



Appendix A:

Impact Assessment of the CMA's proposed measures for the veterinary sector on independent practices.

Version 1.04

November 2025

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Appendix A:

Impact Assessment of the CMA's proposed measures for the veterinary sector on independent practices.

1. Introduction

1.1 In this appendix, we set out the results of an impact assessment performed of the proposed measures for the veterinary sector, as published by the Competition and Markets Authority on 15 October 2025.

2. Impact Assessment

2.1 On 20 October 2025, FIVP launched a survey: **Impact Assessment of the CMA's proposed measures for the veterinary sector on independent practices.**

2.2 The survey was open to anyone working in independent practice, regardless of FIVP membership status. The survey asked for opinions on the CMA's suggested remedies. Data has been anonymised.

2.3 This report represents all responses submitted from 20 October 2025 up to and including 31 October 2025.

2.4 The survey was created with the view of gathering a structured response from independent practices as soon as possible after the publication of the remedy package. These responses would be used to collate FIVP's formal response to the CMA.

2.5 As such, the survey is not intended as a robust scientific survey. We fully accept that it has its limitations and may be open to challenge.

3. Methodology

3.1 We obtained data from independent practices through an online survey. This was distributed by email, social media, on FIVP's website and was reported in veterinary publications.

3.2 Those completing the survey were required to include details such as their name, email address, practice name and the address of their main site. This allowed us to authenticate responses.

3.3 Those surveyed were invited to share their opinion on 17 summarised remedies, which FIVP expects would impact independent practices. Each question was optional.

3.4 Each remedy included questions querying the perceived impact the remedy would have on practice finances and the provision of veterinary services; animal welfare; and clients. These responses have been summarised into the following categories based on the perceived impact to practices: Negatively; Positively; Don't Know; No Effect.

3.5 Those surveyed were asked whether their practice supported each remedy with a multiple-choice Yes/No question.

3.6 Finally, those surveyed were invited to offer any suggested amendments to the remedies.

3.7 There was an option to offer additional comments on each remedy.

3.8 The survey was distributed via the following platforms:

- FIVP's website (fivp.org.uk)
- FIVP's LinkedIn account
- Emails from FIVP to a database of independent veterinary practices
- A press release to veterinary news outlets
- Coverage on Vet Times, MRCVOnline and VNOnline
- Shared by SPVS, BSAVA, BVA and BVNA.

4. Demography

- 4.1** The survey was completed by respondents from 181 independently owned veterinary businesses. These businesses own a combined total of 316 practice sites.
- 4.2** These practices collectively employ 4,066 individuals.
- 4.3** This includes 1,169 veterinary surgeons, 1,463 registered veterinary nurses and student veterinary nurses, and 1,437 support staff.
- 4.4** Based on normal averages, these practices would be providing care to an estimated 935,000 households and an estimated 1,122,240 pets (based on 800 clients per FTE veterinary surgeon and 1.2 pets per client).
- 4.5** When calculating a percentage, a weighting is given to the response received from a practice. This weighting is based on the total number of veterinary surgeons, veterinary nurses and student veterinary nurses at each practice.
- 4.6** For example, a practice with 1 veterinary surgeon and 1 veterinary nurse would be weighted as 2. A practice with 3 veterinary surgeons, 2 veterinary nurses and 1 student veterinary nurse would be weighted as 6.
- 4.7** We believe this gives each response a weighting that is proportionate to the impact the remedies would have on the related independent practice.
- 4.8** This has been calculated to a total of 2,632 responses.
- 4.9** There is no reason to believe that this survey does not accurately reflect the opinion of the entire community of independent veterinary practices.

Number of veterinary surgeons	Number of businesses
1-2 veterinary surgeons	43
3-5 veterinary surgeons	67
6-9 veterinary surgeons	41
10-15 veterinary surgeons	23
16+ veterinary surgeons	7

Number of employees	Number of businesses
1-10 employees	61
10-25 employees	77
26-50 employees	31
51-100 employees	7
101+ employees	5

Region	Number of businesses
South East	30
South West	28
Scotland	24
East of England	19
North West	16
Greater London	13
West Midlands	13
East Midlands	12
Wales	12
North East	10
Northern Ireland	2
Channel Islands	1
Isle of Man	1

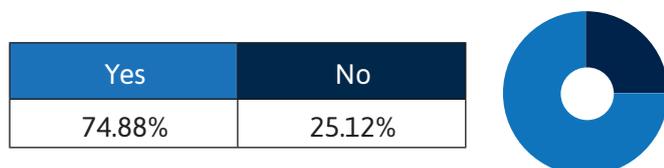
Respondent's role	Number of responses
Veterinary Profession with Director status	139
Non-Clinical Director	4
Veterinary Profession without Director status	23
Leadership Team (Non-Clinical)	15

5. Results

Responses have been analysed and anonymised internally by FIVP.

1. The RCVS will have power to regulate veterinary practices. It will have the power to enforce requirements and standards for these businesses.

1a) Does your practice support this remedy?



2404 total responses out of 2632.
Response percentage 91.34%

1b) How will this affect your practice's finances and your ability to provide veterinary services?



2441 total responses out of 2632. Response percentage 92.74%

Sample responses:

'It would be a detriment to practice finance in staff taking time to fulfil the requirements of the standards'

'We are currently accredited by RCVS Practice Standards and compliant. We are already regulated by VMD and RCVS in many ways – but controls on how we run our businesses in an open market will have an impact'

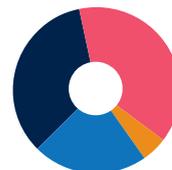
'Negatively if not done appropriately. Being a small practice, we do not have a full-time IT person to deal with price updates, sending info to RCVS etc. Employing another person will increase costs.'

