



Trust in the profession

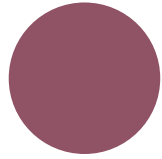
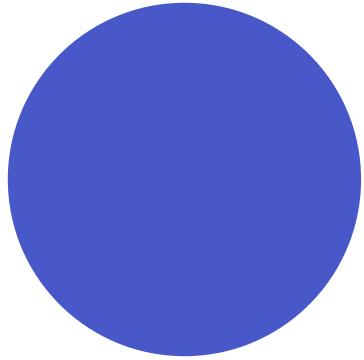
May 2019

Methodology



- March 2015
 - An online public omnibus survey, designed to explore levels of trust in the veterinary profession. A total of 2,002 adults from across Great Britain participated in the survey, which was conducted by market research agency ICM Unlimited between 18 and 20 March 2015. The sample was weighted to be representative of the population of Great Britain.

- May 2019
 - Walnut Omnibus is a quantitative syndicated survey conducted twice a week. The survey is conducted online, interviewing a nationally-representative sample of 2,000 GB adults (aged 18+).
 - The responding sample is weighted to the profile of the sample definition to provide a representative reporting sample. The nationally-representative profile is based on census data collected by the National Office for Statistics.



MAIN REPORT



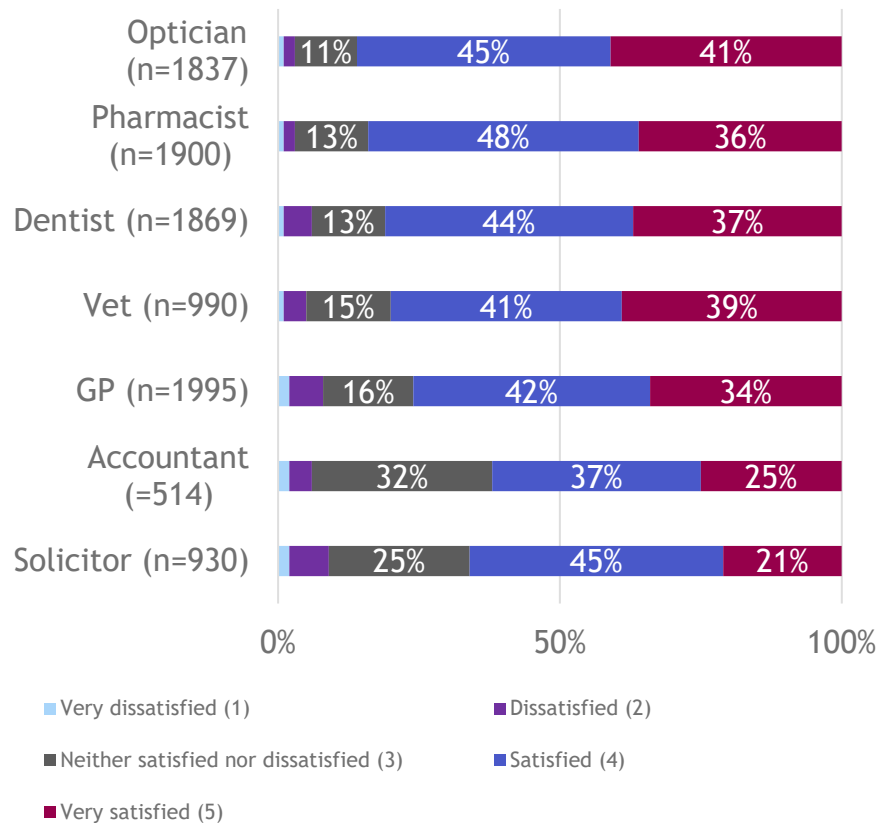


**Service
received**

2019 SERVICE RECEIVED: Satisfaction high with their vet



80% satisfied or very satisfied. One of the professions with the highest number “very satisfied” (39%)

