

VETERINARY SERVICES FOR HOUSEHOLD PETS

Appendix L: Pet owner survey

24 March 2026

© Crown copyright 2026

You may reuse this information (not including logos) free of charge in any format or medium, under the terms of the Open Government Licence.

To view this licence, visit www.nationalarchives.gov.uk/doc/open-government-licence/ or write to the Information Policy Team, The National Archives, Kew, London TW9 4DU, or email: psi@nationalarchives.gsi.gov.uk.

Website: www.gov.uk/cma

**Members of the Competition and Markets Authority
who conducted this inquiry**

Martin Coleman (*Chair of the Group*)

Susan Hankey

Robin Cohen

Humphrey Battcock

Keith Richards

Chief Executive of the Competition and Markets Authority

Sarah Cardell

The Competition and Markets Authority has excluded from this published version of the final report information which the inquiry group considers should be excluded having regard to the three considerations set out in section 244 of the Enterprise Act 2002 (specified information: considerations relevant to disclosure). The omissions are indicated by [✂]. Some numbers have been replaced by a range. These are shown in square brackets. Non-sensitive wording is also indicated in square brackets.

Contents

1.	Introduction.....	5
2.	Qualitative research with veterinary professionals	6
	Overall assessment.....	7
3.	Quantitative survey of pet owners	8
	Survey sample.....	8
	Survey recruitment	8
	Survey response	9
	Questionnaire	10
	Survey analysis	11
	Survey findings.....	12
	Overall assessment.....	12
4.	Qualitative consumer research on remedies	13
	Overall assessment.....	13

1. Introduction

1.1 Over the course of the Market Investigation, we commissioned three pieces of independent research:

(a) Qualitative research with Vet Professionals¹

(b) Quantitative survey of Pet Owners²

(c) Qualitative consumer research on remedies³

1.2 This appendix considers the responses received relating to these pieces of research that have not already been addressed in the PDR, or in other areas of the FDR. It also gives a conclusion on all responses received and the subsequent assessment of the robustness of the research.

¹ [Qualitative research with veterinary professionals](#), Research report by Revealing Reality for the CMA, January 2025, published 6 February 2025.

² [Vet Users Survey, Final Report](#), Accent for the CMA, January 2025, published 6 February 2025.

³ [Qualitative research with consumers](#), Research report by Blue Marble for the CMA, December 2025, published 16 December 2025.

2. Qualitative research with veterinary professionals

- 2.1 We commissioned the market research agency Revealing Reality to conduct qualitative research among veterinary professionals. For this research they interviewed 100 veterinary professionals working at FOPs throughout the UK between September and November 2024. The research report was published alongside our Working Papers in February 2025.⁴
- 2.2 One response sought further information on how the sample quotas were decided on, and how far these quotas were met.⁵ As is typical with qualitative research, the sampling approach was purposive and therefore quotas were used to ensure the qualitative research included a range and breadth of experience from across the veterinary profession, rather than seeking to sample the groups in numbers proportionate to their incidence in the population. Quotas were decided after careful examination of the sample frame (the Royal College of Veterinary Surgeons register). Quotas were set against the key criteria listed in the report including professional role, years of experience, accreditations, practice ownership type, practice size and location. The aim was to ensure a good spread of responses across the profession, and this was achieved using successive random sampling from the frame. The report does not include specific details against quotas to ensure the identity of respondents is not inadvertently disclosed. This is necessary given the detailed and sensitive nature of the interviews with veterinary professionals.
- 2.3 The same response raised the interview length, with the possibility that this biased the achieved sample to those with the time to take part in the research. Relatedly, it asked for information on the number of declined interviews and how far these were spread across the sample. The interviews took no longer than 90 minutes to complete. This is not unusual for qualitative research and the research design took account of the time pressures on vet professionals by taking a flexible recruitment approach. Participation was by invitation only (to minimise self-selection bias) and repeated attempts were made to contact each potential participant. The interviews took place remotely with flexible times offered and rescheduling possible to accommodate emergencies. The research agency reported that this approach was appreciated and they did not encounter an unusually high number of declines or a concentration of declines in a particular sample quota, implying that sample selection bias with regard to interview length had not materially impacted the research.

