

Unlocking Potential

A report on veterinary expertise in
food animal production



To the Vets and Veterinary Services Steering Group

Professor Philip Lowe

Contents

Foreword	5
Executive summary	9
Chapter 1: Background and context	13
My remit	14
My approach	16
Chapter 2: The supply of veterinarians in the farming and food sectors	19
Overall demographics of veterinarians	19
Inflecting veterinary education	25
The ‘right’ applicants	26
The ‘right’ graduates	28
The ‘right’ professional experience	29
Problems in the localised supply of veterinarians	32
Easing the supply of rural veterinarians	32
Chapter 3: Demand for veterinary services	37
Elements of demand for veterinary services	37
Public demand	38
Private demand	40
Farmers’ access to local veterinary services	42
The price, value and uptake of veterinary services	43
Food sector orientation – a gap in skills and expertise?	48
Veterinary services supplied by non-veterinarians	49
Improving customer orientation	50
Chapter 4: Veterinary businesses	51
Different business models	51
Business orientation	54
Practice managers	54

Developing and promoting business skills	55
Veterinary specialisation	56
The veterinary team	57
Chapter 5: The public good functions of food animal veterinarians	61
Animal welfare	61
Combating animal disease	64
Surveillance	65
Contingency planning	67
Public health and food assurance	68
Chapter 6: Unlocking potential – models for change	71
Renewing relationships with government and farmers	71
Responsibility and Cost Sharing	71
Veterinarians' relationship with government	72
Veterinarians' relationship with the farming and food sectors	75
A Veterinary Development Council	76
Animal health and development	77
Farm health planning	78
Veterinarians as agents of knowledge exchange	80
Annex 1 Schedule of working group meetings	83
Annex 2 Membership of the Vets and Vets Services Working Group	85
Annex 3 Personal visits and interviews	87
Figures	
Figure 2.1 Country of graduation of veterinarians in UK government departments and agencies	20
Figure 2.2 Proportion of time spent by veterinarians in private practice by species type 1998-2006 (with predicted values for 2011)	21
Figure 2.3 Age and gender profiles of companion and farm animal veterinarians	21
Figure 2.4 Gender ratio and proportion of time spent on farm animal work	22
Figure 2.5 Gender profile of veterinarians who graduated between 2000 and 2005 by practice type	23
Figure 2.6 Veterinarians' 'top 10' self-declared areas of expertise by employment type	24
Figure 2.7 Key stages in the formation of vets: opportunities and initiatives for refocusing	26
Figure 2.8 Comparison of student employment preferences and graduate employment outcomes	28

Figure 2.9	'The spiral of disillusionment'	30
Figure 3.1	Veterinarians working in government	39
Figure 3.2	Numbers of livestock in Great Britain and % change 1995-2008	40
Figure 3.3	Changes in UK herd and flock sizes 1995-2005	41
Figure 3.4	Reasons for changing veterinary practice in the last three years	43
Figure 3.5	Average total veterinary costs (including veterinary medicines) by farm enterprise type and as a proportion of total farm spend 2007/08	44
Figure 3.6	Reasons why farmers consult veterinarians, by farm type	45
Figure 3.7	Frequency of use of veterinarians, by farm type	45
Figure 3.8	Scottish farmers' views on ways in which local vets add value	46
Figure 3.9	Farm health planning uptake by farm type in England	48
Figure 3.10	Services provided to farmers by non-veterinarians	49
Figure 6.1	The changing profile of the veterinary profession in the UK	73

Professor Phillip Lowe



Philip Lowe is Director of the Rural Economy and Land Use (RELU) Programme of the UK Research Councils.

He has been a leading figure in the development of interdisciplinary rural studies in the UK. In 1992, he founded the Centre for Rural Economy at the University of Newcastle upon Tyne, where he holds the Duke of Northumberland Chair of Rural Economy.

He has played an active role in rural policy development at the national and European levels and in the North of England. For his contribution to the rural economy he was appointed OBE in 2003.

This report was prepared while he was Chairman of the Vets and Veterinary Services Working Group (2007-9).

Foreword

The function of veterinarians is to provide expert advice and services in the care and treatment of animals. In terms of the number of animals they look after and the public significance of their work, no group of veterinarians is more important than those involved in farming and food production. Food animal veterinarians are central to the promotion of animal health and welfare, as well as to the safeguarding of public health from zoonotic diseases.¹

All veterinarians look after the animals in their care on behalf of their clients, but food animal veterinarians are caught up in a more extended web of relationships. In deploying their expertise in the care and treatment of animals they serve as key intermediaries, not only between animals and their keepers, but also between government and farmers, between agriculture and the food industry and between the livestock sector and consumers. Food animal veterinarians are thus required to reconcile very divergent interests.

The centrality of their role subjects them to complex and shifting demands including, recently, novel disease challenges such as Bluetongue and highly pathogenic strains of Avian Flu, pressures to improve animal welfare standards cost effectively and campaigns to clear up such public threats as E. Coli, Campylobacter, BSE and other food and waterborne zoonoses. The past dozen years have seen multiple outbreaks of exotic diseases: Newcastle Disease (1997, 2005), Classical Swine Fever (2000, 2001), Foot and Mouth (2001, 2007), Avian Flu (2006, 2007, 2008), and Bluetongue (2007, 2008). Of course, these new challenges arise in addition to long-established ones, including disturbingly persistent problems such as Bovine TB, Cattle Mastitis and periodic Salmonella outbreaks.

At the same time, the context within which food animal veterinarians work is being transformed. The web of relationships that connect agriculture, the food industry, consumers and the government and shape demand for their professional skills and expertise is itself undergoing profound change. Not only are the technical competences of veterinarians being stretched, there are also considerable structural pressures on the adaptability of veterinary services, requiring an innovative approach to organising and delivering these services.

¹ The term 'food animal veterinarian' encompasses farm animal work, but acknowledges the broader role of the profession (commercial and regulatory) in the food system. It seems to me to be the appropriate counterpart to the term companion animal veterinarian, in expressing the essential function of the role.

Organisational and policy changes that have impacted on the demand for and the delivery of veterinary services, 1995-2007

- 1995 Meat Hygiene Service formed
- 2000 Food Standards Agency formed
- 2001 Defra formed
- 2003 Monopoly Commission's report on supply of prescription medicines
- 2003 Veterinary Surveillance Strategy published
- 2004 Animal Health and Welfare Strategy published
- 2004 European Food Regulations
- 2005 Animal Health Agency formed
- 2005 Lay TB testing introduced
- 2006 Establishment of Welsh and Scottish Chief Veterinary Officers
- 2006 Responsibility and Cost Sharing consultations begin
- 2007 Animal Health Agency's Official Veterinarian Reform Programme begins
- 2007 Animal Welfare Act comes into force

This potent combination of novel demands, intractable problems and structural change has worried various groups within and without the profession, and not only in the UK.² Perhaps the greatest concern is that these developments are occurring against a backdrop of secular decline in the relative standing of farming and food animal veterinary practice both within the profession and within government.

Most veterinarians these days work on pets, or what the profession calls companion animals. This is true for both rural and urban areas. From the perspective of the practices themselves, their customers and the economic vitality of rural areas, this large-scale diversification of veterinary practice over the past 30 years must be hailed as a great success. The shrinking involvement of the profession in farming and food work is, however, a cause for concern, in terms of the potential loss of focus of the profession, the consequences for these sectors and the wider public interest in the health and welfare of food animals. It also has implications for the governance of veterinary services.

Just 30 years ago, most private veterinary work was in agriculture and state veterinarians were a key component of the then Ministry of Agriculture, Fisheries and Food (MAFF) and its farm advisory services. Though the relationship was not without its tensions, these two groups worked together closely, with the farming community, to combat animal disease problems and improve the efficiency and productivity of UK agriculture. Nowadays, by contrast, farming and food animal work are a very minor element of veterinary practice, MAFF no longer exists, and the State Veterinary Service has been (in Whitehall parlance) 'agencified'. There is understandable concern that food animal veterinary medicine is becoming marginal to both the profession

² Frawley, P. (2003), Review of rural veterinary services (Australia).

and government. Inevitably, the relationship between veterinarians in private practice and government – once the central axis of the profession – has come under strain. More widely, this marginalisation is seen by some as symptomatic and by others as an underlying cause, of the pressures besetting food animal veterinary work.

This personal report draws on the deliberations of a working group set up in the wake of a report published by the House of Commons Environment, Food and Rural Affairs Committee (EFRACom) following the Foot and Mouth inquiries of 2001. EFRACom's main concern was whether there was sufficient veterinary expertise to support the farming industry. However, its report provoked deeper questions – about the role of the veterinary surgeon, the demand for veterinary services and the way in which they are organised and delivered – which have continued to exercise the veterinary profession and its farming and governmental customers. I do hope that my report will take these debates forward.

Executive Summary

In 2004, Defra and the devolved administrations in Scotland and Wales published the Animal Health and Welfare Strategy for Great Britain. The strategy was developed because it was generally accepted that the country's animal health and welfare record was neither acceptable nor sustainable. Improvements were urgently needed.

The strategy was built around developing a stronger partnership approach and achieving greater clarity as to the roles and responsibilities of all with an interest in animal health and welfare. The part to be played by the veterinary surgeon would be crucial. The strategy called on the veterinary profession to shift its focus towards services that prevent disease.

However, concerns had already been expressed about whether a perceived loss of farm animal veterinary expertise might compromise the strategy's effectiveness. The Environment, Food and Rural Affairs Select Committee published a report on vets and veterinary services in October 2003. The EFRACom report and Defra's response to it prompted the debate that eventually led to my appointment as Chairman of the Vets and Veterinary Services Working Group.

Chapter 1 sets out the background to the veterinary services debate, the formation of the Vets and Veterinary Services Working Group and the aspects of the changing supply, demand, organisation and role of food animal veterinary services I have covered.

The supply of veterinarians in the farming and food sectors is considered in **Chapter 2**. Analysis of data from the 2006 Royal College of Veterinary Surgeons Survey provides an insight into the overall demographics of veterinarians and trends in farm animal work. I conclude that there is no absolute shortfall in supply and that, while there will be a need to replace older and experienced farm animal veterinarians when they retire, there is no evidence of a systemic problem with succession.

The main issues are the relative attractiveness of food animal work to young veterinarians and their preparedness for such work. The need to attract the right applicants to veterinary school, to produce the right graduates and to ensure that young veterinarians gain the right professional experience is considered. My main conclusion is that there is a case for inflecting the training of those veterinary students with an interest in farm animal work. Efforts should be focused on the transition between graduation and first employment. Consideration should be given to the holding of a regular summer school, ideally supported by bursaries funded by industry and government.

There does not seem to be evidence that student debt is a specific deterrent to taking up farm animal work. A more relevant factor is the need to prepare graduates for the disparity between the veterinary school environment and the realities of full-time work. The Royal College of Veterinary Surgeons' first-year Professional Development Phase is an encouraging initiative.

Problems of localised supply are considered. While the Highlands and Islands Veterinary Services Scheme makes an important contribution to maintaining an affordable veterinary presence for Scottish crofters, the unique factors associated with the Highlands and Islands mean the scheme would not be directly applicable elsewhere in the UK.

The demand for veterinary services is considered in **Chapter 3**. There are both private and public customers for veterinary services in the farming and food animal sectors. This demand is met by private and public sector veterinarians. Added to this mix is the historical role that government has played in the past, in regulating both supply and demand. Government has now given up this role but no organisation has stepped forward to fill the void. Government demand for livestock veterinary services is weighted heavily towards prevailing disease control priorities and commitments. Current and future demand for veterinary services from farmers is influenced by the changing structure and economic prospects of the livestock sectors.

In this chapter I consider a paradox that I encountered during the preparation of this report. Veterinary leaders told me that farmers are increasingly unable to access the veterinary services they need. However, customers of farm animal veterinary services remained silent on the issue. When pushed, they were more concerned that veterinary practices need to provide services that meet the broader needs of the business.

From this chapter I draw three main conclusions. First, the relationship between veterinarians and farmers needs to be renewed (this is considered further in Chapter 6). Second, the demand for veterinary services is poorly articulated and there is a lack of differentiated services on offer. The level of sophistication on the demand side needs to be raised. There are cultural barriers that prevent the veterinary profession from effectively marketing their services. Veterinarians and their farmer customers should address the lack of awareness, poor marketing and weak communication that constitute the status quo.

Finally, both veterinarians and farmers need to recognise that their ultimate customer is the food consumer. Veterinarians need to add value beyond the farm gate but also need to overcome the perception held by some farmers that vets are ‘quasi regulators’ and do not add value.

Chapter 4 looks at veterinary businesses and at how the business model is changing. There is plenty of anecdotal evidence for a trend towards consolidation in farm animal veterinary work with a declining number of very small practices. The British Veterinary Association provided an overview of the ‘established and traditional business structure’ and the ‘new and emerging’ business model. I consider the strengths and weaknesses of both, and conclude that neither has a particular advantage apart from larger practices being better able to offer more specialised services.

I consider how some veterinary practices might need to evolve to meet the challenges described in the previous chapter. My impression of the veterinary profession is of scientific professionalism rather than a strong self-identity as providers of services to businesses. These aspirations must be pursued jointly. In building stronger business skills there is a role for the professional practice manager but also an opportunity to embed business skills more clearly into the veterinary curriculum.

The ability of veterinary businesses to offer more clearly differentiated services to its customers is not helped by a confusing concept of veterinary specialism (which is not structured for the benefit of the customer). The concept of the veterinary team is also poorly developed, with potential for a clearer and more prominent role for veterinary technicians. My key recommendation is that the veterinary profession take a leading and progressive role in the development of training and career structures in broader veterinary services.

The public good functions of the food animal veterinarian are changing. However, it is not clear that this is widely appreciated outside of the profession. **Chapter 5** considers these changing public good functions and identifies a need for greater emphasis on food assurance if the ‘farm to fork’ concept is to be fully realised. The public good function has shifted away from boosting agricultural productivity towards:

- promoting and protecting animal welfare
- combating animal disease through providing advice on biosecurity, delivering and disseminating surveillance and contributing to contingency planning, and
- safeguarding public health and food assurance.

For each of these different public goods, there is a minimum level requirement underpinned by law. However, the profession also delivers against these public goods through incorporating them into the value added services that it provides its commercial customers. It is time the profession was clearer and more assertive about the way it can and should deliver these benefits.

The roles, responsibilities and training of veterinarians in the welfare of farm animals are unclear and I invite the Farm Animal Welfare Council to undertake a review of these issues.

The working group highlighted some unhappiness within the veterinary profession about some aspects of the government's Veterinary Surveillance Strategy and in particular about the role of the veterinarian and the value of passive surveillance. The government and veterinary profession should renew their efforts to reach a common position on these concerns.

There is scope for a broader involvement of veterinarians in assuring the integrity and safety of food. The private and public sectors of the veterinary profession need to ensure that their respective contribution extends across the farm gate to the abattoir and vice versa. Farmers need help in pursuing value added strategies and veterinarians have a potentially crucial role to play in helping to ensure the connection between healthy animals, public hygiene and safety and the healthy, quality assured food that consumers want. Progress here is not helped by a cultural divide brought about by the centralised development of the Meat Hygiene Service.

Chapter 6 proposes some ideas that might assist the farm/food animal niche within the veterinary profession to unlock its potential. The Responsibility and Cost Sharing agenda is the single biggest challenge and opportunity facing the veterinary profession. The profession needs to be clear where expert advice fits into the new system of governance for animal health and welfare. The profession needs to position itself so that it provides advice in a clear and consistent way.

The profession must concentrate on renewing its relationship with government and farmers. When veterinarians are working with government to tackle threats to animal health and welfare, like Bluetongue or Avian Flu, the relationship is often cordial and productive. However, the underlying relationship between the profession and government has come under increasing strain in recent years. The delivery arm of government needs to focus on improving its relationship with the network of small practices and practitioners on which it depends. Greater emphasis should be placed on utilising the problem-solving capacity of the private veterinarian, rather than maintaining a task-based, hierarchical relationship. Defra should draw up a code of conduct as a guide for government bodies on how to deal with veterinary businesses in ways that respect their status as small businesses. The veterinary profession could usefully review the way it develops and communicates its messages to government.

It is also crucial that veterinarians better understand and anticipate their client's needs and then demonstrate and sell their skills and services. Farmers' expectations are changing and veterinary businesses need to be able to respond. Industry will have a far greater say in the development of animal health policy and, if it is to retain its influence, the veterinary profession must nurture its relationship with the livestock sector.

To help draw the veterinary profession closer to its commercial customers, I propose the establishment of a Veterinary Development Council. I do not suggest how such a body should be constituted or funded. However, it could act as a focus for connecting veterinary education and training with the needs of the primary customer. It could also develop services that meet the long-term needs of the commercial customer and manage the development of the veterinary technician. Farm health planning has been widely promoted and encouraged by government in recent years. There is a definite role for veterinarians in providing farm health planning services and a Veterinary Development Council seems a suitable forum for building on the government's recent pump priming initiatives.

I refer to veterinary practices as examples of knowledge intensive business services, heavily reliant on high quality skills and knowledge. As the farming and food industries continue to evolve, there will be a premium on knowledge that is up to date, authoritative, practical and targeted. However, there is a striking lack of formal policies, strategies and structures relating to knowledge transfer from the veterinary profession. The profession must work with government, research establishments and the farming and food sectors to improve this situation.

It is now for the organisations that make up the Vet Services Steering Group to decide what happens next. Although Defra is seeking to reduce its role in animal health, it must remain a central and influential partner. The Animal Health and Welfare Strategy identifies very clearly the public interest in the protection of public health, the promotion of animal welfare and the need to safeguard wider economic and environmental concerns from animal disease. To achieve its goals in these areas, the various branches of government need the active engagement of veterinarians in diverse roles.

My strong recommendation to veterinarians is that, whatever government responsibilities might be, the profession should step into the leadership vacuum and assume greater responsibility for shaping the future structure of farm animal veterinary services. The profession has most at stake and the onus is on it to demonstrate that it is indeed the trusted professional guardian of the health and welfare of food animals. The profession should seize the initiative, developing its own vision of the future of food animal veterinary medicine and working collaboratively to make that vision a reality. A unified voice for the veterinary profession would stand a far greater chance of encouraging key partners in the farming and food industries and government agencies to collaborate in joint initiatives.

