

VETFUTURES



‘GETTING THE CONVERSATION STARTED’

Report of the Qualitative Research

www.vetfutures.org.uk

ABOUT THE PROJECT



The **British Veterinary Association (BVA)** and the **Royal College of Veterinary Surgeons (RCVS)** have joined forces to consider the big issues facing the veterinary profession today, and into the future.

Through a programme of research, engagement with the profession and the public, and a consideration of strategic issues already having an impact on the profession, the aim is to develop a **plan for action** that will help deliver the best – for animal health and welfare, the public and everyone with a role within the veterinary profession.

This research report is the first stage of this programme of work. Designed to ‘get the conversation started’, interviews and focus groups with a wide range of stakeholders took place between November and December 2014.

This report presents the findings from these conversations.



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'I'm quite optimistic about the future – I think there are a lot of challenges and the current business models will suffer, but the practices that survive will be a lot better overall'
Stakeholder organisation

'The risk is that there will be a painful contraction in some areas, with some quite big casualties. Big businesses will take over the small ones if we don't wake up!'
Stakeholder organisation

'The Golden Age is definitely over and it's welcome to the real world!'
BVA/RCVS Council member

'I think the profession will be flourishing in 5 years time, but just different'
BVA/RCVS Council member

KEY MESSAGES



- ✿ There is considerable consensus about the strategic issues facing vets
- ✿ There is less clarity about how the profession might respond to these issues
- ✿ Veterinary surgeons tended to be more pessimistic about the future, and to express feeling unsupported and isolated, with little capacity to engage with wider issues that may affect the future
- ✿ BVA and RCVS Council members tended to be more optimistic about the future and reported feeling better able to identify actions to sustain the profession
- ✿ A recurring message was about a lack of cohesion – that it's important to consider the **whole profession** when thinking about the future, and not just vets in clinical practice
- ✿ The key determinant of future success was thought to be the ability of the profession to adapt to change: some were optimistic here because the profession attracts the brightest; others thought the environment had changed irrevocably and were pessimistic about the future

KEY THEMES



The strategic issues people told us about reflect the following themes:

1. Changing status of the profession
2. Changing profile of vets
3. Changes in the marketplace
4. Pay and pricing
5. Veterinary education/training
6. Stress
7. Need for strong leadership
8. Other worries

APPROACH TO RESEARCH



Objectives:

- ✿ To explore the issues facing the veterinary profession and ideas for how it might shape its future
- ✿ To engage the profession, pet owners and other interested parties in a conversation that will continue beyond the life of the Vet Futures project

Methodology:

- ✿ A qualitative approach to gain depth of feedback and to frame quantitative survey work later on
- ✿ Mix of methodologies depending on the target sample:
 - 6 focus groups (90 minutes each): 2 with pet owners; 2 with BVA Council members; 2 with members of RCVS Council and Veterinary Nurses Council
 - 46 telephone interviews (30 minutes each) with: veterinary surgeons and veterinary nurses; veterinary/non-veterinary members of BVA and RCVS Councils; and 20 stakeholder organisations

Theme 1: Changing status of the profession



1. CHANGING STATUS

- ✿ A recurring theme arises from a perception that esteem for the profession has fallen – and will continue to decline. A number of factors were thought to be undermining the ‘standing’ of the profession...
- ✿ Declining deference by the public (wider societal change)
- ✿ Perceptions of vet services as expensive and vets as high earners
- ✿ Less personal engagement with clients and continuity of care due to part-time working and changes to out of hours
- ✿ Expansion of ‘paraprofessionals’ and erosion of vet role (especially in farming)
- ✿ A failure to exert influence and to stand ‘centre stage’, particularly with Government, and to allow erosion of the veterinary role
- ✿ Comparatively low levels of remuneration (student debt, retention issues)
- ✿ A failure of UK vets to engage sufficiently in public health and food hygiene
- ✿ Anticipated oversupply of vets, which is expected to exacerbate the decline in status



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'I think we need to see the public perception of the profession raised...20 years ago we were seen as a more James Herriot, caring kind of profession and we were highly trusted, but now, in general, perceptions have gone down and we're perceived more as money grabbers'
Stakeholder organisation

'It's a turbulent time for the profession but the one ray of light is that the public adore their pets and will spend money on them, so there's some hope. There is definitely a demand for the profession, the only question is what kind of a profession will it be?'
Vet