⁴ [Qualitative research with veterinary professionals](#), Research report by Revealing Reality for the CMA, January 2025, published 6 February 2025.

⁵ [CEVM response to working papers and external research papers](#), 27 February 2025, p2 and 3.

- 2.4 This response asked the extent to which the comparison of LVG and non-LVG practices was part of the approach to the analysis of the interviews, citing it as having implications for the interpretation of the findings. At the analysis stage, the research agency labelled interview data for a range of criteria, which included the ownership status of the veterinary practice where the participant was employed. Independent and small group practices were identified separately.⁶ Normal good practice for systematic analysis of qualitative data was adhered to and analysis by ownership status of the practice was essential given that one of the objectives of the research was to understand whether business considerations influence veterinary professionals' decision-making.
- 2.5 Finally, the response stated that a quantitative survey and rigorous statistical analysis was required to enable conclusions of outcomes or actions relating to specific groups. However, the research objectives were qualitative – to explore and understand experiences and decision-making of veterinary professionals. It was designed to include a breadth of experience across the profession rather than to be specifically representative of the experience of any one particular group or sub-group.

Overall assessment

- 2.6 This is a robust piece of qualitative research, which purposefully explores breadth of experiences and is not designed to make inferences of prevalence for a particular group or sub-group.

⁶ Small group practices were non-LVG owned practices with at least two sites.

3. Quantitative survey of pet owners

- 3.1 We commissioned the market research agency Accent to conduct a statistical survey of pet owners. Accent drew a random sample of residential addresses to which it sent letters inviting households to complete a survey if they owned a pet. Overall, 65,819 letters were posted on 1 November 2024 and the survey closed on 1 December 2024. After excluding some people that did not meet the eligibility criteria, 2,376 pet owners who had made a visit to a vet practice within the last two years completed the survey. The research report was published alongside our Working Papers in February 2025.⁷
- 3.2 Ahead of the survey commencing, a draft questionnaire and survey invitation letter were published with an invitation to comment on the design and content.⁸ Responses on the survey were also received following the publication of the report alongside the working papers, and in response to the PDR. Points that were made have been grouped below by aspects of the survey methodology, rather than by each separate response.

Survey sample

- 3.3 One response (University of Nottingham / Centre for Evidence-based Veterinary Medicine) sought information on whether pre-planned quotas were met by the sample.⁹ Quotas were not set for the pilot or main survey, as a random probability sample approach was taken. When reporting, only subgroups with sufficient base size were included.

Survey recruitment

- 3.4 One LVG [X] stated that as the survey used incentivised participation through a £10 voucher, used push-to-web methodology and was primed by the public criticisms of LVGs already circulating as a result of the investigation, it is biased by design and cannot represent the market.¹⁰ Incentives are widely used on surveys including on some of the large household surveys conducted by the Office for National Statistics, which are regarded as gold standard in the design and application of survey methodology. Incentives acknowledge the value of respondents' time to complete the survey, boost response rates and reduce engagement bias where only those with the strongest views respond. Push-to-web is a robust methodology based on random probability sampling using a sampling frame that almost completely covers the survey population. The survey

⁷ [Vet Users Survey, Final Report](#), Accent for the CMA, January 2025, published 6 February 2025.

⁸ [Draft consumer questionnaire and invite letter](#).

⁹ [CEVM response to working papers and external research papers](#), 27 February 2025, p 3.

¹⁰ [X] PDR response hearing.

questionnaire was rooted in the participant experience of their vet visit. We therefore do not accept that knowledge of the investigation, if it existed, would have led to biased results.

