chance to be eligible for this section
- Remove introductory text from Q91 and Q92 after the addition of the new question
- Change the wording of Q91 to match Q91b which did not cause as much confusion

2.13 Cremations (Q100 – Q107)

Overall

Participants who answered this section reported that the questions were sensitive and appropriate to the topic although a few found them challenging to complete for emotional reasons.

“They were straightforward and like I said just simple, not intrusive.”

Cognitive Interview Participant

Several participants praised the introduction for its empathetic language with one saying it made them more likely to want to complete the section. One participant praised the inclusion of the link to further help for dealing with pet loss.

“I like the fact you put we’re sorry for your loss, thought that was a nice little touch. It made it personal.”

Cognitive Interview Participant

Most participants noted that it was easy to recall the details for this section with one participant noting that they could remember everything about the loss of their pet seven years before. They suggested expanding the timeframe beyond two years which they felt was too short.

“It happens and it’s relatively fresh in my mind.”

Cognitive Interview Participant

One participant had more trouble remembering the details for this section as their pet had been ill for a long period of time before passing away.

“It wasn’t just a sudden thing that you remember on that, he was sick for quite a while so yeah it was hard to remember really.”

Cognitive Interview Participant

One participant suggested wording the heading of this section differently as ‘cremations’ might be triggering for some people. One participant expressed concern that this section might be more traumatising if they were answering about the death of a dog rather than a hamster.

Q100 – The following questions are about the death of a pet. We understand that this may be very upsetting to answer questions about. If you would prefer not to answer these, please select ‘skip

to next section'. Pet bereavement support can be found at Blue Cross

A few participants asked the moderator for clarification on how to proceed with this question as they had never experienced the loss of a pet or had not lost a pet in the last two years. One suggested moving Q101 to before Q100 to reduce confusion.

"This is not in the last two years but I have had a dog pass away so should I carry on with this?"

Cognitive Interview Participant

"I haven't had a pet who's died, so do I need to proceed with the questions?"

Cognitive Interview Participant

Several participants praised the option to skip the section although they did not use it personally.

"It could be uncomfortable if it was more recent."

Cognitive Interview Participant

"I think it's nice they put that there"

Cognitive Interview Participant

Conversely, one participant was not sure it was necessary to have the option to skip the section. Another participant mentioned that although it's good to have this question they think this section is vital to include because of its importance to pet care.

"The most important part of your pet care is end of life care."

Cognitive Interview Participant

Q103 – When your pet died, which of the following happened?

One participant praised the inclusion of the option 'My pet was buried at home (by ourselves/friends/family)'.

"I like the fact that it acknowledges that people take them home to have their own kind of thing with them rather than just having the vet options"

Cognitive Interview Participant

Q107 – What factors were important to you when selecting a cremation service? Please select all that apply.

One participant found this question difficult as they had never thought about the topic and were unaware that there were different options for cremation services.

"I didn't think there were any other options."

Cognitive Interview Participant

Recommendations

- Amend the wording of Q100 to make it clear how to answer for participants who have not experienced the loss of a pet

2.14 Pet health plans (Q108 – Q111)

Overall

Most participants did not complete this section as they were ineligible. For those that did, it was largely straightforward and the information was easy to recall.

A few participants were not aware of pet health plans or the difference between them and pet insurance and answered this section as if it discussed pet insurance.

“I might ask if they do that though, I didn’t know about this.”

Cognitive Interview Participant

One participant praised the introduction for explaining what is meant by a pet health plan.

Q108 – Do you currently have a pet health plan, or have you had one in the past three years?

One participant was unsure whether this question and the rest in this section referred to only the pet whose vet visit they had discussed in the survey previously or all of their pets. They had pet health plans for certain pets but not others and requested clarification on how to answer the questions.

“So is this about the hamster? Or is this about all the animals?”

Cognitive Interview Participant

One participant could not recall whether they had a pet health plan or not but did not suggest any changes to the survey were necessary.

“I can’t remember if we have one or not.”