The veterinary profession on its own cannot overcome the marginalisation of food animal veterinary medicine. It needs the active and committed support of its major customers. The representative organisations of the farming and food industries in particular cannot afford to remain on the sidelines. It is up to them to ensure that their farming and food business members get the veterinary expertise and service that they undoubtedly need. At this critical time, it is imperative that farming and food leaders acknowledge publicly the key contribution of veterinary services to the economic health and public standing of their industries.

The issues covered by this report seem to me to be fundamental to the success of the Animal Health and Welfare Strategy. That strategy too is built on a partnership approach and has no single owner. Its success is reliant on the extent to which key partners in the food and farming industries, the veterinary profession, government and others are prepared to adapt their roles and responsibilities and work together. The England Implementation Group, the Defra advisory body overseeing Strategy delivery in England, has shown a close interest in this issue and I hope that it and the equivalent bodies in Scotland and Wales will help to guide and, if necessary, challenge the steering group's response to my report.

Chapter 1: Background and Context

- 1.1 Between 2003 and 2007, a succession of formal groups has considered and reported on issues relating to food animal veterinary medicine. This section provides a brief and selective review of those that immediately preceded my own report.
- 1.2 Prompted by concerns expressed during the Foot and Mouth Disease inquiries of 2001 as to whether there were sufficient farm veterinarians, the House of Commons Environment, Food and Rural Affairs Committee (EFRACom) established a sub-committee on veterinarians and veterinary services. After gathering evidence from a range of sources, EFRACom reported in October 2003:

‘Although there are sufficient vets in total, there are concerns about whether there are enough large animal practitioners. The economics of farming is leading to less use of veterinary services and is further reducing the attractiveness of large animal practice. At the same time the government’s animal health and welfare and veterinary surveillance strategies appear to require a greater on-farm presence of veterinary surgeons.’
- 1.3 The committee recommended that Defra make projections of the number of practising large animal veterinarians and of the additional number required to deliver its animal health and surveillance strategies, and conduct a risk analysis of the consequences of not having enough of them in the country. The committee felt that ‘Defra may need to intervene directly in the market to ensure that veterinary practitioners are paid appropriately for the services they provide’.
- 1.4 The government agreed to set up a working group with the veterinary profession to consider the EFRACom report and to look at the future roles and availability of large animal veterinarians. The working group met five times at the veterinary schools in London, Edinburgh, Liverpool, Bristol and Cambridge between February and May 2004, and covered many of the issues aired by the Select Committee. The meetings also threw up many examples of proactive and innovative veterinary practices in farm animal work.
- 1.5 At the same time, Defra had commissioned a report from Westley Consulting and part-funded a study commissioned by the Royal College of Veterinary Surgeons (RCVS) from the Institute of Employment Studies. This concluded that there appeared to be no shortage of veterinary students willing to give farm animal work a try as part of their first job, but suggested that some new qualifiers were put off the idea by their early work experience.
- 1.6 In July 2004, Defra gave its formal response to the EFRACom report. From the studies it had commissioned and the results of the meetings of the working group, Defra concluded that there was ‘no evidence to suggest that there is a supply problem in the number of large animal vets’. It therefore saw no need to carry out a detailed risk analysis. The Department also felt it impractical to identify how many additional large animal veterinarians might be needed to deliver the Animal Health and Welfare Strategy, mainly because much depended on the veterinary profession exploiting the commercial opportunities that would arise from the promotion of the benefits of animal health and welfare envisaged in the strategy.

The Department reflected that ‘there is much that the veterinary profession can do to ensure that it has a sustainable future’.

1.7 Defra’s response to EFRACom was strongly criticised by the veterinary profession as dismissive and perfunctory. With seemingly no consensus as to the issues to be addressed or who should take responsibility, proposals to prepare an action plan for the large animal veterinary sector had to be shelved.

1.8 A year later, prompted by a request from EFRACom for an update on the supply and retention of farm veterinarians, Defra was roused to reconstitute the working group. The RCVS, the British Veterinary Association (BVA) and the National Farmers’ Union (NFU) were prevailed upon to proceed ‘on a partnership basis’ with Defra and the devolved administrations. New terms of reference for the resurrected Vets and Vet Services Working Group were agreed, as follows:

‘To establish a more effective working partnership between the veterinary profession, government and livestock keepers, taking account of the challenges that face the profession and the changing needs of its customers.

To develop a shared and prioritised approach to help ensure that farm animal practice has a sustainable future. To monitor the veterinary profession’s contribution to the Animal Health and Welfare Strategy.’

1.9 While the working group provided a forum for discussion, this did not translate into clear outcomes. Government and the veterinary profession had divergent views on the nature of the problem and each looked to the other to take the lead. The NFU argued for veterinarians to provide services tailored more to the needs of farmers. Having reached an impasse, the working group agreed in April 2007 that the debate required more structure and focus. I was then invited to become the independent chair of an extended working group, for a limited period.

My remit

1.10 I am a Professor of Rural Economy, and have no veterinary expertise. Fortunately such expertise was present in abundance amongst the members of the working group, and I am grateful to them and to the many veterinarians I have met for their patience and enthusiasm in inducting me into the challenges of veterinary practice and the critical issues it faces in rural Britain today. What gave me some confidence that I might contribute something useful were the parallels that I saw with the pressures faced by other commercial and professional services operating in rural areas.

1.11 For the first few months I underwent a steep learning curve, meeting members and key stakeholders to understand the challenges that face farm animal veterinary practice and the possible implications for the health and welfare of farmed livestock.

1.12 In reviewing the earlier deliberations and achievements of the working group, I identified certain issues and problems beyond the question of the supply of veterinarians to the farming sector that required clarification. This set of concerns formed the framework for our meetings, my personal visits and a series of interviews I conducted with veterinarians and their clients across Britain during 2007 and 2008 and in a short study visit to the US in June 2008. Details of the working group meetings are at Annex 1 and a list of those who provided me with evidence or assistance during these meetings, personal visits and interviews is at Annex 3.

- 1.13 Following the first meeting, on 5 September 2007, at which I presented ideas for the working group's agenda, the working group was reconstituted to include farmers, veterinary surgeons and representatives from the Animal Health Agency, veterinary schools and the England Implementation Group (which is charged with overseeing the implementation of the Animal Health and Welfare Strategy). The membership also grew as the agenda progressed. A full list of members is at Annex 2.
- 1.14 Members agreed specific terms of reference for my tenure of the chair of the working group:
- ‘To consider changing public priorities, in Great Britain, for farm animal health and welfare, food safety and public health, and the ability of farm animal veterinarians to respond, including:
- the effectiveness of governance models in delivering the Animal Health and Welfare Strategy and the role of veterinarians and veterinary practice;
 - consequences of changes to livestock farming for farm animal practice and of the organisation of the delivery of veterinary services for agriculture;
 - the provision of training and support to farm animal practice;
 - opportunities to improve communications; and
 - specific challenges in remote areas and areas of low livestock density.’
- 1.15 It was also agreed that at the end of my deliberations I would produce a personal report which I would present to the Vets and Vet Services Steering Group, having then relinquished the chairmanship. This group is now responsible for deciding what action to take in the light of my report.
- 1.16 In the time and with the resources available, the working group and I were not able to search for comprehensive solutions or make detailed recommendations. Nevertheless, our discussions covered a broad range of issues and established a clear sense of common purpose. While I have endeavoured to capture the spirit of our deliberations and have been ably assisted in the drafting process by a capable and hard-working technical team, I remain responsible for the content of the report.
- 1.17 The report seeks in particular to clarify the demand for and supply of food animal veterinarians and their role in realising the Animal Health and Welfare Strategy. I hope it provides a firm basis for further work by, and co-operation between, the veterinary profession, academia, the food and farming industries and the UK and devolved governments to secure a vital future for food animal veterinarians. The marginalisation of food animal veterinary medicine is potentially to the detriment of the veterinary profession, the farming and food sectors and the public interest in the health and welfare of food animals. It can be countered and reversed if those involved act resolutely and in accord.

My approach

- 1.18 The report begins with a review of issues relating to the supply of veterinarians to farming and the food sector (see Chapter 2). Although these have been extensively discussed and analysed, it was important that I absorbed both the results of previous studies and the implications of more recent developments and initiatives. It seemed also that the quality of supply – the preparedness of young veterinarians for the challenges and opportunities of working in the farming and food sectors – deserved attention.
- 1.19 An even more important matter, in my view, was demand for veterinary services. However, compared with the supply side where we know a great deal about veterinary numbers and their trends, on the demand side there is little overall information and no recent trend data. Chapter 3 pieces together what we know about the demand for veterinary services in farming and the food sector. It presents a picture of demand that is complex, diffuse, fragmented and weakly expressed. This seemed symptomatic of a wider problem of a lack of customer focus.
- 1.20 It was important then to consider the commercial orientation of veterinarians and, specifically, the functioning of private veterinary practices. To offer the services they do, they must survive and thrive as efficient, competitive businesses. The structural pressures on veterinary services require organisational innovation at the level of the individual firm as well as the sector. I was keen therefore to learn about changing business models and how veterinary practices are responding to changing market conditions, including through the use of specialised expertise and technicians (Chapter 4).
- 1.21 However clear their commercial orientation, food animal veterinarians also serve the public good. This is another component of the demand for veterinarians, but one that is a cornerstone of their professional identity and which is fundamental to the public standing and professional privileges they enjoy. It did not seem to me that the veterinary profession was clearly and demonstratively claiming for itself a set of forward-looking public good functions. It was therefore important to review what these are or should be (Chapter 5).
- 1.22 The reconciliation of supply and demand needs to be orchestrated at the sectoral level, a process that will necessarily bring together the major customers for veterinary services and those responsible for the supply. Structural change in the institutional relationships surrounding veterinarians – connecting agriculture, the food industry, consumer and the government – calls for organisational innovation at the sectoral level. Chapter 6 therefore considers new governance models for the sector and their effectiveness.
- 1.23 What has shaped my thinking? First of all, I consider it vital that the relationship between the veterinary profession and the government be renewed. This does not mean putting the clock back to a time when government was the patron of the profession. Nor should it mean government relinquishing its proper responsibilities to ensure animal health and welfare. Rather, the relationship needs a new foundation: what the Animal Health and Welfare Strategy refers to as ‘partnerships for delivery’.
- 1.24 Second, such partnerships should fully engage the range of clients for veterinary services. This will of course include various government agencies, but it is also important to include the major private sector clients for veterinary services in farming and the food sector. The squabbles between government and the profession have tended to sideline these clients, who are nevertheless now expected to take more responsibility for the management of animal health and welfare.

- 1.25 Third, new arrangements for developing and delivering veterinary services should seek to help realise the creative potential of the veterinary profession. The traditional 'command' relationship with government has pressed the profession into narrow regulatory and task-based roles. The failure to engage strategically with its other major customers has led to a certain conservatism in farmer-vet relationships in which veterinarians perform traditional technical roles (including a heavy reliance on emergency and routine clinical work) on farms. There is a need for more of a knowledge-based approach, oriented to the food chain, in which veterinarians advise a range of clients in the management of risk.

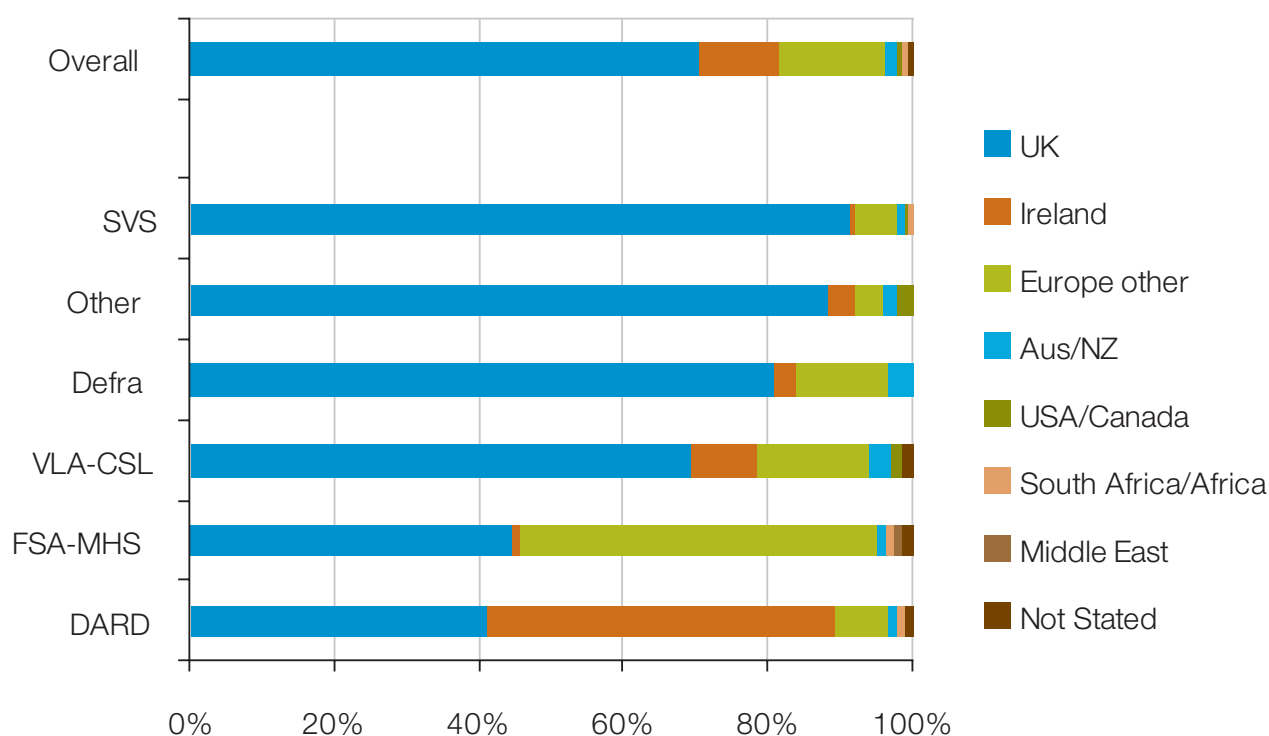
Chapter 2: The Supply of Veterinarians in the Farming and Food Sectors

- 2.1 A recurrent concern is over the adequacy – quantitatively and qualitatively – of the supply of veterinarians in food animal work. These issues are reviewed in this chapter. The number of veterinarians trained and working in the UK has increased considerably over recent decades: the veterinary professional register swelled from 7,948 to 21,622 between 1966 and 2006. In 1997 some 451 new UK graduates were registered; by 2007, that number had risen to 628 in 2007; and by 2010 the figure is expected to reach around 800 with the entry of graduates from the new Nottingham Veterinary School.
- 2.2 It would therefore be difficult to sustain an argument that there is an absolute shortfall in supply. Instead, the salient problems seem to be more of a qualitative nature, largely centring on the relative attractiveness of food animal work to young veterinarians. That in turn begs the question of the effectiveness of demand for veterinary services in the farming and food sectors (see Chapter 3). In this chapter I concentrate on the preparedness of veterinarians to exploit the opportunities and respond to the challenges of working in the farming and food sectors, and on problems in the localised supply of veterinary services.

Overall demographics of veterinarians

- 2.3 Matching supply to demand for veterinary services raises many issues that are well beyond the scope of my report. Indeed, this is not a simple labour market to plan. Major animal disease outbreaks, for example, create their own particular demands, and contingency arrangements for deploying veterinary manpower rely on extensive international co-operation as well as domestic veterinary capacity (see Chapter 5 for more on the specific role accorded to private veterinarians in contingency planning). More generally, veterinarians are very occupationally mobile internationally, especially so in food animal work. There is an open labour market for veterinarians within the EU and reciprocal recognition agreements with a number of other countries. As at 2006, a third of the members of the Royal College of Veterinary Surgeons (RCVS) qualified outside the UK and the majority of new registrations since 2004 have been non-UK graduates.
- 2.4 In such a context, if certain lines of occupation offer insufficient rewards and job satisfaction, they may be unable to attract or retain vet graduates. Equally, if there are certain lines for which UK veterinarians are not so well prepared or interested, then these may come to be filled by foreign graduates. We can see this in the public health field where there has been a large influx of foreign trained veterinarians into the UK in recent years (around half the veterinary staff in the Food Standards Agency and Meat Hygiene Service graduated in another EU member state).