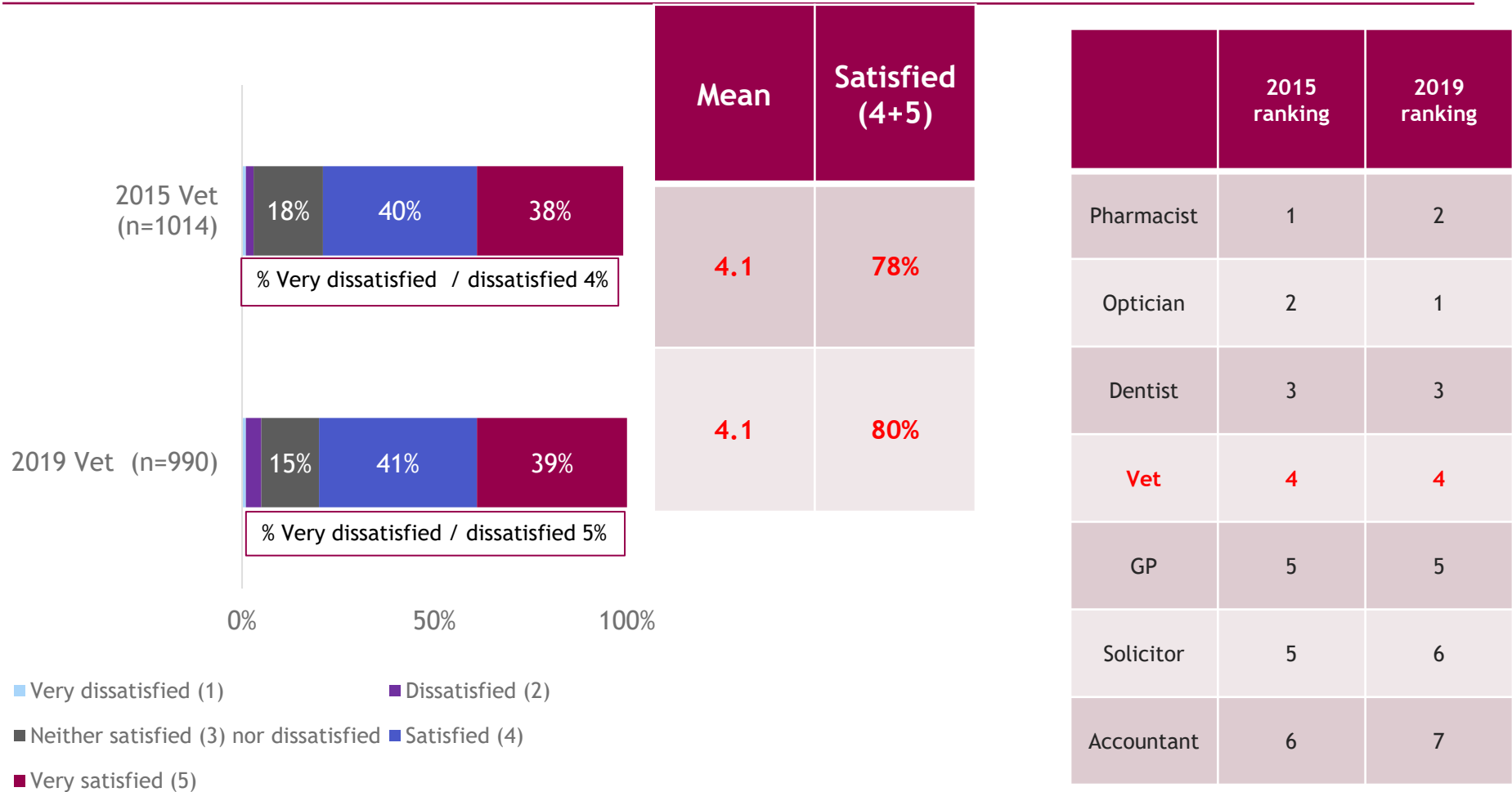


Profession	Mean	Satisfied (4+5)
Optician	4.2	86%
Pharmacist	4.2	84%
Dentist	4.1	81%
Vet	4.1	80%
GP	4.0	76%
Accountant	3.8	62%
Solicitor	3.8	66%