Survey response

- 3.5 A response [X] stated that the average number of visits among survey respondents and the proportion of respondents spending £1000 or more at the vets in the last two years suggested a skew towards customers who are frequent visitors to their vets, for example those with chronic illnesses.¹¹ We do not consider it a problem if the sample has resulted in some over-representation of customers that visit more frequently and spend more as they are likely to have visited their FOP more recently before completing the survey, have more insights to provide and have a higher stake in the sector.
- 3.6 The same response [X] stated that the proportion of survey respondents with insurance is much higher than the proportions estimated among UK pet owners more generally.¹² The comparison is not like-for-like, as the CMA survey only includes pet owners who have visited a vet within the last two years. Nonetheless, the proportion may be high, possibly due to some respondents misreporting Pet Health Care Plans to be a type of insurance in their survey responses and/or a higher propensity for pet insurance holders to respond to the survey. Therefore, while we do not have accurate population estimates for a definitive comparison (those in the UK who have insurance and visited their vets in the past two years), we consider it possible that our pet owners survey may overrepresent pet owners with insurance. Where relevant, we have analysed results from our pet owners survey by whether or not they hold pet insurance.
- 3.7 Another issue of bias reported in this response [X] is that weighting letters towards more households in deprived areas resulted in a higher response rate from respondents from those areas.¹³ The response quotes the number of letters sent ('sample') rather the number of responses ('completes'). The distribution of completes in fact shows very even representation across Indices of Deprivation (IMD) decile areas and demonstrates that boosting the number of letters sent to low IMD decile areas was effective at reducing potential bias in the sample.
- 3.8 A response [X] stated that the survey is statistically irrelevant as it draws market-wide conclusions from a sample representing less than 0.02% of UK pet owners.¹⁴ This comment fails to understand the purpose and underpinning mathematical statistics of a statistical sample survey which, if designed and conducted well,

¹¹ Annex 1 [X] response to CMA working Papers, [X].

¹² Annex 1 [X] response to CMA working Papers, [X].

¹³ Annex 1 [X] response to CMA working Papers, [X].

¹⁴ [X] PDR response hearing.

enables robust inferences to be made about very large populations from a small sample of survey participants.

- 3.9 Another response (Vet Partners) stated that the 2,376 pet owners who completed the survey represents less than 5% of the pet owners invited to participate, which is lower than the threshold that the CMA requires to give evidential weight to surveys.¹⁵ As the Accent survey report explains, while the population of interest (the number of UK residents with a pet who have visited their vets in the past two years) cannot be precisely measured, on the assumption that around 60% of UK households have a pet, the response rate to the survey would be 6% (2,376 responses from 60% of 65,819 invites) and be over the CMA's threshold.¹⁶ Additionally assuming that around three quarters of pet owners have visited a vet in the last two years, the response rate would be over 8% (2,376 responses from 75% of approximately 39,491 pet owners who received the invites).
- 3.10 A response (University of Nottingham / Centre for Evidence-based Veterinary Medicine) suggested studies which may help measure the population of interest, these being Murray et al. 2010, Purewal et al. 2019, and UK Pet Food 2024.¹⁷ The research in Murray et al was conducted in 2006, which is too old to be reliable for contemporary demographic comparisons. Purewal et al was a survey based on only households with children, among which pet ownership may be materially different from the UK households as a whole. The 2024 Pet Food Survey estimates that 60% of households own a pet, which is very similar to the 57% Accent used as its working assumption in its discussion of the survey response rate. None of these sources provides estimates of the proportion of pet owners who have visited a FOP within the last two years.

Questionnaire

- 3.11 A few responses (VetPartners, University of Nottingham / Centre for Evidence-based Veterinary Medicine working papers response and Linnaeus) stated that the survey was too long and this led to a low response and raises questions of representativeness of the survey, with a bias towards those with a strong or particular view.¹⁸ While the published script of the questionnaire is long, this is due to many routing questions. Participants did not see the questionnaire script in its entirety, so this would not have deterred response. In the pilot, the median time taken to complete the survey was 20 minutes and therefore potential respondents were told in the survey invitation letter that the survey would take about 20

¹⁵ VetPartners PDR response.

¹⁶ UK Pet Food estimated that 60% of UK households (17.2 million) owned a pet in 2023/24. [UK Pet Population | UK Pet Food](#).

¹⁷ [CEVM response to working papers and external research papers](#), 27 February 2025, p 2 and 3.

¹⁸ For example, [Vet Partners response to CMAs working paper on how people purchase veterinary services](#), 21 March 2025, p 2, and [CEVM response to working papers and external research papers](#), 27 February 2025, p 4.

minutes, depending on their answers. The response rate, while not possible to calculate accurately due to lack of statistics around eligibility criteria, was over 5% when using a cautious estimate. Drop out from the survey was not excessive, with 245 (9%) respondents dropping out after the scoping stage of the survey.

