

Stakeholder perceptions to incorporated veterinary equine practices in the UK

Allen, J.; Armstrong, Sophie

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Allen, J. and Armstrong, S.*

INTRODUCTION:

Over the last decade the number of independent veterinary practices has decreased mainly due to being bought out by corporations. While independent veterinary practices accounted for 89% of the UK industry in 2013, this share had fallen to less than half (45%) by 2021 (Competition and Markets Authority, 2023). The purpose of this study is to understand the effects the incorporation of equine veterinary practices has had on clients and staff members in service, finance and work life. Current research mainly covers the impact of incorporation on the business functions of the practice rather than the impact on clients or staff and whether that is positive or negative. The study aimed to investigate attitudes to both incorporated and independent practices.

METHOD:

An online questionnaire posted on social media answered by 127 participants. Qualitative data was analysed with thematic analysis and quantitative data was analysed by Chi-squared test of association.

Inclusion criteria:

- 1) Over 18 and live in the UK
- 2) Currently or been a client or member of staff in an equine vet practice

RESULTS:

- Thematic analysis showed a preference towards independent practices in finances and experiences.
- 22.3% of participants were registered with an educational establishment practice (e.g. Royal Veterinary College) and 16% were registered with an incorporated practice (e.g. Vet Partners) and 46% were registered with an independent practice. The majority of respondents were from South East England (37%) however all UK regions were represented.
- Increase in costs for clients when moving from an incorporated practice to an independent practice for diagnostics and medicine ($p=0.02$) (value=4.8).
- A significant decrease in satisfaction was shown for clients experiencing ownership change from independent to incorporated whilst a registered client in both customer service ($p=0.007$) (value=15.097) and horse welfare ($p=0.04$) (value=8.134).