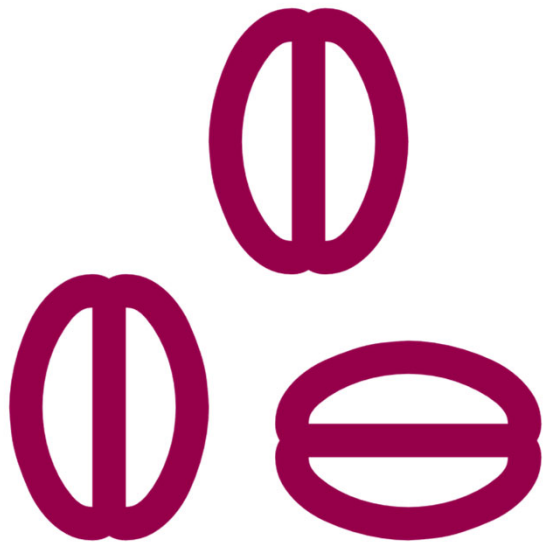
Q1. How satisfied are you with the service that you receive from each of the following professions that you use?
Base: All who use this service (weighted)

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COMPARISON 2015 vs 2019: Satisfaction with the service received from their vet remains high and unchanged in terms of % satisfied / very satisfied and also ranking. The level of dissatisfaction also remains similar



Q1. How satisfied are you with the service that you receive from each of the following professions that you use?
 Base: All who use this service (weighted)

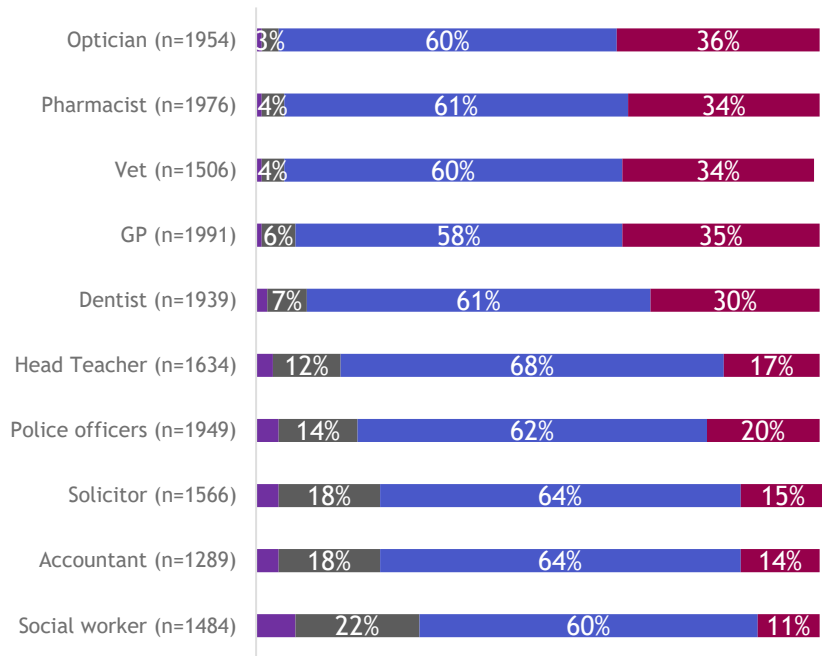


Trust

2019 TRUST: There is a high level of trust in the veterinary profession



94% generally or completely trust the veterinary profession. One of the professions with the highest number who “completely trust” them (34%)