Figure 2.1 – Country of graduation of veterinarians in UK government departments and agencies³



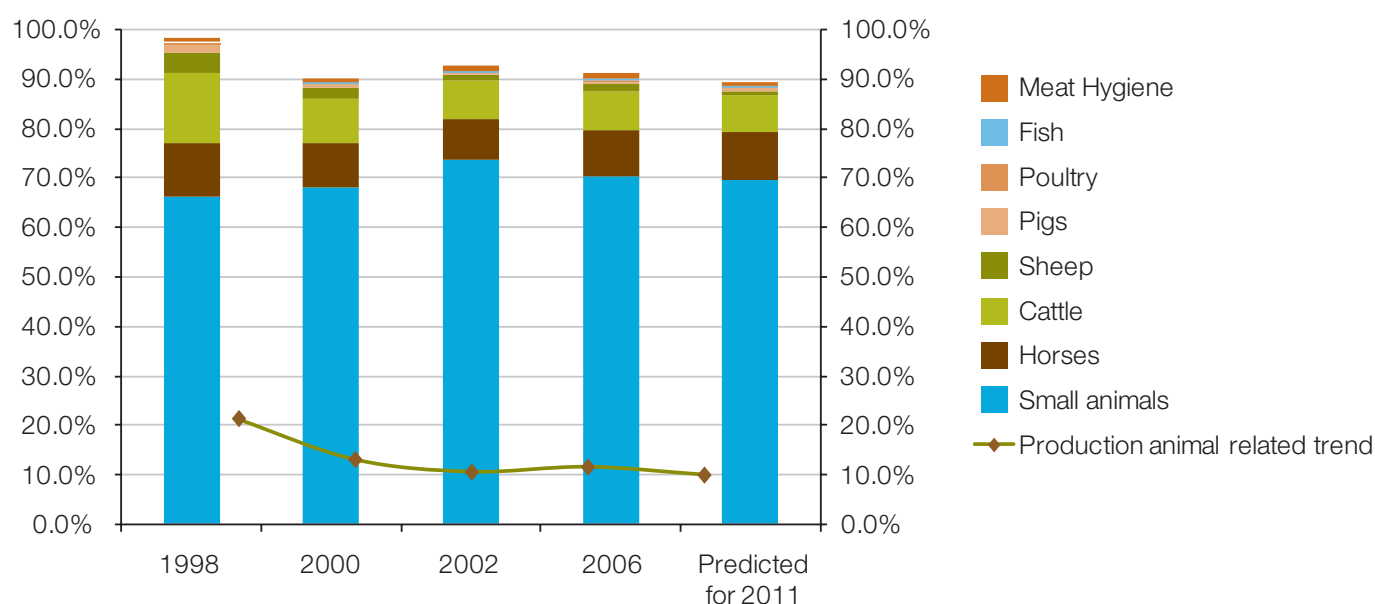
Source: RCVS Survey of the Profession 2006 (N=492)

- 2.5 Over the years there has been a steady growth in the number of veterinarians working with companion animals at the expense of other fields of activity. Figure 2.2 gives a breakdown of the time spent on different animal species by veterinarians in general practice. The sharp decline in food animal work apparent in the late 1990s and the movement towards small animals, which formed the backdrop for the EFRACom Report, does seem to have levelled off in this decade. The proportion of food animal work in private practice seems to have settled at about 10 per cent. This is split between the 5 per cent of veterinarians who work in farm veterinary practices and the 28 per cent working in mixed practices.
- 2.6 Forty years ago, food animal work dominated, accounting for the large majority of private practice income in all regions of the UK.⁴ In northern Scotland and Northern Ireland it accounted for, on average, over 90 per cent of practice gross annual turnover. Only in the south-east region of England was there a marked switch over to 'mixed practice', but even here, 51 per cent of gross turnover was still earned from large animal work.
- 2.7 Nowadays, the large majority of veterinarians work in practices that do no farm/food animal work. The 2006 RCVS Survey of the Profession asked respondents to predict the amount of time they would be spending on the same activities in 2011. A continued slight decrease in food animal work is expected, with respondents stating that the amount of time spent on cattle, sheep and meat hygiene work is going down. Besides these trends in private practice, the number of veterinarians working in government – mainly on farming, food and public health matters – is declining in relative and absolute terms, down from 15 per cent of the profession in 2000 to 10 per cent in 2006.

³ SVS = State Veterinary Service (now Animal Health); VLA = Veterinary Laboratories Agency; CSL = Central Science Laboratory; FSA = Food Standards Agency; MHS = Meat Hygiene Service; DARD = Department for Agriculture, Northern Ireland.

⁴ 'The Future of the Veterinary Profession', Veterinary Record, 23 April 1966, Vol. 78, No. 17.

Figure 2.2 – Proportion of time spent by veterinarians in private practice by species type 1998–2006 (with predicted values for 2011)



Source: RCVS Survey of the Profession 2006

2.8 The veterinary profession was once a male domain but the expansion in student places in recent years has allowed a significant increase in the number of female graduates. By 2006, 49 per cent of all working veterinarians were women, and women accounted for the majority (51 per cent) of private practitioners.⁵ The average age of a working male vet in 2006 was 43, compared with 35 for a working female vet. This age differential is seen across the range of practice types. The increased number of women in the profession has coincided with the growth in companion animal practice, resulting in a male:female ratio in this part of private practice of 4:5 in 2006 (see Figure 2.3).

2.9 While women now outnumber men in companion animal practice, vets working in predominantly farm animal work are still more likely to be men. This set of developments has fuelled concern that there may be problems with succession as older male veterinarians, often highly experienced in food animal work, come to retire. However, it should be noted that the average age of farm animal veterinarians, male and female, is lower than that of companion animal veterinarians.

Figure 2.3 – Age and gender profiles of companion and farm animal veterinarians⁶

	Companion animal veterinarians		Farm animal veterinarians	
Gender	Female	Male	Female	Male
Number of respondents	2,080	1,606	39	81
Average age	36.2	43.6	32.5	41.6

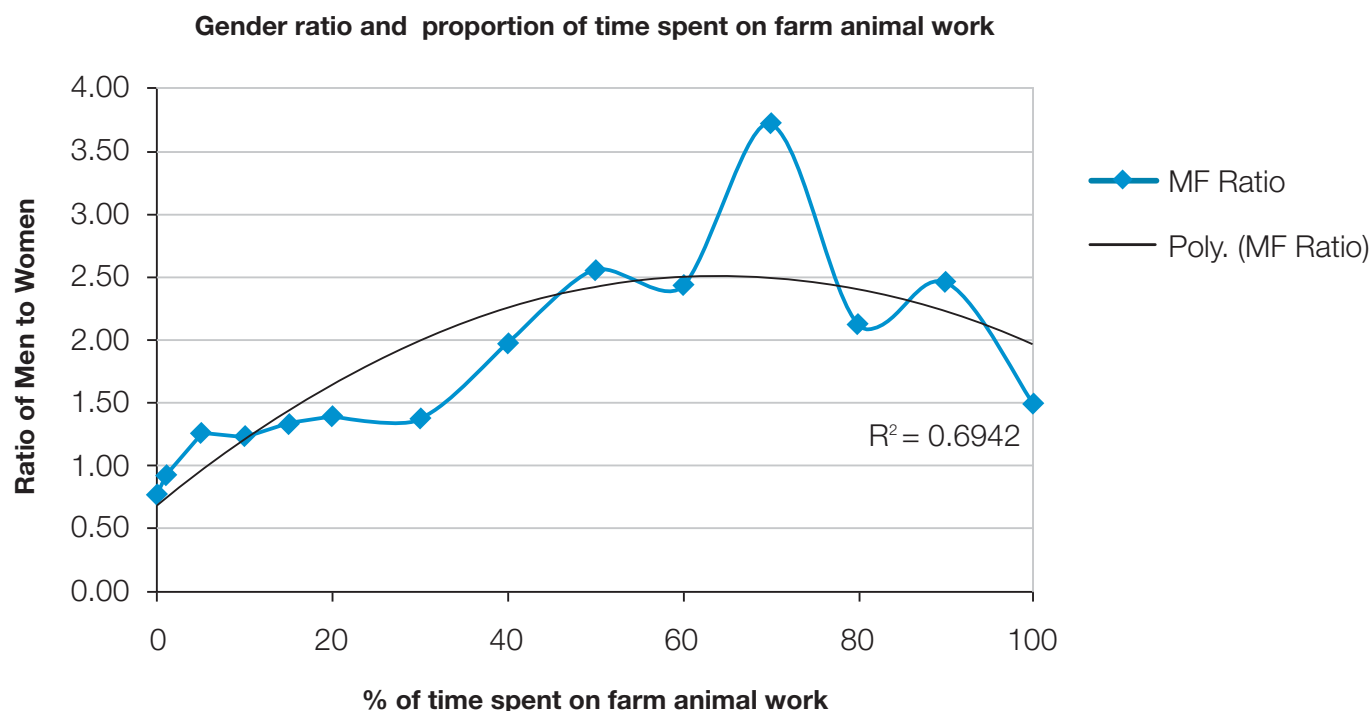
Source: RCVS Survey of the Profession 2006

⁵ Primrose, D., Provision of Rural Veterinary Services Report, George Street Research.

⁶ The farm animal veterinarians were survey respondents engaged in dairy, beef cattle and/or sheep production and doing farm animal work for at least 80 per cent of the time.

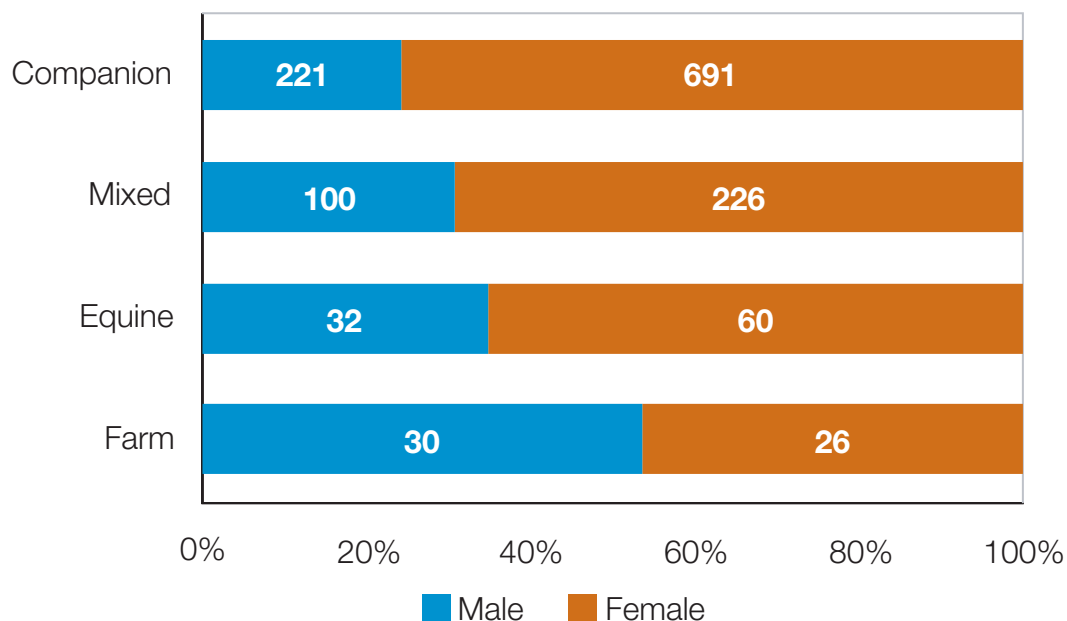
- 2.10 Of 100 farm animal veterinarians interviewed on behalf of the Scottish government, 21 per cent had spent more than 30 years in the profession and 24 per cent had spent between 21 and 30 years. These experienced veterinarians will need to be replaced as they leave the profession over the next 10 to 15 years. Likewise, an analysis of the veterinary profile in government has identified a significantly older and more male profile and has anticipated high retirement rates in the short to medium-term.
- 2.11 However, it is difficult to identify any clear succession risks in the farm practice sector by looking purely at the age profile. There is, for example, no correlation between age and the proportion of time spent in farm animal practice for either men or women in the 2006 RCVS Survey of the Profession. Yet there is an interesting relationship between gender ratio and the proportion of farm work (in mixed and farm practices): as the proportion of time spent in farm practice increases, so does the proportion of male vets, peaking at a ratio of four to one at around 70 per cent. However, above this level, the proportion of female vets starts to rise again (see Figure 2.4). This suggests that, especially in mixed practices, men gravitate towards, or are preferred, in farm animal work. The effect can be seen even amongst young recruits to the profession: farm animal work is the only type of practice where male recruits continue to outnumber female ones (Figure 2.5).

Figure 2.4 – Gender ratio and proportion of time spent on farm animal work



Source: RCVS Survey of the Profession 2006

Figure 2.5 – Gender profile of veterinarians who graduated between 2000 and 2005 by practice type



Source: RCVS Survey of the Profession 2006

2.12 The profession's centre of gravity has shifted towards companion animals, and it would be surprising if this was not reflected more generally in a shift in the broad direction of the profession. Figure 2.6 shows the 'top 10' areas of expertise claimed by different sections of the profession in the RCVS Survey in 2006. This reveals a strong differentiation of skill sets between government and farm animal practice on the one hand and veterinarians in small animal practice and academia on the other.

Figure 2.6 – Veterinarians’ ‘top 10’ self-declared areas of expertise by employment type

Government	
No. of respondents giving an area of expertise	382
% of group	62.7%
Infectious Diseases	114
Public Health	36
Food Hygiene	35
Other (not specified)	32
Pathology	29
Welfare, Ethics & Law	28
Epidemiology	23
Global Animal Health	20
Medicine (general)	16
Health & Production	12

Farm Animal Practice	
No. of respondents giving an area of expertise	120
% of group	41.4%
Reproduction	37
Medicine (general)	20
Health & Production	19
Infectious Diseases	14
Global Animal Health	4
Welfare, Ethics & Law	4
Other (not specified)	3
Pathology	3
Inspection	2
Public Health/Food Hygiene	2

UK Veterinary Schools	
No. of respondents giving an area of expertise	371
% of group	82.2%
Medicine (general)	75
Surgery (general)	40
Anaesthesia	30
Other (not specified)	27
Infectious Diseases	24
Pathology	23
Orthopaedics	18
Diagnostic Imaging	16
Reproduction	16
Neurology	14

Small Animal Practice	
No. of respondents giving an area of expertise	722
% of group	20.8%
Medicine (general)	136
Surgery (general)	104
Orthopaedics	73
Complementary Medicine	62
Ophthalmology	59
Diagnostic Imaging	55
Dermatology	54
Cardiology	33
Other (not specified)	23
Anaesthesia	16

Source: RCVS Survey of the Profession 2006

Inflecting veterinary education

2.13 In a context in which food animal activity is in a distinct minority in the veterinary profession, there is understandable concern about the extent to which this aspect of the role is emphasised in the formation of veterinarians. Farmers, veterinary practitioners and graduates themselves have characterised young veterinarians as poorly equipped for many of the day-to-day-issues and challenges involved in farming and food-related work. The level of support available for new graduates has also been identified as poor. Reporting in 2004, the Institute of Employment Studies⁷ found that newly-qualified veterinarians felt that ‘their University experience of farm animal work was not entirely realistic’ and ‘they were not fully prepared for the economic nature of farming’. The Farm Animal Welfare Council, observing that ‘the content of husbandry and practical skills in undergraduate courses has been reduced over the past decade’, reported also the comments of experienced veterinary surgeons that ‘new veterinary graduates appear to be less competent in dealing with livestock husbandry’.⁸ Such perceptions have fuelled concern over whether the veterinary schools and professional bodies are doing enough to ensure that they attract the right types of recruits and to prepare and equip them appropriately for careers in the farming and food sectors. These issues have been explored in a number of studies and practical initiatives over the past few years.

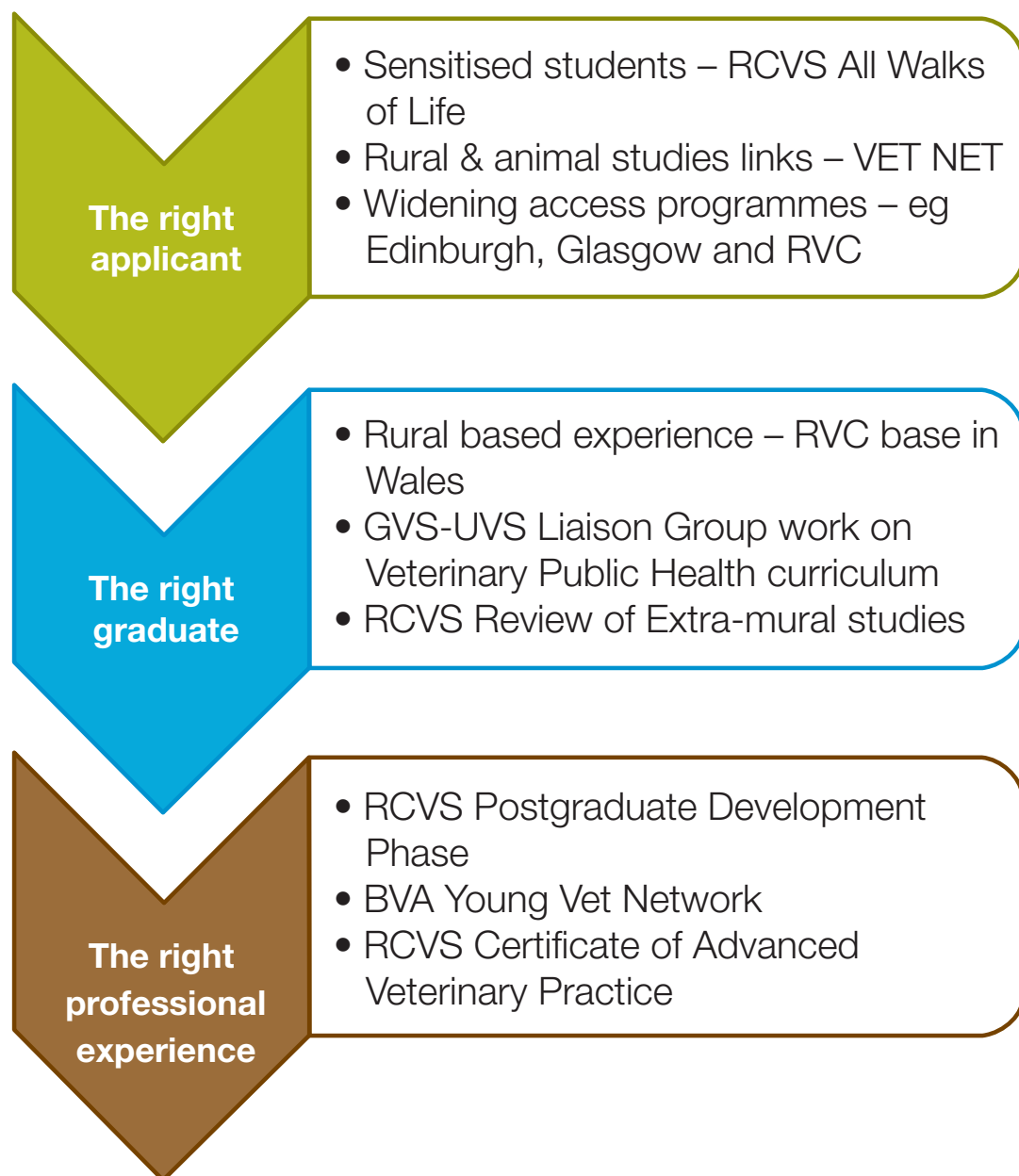
‘The UK has excellent schools for animal treatment, but are veterinary practices up to speed in all areas of herd disease management, including population dynamics, data management and analysis and epidemiology and economics?’ Jonathon Rushton, Food and Agriculture Organization, Livestock Economics, Sector Analysis and Policy Branch

2.14 Against the backdrop of the profession’s core commitment to the omnicompetent veterinary graduate, there have been various efforts to inflect mainstream student recruitment, training and early career development to channel more veterinarians into farm animal work. The stages in veterinary education identified through the working group meetings as relevant to farming and food animal veterinary practice are summarised in Figure 2.7, along with some examples of initiatives aimed at addressing key challenges.