'I am concerned that the proposals will have a disproportionate effect on small independent practices like mine, which larger corporations will be able to absorb'

1c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
34.33%	38.53%	4.99%	22.15%

2144 total responses out of 2632. Response percentage 81.46%



Sample responses:

'We will always ensure the welfare of animals is our top priority, however, our costs reflect what it costs to run the business. Some clients cannot always afford our services'

'Increasing fees means that clients may not come for minor issues, first aid or might avoid us altogether.'

'With scrutiny at its highest, owners may decide to cut corners when caring for their animals because of cost.'

1d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
46.08%	26.83%	5.89%	21.20%

1953 total responses out of 2632. Response percentage 74.20%



Sample response:

'It may provide a higher level of confidence in the regulation of practices by clients, however they may be dissatisfied with the higher charges that accompany this'

'Will almost certainly increase their costs'

'It may increase prices. They are unlikely to be aware of changes to standards or requirements and so will just see a price increase'

'Hopefully help to build trust'

1e) How would you amend this recommendation?

'I would support regulating practices that are not owned directly by veterinary surgeons but consider the level of regulation of vet-owned practices is already sufficient.'

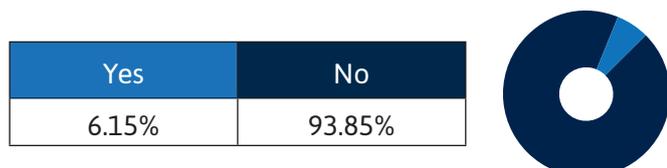
'The RCVS needs to apportion the additional costs proportionally based on the size of the business – perhaps better that all practices are part of PSS?'

'The RCVS should do it by consulting with practising vets as to what is realistic and financially viable'

'New standards committee should be made that is more relevant.'

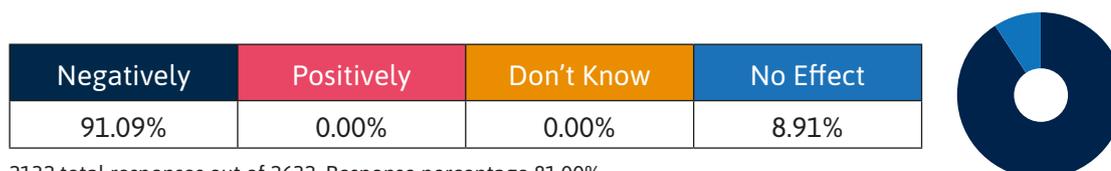
2. The cost of a written prescription is to be capped at £16. Veterinary professionals to inform owners about savings they can make by buying medicines online. Websites should link to an RCVS list of approved online pharmacies.

2a) Does your practice support this remedy?



2245 total responses out of 2632.
Response percentage 85.30%

2b) How will this affect your practice's finances and your ability to provide veterinary services?



2132 total responses out of 2632. Response percentage 81.00%

Sample responses:

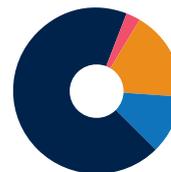
'It will severely negatively impact us in terms of online pharmacies. These companies are run by the very same large corporates that the CMA proposed measures are supposed to help control. We can only buy drugs from approved wholesalers that charge more for us to buy in the first place than an online pharmacy would charge a client'

'If clients are choosing to purchase online we would need to reduce stock levels as more wastage will occur, this will then reduce our ability to provide medications at the time of being prescribed as stocking levels will need to be managed to mitigate wastage, which may delay treatment or reduce options available in stocking medications'

'Medicines are an income stream to the practice. Our three nearest neighbours are corporate practices who have online pharmacies as part of their organisation. This will take an income stream from us who have lower fees for services and give it to them who have a greater buying power so generate the same margin on the drugs fees and charge higher services fees. We are penalised by this, they are helped and there will be an average rise in the cost of services across the industry.'

2c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
68.61%	2.67%	17.55%	11.17%



2131 total responses out of 2632. Response percentage 80.97%

Sample responses:

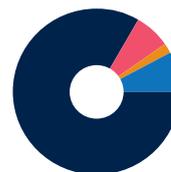
'Clients will not get the same support and advice around medications sourced online. Clients are not just buying a medicine; they're buying the support and advice and guidance that comes along with it. I expect there will be more overdoses and longer waits before meds are received, with clients running out of medications and waiting for recheck appointments.'

'Clients will have to wait for processing times, delivery times to get their animals drugs that they may need urgently.'

'May slow supply of essential drugs. may allow supply of counterfeit drugs. May make clients less inclined to bring pets for treatment due to cost'

2d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
83.44%	7.07%	1.94%	7.55%



2066 total responses out of 2632. Response percentage 78.50%

Sample responses:

'I expect it will increase confusion, costs, friction and encourage a race to the bottom.'

'Our clients will need direction and signposting on how to order online. Those who are elderly or struggle with use of the internet will be unable to access online ordering without assistance. Many in our community do not have significant support networks which means our RVN will be taking time to help them order products online. If clinics send prescriptions directly to their own pharmacies owned by their own companies this keeps all profits in house and increases the unfair market share corporates may hold, also reducing client choice'

'Costs will increase and they will have the inconvenience of buying medicines elsewhere. If practices do not make profit on medicines they will not incur costs stocking them or risk them going out of date. Medicines will ONLY be available online hence inconvenience clients and reduce animal welfare with delayed access.'

2e) How would you amend this recommendation?

'Vets must inform owners about savings they can make. Would strongly advise this is changed to "vets should make pet owners aware that they are free to source their medications from alternative suppliers".'