'The perception amongst our members is that vets are very expensive and that they are profiteering...they have gone from being seen as part of the community to being seen as a business'
Stakeholder organisation

PET OWNERS' VIEWS



- 🌟 Most pet owners in the two focus groups were positive about their experiences of vets, and expressed loyalty towards their regular vet
- 🌟 Convenience and word-of-mouth recommendations were the key factors in determining pet owners' choice of veterinary practice
- 🌟 The attribute they appreciated most about their vet was a caring attitude towards their pet, followed by the vet's knowledge and professionalism, friendly staff and convenient appointments
- 🌟 Pet owners tended to place a great deal of trust in vets – they saw vets as being caring people, and part of a reputable profession that was valued more highly than bankers and politicians, and often better than dentists, lawyers or accountants. Vets were on a par, or even above, doctors in terms of the trust placed in them

STATUS OF VETERINARY NURSES



- ✿ The main issues raised by veterinary nurses stemmed from low levels of pay, perceived lack of worth and low status
- ✿ Many felt underutilised and highlighted the lack of opportunities for career progression – this led to recruitment and retention issues
- ✿ There was hope that ‘protected status’, once achieved, will improve their standing within the wider profession and for the public
- ✿ The key aspiration for the future was a better understanding amongst the public (and vets) about their role and capabilities

‘Clients think that we’re not qualified and that we are just nursing assistants – they don’t realise what we do, and actually the vets don’t help with that perception either’
Veterinary nurse

‘Qualified nurses only earn about £1 an hour more than the receptionists – and that’s demoralising after all our training’
Veterinary nurse

OPPORTUNITIES FOR ACTION



Increasing the influence and status of the veterinary profession in society

Better engagement with different aspects of the profession – in particular food hygiene

Helping the public to understand how vets charge for their services and the value they offer

A higher public profile for vets, particularly on animal welfare issues and in their local communities

Theme 2: Changing profile of vets



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2. CHANGING PROFILE

- ✿ Some speculate that the profession's perceived changing status may be linked to changes in the profile of those choosing to train. For instance....
- ✿ More and more women are entering the profession, and many linked this to:
 - More part-time working
 - A greater demand for career breaks
 - A decline in appetite for practice ownership
- ✿ Wider societal changes are also altering newer vets' aspirations
 - Greater emphasis placed on work-life balance; reluctance to work out of hours
- ✿ Some worry that more part-time working could lead to...
 - Less continuity for clients
 - Difficulties with out of hours/on-call provision



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'The feminisation of the profession changes the life cycle of a vet, but that's not a bad thing. It could mean that we can accommodate more people in practice – a good thing given that there are more and more graduates now'

Vet

'There are a lack of opportunities to work and have a family and women have 22% lower wages than men in the profession...and I don't think the profession is adapting as well as it should – it's not as modern as it thinks it is'

BVA/RCVS Council member

'We are dedicated people, but there is no-one looking out for our interests'

Vet

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OPPORTUNITIES FOR ACTION



Extending opportunities for flexible working and career breaks to all

Ensuring there is gender pay equality

Supporting return to work after absence (e.g. maternity leave)

Theme 3: Changes in the marketplace

3. CHANGES IN THE MARKETPLACE



- ✿ There are big changes afoot in the way vets work...
- ✿ Growing corporatisation is thought to be the biggest one – both opportunities and challenges were highlighted, and there is uncertainty about the long-term implications
- ✿ Maintaining professionalism in an increasingly commercial environment was an issue for some
- ✿ The traditional ‘practice partnership’ model is thought to be dying out
 - Younger vets are considered less interested in practice partnership
 - Vets reaching retirement are left with little alternative than to sell to large chains
 - The ‘James Herriot farm vet’ is being replaced by new business models
 - The result is a decline in independent small practices

CORPORATISATION

| Opportunities | Challenges |
|---|---|
| Structure, support and business expertise | Focus on profit before animal and staff welfare? |
| Increasing shared knowledge e.g. Evidence based practice and clinical databases | Concerns about lack of regulatory oversight |
| Practice without burden of running a business | Less choice for clients and poorer service overall? |
| More flexible working (part time, career breaks) | Less attention to professional development? |
| Better work opportunities for veterinary nurses and wider team | Loss of autonomy/power to vets in corporate environment? |
| Greater job security and options to relocate | Lack of local, community involvement and personal service |
| Economies and efficiencies | |



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'So far, we've held our own but in the future, I think it will probably lead to the downgrading of the professional status of vets, similar to what has happened with opticians. I just hope it works out better for us than it has for the opticians'

Vet

'There is a fear of change...but the service to clients [by corporates] is often better'
BVA/RCVS Council member

'They [corporates] have become massive and they base their whole existence on the sale of products...where will it end?'