⁷ Institute of Employment Studies (2004), Report on Career Choices.

⁸ FAWC (2007), Report on Stockmanship and Farm Animal Welfare, para. 78.

Figure 2.7 – Key stages in the formation of vets: opportunities and initiatives for refocusing



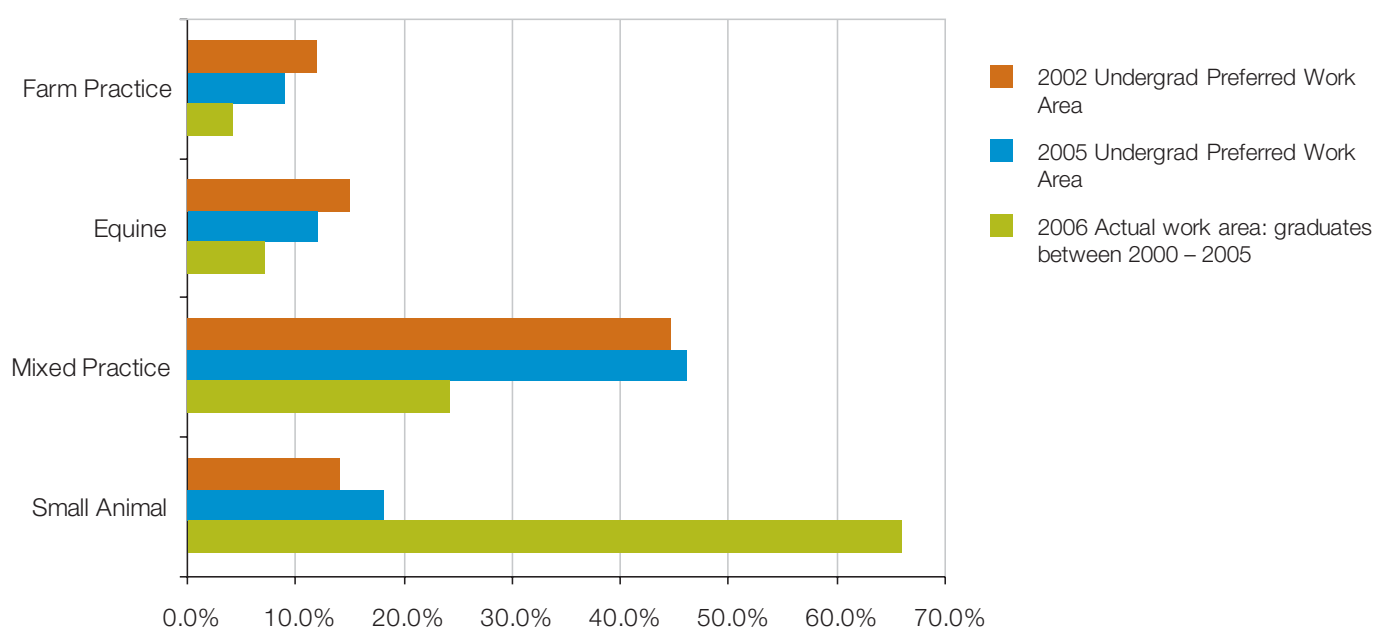
The ‘right’ applicants

2.15 The prevailing selection process for UK veterinary schools is strongly orientated towards academic accomplishment. This reflects the competition for places and the strong science base of veterinary courses. Veterinary schools also seek to ensure that they select well motivated candidates with a strong interest in working with animals. While it must be acknowledged that our vet schools produce world-class veterinary graduates, there is nevertheless concern that the selection process is contributing to the rather narrow profile of the student intake. There is also concern that insufficient attention is given in the selection process to vocational commitment, practical aptitude and expectations for working within the farming and food sectors.

- 2.16 Individual veterinary schools have taken steps to widen access to their courses. Typically this takes the form of encouraging promising local students from lower socio-economic backgrounds and with slightly lower academic attainment to take foundation courses in veterinary studies with the aim of equipping them to enter a full veterinary course. In addition, the recently established VETNET initiative is facilitating links between universities and further education colleges with the promise of widening choice and easing progression opportunities into higher education for those pursuing vocational training in land-based and animal care fields. The RCVS, for its part, has been using DVDs and the internet to promote the 'All Walks of Life' campaign, which aims to interest a wide teenage audience in identifying with a range of occupational roles that veterinarians fulfil. At this stage, it is still difficult to judge the success of these initiatives in widening access and diversifying the intake to the profession. It is also unclear whether or not they will improve the flow of vet graduates into farming and food-related work, attracting more students with a strong sense of vocation towards public health may contribute to this goal.
- 2.17 The Westley report on the supply of large animal vets⁹ recommended that veterinary schools should review their entrance criteria with a view to selecting more candidates likely to be interested in a career in farm animal practice. For example, entry into the Royal Veterinary College requires students to demonstrate completion of at least six weeks' relevant practical work experience, including two weeks in livestock husbandry. More could be done to encourage applications from candidates with a pronounced vocational orientation towards specific aspects of veterinary work, such as the farming and food sectors.
- 2.18 I was impressed by the example of some of the American vet schools (e.g. Cornell and Michigan) that give priority to applicants with a clearly demonstrable interest in food supply veterinary medicine by accepting them with slightly lower academic grades than other students. Another potential source of candidates with a strong vocational focus could be mature students, and much more could be done to attract those with relevant experience to train as veterinarians for example by offering grants, reduced entry grades or accelerated progression.
- 2.19 However, I recognise that there are real limits to the extent to which it would be either practical or desirable to try to 'fix' the career choices of would-be veterinarians. Vet graduates must find their own way in the labour market; no one can guarantee them employment. Moreover, the experience of vet training – like any good graduate training – should be to open up, not shut down, opportunities. In fact, there is apparently very little correlation between the career preferences of vet students and the actual work areas taken up by newly qualified vet graduates.
- 2.20 Figure 2.8 illustrates student employment preferences as expressed in surveys in 2002 and 2005, showing mixed practice as the clear favourite. By contrast, the actual employment profile in 2006 of vets graduating between 2000 and 2005 shows that the overwhelming majority opt for small animal careers. Of course, it may be that the stated preference of many undergraduates for mixed practice simply reflects a wish to keep their options open.

⁹ Large Animal Vets, report to Defra, March 2004.

Figure 2.8 – Comparison of student employment preferences and graduate employment outcomes



Source: British Student Veterinary Association Surveys 2002 and 2005, RCVS Survey of the Profession 2006

The ‘right’ graduates

- 2.21 The UK vet profession is firmly based on a strong surgical orientation. Traditionally, its orientation to animal and public health has been less pronounced than in other countries (such as the US, Australia and Spain). There is also typically a heavy commitment in the veterinary curriculum to basic science such as anatomy, physiology and parasitology while other fields such as public health, epidemiology and zoonotics are covered to a much lesser extent. Vet schools also put a varying degree of emphasis on subjects such as production and reproductive medicine, pathology and animal welfare which may be more relevant to the public health/animal health functions. Finally, they generally provide very little on the commercial, legal and production contexts of the farming and food sectors.
- 2.22 In recent years, moreover, advances in surgical practice and demand in the small animal sector have led to a need for the inclusion of training in skills and treatment beyond primary care. University veterinary schools in the UK combine core educational activities within a working clinical and research environment. In the past few years concomitant growth has occurred in both veterinary undergraduate places and investment to expand the ‘veterinary school related business’ in referral and specialist clinical capacity, predominantly in small animal and equine medicine and surgery. In some schools this level of entrepreneurship yields not only a critical income stream but also consequent learning benefits by providing a flow of challenging case work for specialists as well as for undergraduate and postgraduate study. The public visibility of ‘veterinary related business’ can in turn attract further commercial and charity sector funding as well as high-flying veterinary specialists to the schools to further support research, build facilities and establish state of the art surgical services. The flow of public resources to support research which, typically, is more oriented to public health and international animal health topics, has less impact on the practical training of veterinary graduates because research tends to be carried out by scientists rather than by the clinicians in charge of clinical teaching.

- 2.23 'Real world' farm animal practice has the kudos of neither the 'veterinary related business', nor publicly-funded scientific research. No wonder then that it has declined in most university veterinary schools. The suburbanisation and contraction of farming that has occurred in the areas surrounding most vet schools means that, in some cases, large animal case material for teaching has to be bought in, incurring additional cost or requiring a level of cross-subsidy by other income-generating departments. This in turn has been reflected in the ability of the schools to attract and retain teaching staff in veterinary public health, production and reproduction medicine, and large animal specialisms; to build related research capacity; and, potentially, to provide a vibrant learning environment for specialists, undergraduates or post-graduates in these fields. Coincidentally, access has become more constrained to appropriate food animal work experience, whether in clinical or other working environments, such as abattoirs. Compounding these access problems are the logistics of dealing with ever greater student numbers in field work and extra-mural studies (EMS).
- 2.24 Efforts to address these issues include the Royal Veterinary College's move to establish a collaborative Welsh Regional Veterinary Centre where final year students gain practical experience in a truly rural environment (see Chapter 6). However, the increasing numbers of students in veterinary schools necessarily places constraints on the level of practical one-to-one tuition that can be offered.
- 2.25 The difficulties faced by students in accessing relevant practical and work experience settings have been considered at length by the Government Veterinary Surgeons – University Veterinary Schools Liaison Group. With the support of the Veterinary Public Health Association – a branch of the British Veterinary Association (BVA) – a series of joint meetings held in 2008 identified constraints in providing 'traditional' work experience within business environments that are under increasing pressure to meet regulatory and cost targets.
- 2.26 The need to deliver quality extra-mural studies (EMS) to an increasing number of students is an area of concern. A survey of a small group of final year students in 2007 suggested that, while farm animal EMS was regarded as highly relevant, abattoir EMS was viewed of limited relevance. This raises questions about students' understanding of the role of veterinarians in public health and food assurance, but also about the quality and learning outcomes of much abattoir EMS. The RCVS has recently launched a consultation to re-examine the place and purpose of EMS in the veterinary undergraduate curriculum. The question must arise as to whether students should be allowed greater flexibility to immerse themselves in those areas of practice that they see of relevance to their own career interests.

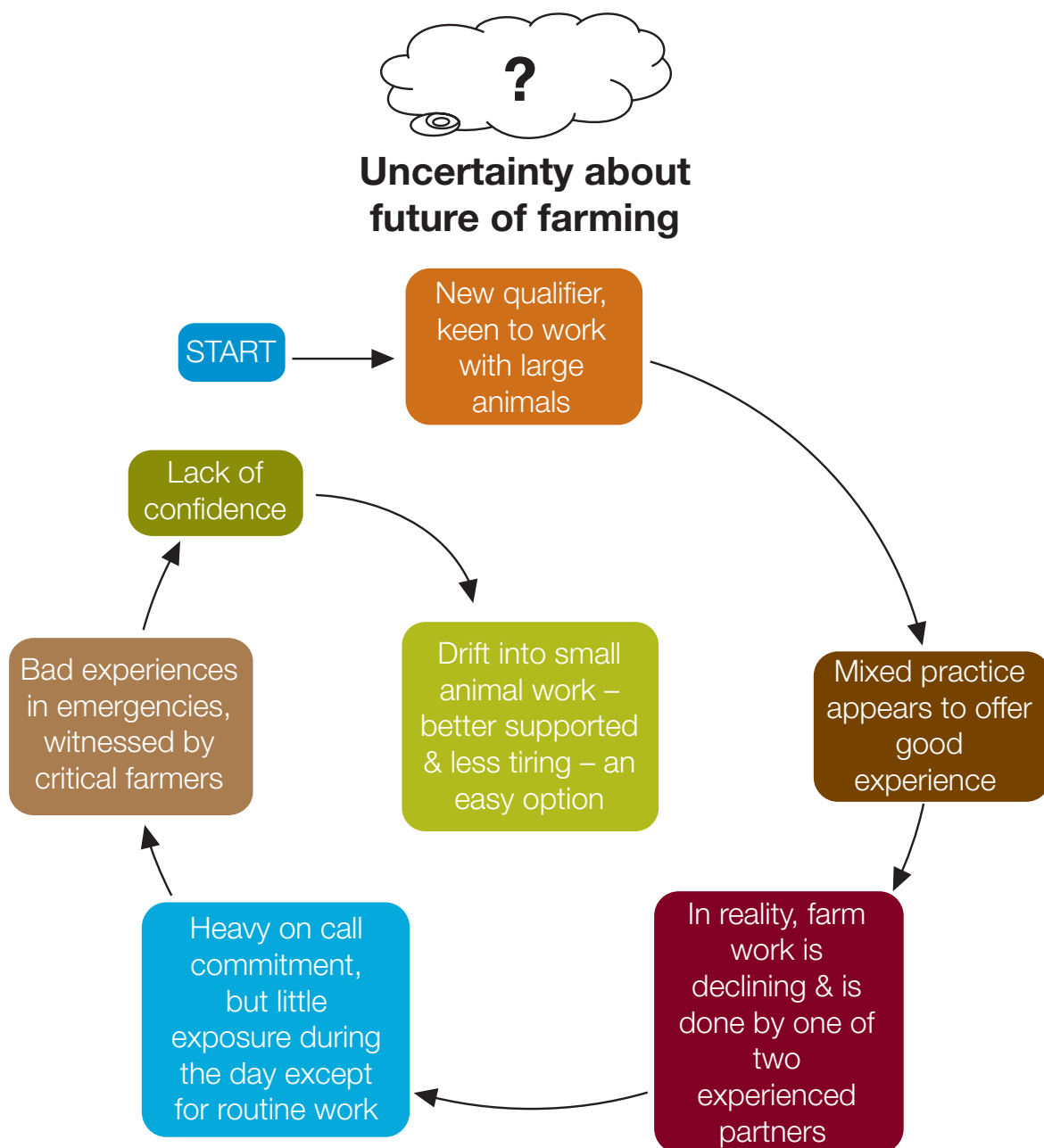
The 'right' professional experience

- 2.27 The transition to first employment is a critical one. As Figure 2.8 (above) shows, while many students express a preference for mixed practice (with a significant minority preferring farm practice), there is a sharp switch to small animal practice on first employment.
- 2.28 The Westley report¹⁰ concluded that there was no overall shortage of veterinary students and that most of them were quite willing to give large animal work a try as part of mixed practice in their first job. Many, though, did not take this any further. A follow-up study was

¹⁰ Large Animal Vets, report to Defra, March 2004.

therefore commissioned from the Institute of Employment Studies¹¹ to look more closely into the motivation of final year students and newly qualified veterinarians (up to five years after graduation). It found that students and new qualifiers were generally enthusiastic to work with large animals. However, for some new qualifiers – particularly those working in mixed practices with only one or two large animal practitioners – early negative experience resulted in a switch to small animal work, which was seen to offer better support to inexperienced veterinarians. This ‘spiral of disillusionment’ was diagnosed as a major factor in the overall drift towards small animal employment, as shown in Figure 2.9.

Figure 2.9 – ‘The spiral of disillusionment’



Source: Institute of Employment Studies, Veterinary Career Choices

¹¹ Robinson, D, Hooker, H, Barber L. (2004), Veterinary Career Choices, Institute of Employment Studies.

- 2.29 Preparing any graduate for the disparity between the relatively cosseted confines of an academic environment and the reality of full-time work is never going to be completely straightforward, and expectations among veterinary graduates may be particularly high. However, there is evidence of different orientations and expectations in those young veterinarians who do commit to a career in farm practice. Notably they are more motivated by working with people/clients and working outdoors, while small animal veterinarians express more of an interest in working with animals and exercising their technical skills.¹²
- 2.30 Young farm animal veterinarians are also more business-oriented and more likely to take up partnership or principal opportunities early in their career. Both of these tendencies are worthy of encouragement and may well be identifiable among undergraduates.
- 2.31 The need for a more managed transition into a highly challenging full-time clinical role has been addressed through the introduction of the RCVS's Professional Development Phase (PDP). This provides new graduates and their employers with a guide to early professional development and clear and staged appraisal processes. The pilot was evaluated favourably by first-year graduates, but an analysis of how the PDP benefits graduates in farm practice will be particularly important.
- 2.32 All practising veterinarians are under a professional obligation to undertake continuing professional development (CPD). The RCVS defines this as 'the systematic maintenance, improvement and broadening of knowledge and skills, and the development of personal qualities necessary for the execution of professional and technical duties throughout the Member's working life'.¹³ The RCVS does not prescribe the subjects or the format for CPD: it is up to individual veterinarians to decide what is relevant to the development of their own professional skills.
- 2.33 In 2007, the RCVS introduced a flexible, modular certification scheme. Veterinarians are able to take individual modules that interest them over a wide range of subjects/species. Credits gained are logged by the RCVS and lead to a Certificate in Advanced Veterinary Practice (CertAVP). Assessment is undertaken by universities accredited for the purpose, but the RCVS also encourages the involvement of other CPD providers – such as the British Cattle Veterinary Association and the Society for Practising Veterinary Surgeons – to work with the universities.
- 2.34 Reports suggest that the availability of CPD courses on farm-oriented studies is poor. Issues of travel and access also may work against farm animal veterinarians. However, they are more likely to have time off work for CPD and employers of farm veterinarians are reported to be generally supportive of the CPD needs of their recent graduates.¹⁴

¹² Chandler, H. (2009), A Review of the RCVS Survey of the Profession 2006: Factors with Potential Influence on Retention in UK Farm Animal Practice.

¹³ RCVS Guide to Professional Conduct, available online at www.rcvs.org.uk

¹⁴ Chandler, H. (2009), A Review of the RCVS Survey of the Profession 2006: Factors with Potential Influence on Retention in UK Farm Animal Practice.