Cognitive Interview Participant

Recommendations

- Add sentence in introduction explaining that pet health plans are different to pet insurance which will be covered later in the survey
- Change wording of Q108 to make it clear that the question applies to all pets

2.15 Insurance (Q112 – Q115)

Overall

As with pet health plans, this section was clear, easy to understand and most participants had little difficulty with recalling the information. This section was more commonly answered than the one on pet health plans.

“Really easy, because I’ve just kept the same insurance provider and I’ve not had a pet plan before.”

Cognitive Interview Participant

“It was fairly straight forward.”

Cognitive Interview Participant

“When I read the question, I thought of the answer and the option was there.”

Cognitive Interview Participant

One participant felt that this section was straightforward but questioned whether it might have been more challenging if they had multiple pets.

Q112 – Do you currently have pet insurance or have you had pet insurance in the past 3 years?

As with Q108, a participant was not clear on how to answer this question as they had pet insurance for some pets but not others.

Q113 – Is there a particular reason you do not have insurance for your pet(s)?

A few participants noted that there were no obvious options for them to choose with one requesting an option for no longer owning a pet as they no longer have insurance as their pet passed away and another wanting an option for those who intend to get insurance but have not got round to doing so.

Q114 – What were your reasons for having pet insurance?

One participant requested a new response code as they have insurance to provide assurance for the care and health of their pet.

Q115 – How did you find the insurance plan that you took out?

One participant could not remember the details for this question as they purchased their pet insurance a long time ago.

One participant expressed support for the examples given for certain response codes as this might make them easier to answer.

“I like the fact that it says like insurance company, and then it gives you an example of like, compare the market or go compare. I think that makes it easier for people.”

Cognitive Interview Participant

Recommendations

- Add introduction to outline what is meant by pet insurance to differentiate from pet health plans
- Change wording of Q112 to make it clear that the question applies to all pets
- Add option for 'no longer own a pet' to Q113 and change wording of question to '*Is there a particular reason you do/did not have insurance for your pet(s)?*'

2.16 Complaints (Q116 – Q123)

Q116 – Have you raised a complaint about your vet or vet's practice in the past two years?

Participants found it easy to remember whether they had raised a complaint and the details of their complaint if they had, especially if it was a recent complaint.

A few participants queried which complaints were eligible for this section, requesting clarification on whether a complaint directly to their vet practice counted for the purposes of this question or whether it had to be a complaint to a different organisation and whether it had to be a formal complaint or not.

"I've raised it with the actual vet, so would that be included?"

Cognitive Interview Participant

Q119 – If there was an issue where you felt you wanted to raise a complaint, what would you be likely to do?

One participant asked for a not applicable option for this question.

Q122 – Before this survey, were you familiar with the RCVS' (Royal College of Veterinary Surgeons) Practice Standards Scheme?

One participant was unclear on how to answer this question if they had heard of the RCVS but knew nothing about it.

"When it says, were you familiar? I've heard of it, but I don't know anything about it. So what do you want me to put for that?"

Cognitive Interview Participant

Q123 – Which of the following relates to your familiarity with the RCVS' Practice Standards Scheme?

One participant noted that they could have selected more than one option for this question if they were able to.

Recommendations

- Make it clear in Q116 that both complaints directly to a vet and to a different organisation mean that participants can select 'yes'
- Keep the ordering of negative and positive options in Q118d consistent with the other questions of this type

2.17 Views on in-home consultations/ mobile vets/ remote consultations/ telemedicine (Q124 – Q129)

Overall

The vast majority of participants had not used in-home consultations, mobile vets or remote consultations and found it easy to remember that they had not. Many had not heard of these services. One participant had used a 24-hour telephone vet service and therefore completed this section.

"I just have never heard of them."
Cognitive Interview Participant

One participant asked if 'video vet' would include a time they sent a video to their vet but did not have a live interaction with the vet.

"I've used something from my surgery where I had to send a video through. So I don't know, it wasn't a live one, though, with a vet on there live able to discuss but I have sent a video."
Cognitive Interview Participant

One participant had used online consultations but as they were provided by insurance they were unclear whether they should proceed with this section.

Recommendations

- Clarify what is meant by video vet in Q124

2.18 Costs and perceptions of costs (Q130 – Q136)

Q130 – Thinking again about the most recent visit to the vets, how was this treatment paid?