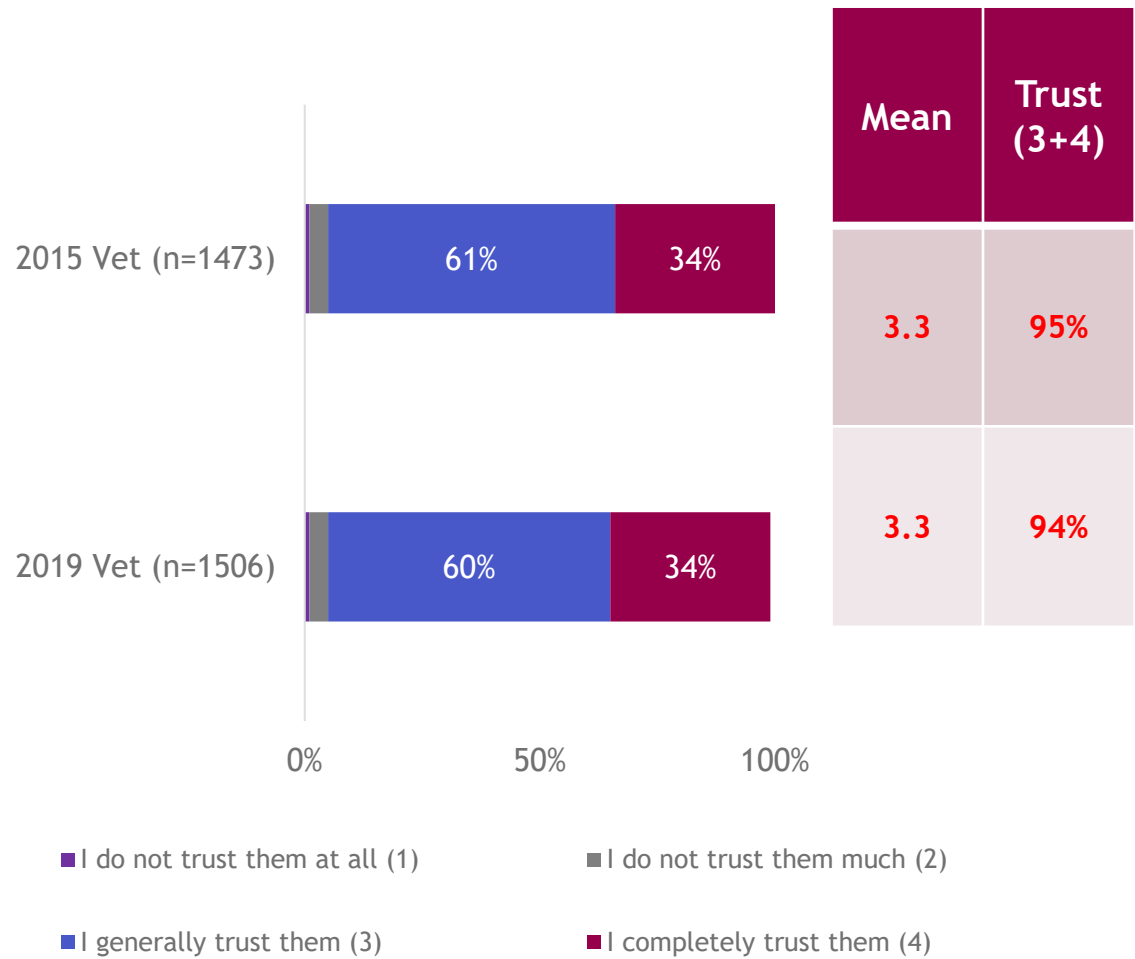
- I do not trust them at all (1)
- I do not trust them much (2)
- I generally trust them (3)
- I completely trust them (4)

Profession	Mean	Trust (3+4)
Optician	3.3	96%
Pharmacist	3.3	95%
Vet	3.3	94%
GP	3.3	93%
Dentist	3.2	91%
Head Teacher	3.0	85%
Police Officer	3.0	82%
Solicitor	2.9	78%
Accountant	2.9	78%
Social Worker	2.7	70%

Q2. How much do you trust each of the following profession?
Base: All who chose to comment on each profession (weighted)

N.B. Q1 All who use this service vs Q2 All who chose to comment on each profession i.e. more (with the exception of GPs) have answered Q2 than answered Q1

COMPARISON 2015 vs 2019: Trust in the veterinary profession remains high and unchanged between waves in terms of % trust and also ranking



Profession	2015 ranking	2019 ranking
Pharmacist	1	2
Optician	2	1
Vet	3	3
GP	4	4
Dentist	5	5
Head Teacher	6	6
Police Officer	7	7
Accountants	8	8
Solicitors	9	9
Social Workers	10	10