Problems in the localised supply of veterinarians

- 2.35 I heard of some difficulties in recruiting farm animal veterinarians in particular locations. In the survey of Scottish farm animal veterinarians,¹⁵ 49 per cent replied 'yes' when asked the sweeping question whether their practice had ever encountered problems in recruiting staff. The main problems identified were: lack of experienced applicants; not wanting to work in a remote area; and lack of interest in large animal work.
- 2.36 Surveys of farmers also show that some have difficulties in accessing veterinary services. Some 7 per cent of Scottish livestock farmers agreed there were gaps in veterinary services, with 3 per cent referring to a lack of veterinary services in their area and 1 per cent stating that they themselves were 'too far' from any veterinarians. Across England, an average of 1 per cent of farmers reported experiencing difficulty in obtaining routine veterinary services (rising as high as 2 per cent in Yorkshire and the Humber), while 1.4 per cent reported difficulty in obtaining emergency veterinary services (rising as high as 2 per cent in the North East and 2.2 per cent in the South West).¹⁶
- 2.37 Overall, we can say that while there will be a need to replace older and experienced farm animal veterinarians as they come to retire, there is no evidence of a systemic problem with succession. Likewise, the evidence suggests that the geographical difficulties in accessing or recruiting farm veterinarians are largely temporary or localised. The more significant issue seems to be how to ensure that a modest proportion of graduating veterinarians are well prepared to take up the opportunities and respond to the challenges of working in the farming and food sectors. The next section looks at some schemes and proposals aimed at easing the supply of rural veterinarians.

A traditional mixed practice

Conanvet is a 5 vet traditional mixed practice covering a large area in the north of Scotland. They are based near Inverness and have a branch surgery on the west coast at Gairloch 60 miles away. Over the past 20 years, their business has moved from mainly farm work to a mixture of farm, small animal and equine. Work commissioned by Government has decreased since the cessation of brucella testing. The practice has found it difficult to recruit staff, though some are attracted to the area for lifestyle reasons.

For farmers, they provide herd/flock health planning, 24 hour emergency cover and routine visits. The practice has gained new clients when other practices gave up farm work but this means covering a bigger area. Their furthest farm calls involve round trips of up to 150 miles. In recent years sheep numbers have dropped significantly, but suckler cow numbers have been more stable. Their farming population is ageing, but there is some new demand for their services from a growing number of hobby farmers.

¹⁵ Primrose, D., Provision of Rural Veterinary Services Report, George Street Research.

¹⁶ Farm Practices Survey, Defra, 2007.

Easing the supply of rural veterinarians

The Highlands and Islands Veterinary Services Scheme (HIVSS)

- 2.38 There is a longstanding scheme to secure veterinary services in a geographically remote part of the UK. The Highlands and Islands Veterinary Services Scheme (HIVSS) was introduced in 1915 to ensure that Scotland's crofters could afford veterinary treatment for their livestock.
- 2.39 The Scheme operates across the former crofting counties, an area of very extensive livestock production but farmed mainly on a small scale and in line with the particular tenurial arrangements of crofting. These social features mean that the demand for veterinary services is diffuse and financially constrained. In turn, problems of distance, isolation and scattered demand mean that it is costly to supply veterinary services. Some island visits can involve spending days rather than hours away from the practice base.
- 2.40 The Scheme seeks to overcome these difficulties by subsidising the costs of supplying veterinary services. Those eligible for the supported services are crofters who are either wholly or mainly dependent on their holding for their livelihood and other land-based workers, such as shepherds, estate workers and gamekeepers, with similar economic status.
- 2.41 Financial assistance is paid to the veterinary practice and is determined by the distance travelled, the number of annual visits and additional costs, such as ferry and air fares. Any practice in the designated area may be considered for entry to the Scheme provided it has operated effectively in that area for at least three years. All participating veterinary practices are paid a grant to ensure their presence.
- 2.42 Clients contribute to the cost of the veterinarian's visit up to a maximum limit set annually by the Scottish Government. This maximum fee covers the initial inspection of the animals concerned. The client is required additionally to pay for the cost of medicine supplied, operations performed, and any other charges which may be imposed by the veterinarian.
- 2.43 The Scottish Government annually reviews the grants paid to veterinary practices and the contribution made by clients. In 2008-09 the total annual cost of the Scheme to the Scottish Government was around £720,000. The Scottish Government believes that the Scheme makes a significant contribution to ensuring that livestock in the most remote parts of Scotland are able to benefit from veterinary care, and that it is a cost-effective way of allowing livestock to continue to be reared in the Highlands and Islands.
- 2.44 I am convinced that without the HIVSS, there would be a risk that large areas of the Highlands and Islands would be without an affordable veterinary presence. However, the specific context of the scheme – the extremes of remoteness encountered in the Highlands and Islands and the unique social and legal characteristics of crofting – mean that it would not be directly transferable to other parts of the UK. Evidence from other geographically marginal areas is that any pronounced difficulties in accessing or supplying veterinary services are essentially localised or transient problems that would not justify permanent relief but might be receptive to one-off or emergency aid.
- 2.45 We consider regionally-targeted funding that can support schemes to promote animal health and development as a contribution to regional development in Chapter 6. Providing financial help with the costs of establishing new veterinary practices in poorly served rural areas would seem to be a legitimate objective.

Student debt relief

- 2.46 The amount of debt accrued by new veterinary graduates has been raised as a key factor in their career choice, with many attracted to the higher salaries that can be found in companion animal work.¹⁷ If this means that heavily indebted vet graduates are then discouraged from taking up farm or food animal work, it may be that a targeted student debt relief programme could be an appropriate corrective.
- 2.47 During my visit to the US, I heard about the Kansas Debt Forgiveness Programme, which was established in 2006. This scheme, run by the Kansas State Government, is a loan/debt forgiveness programme for students who are willing to go into veterinary practice in rural Kansas. Each year loans to cover university fees are made available to a maximum of five veterinary students in return for their agreeing to participate in a veterinary training programme for rural Kansas and to practise veterinary medicine full time for four years in a rural community in Kansas after completing their training. If they complete the four years' practice, they do not have to repay the loan. Participating students spend their summers obtaining advanced training in public health, livestock bio-security, exotic disease diagnosis and regulatory veterinary medicine. During their final year of training they are also required to spend six weeks as interns being mentored by a licensed, accredited veterinarian in rural Kansas. On graduating, the students then join or set up a veterinary practice in rural Kansas.
- 2.48 The benefits of the programme are said to include: reversing the trend of decreasing veterinary and public health care in the state; creating a positive economic driver for rural Kansas; and helping to reinvigorate the leadership of rural communities. I found much to admire in it, besides its contribution to lifting the burden of student debt, particularly in the way it encouraged students' interest in farm animal work and systematically enhanced their preparedness and employability to work in the sector.
- 2.49 I have considered the desirability and practicability of introducing such a scheme in the UK. First, it must be said that in the Institute of Employment Studies' 2004 report on career choices,¹⁸ student debt did not seem to influence vet students' choice of first job. Furthermore, as reported above, young farm animal veterinarians are more likely than their small animal counterparts to be more business orientated and more likely to take up partnership or principal opportunities early in their career. Second, whereas the Kansas Programme was modelled on an earlier initiative to encourage trainee medical doctors to commit to working in rural Kansas, I have been unable to find any scheme or facility for loan write-off for other professions in the UK. The Repayment of Teachers' Loan Scheme (England and Wales only) was introduced in September 2002 as a three-year pilot scheme to repay the loans of newly qualified teachers of specified shortage subjects. In June 2005, ministers announced that the scheme would not be continued. That does not bode well for promoting a student debt relief scheme for veterinarians in the UK.

¹⁷ Veterinary Record, 8 October 2005, Vol. 157, pp.429-430.

¹⁸ Pollard E., Pearson R. and Willison R., Next Choices: Career Choices Beyond University, Institute for Employment Studies, February 2004.

Training veterinary graduates for food animal work

- 2.50 Nevertheless, certain elements of the Kansas approach may still be transferrable to the UK. These include developing the interest in farm animal work of selected vet students and enhancing their preparedness for employment in that sector through optional summer school provision. A number of US veterinary schools have gone down this route. For example, Cornell Vet School runs a summer Dairy Institute for third and fourth year vet students. This eight-week course focuses intensively on dairy production medicine, including field visits and meetings with practice and regulating veterinarians. There are similar summer vacation courses for dairying at Minnesota and Wisconsin, on bovines at the University of California at Davis and on pig production medicine at Illinois.
- 2.51 Reviewing the various initiatives (outlined earlier in this chapter) to inflect vet education in order to channel more and better prepared veterinarians into food animal work, one can conclude that efforts should best be focused on the transition from undergraduate to first employment. This is the stage at which any unpreparedness on the part of rookie veterinarians may turn them forever away from farm animal work. Earlier intervention is unlikely to be particularly effective. At this stage too, an approach that is voluntary and selective is both desirable and feasible. Students may well be firming up their career choices. Moreover, only a minority of vet graduates are needed in food /farm animal work, and it is not realistic that the majority should be subjected to additional training in a field they are unlikely to pursue.
- 2.52 Consideration should be given to holding a regular summer school, ideally supported by bursaries funded by industry and government, to provide specialised training in food animal work that includes practical guidance on its commercial, public policy and regulatory aspects. The summer school would be aimed at trainee vets interested in a career in the farming or food sectors, and would contribute to fulfilling their EMS requirements. It would develop their understanding of the economics of food animal reproduction, production and processing and of the role of animal and public health in the running of farming and food businesses. It would be best focused in one or two veterinary schools, to allow them to develop a reputation in delivering food animal veterinary education.
- 2.53 An annual summer school could also provide an opportunity for the public delivery agencies (Animal Health, the Meat Hygiene Service and the Veterinary Laboratories Agency) to concentrate their efforts to inculcate the public good functions of food animal veterinary practice. They might look to the US example where veterinary officials teach on summer schools in order to build a relationship with student vets before they start in employment and to foster an all round understanding of the role of the veterinarian in risk management and disease control regimes. US officials told me that such a relationship, once established, helps to counter any 'bad habits' that young practitioners might be exposed to in private practice.

Chapter 3: Demand for Veterinary Services

- 3.1 While considerable attention has been paid to the supply of veterinarians in recent years, including various initiatives to improve the quantity and quality of supply, much less has been focused on demand for veterinary services. My sense that this might point to wider underlying issues prompted the focus of this chapter. Indeed the underlying structural weaknesses my enquiries have revealed in the demand for veterinary services form the framework for the analysis and recommendations set out in the following two chapters, one of which looks at the commercial orientation of veterinarians while the other focuses on public good functions.
- 3.2 Compared with the supply side, where we know a great deal about the past, present and likely future numbers of veterinarians, on the demand side there is little overall information and no decent trend data. We are fortunate that both Defra and the Scottish Government have recently sponsored surveys of farmers' demands for veterinary services, the findings of which are reviewed below. Without such information, not only do myths abound but there is also no firm basis whereby representatives of major customers and those responsible for supply can coordinate the development and application of veterinary services.
- 3.3 A related complication is the way demand is structured and expressed. There are both public and private customers for veterinary services in the farming/food animal sector, as well as both public and private providers of veterinary services. Private practitioners serve the needs of both private customers and government. Government, in turn, operates as a monopoly contractor for certain veterinary services. In certain roles too, private veterinarians fulfil statutory functions.
- 3.4 The companion animal side is much simpler, being largely a private/private exchange and thus subject to clear market signals. In the farming/food animal sector, in contrast, public and private demand are inextricably intertwined. To give a simple example, the decision (essentially a policy decision) to accept a disease as endemic or treat it as exotic will typically shift the responsibility for tackling it between public and private. Likewise, the current Responsibility and Cost Sharing agenda, which is seeking to alter the balance between public and private responsibilities in livestock disease prevention and control, will inevitably have consequences for the demand for veterinary services and how that demand is expressed. That prospect is discussed further in Chapter 6.

Elements of demand for veterinary services

'There was also, at the time (1963), a feeling... that there could be a redundancy in the profession owing to the shrinkage of some official work and the economic pressure on agriculture'. 'The Future of the Veterinary Profession', *Veterinary Record*, 23 April 1966, Vol. 78, No. 17

- 3.5 The quote above typifies the historic anxiety of UK private farm veterinarians over demand for their services. Their two key revenue sources – agricultural and governmental – are subject to external pressures over which they have little influence.
- 3.6 In the past, government acted as dominant sponsor for both the veterinary profession and its then main customer, the agricultural industry. Government was therefore able to take the lead in formulating future demand (both public and private) for veterinary services on the basis of which it could then plan the long-term supply of veterinarians. In addition, through both its direct client role and its sponsorship of the agricultural industry, it could also generate much of the necessary medium-term demand. Thus, predecessor reports¹⁹ to mine were noticeably official ones, and sought systematically to orchestrate future veterinary supply and demand in a way which would be considered far too dirigiste today.
- 3.7 With government having given up the role of overall formulator (and guarantor) of future demand for veterinary services, no other organisation – professional or commercial – has stepped into the breach, at least as regards the livestock/meat sector. The sector has not attracted the sort of private market research seen recently in analyses of the UK pet food sector²⁰ or general veterinary practice²¹ or in studies of veterinary services in Australia²² and the US²³ that do cover the livestock sector. One of the earliest tasks for the new Veterinary Development Council (whose establishment I propose in Chapter 6) should be to commission a report covering the current situation and outlook for food animal veterinary services in the UK.
- 3.8 The chapter reviews what we know of the demand for veterinary services for the livestock sector. It considers first the public demand expressed by government and public agencies and then the private demand. The latter comes mainly from the farming sector and the chapter considers in turn: the economic prospects for livestock farming; farmers' access to local veterinary services; and the price, value and uptake of farm veterinary services. The chapter ends with a brief consideration of private demand for veterinary services in the wider food chain and of the demand for veterinary services supplied by non-veterinarians.

Public demand

- 3.9 The public demand for veterinary intervention in disease control and health assurance is set by a framework of UK and EU legislation and World Trade Organisation rules. In many countries that demand is fulfilled exclusively by public veterinarians. In the UK, by contrast, statutory requirements are discharged by a combination of: vets employed wholly within the government service; vets contracted by public agencies from privately managed sources; and private vets licensed or employed on a more ad hoc basis as Official Veterinarians to cover key tasks. Public sector demand for veterinary services is divided sharply between health assurance of livestock production and assurance of animal products.

¹⁹ Loveday reports (1938, 1944); Northumberland committee (1964); Swann committee (1975); Ministry of Agriculture (1938), Veterinary education in Great Britain, London, HMSO; Ministry of Agriculture (1944), Second report of the committee on veterinary education in Great Britain, London, HMSO; Ministry of Agriculture (1964), Report of the Departmental Committee on Recruitment for the Veterinary Profession, London, HMSO; Ministry of Agriculture (1975), Report of the Departmental Committee on the Veterinary Profession, London, HMSO.

²⁰ Pet Food and Pet Care Retailing – UK, Mintel International Group

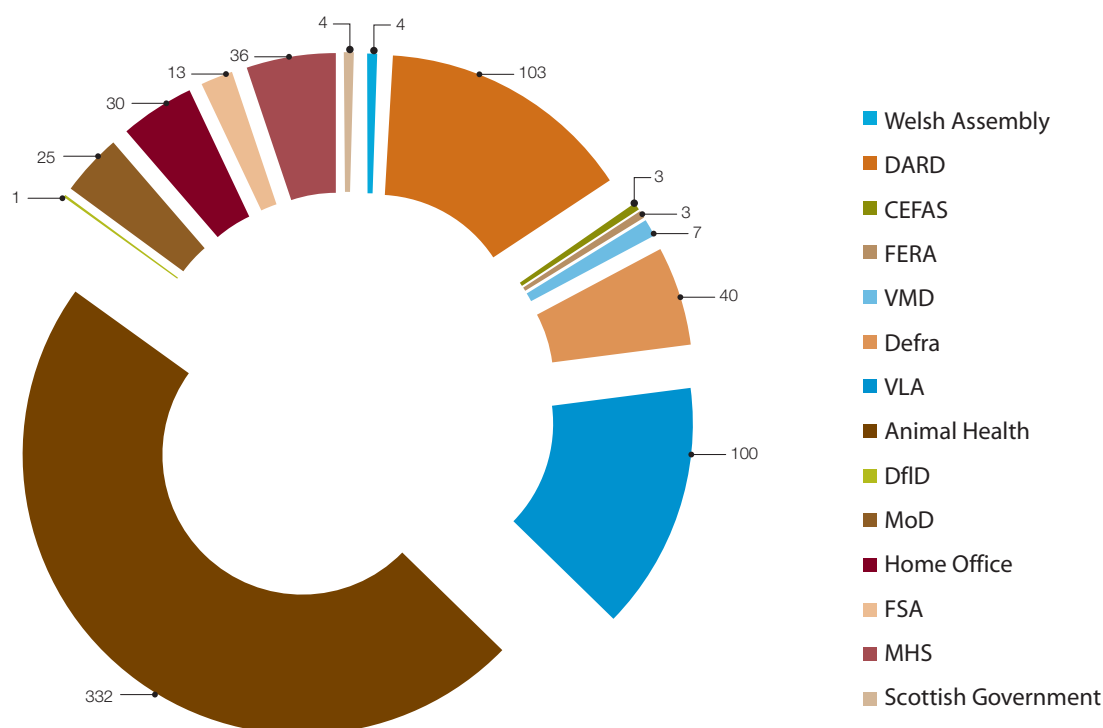
²¹ Plimsoll Analysis – Veterinary Surgeons and Practitioners (UK) (2008), Plimsoll Publishing Ltd.

²² Veterinary Services in Australia – Industry Market Research Report, IBIS World (includes analysis of livestock and food sectors).

²³ Veterinary services for livestock: Industry Cluster Report, BizMiner (US report examining data from 2000+ businesses in four sectors).

- 3.10 The devolution of animal health policy from Westminster and the establishment of various delivery agencies for veterinary public health, animal health, welfare and research have made more complicated the task of estimating current, let alone projecting future, public demand for veterinary services. Although Defra as a core department retains some oversight of the largest veterinary employers in government – Animal Health and the Veterinary Laboratories Agency – these organisations have sought to establish corporate independence on veterinary management and deployment.
- 3.11 Figure 3.1 gives the number of veterinarians employed directly by government and its agencies working largely or wholly in farm and food animal veterinary work. In recruiting veterinary staff, the agencies tend to look for experienced practitioners especially with experience of farm animal work. Central government tends to look for people with a similar background but with additional experience in regulatory and public veterinary health roles.
- 3.12 In addition, the Meat Hygiene Service currently contracts around 460 private practitioners for meat and abattoir inspection work. These are mainly EU trained and recruited vets with a strong public health orientation. Finally, Animal Health coordinates the services of around 5,100²⁴ private practitioners for farm animal disease control (e.g. TB testing) or other health assurance roles (e.g. post-import or pre-export certification) in England, Scotland and Wales. Of these, around 3,400 are currently undertaking work for Animal Health.