Vet

'The problem with the corporates is that they are owned by financial institutions and their aim is retail not service and you lose that personal touch'

Vet

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...CHANGES IN THE MARKETPLACE



- ✿ As well as the rise in corporatisation, there are other issues felt to be changing the wider landscape of veterinary practice within the UK
- ✿ Most opportunities for clinical practice were perceived to lie in small animal practice (which represents the largest proportion of the profession)
- ✿ Fewer mixed practices were reported, together with more specialisation (including out of hours services and referral centres)
- ✿ The farm vet was seen to have a diminishing role (a reflection of the fact that farmers are doing more themselves, and also the rise of paraprofessionals)
- ✿ There was a perception of fewer opportunities coming from Government (thanks to budget cuts and the profession's seeming decline in status)
- ✿ There was also a perceived shortage of UK vets working in the key area of animal food hygiene (considered unattractive to UK vets)
- ✿ There was a worry about general erosion of the vet's role – by vets 'giving away' less popular aspects of the job (e.g. artificial insemination, dental work)

OPPORTUNITIES FOR ACTION



Supporting vets in practice with marketing and business skills

Increasing the attention given to career opportunities in industry, business, research, pharmaceuticals, food hygiene/processing etc.

Considering 'the offer' to a range of clients – e.g. increasing preventative services and consultative work – and what sets independents apart from corporates

Theme 4: Pay and pricing



4. PAY AND PRICING

- ✿ Many articulated significant worries that vets are not paid enough, at the same time as perceiving the public to feel they are charged too much for vet services

- ✿ There are real concerns about the impact of **inadequate earnings** on the long-term sustainability of the profession
 - People worry that current levels of vet student debt and the prospect of inadequate subsequent earnings could be a disincentive to training
 - Earnings were felt to be too low in comparison to other professions, and to be falling

- ✿ At the same time, many felt practices need to **revise charging models** and move away from a reliance on drug mark-ups
 - There was a general perception that the public sees vet charges as too high
 - Internet pharmacy and possible EU legislation threaten % of profit derived from medicines
 - There is a need for better understanding of most lucrative avenues of income

PET OWNERS ON PRICING



- ✿ Concern about the costs of veterinary care was the main area of complaint voiced by pet owners in the two focus groups
- ✿ Vet services were thought to be expensive, with little transparency about costs
- ✿ Some questioned whether vets might suggest treatments that were not strictly necessary
- ✿ Despite these concerns, very few described shopping around for cheaper **services**, although there was some evidence that pet owners were starting to shop around for cheaper **medicines** (supermarkets, online)
- ✿ Pet owners would welcome **greater transparency** about the costs of veterinary services, including:
 - Displaying prices in waiting rooms
 - Standardised pricing schemes
 - The option of payment plans



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'It may no longer become a first profession – it's not considered a primary income generating job in some parts of Europe already and that will not attract the brightest of children in to becoming vets'

BVA/RCVS Council member

'I think maybe less people will go into the veterinary profession in the future if salaries keep falling, and that will change the quality of the people coming in'

Vet

'Teachers bring home more money than a vet and they don't have to train as long'

Vet

'We need to charge appropriately for our services, rather than inappropriately for drugs'

Stakeholder organisation



'Vets need to be a bit more savvy about the fact that they are dealing with two different parts of the market...and it's not that you can be cheap on the preventative and expensive on the treatment, but you need to understand that people buy those services in a different way'

Stakeholder organisation

'The business model of most practices is driven by the margins they make on the sale of medicines, so if decoupling happened, the profession would have to revise its fee structures. And I think the majority of the profession haven't woken up to this yet'

Stakeholder organisation

OPPORTUNITIES FOR ACTION



Considering vet earnings as part of discussions about the longer-term sustainability of the profession

Exploring new charging models and ensuring that services are charged for appropriately