Although not noted by participants, we would flag that it is not clear whether this question is trying to ascertain the source of the funds or the physical mode of payment. Some answer codes cover the former, some the latter. Some participants coded the 'source' code, others the 'mode' code and a few coded both but they were in the minority.

A few participants had to select 'another way' as there was no option for payment by family/friends.

“A lot of people would ask family.”
Cognitive Interview Participant

A few participants suggested adding a payment plan as an option for this question.

One participant did not realise this question was referring to the most recent visit until informed by the moderator.

One participant asked for the addition of information explaining that participants should answer this question even if they did not pay for the treatment personally.

Q131 – Compared to three years ago, to what extent do you think vet prices have changed?

Some participants mentioned that they were not able to answer this question as they had not had the same treatment/service more than once or had no recent experience to compare to.

“Tricky that because I suppose it depends what you’ve actually had done at the vets, whether you’ve had it done previously to know cost has risen or whether the standards have risen. I’ve had blood tests with the dog for a while so I know it’s gone up in price.”

Cognitive Interview Participant

“I don’t know because I wasn’t going for the exact same thing.”

Cognitive Interview Participant

Q132 – Compared to three years ago, to what extent do you think the quality of vet services have changed?

Much like Q131, participants found this question challenging to answer if they had not experienced the same treatment/service multiple times.

“I can't say whether the actual work is any better or not because I haven't had the same thing twice.”

Cognitive Interview Participant

Q133 – How much do you estimate you have spent on vet services over the last two years?

Many participants experienced difficulty in answering this question accurately with several admitting that they were guessing and that the answer was likely to be very different. One participant was not sure whether they were allowed to guess and required support from the moderator. A few were able to provide an answer with ease.

“I really don’t recall how much this was.”

Cognitive Interview Participant

“Well, that's difficult to remember [...] I probably underestimated, I would imagine it might have been more.”

Cognitive Interview Participant

“I'm not sure, because I know like the individual prices, but I wasn't entirely sure altogether how much I'd spent.”

Cognitive Interview Participant

A few participants suggested including examples to make it clear what is included in this question or to prompt people's memory. A few participants asked for clarification on whether they should include the cost of their pet health plan with one asking about the relevance of pet insurance costs as well.

“Does that include pet plan and insurance, or just what you've spent at the vets?”

Cognitive Interview Participant

A few participants suggested adding bands of numbers to make this question easier to answer.

One participant requested changing the question's focus to how much did your last vet visit cost.

Q134 – When it comes to receiving medical care, to what extent should pets be treated similarly or differently to humans?

Many participants took longer to answer this question than they had others and described it variously as 'hard', 'silly' and 'intrusive'. A few participants questioned why it was relevant to include in this survey.

“It's a bit of an odd question I think [...] it doesn't feel relevant.”

Cognitive Interview Participant

“That's a really strange question.”

Cognitive Interview Participant

“Blimey that's a difficult question, isn't it?”

Cognitive Interview Participant

One participant noted that pets should be treated the same as humans or completely different could both be positive statements about ensuring pets have the best care.

Q135 – Pet owners make choices about how to spend household finances on pet care. Which of the following statements do you most agree with?

As with Q134, some participants struggled to answer this question, taking time to answer it and often spontaneously justifying their answer in a way that they did not for other questions.

"It's a good question but it's a hard question."

Cognitive Interview Participant

One participant suggested a change of focus to thinking about an ideal world while another participant wanted an option to convey that it depends on household circumstances.

One participant requested information on what was meant by the household expenses the question referred to.

One participant suggested removing *'Pet owners make choices about how to spend household finances on pet care'* from the question wording as they felt this was unnecessary.

Recommendations

- Consider splitting Q130 into 'source' and 'mode' questions or refining so that it covers only 'source' or 'mode'
- Add by family/friends as an option for Q130
- Consider providing price ranges for Q133
- Clarify in question wording whether pet health plans and pet insurance should be included in the answer for Q133
- Add examples for Q133

2.19 Comments on the overall experience of the survey

At any point during the survey was it unclear which visit to the vets the questions were relating to?