'Remove the requirement for vets to discuss with owners and have an evidence-based cap on prescription fees rather than an arbitrary value.'

'Remove or increase the prescription cap, and make sure that allowance is made for increase in line with annual inflation. A prescription should not be the default means of medicating for acute conditions where the animal needs to start medication immediately, but should always be offered for ongoing/repeat medications.'

3. Veterinary businesses must publish comprehensive price lists.

3a) Does your practice support this remedy?

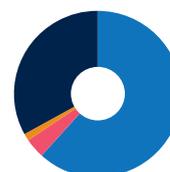
Yes	No
50.77%	49.23%



2145 total responses out of 2632.
Response percentage 81.50%

3b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
33.04%	3.73%	1.40%	61.83%



1931 total responses out of 2632. Response percentage 73.37%

Sample responses:

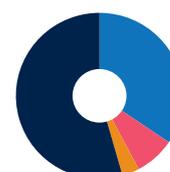
'The RCVS need to create the price list in the first place and show what's included so it is like for like, apples for apples... that is quite hard!'

'Different practices have different fee structures so this will be difficult to do. Beyond a basic list it will increase costs. We have a quite minutely itemised invoicing system so people can really see what they are paying for and they only get charged for what they get'

'I am happy with this recommendation; it is something we already do for basic services. However, pricing is subjective to clinician expertise, experience, and patient requirements so is very personalised'

3c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
54.33%	7.65%	3.41%	34.61%



1962 total responses out of 2632. Response percentage 74.54%

Sample responses:

'Clients may seek a drive to the cheapest, believing that the standard of care will be similar. This will likely drive a reduction in quality to the lowest possible price point.'

'This could be detrimental should clients regularly swap practices for procedures. It means continuity of care is affected and makes it difficult for vets to keep track of treatments and medications. Trying to keep track of clinical histories could be difficult.'

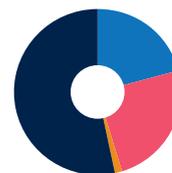
'Incomplete histories with owners unhappy to divulge information leading to potential incorrect drug or drug combinations been used'

'Shopping around for a service when an animal is ill will delay treatment. Moving an unwell animal for treatment elsewhere could have very serious welfare consequences. I can only see negative animal welfare implications for this.'

Continued overleaf

3d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
53.12%	24.38%	1.56%	20.94%



1858 total responses out of 2632. Response percentage 70.59%

Sample responses:

'Clients may be confused as to why practices differ in price for what may seem to be a similar service. However, it will encourage transparency of fee structure and allow clients to be forewarned of the cost of veterinary care. I am concerned about a drive to the cheapest service'

'Clients will choose vets according to cost alone, not on the quality of service.'

'They will have more certainty about the likely costs, but of course no price list can cover all eventuality/ permutation of the medical or surgical problem we are faced with.'

'Clients will benefit from greater transparency and a clearer understanding of typical costs, helping them plan for care and make informed decisions. However, comprehensive price lists could also create confusion, as final costs often depend on clinical judgment, diagnostics, and patient factors. Without proper context, clients may feel misled or frustrated if an initial estimate differs from an online list. The focus should be on clear, example-based estimates and open communication, not static price catalogues that can't reflect clinical nuance.'

3e) How would you amend this recommendation?

'Ensure that clients get an honest estimate before anything starts.'

'Keep it to a limited but tightly prescribed list to ensure like for like comparisons.'

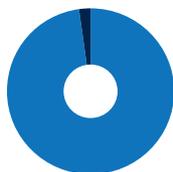
'Enforce practices to publish on their websites. Not on a price comparison website.'

'Practices be required to publish clear example pricing or "from" ranges for common procedures, rather than exhaustive lists. The emphasis should be on transparent estimates at the point of care, not static online tables that may become outdated or misleading. The CMA provide a standardised format or template to ensure fairness and consistency across the sector. Guidance explicitly recognises that clinical judgement and patient-specific factors mean published prices can only ever be indicative.'

4. Veterinary practices must make it clear if they are part of a larger group.

4a) Does your practice support this remedy?

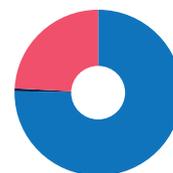
Yes	No
97.82%	2.18%



2160 total responses out of 2632.
Response percentage 82.07%

4b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
0.64%	24.03%	0.00%	75.33%



1885 total responses out of 2632. Response percentage 71.62%

Sample responses:

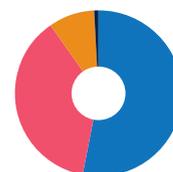
'This will help our practice because there are many clients who prefer independent practices but do not know that theirs is not one.'

'Many clients are not aware whether their practice is independent or part of a larger group and seek smaller independent practices. This will increase transparency.'

'Positive impact'

4c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
0.70%	37.18%	8.86%	53.26%



1716 total responses out of 2632. Response percentage 65.20%

Sample responses:

'Care should be a high standard regardless'

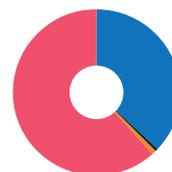
'Beneficial, the people in charge are easier to hold to account. The owners have the added responsibility of being an MRCVS and obligations attached to that'

'Positive – clients will be aware whether referral is to best practice available or within the same corporate.'

Continued overleaf

4d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
0.70%	61.63%	0.64%	37.03%



1720 total responses out of 2632. Response percentage 65.35%

Sample responses:

'This will allow clients to choose whether to use an LVG vs an independent practice with the pros/cons of each business model. Currently clients are mostly unaware that they have a choice'

'They will not be being misled to thinking it's the same run practice as it used to be. They will understand why things are suddenly different as the practice will be shown as who it is owned by'

'Clarity and having an informed choice'

4e) How would you amend this recommendation?