Improving transparency over charges for clients

Considering options to help take the sting out of vet bills

Theme 5: Veterinary education/training

5. VETERINARY EDUCATION/TRAINING

VET**FUTURES**



- ✿ A range of concerns were voiced about training for tomorrow's vets and there was a call for the profession to discuss these more openly...
- ✿ There were worries around the recruitment of vet students. Some talked about a failure to recruit from low-income families, and questioned an over-emphasis on academic prowess
- ✿ A recurring issue was over whether existing curricula deliver the competencies required for modern veterinary careers – there were perceptions of insufficient emphasis on industry, food hygiene, research etc.
- ✿ Some questioned whether omnicompetence was appropriate in the context of increasing specialisation – some felt a Limited Licence to Practice (e.g. graduate as a small animal vet and can train in other areas later, as required) would better reflect the role of the modern vet

...VETERINARY TRAINING

- ✿ Oversupply of vets was a commonly aired issue – it is expected to impact in five to ten years and reflects an increasing student intake, additional vet schools, and an influx of European graduates to the UK
 - There were concerns about flooding of the market, creating a downward pressure on salaries and making the profession less attractive
 - There was anxiety about pressure on the jobs market
- ✿ Vet students' expectations of the jobs market, remuneration, and career options were highlighted as often being unrealistic and too narrow
- ✿ There was concern about vet student debt – and the imbalance of debt with the salaries graduates can expect to receive
- ✿ The competence of EU vets in comparison with UK vets was queried
- ✿ Shortages of funding and training practices for veterinary nurses were reported, with little opportunity for career progression, and a shortage of information about different career opportunities

'Vets' clients have changed – farmers farm differently now and the demands on them are much greater...but has the veterinary qualification kept pace with this client base?'
Stakeholder organisation

'Training vets to do things they are never going to do – a waste of money'
BVA/RCVS Council member

'When you read the personal statements of the applicants, you see that we are interviewing the crème de la crème – but are we missing a whole tranche of the population?'
BVA/RCVS Council member

OPPORTUNITIES FOR ACTION



Ensuring that the front door to the profession admits those with the qualities most valued for future veterinary careers

Ensuring that education and training programmes are producing vets with the competencies needed for modern and future veterinary careers

Equipping tomorrow's vets with realistic expectations and encouraging them to consider opportunities across the breadth of the profession

Ensuring that training provision for veterinary nurses reflects the needs of the service for their skill set

Theme 6: Stress



6. STRESS

- 🌸 Many of the vets in practice, and veterinary nurses, emphasised the stresses of the job
- 🌸 The profession has been slow to acknowledge and respond to the pressures on vets, which were thought to be an increasing problem
- 🌸 People talked about:
 - Stressful practice work, long hours, out of hours
 - Increasing expectations from the public
 - Professional isolation
 - Insufficient financial remuneration
 - Lack of preparedness for client interactions and the emotional side of supporting animal owners
 - Insufficient training in business and marketing skills
- 🌸 New graduates were thought to need most help; but there was also concern about a high 'drop-out' rate at later stages of the career pathway due to stress



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'There is a lot of low level mental distress in this job – worse than in other professions. There are very high expectations from clients and it's often a very emotional environment'

Stakeholder organisation

'We live in a 24 hour society and there are higher expectations now. If you can go to the supermarket in the middle of the night, people want to be able to do the same with their vet'

Vet

'The Vet Record does give helplines and so on but the attitude [by employers] is often 'man up' and get on with it'

Vet

OPPORTUNITIES FOR ACTION



Improving working practices, particularly more flexible working hours

Increasing support for new graduates and also experienced vets who risk facing 'burn out'

Helping employers to recognise and respond to the stresses of work for vets and veterinary nurses

Theme 7: Need for strong leadership

7. NEED FOR STRONG LEADERSHIP



- 🌸 People felt strong leadership was key to whether the profession can adapt successfully to future challenges and grasp the opportunities before it
- 🌸 A recurring theme was around a disconnect between different branches of the profession, and a lack of joined up thinking
- 🌸 There was a perception that attention is overly-focused on clinical practice at the expense of other areas, such as industry, research, and food hygiene
- 🌸 Concern was expressed by some BVA/RCVS Council members about a loss of influence at a high level e.g. in discussions about complex world problems and biological issues
- 🌸 Most welcomed the collaboration of the BVA and RCVS on the Vet Futures project – for the overall good of the profession. Both organisations were perceived as having become more proactive, although more needed to be done and issues were raised about the roles of each organisation
- 🌸 Veterinary nurses wanted a more integrated approach, to reinforce their role within the veterinary team



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'...we do need our regulatory body and our major representative body to work very closely together to make sure our profession is properly represented to the public and to our new graduates'
Stakeholder organisation

