

Veterinary Services for Household Pets Market Investigation – Consumer research

Introduction

1. We commissioned an independent agency, Blue Marble Research, to undertake some research on our behalf. That research was to test pet owners' reactions to a number of potential consumer-facing remedies which were later developed and proposed in our provisional decision report (PDR). It was undertaken to help us decide, in due course, which remedies (if any) we might adopt and how we might design them. We have published Blue Marble's report to allow interested parties to comment on the findings and how we should use them as we consider our final decisions on any remedies.

Background

2. Ahead of the publication of the PDR we considered the additional research we could undertake with pet owners in relation to potential remedies. Our view was that testing pet owners' reactions to the consumer-facing remedies we were contemplating, and the ideas and concepts that lie behind them, could help us make our decisions. We took this approach instead of making a provisional decision to use our statutory powers to trial the implementation of information remedies at a later stage of our investigation.¹

The research

3. The objectives we gave Blue Marble and the approach it took in conducting the research are described in section 2 of its report. Blue Marble carried out qualitative research with 70 pet owners from across the UK. Through 12 focus groups, the research explored pet owners' experiences of veterinary services, as well as their reactions to some of our potential remedies and their underlying concepts.
4. As the report says, the research's objectives were to:
 - a. capture and explore pet owners' reactions to some of the potential remedies and possible means of their delivery; and

¹ In paragraphs 2.81 to 2.83 of Part B of the PDR we said that, while the CMA has important statutory powers to trial the implementation of information remedies, and those powers are likely to be valuable in many market investigations, we did not propose to exercise them in the present case. We noted that in some respects the remedies we proposed were simplified from those previously discussed in our Remedies Working Paper. Our provisional view was that such statutory trials would be unlikely to demonstrate that one form of implementing those remedies would be more effective than another to such an extent as to justify the use of the powers.

- b. explore with pet owners their current behaviour as a means of testing assumptions underpinning some of the remedies.
- 5. The report notes that qualitative research can test these areas by exploring with pet owners underlying issues, their personal experiences, and their motivations. It is designed to obtain specific insights and indications of prevailing attitudes rather than statistical representations. We note that for some elements of the remedies, respondents may not be consciously aware of the potential effects.
- 6. The remedies presented to the pet owners as part of the research are summarised in Figure 1 of the report and described more fully in section 3. Due to the timing of the research, which was conducted prior to the publication of the PDR, there are some differences in the details of the remedies explored in the research and those published in the PDR. The way that the remedies are set out in the report should not therefore be taken to indicate the exact form of our proposed remedies; these can be found in Part B of the PDR.

Key findings

- 7. The research's key findings are explained in more detail in Section 3 of the report. We note that they show a range of responses to the remedies.
- 8. In particular, we see that there were strong positive reactions to: published price information for common veterinary services; standardised information about prescriptions; having a choice of prescription format; and capping prescription charges.
- 9. There was support for: the disclosure of practice ownership; and written price information for treatments.
- 10. There was broad interest in the concept of a veterinary comparison website, but participants were divided on whether they would use it.
- 11. Reactions were more muted for some remedies. Many considered that potential customer satisfaction survey was unlikely to influence their choice of veterinary practice. While additional information for referrals was broadly supported, it was not well understood.
- 12. There was limited support for prescription defaults and a pet health plan calculator, with many considering that these remedies addressed issues they did not perceive as problems.

Comments and next steps

13. We are considering the findings, insights and analysis set out in the report. We are thinking about the way in which we might take them into account along with other evidence in, and responses to, the PDR. We invite parties' comments on the report, the use we should make of the findings it contains and the weight we should place on them. Such comments should be provided by email to VetsMI@cma.gov.uk by 5pm on 6 January 2026.