'Make LVGs trade under a unified banner for each group. Nothing would make it clearer than that'

'There needs to be some form of protected words – a large corporate should not be able to describe themselves as 'independent' or 'family-owned.''

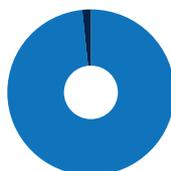
'Must be clear and easily visible not buried in small print'

'Out of house cover should be known to all clients – we see lots out of hours who don't know their own practice uses LVG'

5. Veterinary practices must make sure their policies and processes allow vets to act in the best interest of pets and their owners.

5a) Does your practice support this remedy?

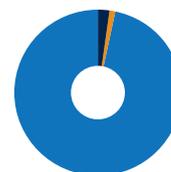
Yes	No
98.39%	1.61%



2115 total responses out of 2632.
Response percentage 80.36%

5b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
2.15%	0.00%	1.03%	96.82%



1949 total responses out of 2632. Response percentage 74.05%

Sample responses:

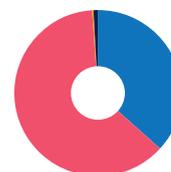
'It would not, our policies and procedures are already set to prioritise welfare of animals'

'It won't as we already do allow vets to act in patients best interest'

'No effect as this is how we work now. Vets have clinical freedom to make decisions with animal owners'

5c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
0.59%	62.22%	0.36%	36.83%



1678 total responses out of 2632. Response percentage 63.75%

Sample responses:

'Will have a positive effect on animal welfare as vets are able to make decisions based on what they feel is best.'

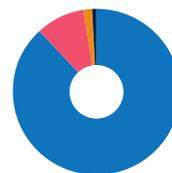
'Continue the great care we provide'

'Positively. Ensuring all veterinary professionals can act in the best interests of animals and their owners directly supports improved welfare outcomes. Where clinical judgement is prioritised over commercial metrics, pets receive more appropriate, timely, and compassionate care. This recommendation reinforces the RCVS Code of Professional Conduct, supporting ethical, welfare-focused practice across all business models.'

Continued overleaf

5d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
0.59%	9.42%	1.85%	88.14%



1678 total responses out of 2632. Response percentage 63.75%

Sample responses:

'Positively. It reinforces the 'ethos' they expect from us and so hopefully builds trust'

'It will promote an open discussion between vets and owners to discuss which treatment options suit owner and pet rather than always aiming for the most comprehensive treatment options regardless of overall benefit'

'Clients benefit when they know their vet's advice is free from commercial influence and focused entirely on their pet's needs. This fosters trust, openness, and long-term relationships, which are essential for effective preventative care and compliance with treatment plans. It may also enhance public confidence in the profession as a whole, reassuring owners that financial structures do not override clinical judgment.'

5e) How would you amend this recommendation?

'The RCVS provide clear definitions of what constitutes acting in the best interests of animals and clients, supported by practical examples.'

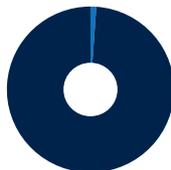
'The implementation process include consultation with practising vets across independent and corporate sectors to identify potential conflicts of interest.'

'The CMA could include whistleblowing protections for vets who feel pressured to compromise welfare, ensuring genuine accountability in larger organisations.'

6. Veterinary professionals must automatically provide a written prescription if a medicine will be needed regularly. Businesses may need to allow additional consultation and/or administrative time to allow this.

6a) Does your practice support this remedy?

Yes	No
1.23%	98.77%



2204 total responses out of 2632.
Response percentage 83.74%

6b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
93.81%	0.00%	0.00%	6.19%



2020 total responses out of 2632. Response percentage 76.75%

Sample responses:

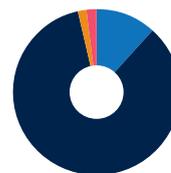
'Prescriptions require significant time to be written and checked then communicated to the client which impacts workflow'

'Huge increase in administrative burden. Automaticity should not be a thing, but can be offered.'

'Reduce finances and put on a huge admin strain on staff. Less time for actual client and costs of consults will have to increase to cover the lost revenue and time'

6c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
84.84%	1.71%	1.66%	11.79%



1873 total responses out of 2632. Response percentage 71.16%

Sample responses:

'Reduce the availability of clinician time to fulfil this requirement, meaning fewer appointments available'

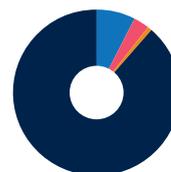
'This may reduce access to medications as owners will have less capacity to obtain medications at short notice if it is no longer stocked at the local practice due to the rule changes.'

'It will make basic veterinary services less easily accessible as the prices will have to go up to compensate for lost revenue and to factor in increased professional time taken.'

'How is this regulated, multiple online pharmacies complete and deliver the same prescription that is then used on multiple animals it was not intended for without veterinary guidance – who will they take their now sick animal to?'

6d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
88.51%	2.98%	0.87%	7.64%



1845 total responses out of 2632. Response percentage 70.10%

Sample responses:

'This will confuse them and I feel that our clients are aware that medication is online and the cost implications. There is no barrier for them to ask and they know that, often they do not have the time or ability to order online'

'There will be fewer appointments available, so clients will be inconvenienced'

'They may re-use the prescription at multiple sites and continue to give medications when they are no longer relevant or safe as the vet won't know the client is still giving them'

'Negatively. I do not believe the online pharmacies will give the support we do. If the bottle/tube is faulty, will they sort it? Will they they show client how to use meds? Open the bottles when they have arthritis? (...) In addition If we see the client every month when they collect meds we ask how the pet is doing and are more aware & can act more quickly for the health of the animal than if we only see them every 3-6 months.'