'We're not the most joined up profession and we tend to be in our own little bubbles'
Vet

'There is a leadership void in the profession – who is leading us? I thought it was the RCVS but it isn't, so is it the BVA's job? We need a clear demonstration of who is leading us...and this project is a good first step'
BVA/RCVS Council member

'The profession has lost its way a bit and there is no clear leadership...I think the profession needs to have a much higher profile and to really take a stand on issues'
BVA/RCVS Council member

- 🌸 Most were looking to the BVA to take the lead on the issues they aired
- 🌸 Many said that the BVA was, or should be, the voice of the profession – and vets were looking to it to stand up for them and maintain pride in the profession
- 🌸 Many wanted the BVA to be more influential – to better advocate for, and connect, the whole profession. It tended to be perceived as speaking on behalf of its members only, and most interested in large-animal practice and farming
- 🌸 The structure of the BVA and its specialist divisions was perceived as needing reform, including a financial contribution from the divisions and more united relationships
- 🌸 The short Presidency term was considered unhelpful to strategic thinking
- 🌸 There was a view that the BVA needs to be clearer on its stand on issues of animal welfare – like badger culling – which may conflict with members’ interests and yet be in the longer-term interests of maintaining the broader standing of the profession
- 🌸 There was positive feedback about Vet Record and other membership benefits



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'We are only a small profession, so we don't have a lot of power. We could do with a real union as there is nobody out there to sort out our long hours and things like that'
Vet

'I think the BVA has a thankless task of trying to represent the whole profession to Government and to the College and one thing I strongly believe is that members of the BVA divisions should pay some kind of small premium to the BVA so that it can do that job properly'
Stakeholder organisation

'It [the BVA] is a very democratic organisation but it tends to be more tactical than strategic...and they need to be able to think more for the long term'
Stakeholder organisation

- ✿ The RCVS balances dual roles – of ‘regulator’ and ‘royal college’. This causes some confusion, according to the research
- ✿ Vets in practice struggle to see the RCVS as anything more than the regulator – most felt it should be the BVA that takes up the fight for the future of the profession
- ✿ The RCVS also struggles with a slightly old-fashioned image, and was perceived as giving insufficient attention to younger members of the profession
- ✿ The size of the Council, and its one-year Presidency term, were both thought to be uncondusive to strategic thinking/action
- ✿ There were some criticisms of the way the RCVS performs its regulatory role
- ✿ There was a desire to see the Practice Standards Scheme taken further – and to increase public understanding of it
- ✿ Some felt the RCVS should not provide Continuing Professional Development (CPD) – regarding this as something for the BVA to provide – and that its focus in this area should instead be solely on maintaining standards



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'You get the feeling that the RCVS has lots of resources and is actively looking for things to get involved in, but they need to be more hands-off and let the BVA step up'
Stakeholder organisation

'The RCVS is there to protect the public against the profession, whereas the BVA is there to protect the profession'
Vet

'This exercise might be a good way of helping the BVA and the College to define themselves and their roles and for the profession to understand a little bit more about those respective roles'
BVA/RCVS Council member

OPPORTUNITIES FOR ACTION



Promoting the value of the profession to the public (including setting realistic expectations around services and vet earnings)

Getting the voice of the profession heard at a high level (particularly Government)

Uniting the profession so that it can speak with one voice

Being clear about the respective roles of those organisations leading the profession

8. Other worries



VETFUTURES

8. OTHER WORRIES

- ✿ There was also a range of other worries generated by the research. These tended to be external issues directly affecting the profession but over which it has limited, if any, control. For the purposes of this report, these issues are touched upon briefly
- ✿ A number of factors external to the profession are expected to have a significant impact on the profession in the future
- ✿ There was a sense that the profession needs to be more proactive – to anticipate changes coming at them, and to fully engage with policymakers – thereby taking more control, rather than being the passive recipients of change

...OTHER WORRIES

- Four aspects of the external environment were expected to have a particular impact on the future of the profession

External factors thought to have a significant impact in the future

EU legislation – particularly the impact of decoupling the right to prescribe and the right to dispense, and any changes to antimicrobial usage

UK Government policy – including reductions in Government disease surveillance, and changes in the tendering process for TB testing. There were also calls for changes to legislation to modernise meat hygiene inspection practices

Technological and scientific advance – including risks of overtreatment, changing expectations from clients, and embracing new ways of working