- 3.12 A response (Vet Partners) stated the survey should have included a question asking if the respondent was aware of the market investigation as this could potentially have had an influence on responses.¹⁹ The questions of the survey were rooted in the respondents' experience of visiting the vets and there were few perception questions. The cognitive testing in October 2024 found minimal awareness of the market investigation, and no evidence that such knowledge influenced responses.
- 3.13 A response (Linnaeus) stated that the use of an online medium introduces the risk of response fatigue, particularly when coupled with the length of the survey.²⁰ The survey was scripted with routing so that only relevant questions were asked to participants. The cognitive testing found that most participants believed the survey was a good length and quick to complete and, as mentioned above, the number of drop outs was low.

Survey analysis

- 3.14 A response [X] raised several technical concerns in relation to the use of statistical significance testing of Accent's detailed survey results. We acknowledge the points made, all of which are standard considerations when interpreting survey results in the CMA. Our main use of statistical significance tests for this survey was to provide an initial filtering out of results for which sample sizes and the distribution of responses were not sufficient to draw statistically robust evidence of difference.
- 3.15 A response (University of Nottingham / Centre for Evidence-based Veterinary Medicine) referenced the frequent comparison of respondents of independent practices compared with those of large veterinary groups. They asked to see the analysis of any other variables that were looked at in a similar way.²¹ A whole range of variables were compared through cross-breaks and crosstabulations, including key demographics. These can all be seen in the published data tables.²²

¹⁹ VetPartners PDR response, p 19.

²⁰ Linnaeus PDR response, p 2.

²¹ [CEVM response to working papers and external research papers](#), 27 February 2025, p 4.

²² [Pet owners survey data tables](#), research by Accent, February 2025.

Survey findings

- 3.16 A response [X] stated that the survey is a snapshot from 2024 and is now factually outdated and ignores subsequent positive market changes.²³ It was necessary to carry out the survey in the early stages of the market investigation to inform our decisions. While the evidence will not capture changes made since that time, it is still a recent survey.

Overall assessment

- 3.17 The research took a methodologically robust random probability sampling approach and exceeded the CMA's response rate threshold of over 5% when using a cautious estimate. It is accepted that there may be some overrepresentation of those with pet insurance. However, where this may be important, results have been analysed separately by whether the respondent has pet insurance. This survey was designed to meet the needs of decision-makers, following the principles of the CMA's published Good Practice, and worked well in the field in a subject which has a high-level engagement among pet owners. We therefore conclude that this survey can be regarded as providing robust evidence for the purpose of this market investigation.

²³ [X] PDR response hearing.

4. Qualitative consumer research on remedies

- 4.1 We commissioned the market research agency Blue Marble Research to carry out 12 focus groups with a total of 70 participants. These participants were sampled from respondents of the pet owners survey who had consented to be recontacted for further research. The focus groups were split equally across two topic modules. The research took place in September 2025, and the report was published alongside our PDR in December 2025.²⁴
- 4.2 A few responses were received on this research. One response (IVC) raised a methodological issue as it had significant concerns about the reliability of the research for informing the prescription price cap remedy and considered it inappropriate to seek consumer insights on the remedy in the research as participants would lack understanding of the full range of market consequences of technical supply-side remedies.²⁵ This remedy was included in the research as it includes a customer-facing element and the findings were considered in the round alongside other evidence, including evidence from the industry.
- 4.3 The sample for this research was drawn from the above quantitative sample of pet owners, which as referenced above could have had an overrepresentation of those with pet insurance. However, when recruiting for participation in the focus groups, screening questions were asked which included whether they had pet insurance and a mix was included in every focus group.

Overall assessment

- 4.4 This is a robust piece of qualitative research, which purposefully explores breadth of experiences and is not designed to make inferences of prevalence for a particular group or sub-group.

²⁴ [Qualitative research with consumers](#), Research report by Blue Marble for the CMA, December 2025, published 16 December 2025.

²⁵ IVC response to qualitative consumer research on remedies, 9 January 2026, p 5.