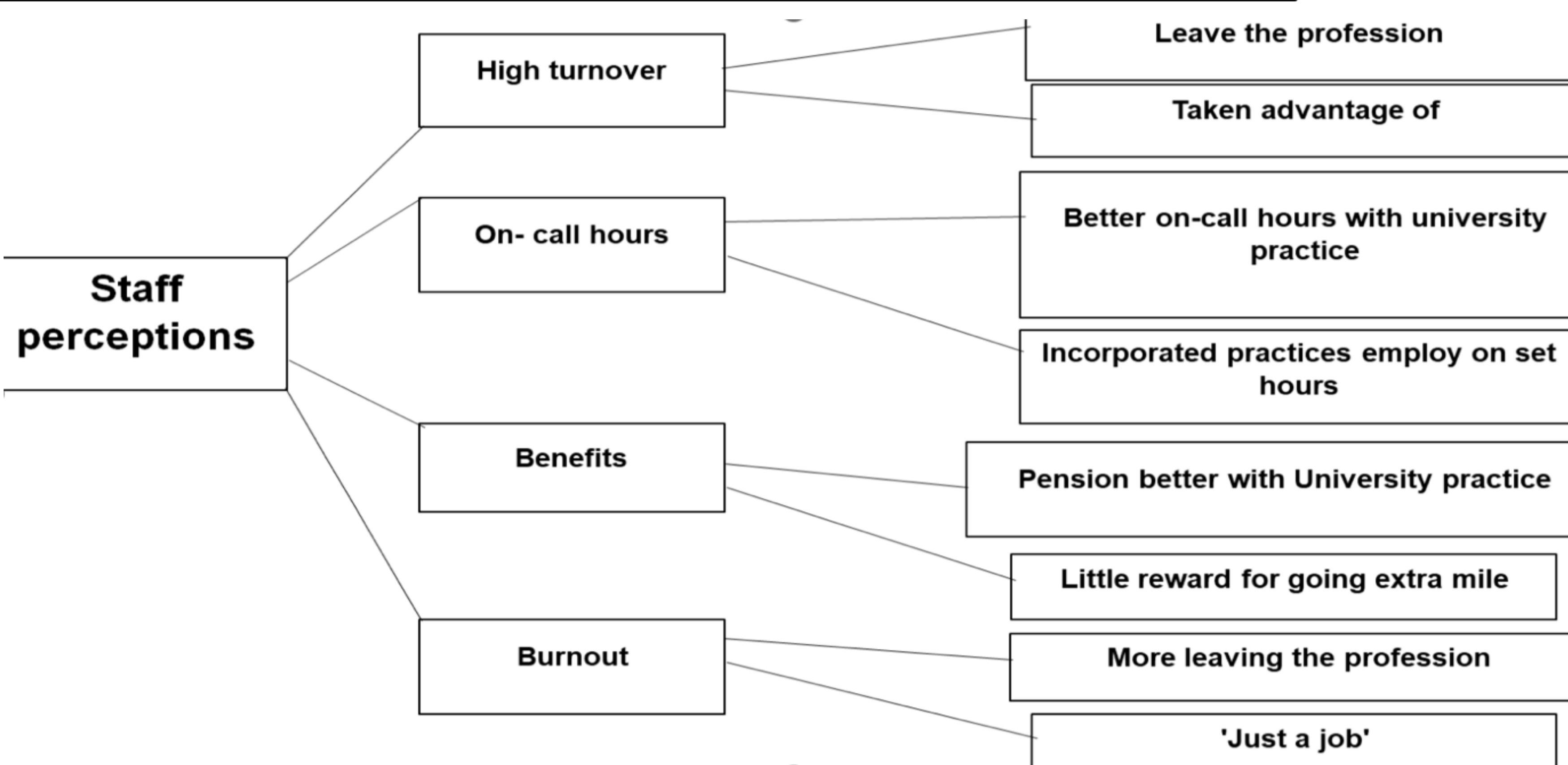


Figure 1: Thematic analysis for staff perceptions

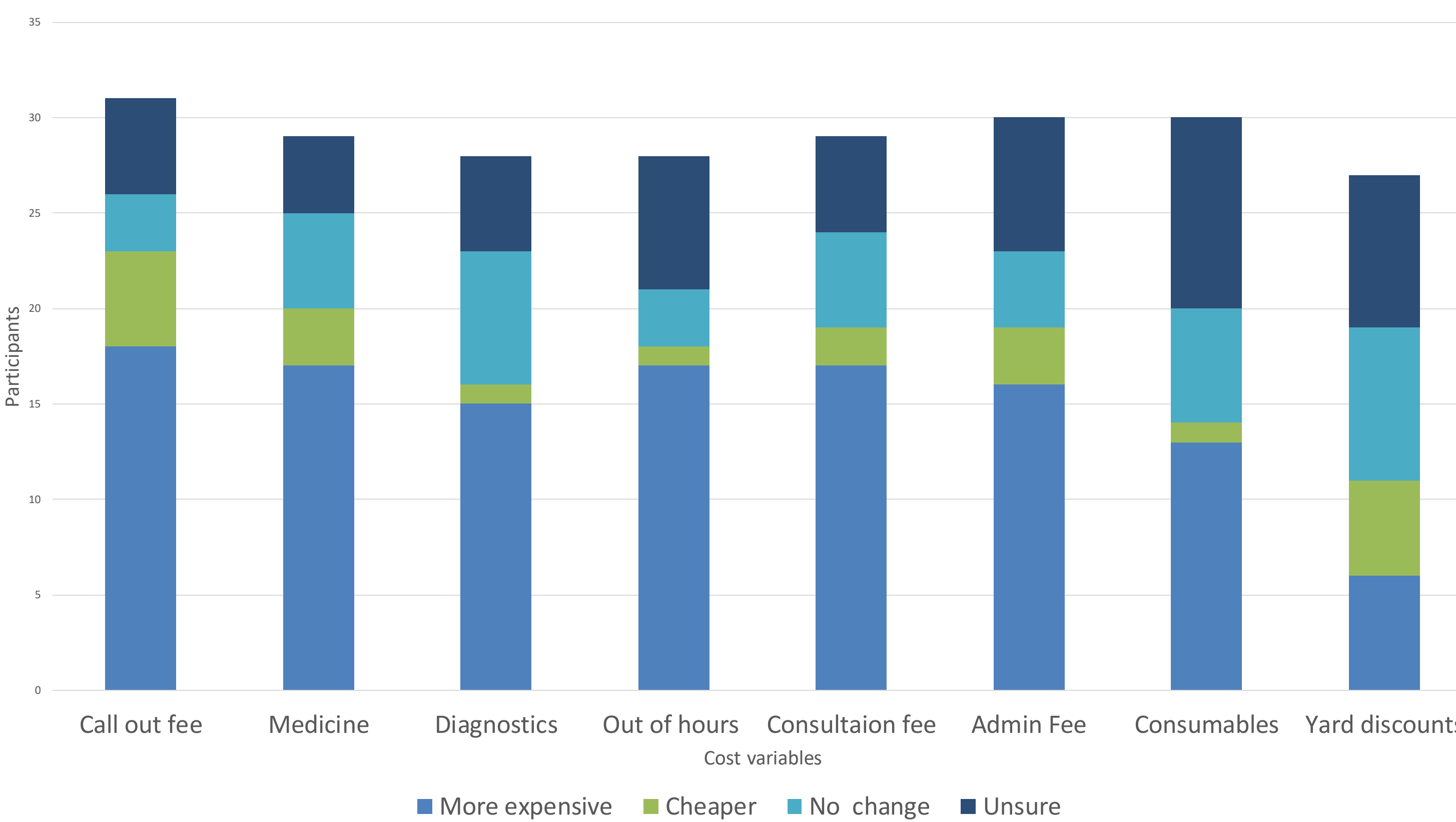


Figure 2: Change in expenses for stakeholders who had moved from an independent to incorporated practice