Figure 3.1 – Veterinarians working in government²⁵



²⁴ There are approximately 9955 authorised Official Veterinarians

²⁵ DARD, Department of Agriculture and Rural Affairs, Northern Ireland. CEFAS, Centre for Environment, Fisheries and Aquaculture Science. FERA, Food and Environment Research Agency. VMD, Veterinary Medicines Directorate, VLA, Veterinary Laboratories Agency. DfID, Department for International Development. MoD, Ministry of Defence. FSA, Food Standards Agency. MHS, Meat Hygiene Service.

- 3.13 Government demand for livestock veterinary services is heavily influenced by its prevailing disease control priorities and commitments. In 2007/08, some 89 per cent of funding for Official Veterinarians was allocated to the control of bovine TB. Given the geographical incidence of the disease in cattle, much of the money is channelled to veterinary practices in the south west of England, the West Midlands and Wales. The dependence of practices on this funding and their resultant vulnerability to switches in disease policy were illustrated by the removal in 2008 of the Brucellosis testing programme, which, although accounting for only a small fraction of expenditure on bovine TB control, impacted relatively heavily on practices in Scotland and North Wales. Defra attracted criticism for the lack of notice given for the decision to withdraw testing.

Private demand

The economic prospects for livestock farming

- 3.14 Private veterinarians serving farming need to be attuned to the prospects for the livestock industry. The British livestock industry faces strong competition not only from other EU countries but also, increasingly, from global markets. It continues to adjust structurally to the market-orientated reforms of the Common Agricultural Policy which are taking it away from the previously highly regulated system of production subsidies and controls. At the same time, livestock producers face tougher environmental, welfare and food assurance regulations and standards. These developments are making producers ever more conscious of their production costs, not least the rising costs of animal feed, and including their veterinary bills. Veterinary advice is important to the farmer in enabling him or her to compete more effectively, by helping to keep costs down and to produce a more valued product.
- 3.15 Livestock numbers in the UK have fallen sharply since the early 1990s, attributable in part to changes in farming subsidies as well as to devastating disease epidemics such as BSE and Foot and Mouth (see Figure 3.2).

Figure 3.2 – Numbers of livestock (in '000s) in Great Britain and % change 1995-2008

Year	Dairy Cows	Beef Cows	Breeding Sheep
1995	2,331	1,532	19,485
2000	2,051	1,524	19,116
2005	1,711	1,470	15,908
2007	1,668	1,426	15,106
2008 (Prov)	1,622	1,403	14,902
% change	-30.4	-8.4	-23.5

Source: Defra Agricultural Census

3.16 There have been structural changes too. For example, in cattle production, the number of enterprises has been declining at an even faster rate than the livestock population, leading to an increase in the average number of animals per enterprise. This growth has been mainly due to the increasing concentration of livestock in larger enterprises (see Figure 3.3). The trend towards fewer livestock is a significant negative factor in the demand for veterinary services which may be offset somewhat by the trend towards larger units which have a tendency to make greater and more intensive use of veterinary services.²⁶

Figure 3.3 – Changes in UK herd and flock sizes 1995-2005

Year	Dairy Cattle		Beef Cattle		Sheep	
	Avg dairy herd size	Proportion of herds with 100 breeding cows or more	Avg beef herd size	Proportion of herds with 50 breeding cows or more	Avg flock size	Proportion of flocks with 500 breeding ewes or more
1995	67	45%	25	50%	232	51%
2000	73	53%	27	53%	240	56%
2005	84	58%	29	52%	214	53%

Source: Agriculture in the UK, 2006

3.17 The government's long-term vision for agriculture involves sweeping away pillar 1 (the main production support) of the Common Agricultural Policy by about 2020. The key elements include:

- eliminating remaining price support to agriculture
- phasing out quantitative restrictions like sugar and milk quota and set aside
- phasing out the Single Farm Payment
- abolishing export refunds, and
- reducing agricultural import tariffs (to the average level of other industries).

3.18 This radical and far-reaching agenda would expose EU agriculture to world markets. The effect would be to bring down EU prices to world levels. The impact on the British livestock sectors could be significant, with sustained pressure on output prices and profitability leading to lower livestock numbers and providing incentives for structural change (larger farms, herds and flocks). Overall, production systems for grazing livestock would become more extensive but there could be more regional concentration (e.g. dairying in the west, fewer cattle and sheep in the east), larger units, and possibly even some localised intensification. Modelling of this liberalised policy scenario suggests a decline in livestock numbers in England between 2004 and 2015 of 22 per cent for sheep, 29 per cent for dairy and 31 per cent for beef cattle.²⁷

²⁶ Farm Practices Survey.

²⁷ ADAS UK Ltd (2007), An Independent Evidence Baseline for Farm Health Planning in England.

- 3.19 These projections illustrate clearly the increasingly difficult environment in which veterinary practices must operate. Their farmer-clients face increasing competition, loss of subsidy and greater regulation. The structure and practice of farming are likely to undergo further fundamental change. The veterinary profession must realise that the model for delivering services to the farmer may look very different in the future (see Chapter 4).
- 3.20 The National Farmers' Union (NFU) described a need for the veterinary profession to plan for a change of structure in livestock farming, with a move towards farm animal veterinarians providing more business/commercially focused advice. They also described a lack of cohesion or consistency within the wider profession in the face of the challenges confronting the livestock industry and called for a more forward-looking and strategic approach. However, the NFU also conceded that the veterinary profession was undergoing a step change similar to the one that farming was going through. The challenges and uncertainties at a business and professional level are very similar.

Farmers' access to local veterinary services

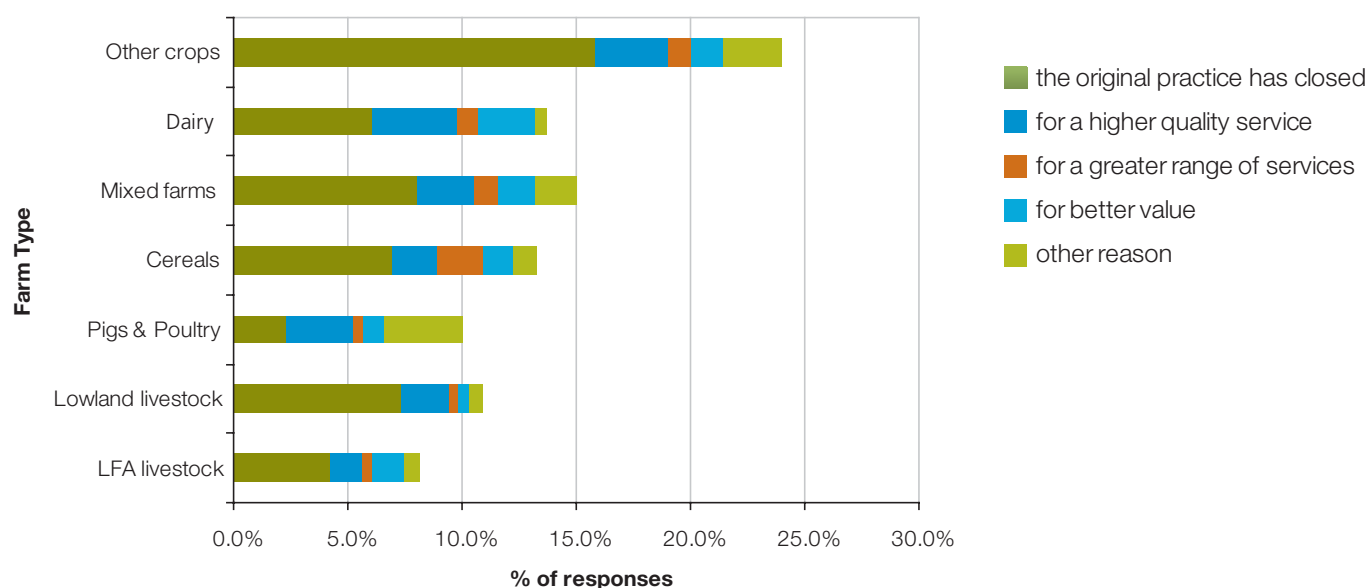
- 3.21 In my discussions with veterinary leaders, concern was expressed that the network of farm animal expertise and services was in decline. Veterinarians tell me that farmers are increasingly unable to access the veterinary services they need to be able to run their businesses and meet their responsibilities as animal owners. However, the customers of farm animal veterinary services have remained silent on this issue. No farmer has raised concerns to me that they cannot find a vet.
- 3.22 In 2007, Defra²⁸ found that just 1.2 per cent of farms with livestock reported difficulty in accessing veterinary services. The figure rose as high as 1.6 per cent in the South West and in Yorkshire and Humber. But overall the survey suggests little difficulty for farmers in accessing veterinary services.
- 3.23 This is not to imply that farmers have been unaffected by the consolidation of farm animal veterinary services, including both the closure and the movement out of farm animal work of local practices. During the three-year period covered by the survey (2004-07), 11 per cent of farmers had changed their veterinary practice. Of these, the largest group was the 6.7 per cent who had had to change because the practice that they had been using had closed down. In the West Midlands, the figure was 13.9 per cent, meaning that nearly one in seven farms with livestock had been affected by the closure of their veterinary practice during the survey period.
- 3.24 A similar survey commissioned by the Scottish Government²⁹ reported that 'some farmers mentioned they were noticing fewer veterinarians'. However, just 4 per cent of the farmers reported that they suffered from an absence of local veterinary services.
- 3.25 Of course, what counts as local may vary between regions. Farmers in Northern Scotland were further, on average, from a practice (17.5 miles) than those in the East of Scotland (8.4 miles). Across the UK, the average distance travelled by farm animal veterinarians visiting a client is around 11.2 miles.³⁰

²⁸ Defra, Farm Practice Survey 2007.

²⁹ Primrose, D., Provision of Rural Veterinary Services Report, George Street Research

³⁰ RCVS Survey of the Profession 2006. The figure applies to those veterinarians spending more than 80 per cent of their time on farm animal work.

Figure 3.4 – Reasons for changing veterinary practice in the last three years³¹



Source: Defra Farm Practices Survey, 2007 (N = 1653)

3.26 Figure 3.4 (which is based on results from the English survey) shows that farmers have a number of reasons for changing veterinary practices apart from the closure of their original practice. Larger farms in particular are more likely to change veterinarians through choice, whether for a ‘higher quality service’, ‘a greater range of services’ or ‘better value’. Dairy farmers are the most likely to shop around.

‘(In Australia) only 20 to 30 per cent of individual producers in livestock industries regularly engage private veterinary surgeons. In most instances, veterinarians are only called to treat an individual animal and whole herd/flock care is seldom undertaken. The explanation most frequently offered for the low utilisation is a belief by livestock owners that veterinarians are costly and do not add value. A second view is that veterinarians lack experience at selling their expertise.’

Frawley Report, 2003

The price, value and uptake of veterinary services

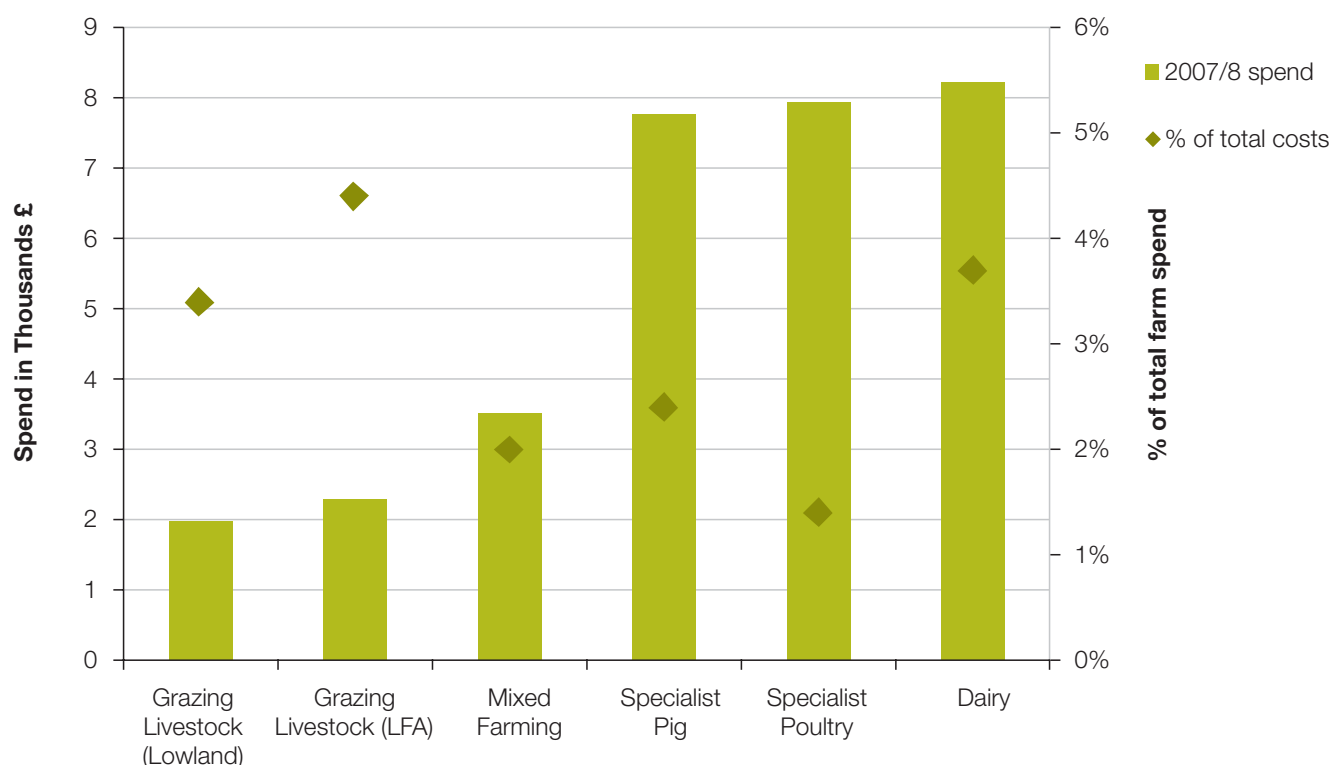
3.27 There is a common perception that many farmers are reluctant to access veterinary services as they consider them too costly. According to the NFU, the main concerns expressed by farmers are about the prices veterinarians charge, including the lack of price transparency on medicines. It was pointed out that the costs of farming are increasing and vet bills are a prominent and recurrent cost that farmers are anxious to contain. In the Scottish survey a third of farmers felt that vets charged too much for their services.³²

³¹ ‘Cereals’ includes holdings on which cereals account for more than two thirds of their standard gross margin (SGM). ‘Mixed’ includes holdings where crops and livestock each account for at least one third of total SGM. ‘Other crops’ includes mainly specialist holdings. All holdings covered have farmed livestock.

³² Primrose, D., Provision of Rural Veterinary Services Report, George Street Research.

3.28 Average annual expenditure over the period 1997 to 2007 on veterinary services and medicines in the UK was around £290 million. This represents a fall of around 15 per cent in real terms, which is roughly in line with the fall in livestock numbers. In absolute terms dairy and intensive livestock farms (specialist pig and poultry) spend the most, at around £8,000 per farm per annum. As a proportion of total costs, however, grazing livestock farms in less favoured areas (LFAs) (which largely rear beef cattle and sheep) spend the most, followed by dairy farms and lowland grazing farms (which largely finish beef cattle and sheep).³³

Figure 3.5 – Average total veterinary costs (including veterinary medicines) by farm enterprise type and as proportion of total farm spend 2007/08

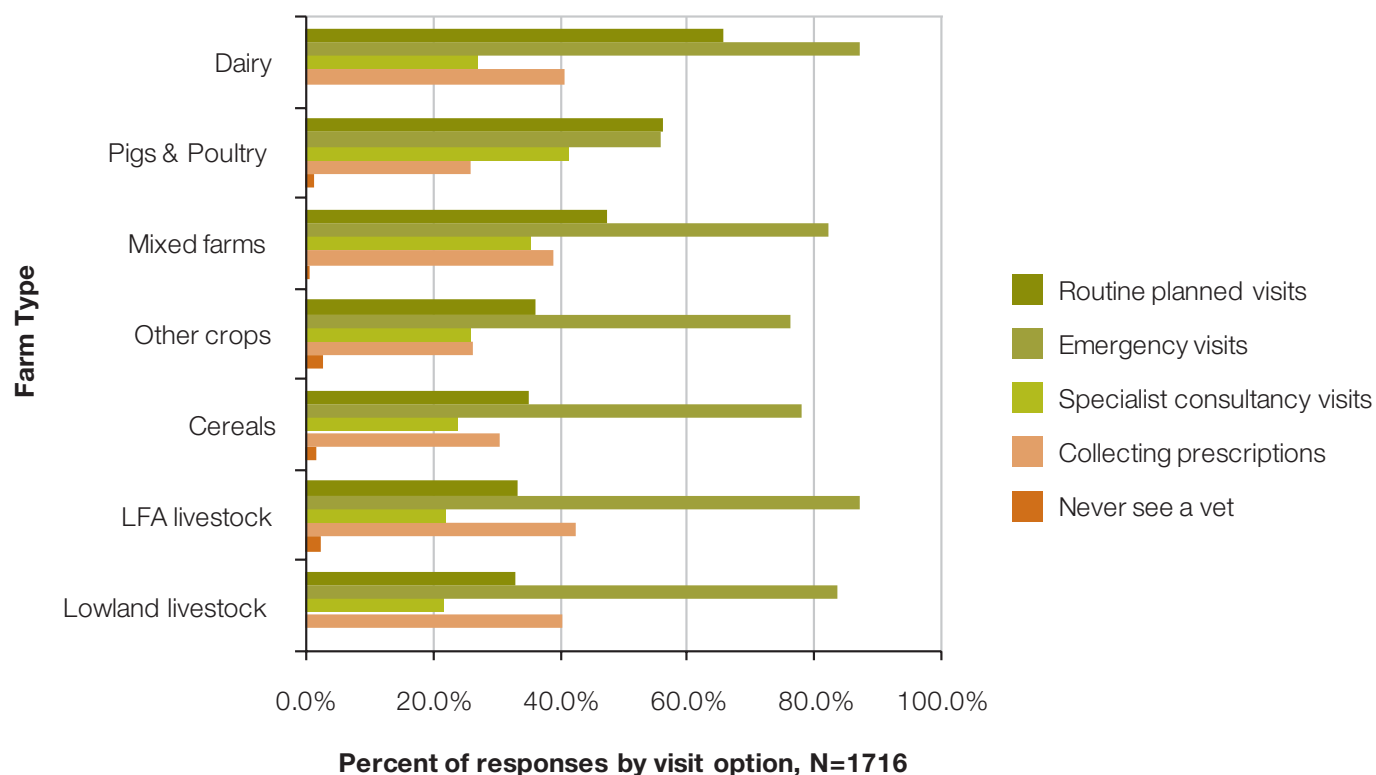


Source: Farm Accounts in England 2007/08, Farm Business Survey

3.29 The variation in the pattern of veterinary expenditure between livestock sectors reflects variations in the use of veterinary services as seen in Figure 3.6. The profile is dominated by emergency visits, for which around about 80 per cent of farmers in all sectors call on veterinarians. The exception is the specialist pig and poultry sectors in which producers are marginally more likely to use veterinarians on routine planned visits than emergency visits – these sectors also make high levels of use of specialist consulting visits. Dairy farmers, though, are most likely to make use of routine planned visits, with 65.6 per cent doing so. The pattern of use by the dairy and specialist pig and poultry sectors contrasts with that of grazing livestock farms which, after emergency visits, use veterinarians mainly for issuing prescriptions. There is also considerable variation in the frequency of use of veterinarians with the majority of dairy farmers reporting a frequency of at least once a month; but a third of LFA livestock farmers not having consulted a veterinarian for a year or more (see Figure 3.7).