6e) How would you amend this recommendation?

'The RCVS must develop a robust identity management system that allows the profession to securely issue prescriptions that is recognised by pharmacists.'

'Allow clients to have prescriptions on request'

'I think the onus should be on the client to request a written prescription. I don't believe it's the vet's job to tell them to use another business, which is then detrimental to their own practice'

7. Veterinary practices must provide pet owners with pricing estimates when they are choosing treatments. This includes a written estimate for costs where a treatment is over £500. Businesses may need to allow additional consultation and/or administrative time to allow this.

7a) Does your practice support this remedy?

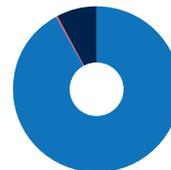
Yes	No
71.09%	28.91%



2110 total responses out of 2632.
Response percentage 80.17%

7b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
7.76%	0.26%	0.00%	91.98%



1971 total responses out of 2632. Response percentage 74.89%

Sample responses:

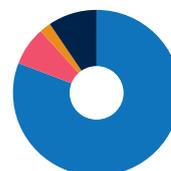
'We already try to do this. This is good for transparency and client relations.'

'This is good practice and we are already doing it.'

'Estimates are already given for all procedures. This is normally done verbally but written estimates could be done. Additional consultation time for this will need to be passed on to owners'

7c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
9.18%	7.58%	2.31%	80.93%



1688 total responses out of 2632. Response percentage 64.13%

Sample responses:

'Discussion about costs helps pick treatment options and benefits animal welfare'

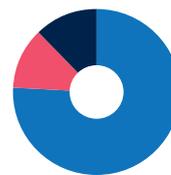
'Transparent pricing can improve welfare by encouraging open, informed discussions between vets and owners, helping ensure clients commit to treatment plans they can afford. However, there is a potential downside if delays in preparing written estimates slow down urgent or unplanned care, or if clients feel pressured to base medical decisions on cost alone. To protect welfare, the focus should be on timely, proportionate communication, especially in emergencies or evolving cases.'

'Price transparency and clarity is always good.'

Continued overleaf

7d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
12.20%	11.73%	0.00%	76.07%



1730 total responses out of 2632. Response percentage 65.73%

Sample responses:

'Clients will benefit from greater clarity and predictability in treatment costs, helping them budget and plan. However, they should be made aware that veterinary medicine is not always predictable, and estimates may change based on diagnostic findings or patient response. Without that context, written estimates could create unrealistic expectations or lead to unnecessary disputes. The key will be pairing cost transparency with clear explanation and empathy.'

'It should make things clearer for them, however, clients need to realise that vet medicine is not a finite thing and complications and additional charges may occur.'

'They will be better informed and will hopefully say if they are unable to afford it so that a different plan can be formulated.'

7e) How would you amend this recommendation?

'Elective treatment should have estimates prior to consent, emergency treatment should have an estimate range discussed whereby owners can provide appropriate costings limits they find suitable, and discuss options where time permits. Clinics should keep owners updated whereby costs are expected to exceed estimates quoted.'

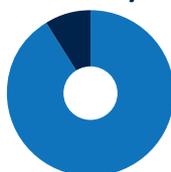
'Not always practical in emergencies where animal care should always come first'

'Clients need to be made aware that vet medicine is not a finite thing and complications and additional charges may occur. We are dealing with living creatures.'

8. Veterinary professionals must provide clients with itemised bills. Businesses may need to allow additional consultation and/or administrative time to allow this.

8a) Does your practice support this remedy?

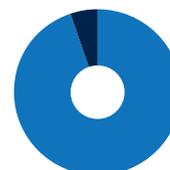
Yes	No
91.22%	8.78%



2072 total responses out of 2632.
Response percentage 78.72%

8b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
5.15%	0.00%	0.00%	94.85%



2096 total responses out of 2632. Response percentage 79.64%

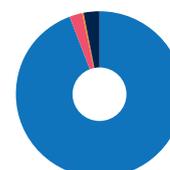
Sample responses:

'Already in place'

'We currently provide itemised receipts at the point of sale – clients have the option to accept or decline this. Receipts are generally emailed if at all possible – this saves on paper. As long as this is still acceptable, all OK. It will be onerous to have to print these for the vast majority of people who don't want them.'

8c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
2.88%	2.56%	0.37%	94.19%



1565 total responses out of 2632. Response percentage 59.46%

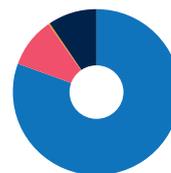
Sample responses:

'No effect'

'Providing itemised bills should have no direct effect on animal welfare. However, improved transparency can strengthen client trust, which may indirectly encourage better compliance with veterinary recommendations. When clients understand what they are paying for and why, they are often more confident in the level of care.'

8d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
9.29%	9.68%	0.26%	80.77%



1539 total responses out of 2632. Response percentage 58.47%

Sample responses:

'Good for transparency, helps the client to see what they are actually paying for.'

'Help them understand the bill'

'Clients sometimes get overwhelmed by line items and think it is a shopping list that they can pick and choose from. Clients need to understand that some things are non-negotiable.'

8e) How would you amend this recommendation?

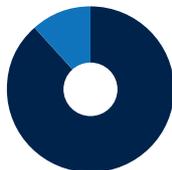
'No amendments, this is very reasonable and should be the normal'

'Not everyone wants an itemised bill even when offered, owners should have right to decline.'