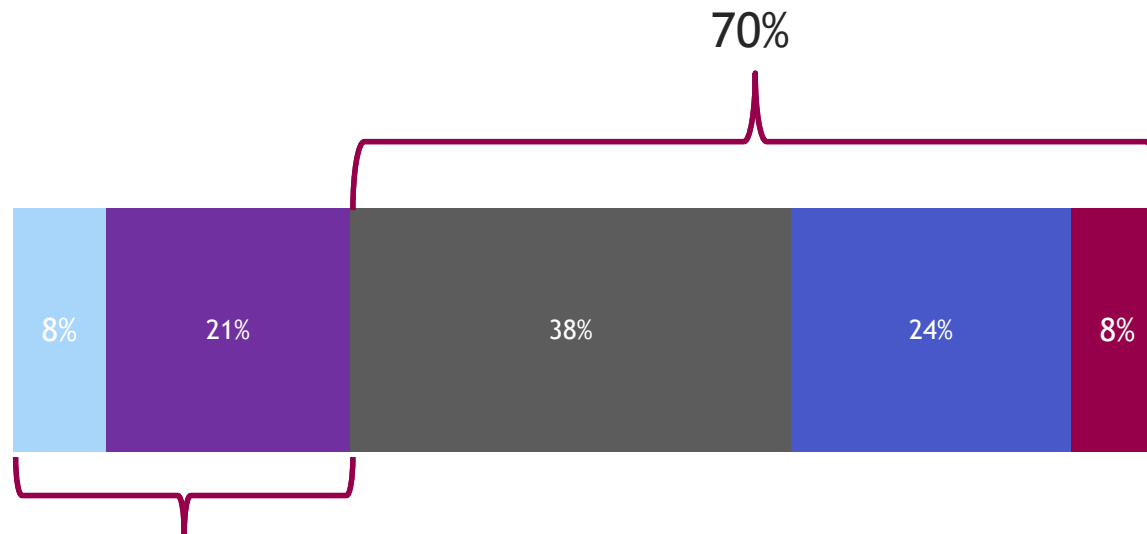
Q2. How much do you trust each of the following professions?
 Base: All who chose to comment on each profession (weighted)

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**Value for
money**

2019 VFM: The majority of animal owners (70%) feel vet fees are at least fair, with over a third (38%) feeling they are at least good value for money



Mean	% Good / excellent
3.0	32%

Poor VFM

- More likely to feel they are poor VFM: 45-54y (37%), 55-64y (35%), North East region (34%)
- Less likely to feel they are poor VFM: 25-34y (23%)