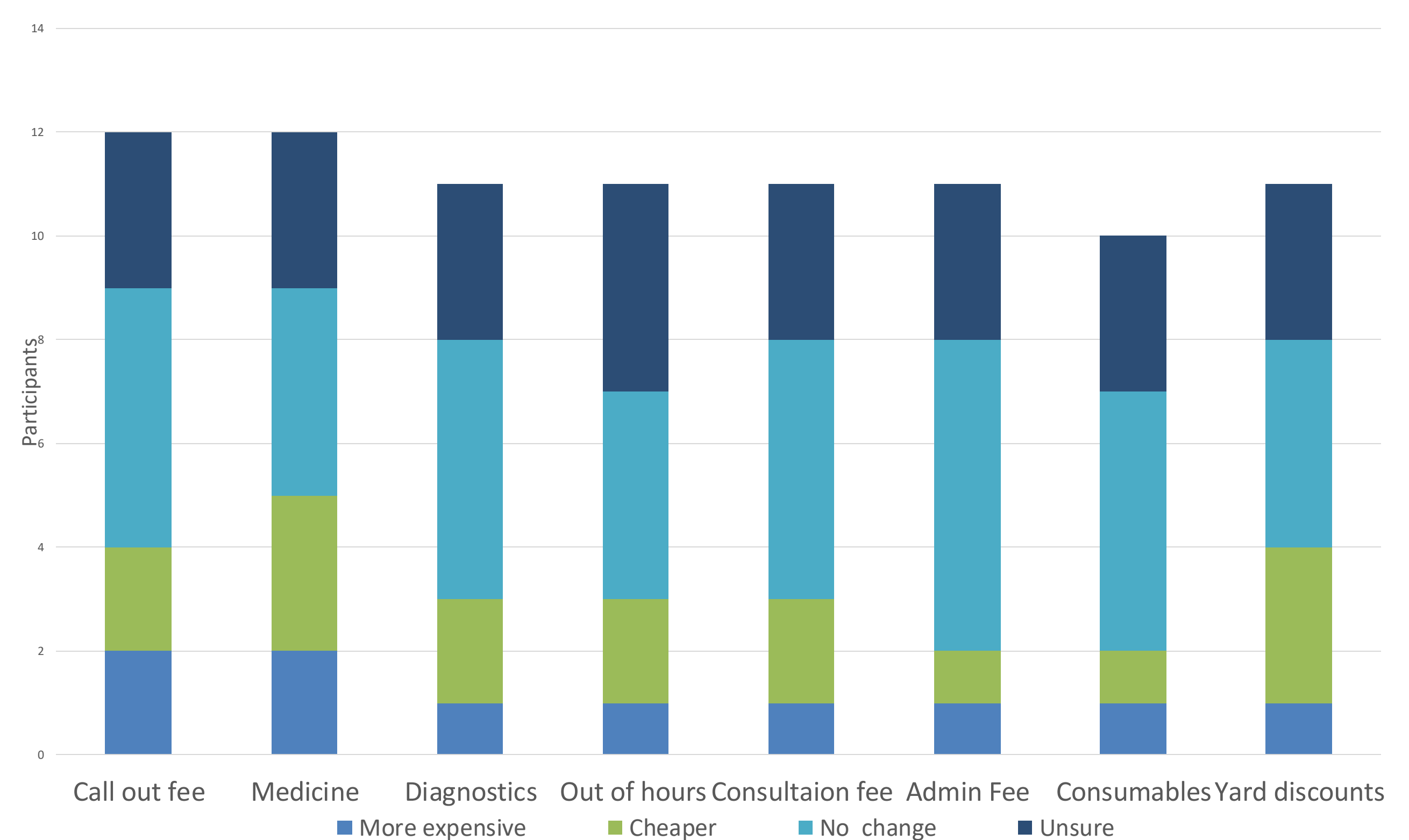


Figure 3: Change in expenses for stakeholders who had moved from an incorporated to independent practice

DISCUSSION & CONCLUSIONS:

The general preference towards independent practices in clients and staff was mainly seen in quality of service, however, there were factors of incorporated practices that were perceived as better such as yard discounts and the process of hospital referrals such as choice of hospital and quality. Expenses were a key influence for clients and their opinions of ownership types, possibly from the rise in cost of horse ownership (National Equine Welfare Council, 2023) having a direct impact on horse welfare. Staff perceptions of the profession on the whole was negative regardless of ownership type which participants suggested was due to lack of motivation, long work hours and lack of benefits from the job; these findings support a recent survey of the veterinary profession (RCVS, 2019). The study showed there needs to be more information available for clients – there is little information on ownership type as practices are still branded individually and independent practices will likely need more financial support to prevent being taken over in the future.

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