9. RCVS should enhance its 'Find a Vet' feature to include pricing data. This data will be accessible by third party websites and apps.

9a) Does your practice support this remedy?

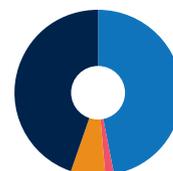
Yes	No
11.55%	88.45%



1966 total responses out of 2632.
Response percentage 74.70%

9b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
44.65%	1.80%	6.53%	47.02%



1776 total responses out of 2632. Response percentage 67.48%

Sample responses:

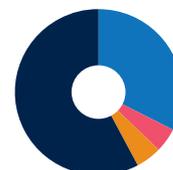
'Will create a race to the bottom'

'Pricing again is subjective. Clients who search for the cheapest vet may not understand that low pricing likely means cutting corners with possibly poorer standards. Clinics may be tempted to reduce costs in order to advertise cheaply with then extra payable options bolted on afterwards.'

'It will lead to confusion and it will be very difficult to regulate and specify. It will cost independents more time and money.'

9c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
57.76%	4.64%	4.87%	32.73%



1314 total responses out of 2632. Response percentage 49.92%

Sample responses:

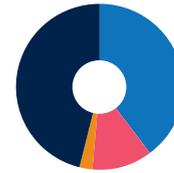
'Continuity of care is potentially affected'

'Hunting for low cost and travelling more in urgent/emergent cases'

'May affect adversely if people moving between practices without proper history'

9d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
45.86%	11.68%	2.70%	39.76%



1147 total responses out of 2632. Response percentage 43.58%

Sample responses:

'Shopping around will erode trust in vet-client/patient bond.'

'Confusion as direct comparison purely on price is misleading and confusing.'

'Clients need education around, services, levels of clinical qualification, practice standards etc. Cheap does not always mean good clinical medicine and complications can occur.'

9e) How would you amend this recommendation?

'We must be careful not to create a race to the bottom and a "compare the market" type approach to veterinary care'

'Find a vet feature should contain links to the vets appropriate skills and certificates to indicate their specialisms and experience'

'The Find a Vet website already links to the practice website, and if we all have to provide a price list on there I don't see the need for it being on a 'comparison' type site. You simply cannot directly compare many services provided by veterinary practices in a simple way.'

10. Veterinary practices must provide clear price information when pet owners are arranging cremations.

10a) Does your practice support this remedy?

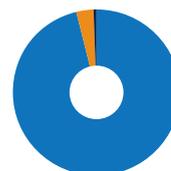
Yes	No
78.20%	21.80%



2018 total responses out of 2632.
Response percentage 76.67%

10b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
0.54%	0.00%	3.22%	96.24%



1861 total responses out of 2632. Response percentage 70.71%

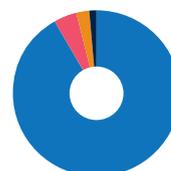
Sample responses:

'Already in place'

'We work directly with crematoria so they provide costs directly to clients'

10c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
1.27%	4.52%	2.36%	91.85%



1570 total responses out of 2632. Response percentage 59.65%

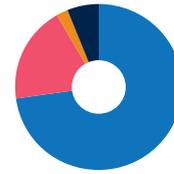
Sample responses:

'It won't'

'This recommendation will not directly affect animal welfare, but it may have an indirect positive effect by helping owners make timely and informed decisions when end-of-life care is required. When clients clearly understand their options and the associated costs, they are less likely to delay euthanasia due to uncertainty or financial confusion'

10d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
5.98%	18.82%	2.37%	72.83%



1222 total responses out of 2632. Response percentage 46.43%

Sample responses:

'Clients should be made aware of costs involved especially for individual cremations and advised appropriately at a difficult time. Unfortunately individual cremations are more expensive and not all clients can afford them but this should be made clear to clients'

'Good that they know how much they'll be paying at an emotional time.'

'May improve transparency at an emotionally charged time.'

10e) How would you amend this recommendation?

'Vets should provide clear information on a range of crematorium options, their locations and service availability available for pets at the end of their life. Vets should also provide bereavement support resources for their clients and their families'

'That the businesses interests/ownership of the cremation business and it's relation to the practice are clearly stated'

'Clients need to be made aware of who owns the pet cremation services'

11. Veterinary practices must provide pricing breakdowns for their pet care plans, if they provide them.

11a) Does your practice support this remedy?

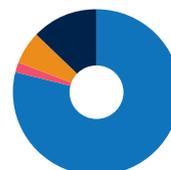
Yes	No
64.89%	35.11%



1954 total responses out of 2632.
Response percentage 74.24%

11b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
12.72%	1.91%	6.22%	79.15%



1784 total responses out of 2632. Response percentage 67.78%

Sample responses:

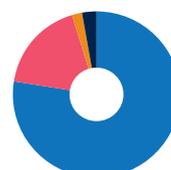
'More detail needed. Also need to understand the impact of sharing all of the information – could be very time consuming to do so.'

'We already have a basic saving calculator on our marketing literature. The difficulty comes as the exact saving does vary a bit by weight of dog, and the specific products they choose.'

'Already in place'

11c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
2.71%	17.64%	2.01%	77.64%



1145 total responses out of 2632. Response percentage 43.50%

Sample responses:

'Probably beneficial to animal welfare if more owners can be persuaded to take advantage of competitive pricing for preventative healthcare.'

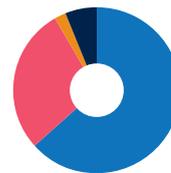
'Owners will see the value in our subscription plans'

'Preventative health plans are good for animal welfare.'