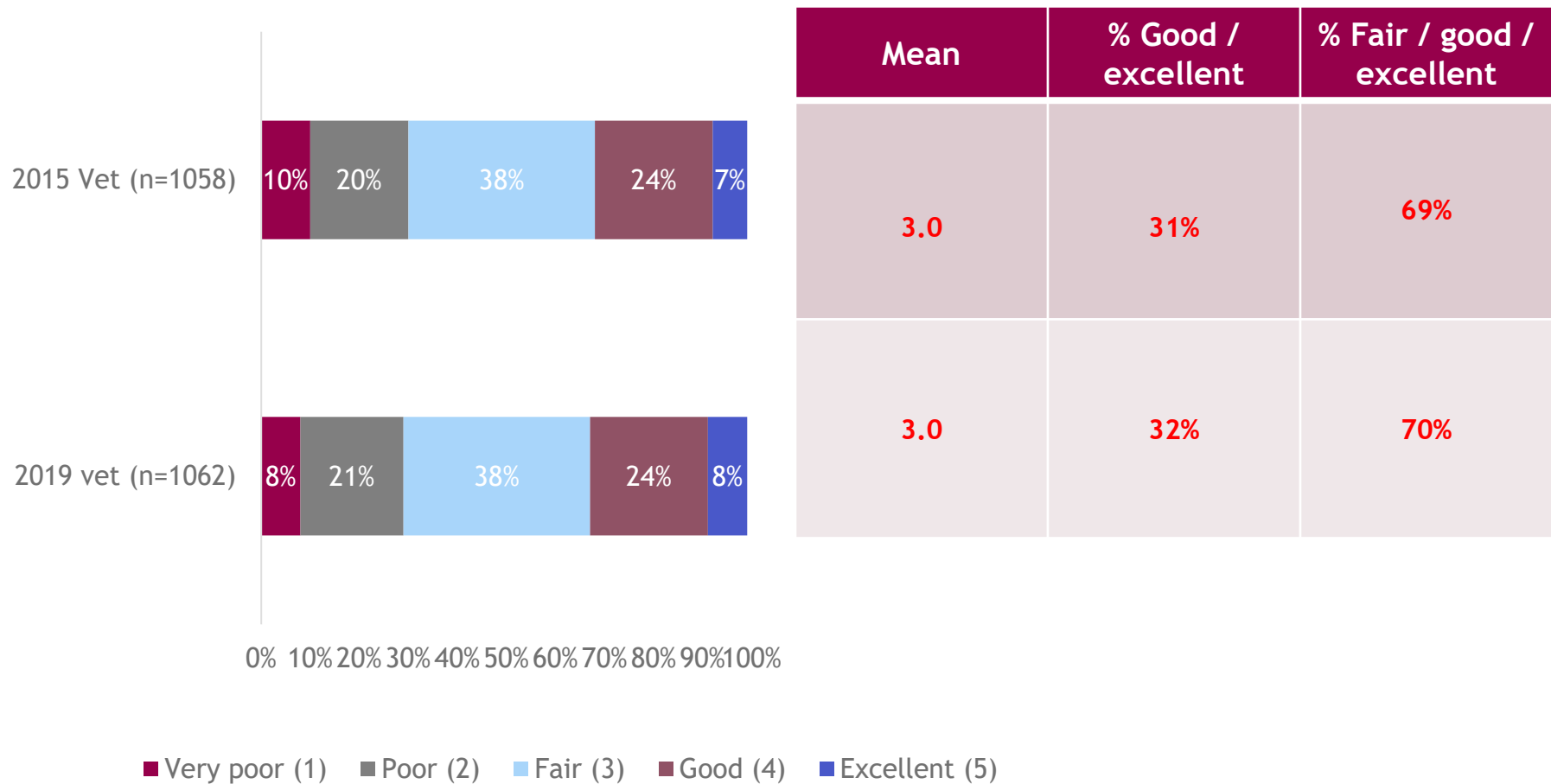
■ Very poor (1)
 ■ Poor (2)
 ■ Fair (3)
 ■ Good (4)
 ■ Excellent (5)

Q3. If you are an animal owner, thinking in general about the fees charged by your veterinary practice, how do you rate their value for money?

Base: All animal owners who use the vet (n=1,062) (weighted)

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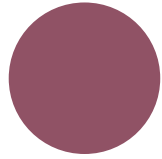
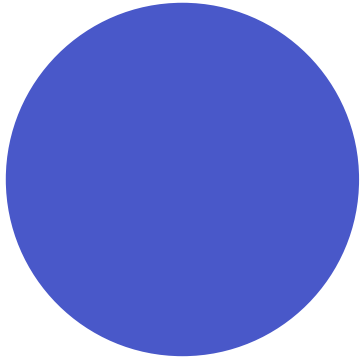
COMPARISON 2015 vs 2019: The perception of value for money remains unchanged



Q3. If you are an animal owner, thinking in general about the fees charged by your veterinary practice, how do you rate their value for money?

Base: All animal owners who use the vet (n=1,062) (weighted)

Trust in the profession. May 2019. Wave 2



SUMMARY



Summary: The veterinary profession has retained its strong position of providing a high level of satisfaction, being trusted and being perceived as at least good or excellent value for money by approximately a third



Level of satisfaction with veterinary services

- Remains high
 - 2019 80% satisfied / very satisfied
 - 2015 78% satisfied / very satisfied

Level of trust in the veterinary profession

- Remains very high
 - 2019 94% generally trust / completely trust
 - 2015 95% generally trust / completely trust

Value for money

- Remains high
 - 2019 32% good / excellent value for money
 - 2015 32% good / excellent value for money



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