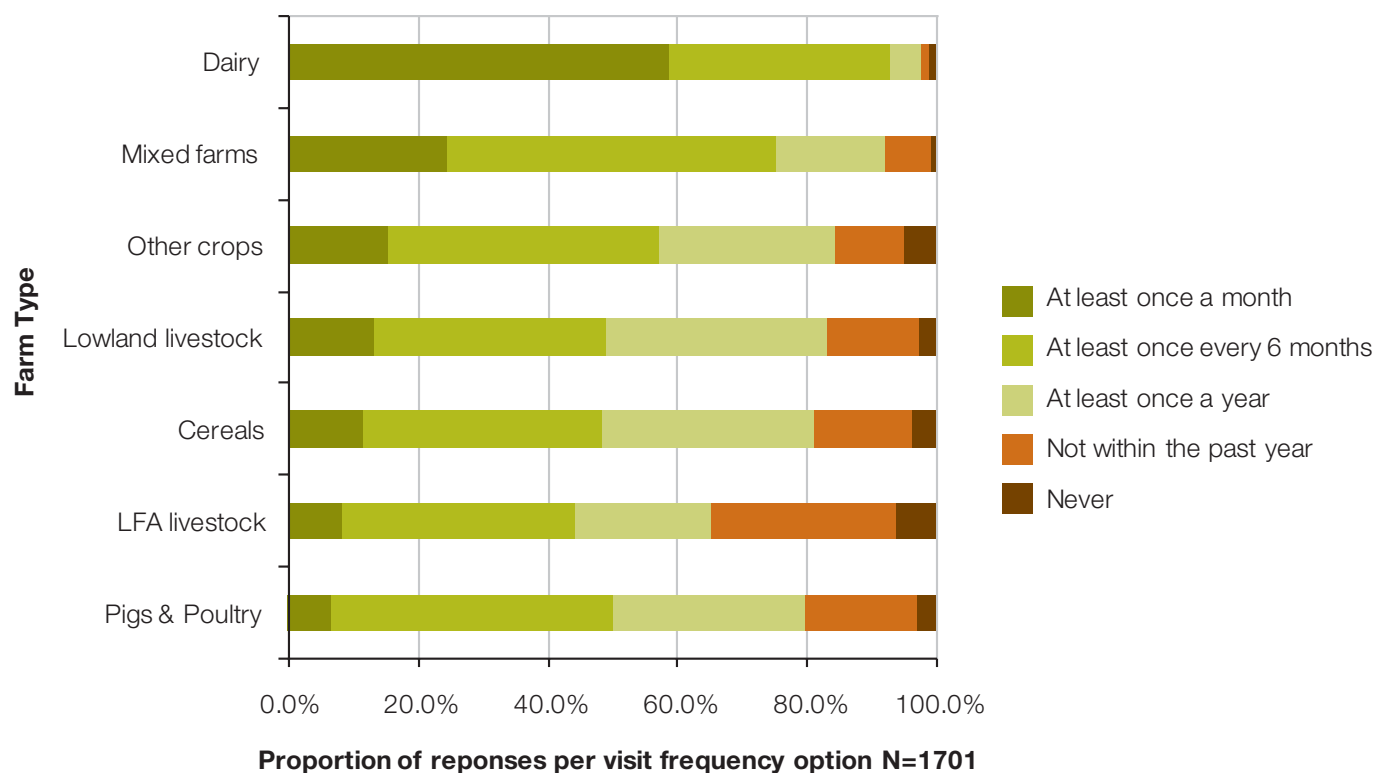
³³ Farm Accounts in England 2007/8, Farm Business Survey.

Figure 3.6 – Reasons why farmers consult veterinarians, by farm type



Source: Defra Farm Practices Survey, 2007

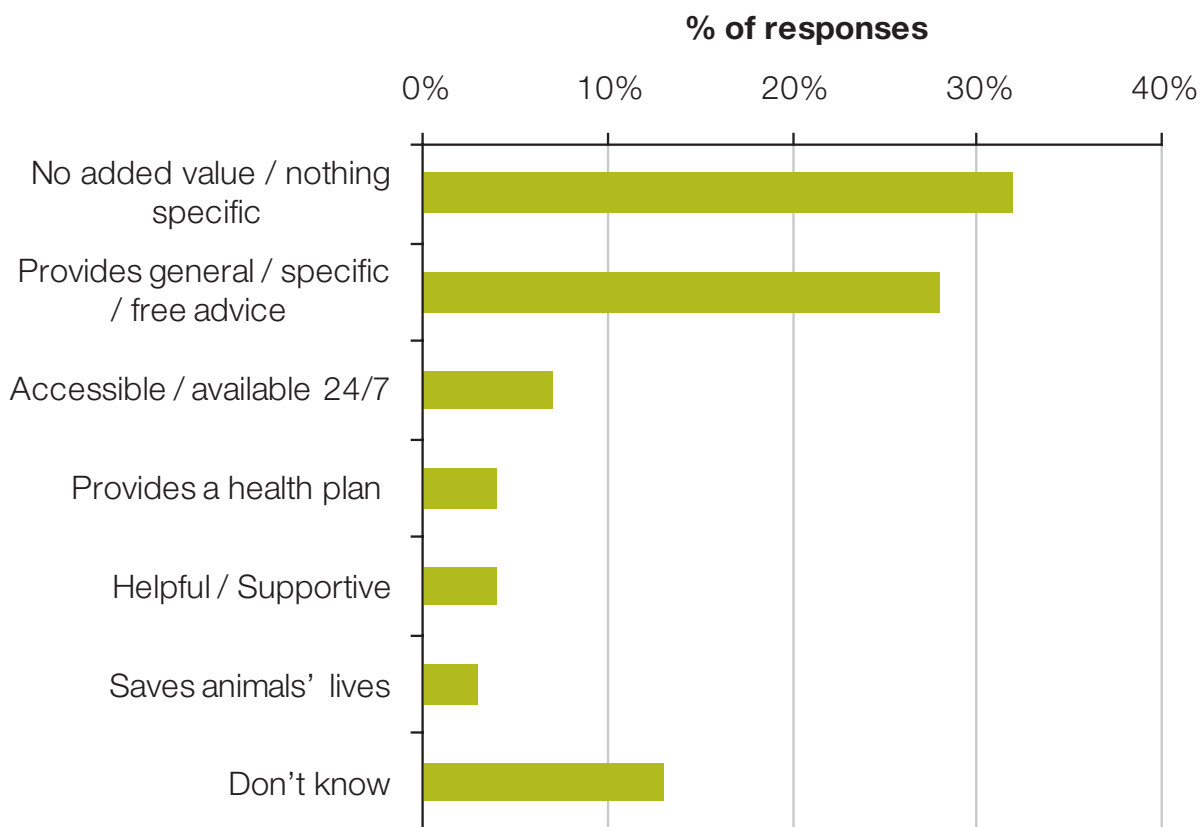
Figure 3.7 – Frequency of use of veterinarians, by farm type



Source: Defra Farm Practices Survey, 2007

3.30 According to the NFU, the main barrier to farmers making greater use of veterinary services is the perception by farmers that veterinary input is not strategically targeted on solving their business problems and so helping to reduce costs and boost profitability. The consequence is that farmers see the veterinary bill as a significant charge on the farm business and one that is not reflected in specific financial benefits.

Figure 3.8 – Scottish farmers’ views on ways in which local vets add value



Source: Primrose, D., Provision of Rural Veterinary Services Report, George Street Research (N=All farmers (500))

3.31 Confirmation of the NFU’s view comes from the Scottish survey³⁴ which interviewed both vets and farmers (mostly of sheep and beef cattle). The vets were asked where they could add most value for their farmer-clients, and a majority indicated disease prevention and health planning. However, the farmers themselves, when asked, found it difficult to identify what, if any, value added their own local vets currently provided (see Figure 3.8), or how the service on offer might be improved.

³⁴ Primrose, D., Provision of Rural Veterinary Services Report, George Street Research.

3.32 The Scottish study concluded:

‘The challenge faced by large animal vets is substantial, mainly because they are dealing with a customer base that is very keen not to use their services because of costs involved. Therefore, they are going to have to develop products, services and, most importantly, an effective message as to how they can add value and profitability to the livestock businesses in their locality.’³⁵

3.33 At our first meeting the NFU provided a shopping list of what farmers want or need from their vet:

- price transparency (especially with veterinary medicines)
- fair and open trading practices and operating standards
- a 24-hour emergency service
- routine health care
- horizon scanning
- consultancy
- diagnostic services
- farm health planning, and
- new technology and R&D support.

3.34 The NFU questioned the requirement for omnicompetence in veterinary surgeons, feeling that veterinarians had to specialise and focus more on the needs of the business, without losing sight of the needs of the animal. Farm animals had to have a commercial value, particularly with the loss of subsidy. Farmers needed advice on such matters as genetics and nutrition as well as farm health planning.

3.35 Veterinarians compared less favourably in the NFU’s estimation with providers of other farm services – such as nutritionists, crop consultants and agricultural engineers – in the business focus of the service they provided. Indeed, more fundamentally it was felt that some veterinarians failed to see themselves as service providers. One farmer explained to me that he had developed a good relationship with advisors for his cereals business, but that his vet could not advise on worming strategies. He had changed his purchasing, blood testing and vaccination regime, yet the stimulus to do this had not come from his vet.

3.36 Farm health planning offers veterinarians the opportunity to bring their expertise to bear systematically in providing business-oriented advice on preventative medicine. It has been extensively promoted by government (see Chapter 6). Figure 3.9 gives details of patterns of adoption of farm health planning in England. There has been variable take-up between livestock sectors, although farm health planning has become the norm amongst larger enterprises. However, not only is formal health planning less prevalent in the more extensive production sectors, veterinarians are also less involved in the process. Indeed, the majority of sheep health plans had been prepared without veterinary input.

³⁵ Primrose, D., Provision of Rural Veterinary Services Report, George Street Research.

Figure 3.9 – Farm health planning uptake by farm type in England

	Farm Type			
	Dairy	Beef	Sheep	Pigs
% Farm Health Plan in place	83%	42%	56%	50%
% Farm Health Plan in larger enterprise	92%	53%	65%	73%
% engaged veterinarian to produce FHP	72%	34%	25%	69%

Source: ADAS, Telephone survey of uptake of farm health planning in England in 2007

- 3.37 It would seem that veterinarians may be missing opportunities, in particular to make the link between farm health planning and business planning. Only one in four respondents to the ADAS survey of English farmers³⁶ assessed the impact of their farm health plan in relation to the bottom line or the performance of other farms. In making a persuasive case for farm health planning, vets must be able to demonstrate to individual farmers that it will have a positive impact on the profitability of their farm business. The veterinary profession still has some way to go to establish a proactive approach to preventative farm health in some agricultural sectors.
- 3.38 It may be that it is the quality of veterinary advice rather than the quantity of attendance that counts in making health improvements. For example, pig and poultry units, with vets visiting typically once every six months, are more likely to use stringent biosecurity measures (such as pre-test and isolation for new introductions) than livestock farms which generally have more frequent vet visits. LFA livestock farmers are also more likely to use footbaths, although they see a vet least often, if at all.³⁷ Conversely, the Sheep Veterinary Society farm health planning project found that farmers who did not engage a vet were more likely to ‘overmedicate’ (and therefore overspend), particularly for parasite control, which could be improved with the right veterinary advice.³⁸

Food sector orientation – a gap in skills and expertise?

- 3.39 During the numerous activities I undertook as part of this review, I discerned limited moves, at this stage, by the farming and veterinary communities, to expand their horizons to consider their role in the food chain. It is clear to me that the profession could do more, alongside their farm clients, to shift their mind-set to see their ultimate customer as the food consumer.
- 3.40 Perhaps the greatest worry was the rather negative reaction by the NFU to my suggestion that veterinarians should get more involved in food assurance. This reluctance was due to a perception that veterinarians would simply tick boxes and not add value. There was also a perception that veterinarians could push farmers to pursue standards in relation to animal welfare without regard to costs. In this respect the farming group suggested that veterinarians were viewed (and perhaps viewed themselves) as ‘quasi-regulators’, instead of being valued for the expert advice that they provided to livestock businesses to enable them to effectively meet their statutory obligations and make the most of commercial opportunities.

³⁶ ADAS UK Ltd (2007), An Independent Evidence Baseline for Farm Health Planning in England.

³⁷ Farm Practice Survey 2007.

³⁸ Rogers, P. (2008), BVA Congress presentation.

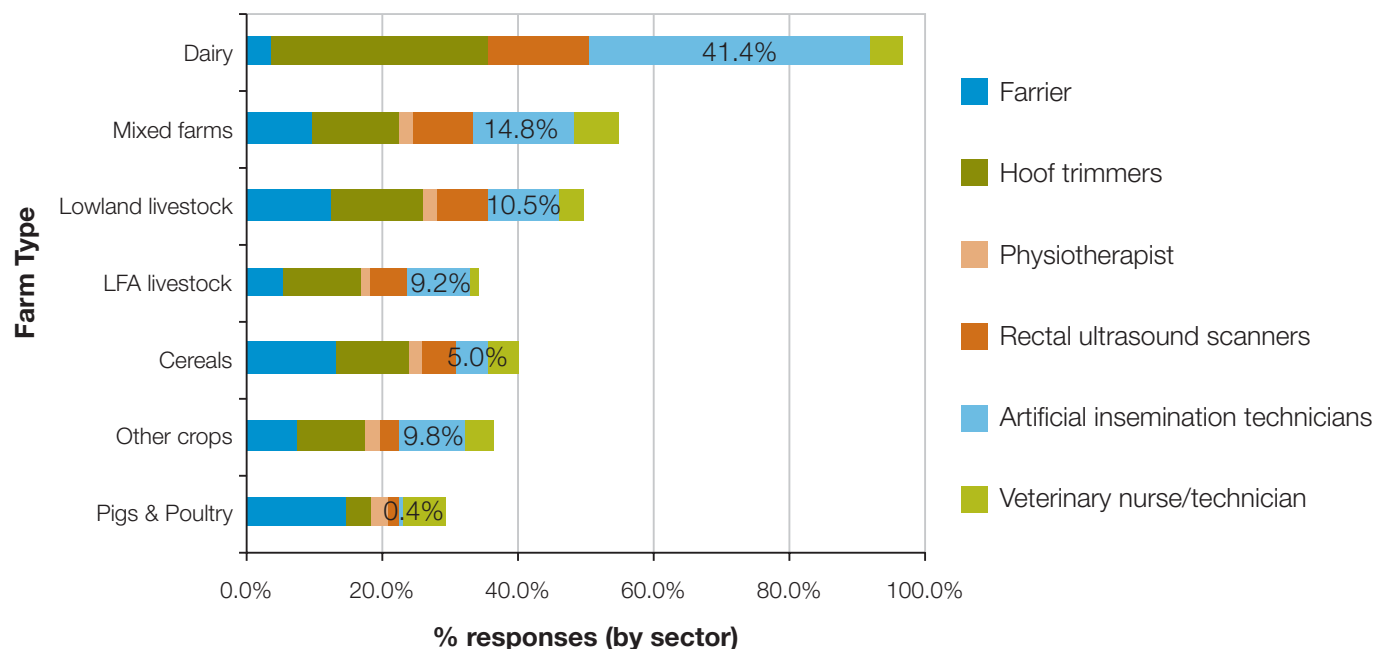
3.41 European legislation, which now clearly characterises the farm business as a ‘food business operator’ embedded in the food chain with specified responsibilities, should finally put an end to the notion that the private practitioner’s role can start and finish at the farmgate. Dairy vets have always had to see this bigger picture. In meat production, however, apart from the recognised role of private veterinarians in assuring food against drug residues, their overall potential to add value and consumer assurance to the final product is weakly realised. I examine some of the structural and cultural obstacles in Chapter 5.

Veterinary services supplied by non-veterinarians

3.42 In considering demand for veterinary services, it is important to recognise that veterinarians are not the only people providing such services. There is an array of other groups that do so, particularly in the farm and food sectors, including hoof trimmers, physiotherapists, ultrasound scanners, meat hygiene inspectors and veterinary technicians of various kinds.

3.43 The Defra farm practices survey identified dairy farms as the predominant user of ancillary services. Figure 3.10 shows the proportion of responses by farm type (note that farmers could record more than one service). Reproductive services – ultrasound scanning and artificial insemination – are the most utilised across all types of farm enterprise. Hoof trimming is also a key input to support animal husbandry.