Continued overleaf

11d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
6.03%	28.34%	2.29%	63.34%



1094 total responses out of 2632. Response percentage 41.57%

Sample responses:

'Clarity if it does not cause confusion through lack of understanding. e.g. understanding why certain consumables or drugs are present in an estimate'

'Greater transparency'

'Clients will easily be able to see how cost effective these are.'

11e) How would you amend this recommendation?

'Give the average saving instead'

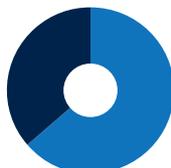
'Practices be required to provide clear summaries or "value breakdowns", rather than full cost-accounting of each individual service. The CMA and RCVS develop a standardised format or example template to ensure consistency and fairness across the sector. Guidance should clarify that itemisation must enhance understanding, not overwhelm clients with technical or pricing minutiae. The focus should remain on educating clients about the preventive health value of plans, rather than reducing them to price comparisons.'

'I consider this proposal to be an unnecessary intrusion. Clients can compare existing plans with relative ease already.'

12. All veterinary businesses must have an in-house complaint system available to clients. The RCVS may collect, analyse and publish insights on this to support improvements in the sector.

12a) Does your practice support this remedy?

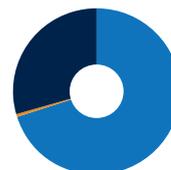
Yes	No
63.85%	36.15%



2000 total responses out of 2632.
Response percentage 75.99%

12b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
29.28%	0.00%	0.49%	70.23%



1827 total responses out of 2632. Response percentage 69.41%

Sample responses:

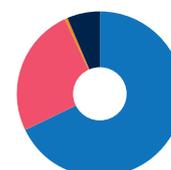
'Already do this. Not shared with RCVS though'

'We actively encourage our clients to share any concerns they have'

'We already have a complaints system. I imagine the RCVS will charge for their involvement via their fees.'

12c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
6.19%	25.28%	0.51%	68.02%



1179 total responses out of 2632. Response percentage 44.79%

Sample responses:

'May allow identification of common areas of improvement'

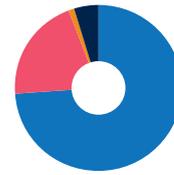
'Minimally – a complaints procedure to RCVS is already in place of welfare issues'

'RCVS will create guidelines and help clinics based on other practices' issues so there is only to gain from this'

Continued overleaf

12d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
4.46%	20.29%	1.18%	74.07%



1099 total responses out of 2632. Response percentage 41.76%

Sample responses:

'Hopefully more confidence to raise concerns which is good so improves communication'

'Basic complaints may escalate to being RCVS complaints more rapidly with RCVS linkage.'

'A clear system means those with genuine dissatisfaction or concerns can raise them in the appropriate manner and have their concerns answered'

12e) How would you amend this recommendation?

'In principle I support but need more info on how RCVS will use the data and what level of "complaint" needs logging – is this every time someone moans at reception or every written complaint?'

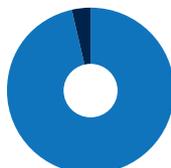
'I think practices should have a complaints system but complaints can already be escalated to the RCVS if serious enough?'

'Practices will need specific guidance on what is expected here'

13. Limit the notice period in OOH contracts to 12 months, to reduce barriers to FOPs switching providers.

13a) Does your practice support this remedy?

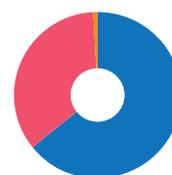
Yes	No
96.63%	3.37%



1867 total responses out of 2632.
Response percentage 70.93%

13b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
0.00%	34.81%	0.80%	64.39%



1626 total responses out of 2632. Response percentage 61.78%

Sample responses:

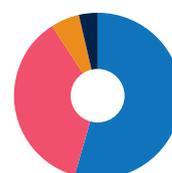
'It would allow us the flexibility to change quicker if circumstances arise'

'We do our own OOH'

'Will help as many clients enquire but are stuck in contract'

13c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
3.36%	36.47%	5.53%	54.64%



1755 total responses out of 2632. Response percentage 66.68%

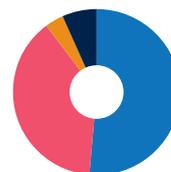
Sample responses:

'Will help as many clients enquire but are stuck in contracts'

'Potentially positive if it encourages higher standards and accountability among OOH providers, as practices could more easily switch if service levels drop.'

13d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
6.46%	38.11%	3.78%	51.65%



1456 total responses out of 2632. Response percentage 55.32%

Sample responses:

'Clients may benefit if we change providers that we judge to be better for our circumstances'

'Freedom of choice'

'Improve their options'

13e) How would you amend this recommendation?

'It should actually be limited to no more than 6 months'

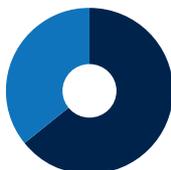
'Practices should display the information clearly to clients to inform them who and where the OOH provider is and their costings for consultations if possible'

'The 12-month maximum notice period should be paired with guidance requiring adequate handover and communication to ensure uninterrupted OOH provision. The CMA and RCVS should monitor the impact on OOH service availability and cost, particularly for independents in less-served areas. Consider allowing mutual flexibility – for example, permitting shorter notice by agreement, while protecting both parties from abrupt termination. Practices should be encouraged to review and document OOH arrangements annually, ensuring welfare, accessibility, and cost effectiveness remain balanced.'

14. Veterinary businesses to submit annual attestation that CMA remedies are being complied with to the RCVS as requested. RCVS to monitor businesses to ensure compliance with CMA remedies, including spot checks.

14a) Does your practice support this remedy?