Many participants stated that this was clear throughout however a few participants noted that there was uncertainty when completing the referral sections, either because the questions were similar to the recent visit section or because they had not noticed the two-year timeframe.

"No, because it normally specified the most recent visit, or routine check-up."

Cognitive Interview Participant

"It was a pretty clear survey."

Cognitive Interview Participant

One participant suggested that they might have struggled if they had had more than one vet visit within the relevant timeframe.

A few participants mentioned that the changing timeframes were unclear and requested the inclusion of the timeframe for every question.

One participant did not struggle with the timeframe but noted that they had to spend longer reading the questions as they have multiple pets.

Have you heard of Competitions and Market Authority (CMA) Market Investigation before?

Most participants had not heard of the Market Investigation. Of the few that had, none reported that knowledge of it, which was generally limited, impacted their answers.

What are your thoughts on the overall length of the survey?

Most participants believed that the survey was a good length and quick to complete.

"The pace of it was it good."

Cognitive Interview Participant

"I think it was quite good, like it wasn't too long and the questions were easy to read and didn't make me like, reread them quite a few times to understand them or anything."

Cognitive Interview Participant

Some participants noted that the survey was long although they could not think what they would have cut out as they felt it was all useful, relevant to them or easy to answer. They were aware that their survey experience might be longer than others as they had completed some of the optional modules. One explained that they would complete this survey willingly for an incentive but not for free due to its length.

"It is quite lengthy but they've had to cover all different aspects so I don't see how they would do it without asking the questions that they have done."

Cognitive Interview Participant

"It was quite a lot but I think that's probably my fault, because I ticked about a million boxes because I've used so many services over the past year."

Cognitive Interview Participant

One participant admitted that they would have skipped the cremations section to save time if they were completing the survey outside the context of a cognitive interview. They noted that they prefer a 5-10 minute survey to the 10-15 minutes they believe the survey would have taken if it was not part of a cognitive interview.

Several participants believed that one of the following aspects of the questions made it quicker to complete:

- Multiple choice
- Direct
- Mostly relevant to them

One participant felt the survey was repetitive although they noted they have that experience with a lot of surveys.

How easy/difficult was it to recall this information about visiting a vet practice?

Many participants felt that it was easy to recall this information. A few participants believed that it was easier for them to remember as they had only one pet while another credited the fact that they rarely visit the vet. Another participant, who had multiple pets, did note that they struggled recalling the number of vet visits.

"I struggled to remember how many times I've been but I have a multi-dog household."

Cognitive Interview Participant

"I suppose a visit to the vets would stand out for me, because we're not sort of there all the time."

Cognitive Interview Participant

"I found it fairly easy just having one pet and one episode of visits."

Cognitive Interview Participant

Several participants believed it was easiest to recall recent visits accurately compared to ones that were more distant, for example a year or two ago.

"Easier when it asked me about specific ones, like in your last visit or around the blood tests. It was more tricky when I was looking at things over a longer time span to recall it accurately."

Cognitive Interview Participant

"Easy because I was there recently [...] think if I had been back and forth it would be more difficult."

Cognitive Interview Participant

"I think if it was like nearly two years ago, it maybe wouldn't have been as in my head."

Cognitive Interview Participant

One participant acknowledged that they would have struggled and selected 'don't know' more often for questions on dates and locations if they had not used the receipts they had found before the interview.

One participant found information on pricing challenging to recall but felt the rest of the information was easy.

"Apart from pricing, it was fairly easy, it's not something you forget."

Cognitive Interview Participant

One participant reported issues with trying to remember whether an issue was in the relevant timeframe and would have preferred a lengthier timeframe of five years.

One participant noted that more serious appointments were much easier to remember than routine check-ups.

"If it's a worse scenario, then yeah, you'll kind of remember them all. But if it's like a routine checkup like a year ago then you won't remember."

Cognitive Interview Participant

Would you have been willing to share the name of your pet during the survey? / If yes, do you think that would make it clearer which vet visit the questions are referring to?

This question was only added to the topic guide on the final day of the cognitive interviews so most participants were not asked.

Of those that were, all were willing to share the name of their pets in the survey. One participant felt that this would make it clearer which vet visit the questions referred to whereas another believed this would not help.