Insurance products – facilitated access to advanced treatments, but fears that premiums will become unaffordable as increasingly expensive procedures drive higher payouts



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'There are opportunities for the profession – especially with disease surveillance. It is important and vets need a fuller understanding of their potential and their role in this – it's not a threat, it's an opportunity'

Stakeholder organisation

'Vets are going to be required to partake in new EU legislation – reduction of use of chemicals etc. – and they need more help to understand this'

Stakeholder organisation

'The profession needs to be realistic about what they can expect from Government – there are going to be greater cuts and they have to accept this and think about new ways of working (e.g. with disease surveillance)...be innovative, contribute rather than oppose...work towards solutions'

Stakeholder organisation

OPPORTUNITIES FOR ACTION



Proactively influencing policy to the advantage of animal health and welfare, the public and the profession

Encouraging the adoption and dissemination of new technologies

Increasing engagement with the pet insurance industry

IN SUMMARY



- 🌸 This research has shone a light on a range of broad and shared concerns about the future for the veterinary profession in the UK
- 🌸 Some are worried about a perceived decline in the status of the profession within the broader public and policy community
- 🌸 The marketplace, anyway, in general, is changing – with a significant rise in corporate ownership, and decline in the traditional practice partnership
- 🌸 There is a mismatch between concerns within the profession about poor pay, and perceptions of the public that they have to pay too much for the care their pets receive. This research indicates that while pet owners clearly value their vet highly, they are concerned about pricing
- 🌸 Being a vet is also perceived by those within the profession as a relatively high-stress occupation
- 🌸 Many within the profession are looking for stronger and more unified representation and leadership



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*'It's about standing up for our uniqueness'
BVA/RCVS Council member*

*'What we need is for the profession to unite
over what it contributes to this country...we
make a huge contribution to human well-
being as a result of looking after the health
and welfare of their animals'
BVA/RCVS Council member*

The sample

18 MEMBERS OF THE PROFESSION



| | Characteristics | Area of work | Type of practice | Location |
|----------------------------------|--|---|--|--|
| Veterinary surgeons (VSs) | <p>13 VSs – 8 female, 5 male</p> <p>8 BVA or BSAVA members</p> | <p>8 independent practice</p> <p>3 working for corporates</p> <p>2 working for Government</p> | <p>Of those in practice, mix of:</p> <ul style="list-style-type: none"> - Small animal - Mixed - Large/farm - Large referral | <p>Mix of urban and rural practice</p> <p>11 England</p> <p>1 Wales</p> <p>1 Ireland</p> |
| Veterinary nurses (VNs) | <p>5 VNs</p> <p>2 BVNA members</p> | <p>4 in practice (all independent practices)</p> <p>1 lecturer</p> | <p>Of those in practice, mix of:</p> <ul style="list-style-type: none"> - Small animal - Referral | <p>Mix of urban and rural</p> <p>4 England</p> <p>1 Wales</p> |

PET OWNERS + COUNCIL MEMBERS



| | PET OWNERS | BVA COUNCIL MEMBERS | RCVS COUNCIL MEMBERS |
|-----------------------|--|--|---|
| Focus groups | Two focus groups | Two focus groups | Two focus groups – one predominantly members of the Veterinary Nurses Council |
| One-to-one interviews | - | Four members of Council | Four members of Council |
| Characteristics | <p>All own at least 1 pet</p> <p>Visited vet >once last year</p> <p>Mix of gender</p> <p>Aged 25-60 years</p> <p>Social grades BC1C2D</p> | <p>Variety of backgrounds, including current practice, academia, business, industry, Government, research, pharmaceuticals</p> <p>Mix of age, gender and time spent on Council</p> | |

20 STAKEHOLDER ORGANISATIONS



| | | |
|---------------------|--|---|
| Veterinary | Association of Vets in Industry (AVI) Association of Veterinary Students (AVS) British Cattle Veterinary Association (BCVA) British Equine Veterinary Association (BEVA) British Small Animal Veterinary Association (BSAVA) British Veterinary Nurses Association (BVNA) | Large Employer's Group Medivet Society of Practicing Veterinary Surgeons (SPVS) Veterinary Benevolent Fund (VBF) Veterinary Defence Society (VDS) Veterinary Schools Council (VSC) |
| Service user | British Horse Society British Meat Processors Association Kennel Club | RSPCA Waitrose |
| Other | Animal Health and Welfare Board England DEFRA, Chief Veterinary Officer Unite (British Veterinary Union) | |