Yes	No
35.70%	64.30%



1975 total responses out of 2632.
Response percentage 75.04%

14b) How will this affect your practice's finances and your ability to provide veterinary services?

Negatively	Positively	Don't Know	No Effect
75.80%	0.48%	6.36%	17.36%



1682 total responses out of 2632. Response percentage 75.04%

Sample responses:

'More administration costs and more costs to the client'

'More time spent on paperwork less on animals'

'This is additional administrative work and really it's going to take staff away from what is needed'

14c) How will this affect animal welfare?

Negatively	Positively	Don't Know	No Effect
22.57%	1.15%	26.82%	49.46%



1391 total responses out of 2632. Response percentage 75.04%

Sample responses:

'There will be less time in everyone's day for the main tasks of looking after animals'

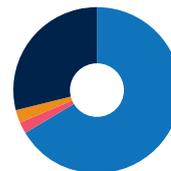
'No effect'

'Go down, as independents will end up going out of business from all the extra financial burdens.'

Continued overleaf

14d) How will this affect your clients?

Negatively	Positively	Don't Know	No Effect
28.78%	2.34%	2.34%	66.54%



1067 total responses out of 2632. Response percentage 37.74%

Sample responses:

'Clients may gain greater confidence that all practices are meeting consistent national standards and complying with CMA remedies. However, if compliance becomes overly complex or costly, it may raise practice overheads, which could ultimately be reflected in client fees. The key will be ensuring that monitoring remains light-touch and proportionate, protecting both client trust and practice sustainability.'

'Customers will be reassured that vets are following the rules'

14e) How would you amend this recommendation?

'Be supportive of us, not add more things to do over and above caring for animals'

'We would recommend that the attestation and monitoring process be proportionate, practical, and risk-based. Specifically, we suggest that:

- The annual attestation be a simple digital declaration confirming compliance, without requiring extensive evidence unless concerns are raised.*
- Spot checks be carried out on a random or risk-assessed basis, focusing on education and improvement rather than punishment.*
- Independent practices with strong compliance records should not face the same frequency or intensity of checks as larger corporate groups.*
- The RCVS provide clear guidance and timelines to minimise disruption to daily operations, or build this into their practice inspections programme.'*

'It should be part of the RCVS practice standards, rather than a separate scheme, to streamline administration'

15. Any additional comments.

'The investigation started as concern over the power of LVGs and the promotion of the image that the investigation would lower costs for consumers. It has ended up providing further opportunities for the LVGs to increase overall market share and most likely higher overall costs for consumers.'

'The biggest single impact of the CMA's proposed measures is likely to be increased overheads and charges being passed on to the client.'

'The purchasing price of the drugs and services can be a lot lower for larger businesses than smaller independents. If these practices are locked out of these deals, how are they to be competitive? Moving these sales to larger online retailers pushes the industry towards fewer and fewer controlling entities and further and further away from vets' influence.'

'Regulated independent vet practices gave us a system that the world looked towards as an aspiration, why put in place systems and regulations that will accelerate the problem of large-scale companies charging higher fees because they hold the powers of market share, lack of accountability to clients and lack of competition within the local area?'

'The CMA's proposed remedies risk undermining both independent veterinary practices and animal welfare by focusing narrowly on medicine pricing and prescriptions – a move that, intentionally or not, unfairly advantages the large veterinary groups (LVGs).'

'The conversation has been conveniently diverted – away from corporate consolidation and monopolies, where LVGs are most exposed, and towards drug mark-ups and prescriptions, an emotionally charged topic for pet owners in which LVGs already hold an unassailable advantage.'

'Devaluing Professional Standards. The CMA's cost comparisons and repeated insinuations of "vet profiteering" ignore the complexity, expertise, and safety standards that underpin modern veterinary medicine. An experienced surgeon in a 24-hour hospital – using full anaesthetic monitoring, sterile technique, trained RVN assistance, analgesia, and structured follow-up – cannot be compared to a new graduate performing procedures under heavy sedation with minimal support. To suggest both should charge the same promotes a race to the bottom, undermining welfare, standards, and staff morale.'

'The main element seems to be pushing for cheaper online supply of drugs moving these sales to a different arm of the veterinary corporates. Could the CMA not have looked at creating a level playing field for practice to purchase drugs at lower prices or the same prices?'

Continued overleaf

'I don't understand why, if the CMA has found that on average client bills are 50% less at independent practices, that they are making recommendations to affect independents adversely. Corporates can absorb all this extra admin with economies of scale and larger admin staff numbers. We cannot. I am seriously considering my future owning a vet practice.'

'I generally feel all remedies are appropriate with the huge exception of remedies around prescriptions and telling owners about online savings. I have real fear my business wouldn't be viable if this happens. Ultimately, I think it will lead to higher prices for services, as practices will need to make up the shortfall in turnover due to sales lost from medications. I absolutely disagree that practices should be trying to compete with prices from online pharmacies, it's damaging to vets and is like comparing apples and oranges.'

'The investigation seems to have ignored the monopolies that have developed with corporates owning referral centres, online pharmacies, crematoria and labs. In the days when practices were owned by vets, the law of economics regulated prices, we sought the best deal and purchased services accordingly, these fair prices were then passed onto our customers. This is why prices have gone up for pet owners, there is no competition, and there are greedy shareholders at the top of the food chain.'

'This is pushing more money to the corporate practices who own the pharmacies and have administrative teams who can do some of the additional work while making things harder for independent clinics'

'The recommendations by the CMA appear to be disproportionately biased against small independent practices, which is the opposite of their intention. In particular, encouraging clients to purchase medications online from pharmacies that are largely owned by large corporations'