Figure 3.10 – Services provided to farmers by non-veterinarians



Source: Defra Farm Practices Survey, 2007

- 3.44 In the Scottish survey, 40 per cent of veterinarians said that they could not provide all the services that local farmers needed.³⁹ The major gaps identified were embryo transfer, artificial insemination, fertility testing and treatment, foot trimming and nutritional advice. The main reasons vets were not offering these services were lack of experience or equipment. In most cases, services were being offered instead by specialist providers.
- 3.45 Veterinarians do regard some of these providers as competitors. In Chapter 4 I examine the case for promoting and developing more widely the role of veterinary technicians. Here, I simply want to make the point that the variety and variably regulated array of veterinary paraprofessionals and technicians contributes further to a picture of demand for veterinary services that is complex, diffuse, fragmented and weakly expressed.

Improving customer orientation

- 3.46 A number of themes emerge from this analysis of supply and demand, which I will go on to discuss in more detail in the following chapters. Veterinarians are challenged to build value for private sector needs which enables their clients to meet both commercial imperatives and statutory requirements.
- 3.47 Regardless of the business focus of the individual rural practitioner, it is clear that the level of sophistication on the demand side needs to be raised on two fronts. There is a need to clearly understand and articulate customer requirements for veterinary services and to effectively market value added veterinary services to both the private and public sectors.
- 3.48 Supplying into a market where farmers are becoming more competent to deal with some problems themselves and where vets find their services hard to sell, either because farmers do not want to buy or because veterinarians find self-marketing uncomfortable, encapsulates the challenge facing the food animal veterinary sector. A co-ordinated response, building on initiatives to pump prime farm health planning, is needed from the veterinary profession working in partnership with their commercial customers.
- 3.49 For the veterinary profession there remain cultural barriers to effectively marketing their potential services. The agricultural sector's rather undifferentiated view of what the veterinary profession can provide is clear and the combination of lack of awareness, poor marketing and weak communication maintains the status quo. Feedback from the NFU suggests that there is an urgent need for the veterinary profession to build on existing good examples of partnership working with farmers to renew its relationship with its customers.
- 3.50 The question I pose in the final chapter is how to bridge the gap between perception and reality that currently exists between the veterinary profession and its customers, both private and public. I propose the establishment of a forum to provide a basis for cooperation and coordination and to realise better the potential of veterinary expertise in providing customer-oriented and value-added services. Such a forum – a 'Veterinary Development Council', perhaps – could also provide feedback to education providers on the skills set needed for the UK veterinary profession to ensure their relevance and responsiveness for the future of farming and food production.

³⁹ Primrose, D., Provision of Rural Veterinary Services Report, George Street Research.

Chapter 4: Veterinary Businesses

- 4.1 What is the veterinary business model and how is it changing? This is a very broad area and, in the time available, the working group was not able to carry out a thorough analysis of all the issues. We were not helped by a lack of reliable data on the number, type and size of veterinary practices operating in Great Britain. There is a clear need for more and better information if trends within the profession are to be better understood. The Royal College of Veterinary Surgeons (RCVS) may be best placed to consider how to build an evidence base for the future, given their new role in registering veterinary practices under veterinary medicine legislation.
- 4.2 The direction and pace of change in the veterinary business model is causing disquiet within parts of the profession yet it seems an entirely rational response to the changing demand for veterinary services. This disquiet relates primarily to those veterinary practices that have decided that farm animal work is uneconomic for them and have made a pragmatic business decision to concentrate on companion animal veterinary services. However, there are also concerns about the changing structure of farm animal veterinary practices and, specifically, about the trend for small locally based practices to be replaced by larger, more corporate businesses.
- 4.3 There are a number of factors which the veterinary profession clearly feels are having a significant impact on the profitability of veterinary practice. The working group touched on the sale of veterinary medicines, 24-hour emergency cover and the implementation of the EU Working Time Regulations. However, these subjects are already well understood by the veterinary professional bodies. Issues which I feel have been overlooked and require attention are the development and use of business skills, the concept of the veterinary specialist and the need to develop a veterinary team with a broad range of skills to meet a widening spectrum of customer needs.
- 4.4 The Animal Health and Welfare Strategy calls for a change of culture within the veterinary profession, with a shift in focus away from traditional reactive (or 'fire-fighting') services and towards the prevention of disease and welfare problems. Practices should be offering services like farm/herd health planning, as well as advising animal owners on how to meet the behavioural and other needs that underpin good animal welfare.
- 4.5 Private veterinarians and those who provide veterinary services to farmers operate mainly as small businesses. To remain competitive and profitable, they must become more aware of the changing business needs of their customers and provide more specialised and value added services.

Different business models

- 4.6 There are many examples showing how veterinary practices have responded to the challenges described above. The business structure of veterinary practice is itself changing. There is anecdotal evidence for a trend towards consolidation in farm animal work, with the number of very small practices (that is, practices with between one and

three veterinarians) declining in most areas while the number of larger practices increases. This shift, in direct response to professional and commercial pressures, has generated debate about the implications for practices' ability to promote animal health and respond to their customers' needs.

- 4.7 The move towards larger veterinary practices specialising in farm animals and operating over larger areas seems to make a great deal of commercial and practical sense. Such practices can take a more flexible approach to the recruitment, development and deployment of professional staff resources, allowing them to offer a greater range and diversity of services to their customers. They are also able to achieve economies of scale in the use of premises, equipment and support staff.
- 4.8 Of course, there may be countervailing diseconomies of scale, for example in travel times and costs. The expansion of individual practices may also introduce unwelcome competition for neighbouring practices, creating tensions that cause anxiety within the profession. But do these changing business structures and models offer cause for wider concern?
- 4.9 The British Veterinary Association's (BVA) Veterinary Policy Group provided me with a short assessment of the relative strengths and weaknesses of the 'established and traditional business structure' and the 'new and evolving business model'. The strengths of the former derive from the fact that many traditional practices are still relatively small and localised, allowing them to maintain close working relationships with customers and provide continuity of care. Locally-based veterinary practices are likely to have good local knowledge and may also have maintained a veterinary presence on smaller farms. The potential weaknesses of the model include a more limited degree and range of specialist veterinary expertise. This is compounded by smaller practices' reluctance to call in outside specialist expertise for fear of losing business. This is particularly so for those practices that cover a wide range of species. By comparison, practices based on the 'new and evolving business model' can make more effective use of external and in-house specialist advice and are better placed to develop new approaches by maintaining a clear focus on the market and adopting a progressive approach to business management. However, such practices may pay less attention to the care of individual animals and have poorer public good functions (through a lack of local knowledge), and are more likely to focus on high product sales than on good health outcomes.
- 4.10 The BVA's conclusions regarding the possible weaknesses of the new and emerging business model require closer scrutiny. While it is probably true that the model will involve the loss of some intimate knowledge of a local area, particularly the diversity of local farms, the level of specialisation achievable within larger practices offers scope for developing more skilled and detailed clinical and commercial knowledge of specific animal sectors (beef, dairy, etc). The two models represent a trade-off between detailed local knowledge and extensive animal population knowledge. It is not immediately clear which has a greater contribution to make to the public good.
- 4.11 The BVA suggests that good local knowledge enables practices based on the established and traditional model to make a significant contribution to animal welfare, disease surveillance and emergency response. However, the extensive animal population knowledge offered by practices based on the new and emerging model put them in a strong position to promote preventative medicine, conduct strategic surveillance and assess public health risks from animals and animal products.

- 4.12 Significantly, I have not heard anything from government that suggests that it shares the perception or concern that new veterinary business models are less effective at performing public good functions. From a government perspective, having a smaller number of private sector operators seems more efficient. This cannot be discounted as a factor in the consolidation of the profession. With regard to certain functions, though, there is clearly disagreement as to the past significance and contemporary relevance of the role of traditional veterinarians. For example, it is argued in some circles that a reduction in routine visits to farms reduces the scope for veterinarians to spot instances of disease or to encourage farmers to make animal health a priority. However, Defra is not convinced of the significance of such passive surveillance by veterinarians and has emphasised the value of more formal forms of farm health planning. I return to consider the role of surveillance as a public good in Chapter 5, and to review the experience of farm health planning in Chapter 6 (I see farm health planning as relevant to both models). However, there would be value in a piece of research into how veterinarians' changing presence and functions are affecting their ability to provide passive surveillance.
- 4.13 I have not been able to substantiate the BVA's concern that the new and emerging business model might be too focused on product sales at the expense of animal health. This does not seem to be a particular feature of the newer/larger practices. There are specific concerns about so-called 'motorway vets' who offer consultancy-based services over a large geographical area, and who prescribe and dispense for animals without providing 24-hour veterinary care and are not able to provide regular call-out services. I have not seen any evidence that this form of veterinary service is likely to become a significant model, and the RCVS has a system in place for handling complaints.
- 4.14 The BVA's view that, under the new and emerging model, less veterinary attention is paid to individual animals seems to have more substance. A greater emphasis on population medicine does imply a shift away from caring for the individual. This may have implications for animal welfare, as well as for the individual treatment services that farmers expect from veterinarians. Some of the latter services may be suited to delivery by paraprofessionals or trained animal technicians, a topic that we return to later in this chapter. Chapter 5 also examines the changing responsibilities of veterinarians for animal welfare.

A new business model

Westpoint Veterinary Group is a large animal veterinary services provider based in the south-east of England. Since the Group was set up in 2000, it has taken over the large animal work of a number of neighbouring practices and now has a client base that stretches from Cornwall in the south-west to Kent in the east and northwards to Essex, Hertfordshire and Suffolk.

By 2008, Westpoint was employing around 32 veterinarians across a total of seven branches operating under three trading names (Westpoint, Eastpoint and Northpoint). The corporate structure is based around a main board and an operational board, which is further subdivided into working groups.

Business orientation

- 4.15 Veterinary practices based around the new and emerging model will need a larger and more diversified team if they are to cover a wide geographical area at the same time as maintaining a local focus. Educating animal owners and providing a complete service package for clients is key to success. Private veterinarians are in the business of selling their expertise, and to do this successfully they need to offer it as part of a package of services. By passing on their expertise, they will effectively be ‘training’ farmers. Some of them do this formally, most do it informally, but all of them need to educate their customers to appreciate their skills.
- 4.16 Veterinarians are in a strong position to understand farmers’ economic situation and their objectives, and to apply veterinary skills and experience to help improve the efficiency and profitability of their clients’ businesses. My impression of the veterinary profession is of scientific professionalism rather than a strong self-identity as providers of services to business. These aspirations are not incompatible and must be pursued jointly. Veterinary practices are prime examples of knowledge intensive business services. Such services rely heavily on the high quality, relevant clinical and technical skills of those working for them and on the business organisation and management skills of those leading them. To survive and prosper, practices should promote themselves as multi-disciplinary teams supported by an effective internal management system that covers finance, human resources and operations.
- 4.17 Practices need to believe that they have a future in large animal service provision and communicate this to their clients. Practices must charge realistic prices for their services. They may need to re-think their approach to marketing, putting more emphasis on the promotion of some of their professional services and developing new methods of delivery. I have met some very entrepreneurial young veterinarians and seen encouraging signs of innovative practice. Leading veterinarians should ensure that the right training in business and management are made available and be prepared to share some of their own insights. Providers of support for rural and small businesses should recognise veterinary practices as important potential customers, and be proactive in addressing their business training and advice needs. The profession itself should take the lead in drawing up and sharing best practice models for successful large animal practices.
- 4.18 Much farm expertise resides with older, more experienced veterinarians. Ideally, a practice would employ veterinarians across the age spectrum, allowing farm skills and local knowledge to be passed on. At the same time, practices need to respond to the changing expectations of the rising generation of veterinary graduates. The tried and tested approach to introducing young graduates to farm animal work may not be enough to maintain their interest and commitment. Job shares, part-time working and developing more rounded job descriptions with less emphasis on routine technical tasks may help, and are likely to be more achievable within the new and emerging business model.

Practice managers

- 4.19 At one of our working group meetings, we took evidence from the Veterinary Practice Managers Association (VPMA) which, at the time, had 750 members. Membership is open to individuals (not necessarily veterinarians) who are employed by, own or are involved in the management of veterinary practices. The VPMA provides training and runs road shows for veterinary practices that do not employ a practice manager. The Certificate

in Veterinary Practice Management (CVPM) is a formal qualification that demonstrates to prospective and current employers a manager's measurable skills in administration, financial management, personnel matters and marketing.

- 4.20 At the meeting, we learned that the employment of non-veterinary practice managers is on the increase and that more are becoming practice partners. Some practice managers are able to make their roles self-funding through agreed business changes and reducing overheads. The working group considered whether there was a need to promote the adoption of practice managers more widely. However, it was felt that smaller practices would not have the necessary turnover. Sharing a manager may be an option, and some local practices are already using practice managers as a shared resource, overcoming concerns about confidentiality and competition.
- 4.21 The VPMA identified the key skill of practice managers as business-to-business planning, including pricing, marketing, networking and IT. These are basic business skills and veterinary practices that do not employ specialist managers must be absolutely certain that those skills exist within the business. The VPMA has an important contribution to make to the successful evolution of farm animal veterinary practice, and the veterinary professional bodies should throw their weight behind the drive to raise standards of business planning.

Developing and promoting business skills

- 4.22 During the working group discussions, it became clear that veterinarians often do not get adequate training or support to be effective business managers or leaders. Insufficient attention is given in the selection, training and professional development of veterinarians to prepare them to run small businesses. This would seem to be a systemic issue. Veterinarians' generally poor self-image of themselves as professional businessmen and women is both a cause and a consequence. While veterinary education and professional development should attach more importance to helping veterinarians develop appropriate skills in (or at least a basic appreciation of) business planning, marketing and human resource management, the professional bodies should work to encourage a change in attitudes. This is an issue for education, training and professional/business support.
- 4.23 When I raised these concerns with representatives of the profession, the point was made that the main objective of training is to turn out scientists and competent professionals, not business managers, and that any such training should be carried out post-qualification. These views were partly influenced by concerns that undergraduates would not be interested in developing their awareness of the business environment and that the veterinary curriculum was already very crowded. It was also suggested that new graduates would not need these skills in their early years of practice. However, farmers have told me that they want their veterinarians to provide cost-effective treatment and prevention strategies aligned to the commercial needs of the business.
- 4.24 I understand the reservations of the profession but would argue that it cannot afford to relegate training in business knowledge and skills until after graduation. A survey of final year students in 2007 found few of them motivated by the potential for a career in a business environment. This strikes me as a recipe not only for poor commercial performance but also for professional disillusionment.

- 4.25 Veterinary students should have a realistic expectation of what is involved in working in a small business and of operating in a commercial context. It is vital that veterinarians appreciate the market conditions, both present and future, that face their clients. The new generation of veterinarians should bring with them fresh ideas about providing service to their customers, and a much stronger customer orientation. Better business skills would prepare graduates for the challenges ahead.
- 4.26 During my visit to the US, I learned of the progress being made by American vet schools in providing business education for trainee veterinarians. A survey, carried out in 1999, of practice management education in American veterinary schools found that, although many students were exposed to business courses, the content varied greatly between institutions.⁴⁰ Two other studies found a pressing need for business management to be included in veterinary education, identifying it as the key to improving the business acumen of practitioners.⁴¹ Subjects prescribed include business management, marketing, personal finance, communication, entrepreneurship, and life skills.⁴² Veterinary colleges have responded by putting more emphasis on the teaching of practice management. For example, Kansas University Vet School has made 45 previously optional lectures part of its core training. The lectures cover topics including personal marketing, business organisational structure, gauging and monitoring production, effective practice marketing, achieving better client satisfaction and retention, and the road to practice ownership. While I am not suggesting that UK veterinary schools make changes of this magnitude to their core curriculum, the American initiatives clearly signal the importance that they attach to preparing their graduates for the realities of commercial life.

Veterinary specialisation

- 4.27 One of the more surprising things that I have learned about the veterinary profession is the way that veterinary specialism is defined and recognised. Despite several attempts to have the profession's approach explained to me, I have struggled to make sense of it.
- 4.28 Recognised specialisms should provide a means to develop and provide complex and advanced treatments and services in line with customers' priorities and needs. In principle, therefore, specialisation should play an important role in signalling to the customer that particular and authoritative skills or expertise are available. However, not only is the organisation of veterinary specialisation confusing and opaque, but the profession's concept of specialisation is inward-looking and orientated towards fellow professionals rather than aimed at informing the customer. The customer is not even given the reassurance that someone who claims a specialism is professionally sanctioned to do so. The term 'specialist' is not a protected title, so any registered veterinarian (provided they do not practice beyond their area of competency) may adopt the title of specialist without holding any formal specialist qualification whatsoever.

⁴⁰ Lloyd, J.W. and Covert, B.R. (2001), 'Veterinary practice management education in the Association of American Veterinary Member Colleges during 1999', JAVMA, Vol. 219, pp. 176-179.

⁴¹ Brown, J.P. and Silverman, J.D. (1999), 'The current and future market for veterinarians and the future market for veterinarians and veterinary medical services in the United States', JAVMA, Vol. 215, pp.161-183. Cron, W.L. (2000), 'Executive summary of the Brakke Management and Behaviour Study', JAVMA, Vol. 217, pp. 332-338.

⁴² Lloyd, J.W. and King, L.J. (2004), 'What are the veterinary schools and colleges doing to improve the non-technical skills, knowledge, aptitudes and attitudes of veterinary students?', JAVMA, Vol. 224, pp. 1923-1924. Volk, J.O. et al (2006), 'Executive summary of the AVMA-Pfizer business practices study', JAVMA, Vol. 226, pp. 212-218.

- 4.29 Given these shortcomings it is perhaps unsurprising that formal veterinary specialisation is so weakly developed, certainly in comparison with professions such as human medicine and dentistry. Just one per cent of practising veterinary surgeons are RCVS-recognised specialists. The RCVS criteria include relevant postgraduate qualifications and peer acknowledgement, in part to support a system of vet-to-vet referral (which is also weakly developed within the profession), but also to confirm the academic standing of the specialist. Very few veterinarians pursue this route, with many more opting instead to join one of the specialist divisions of the BVA in order to cultivate their specialist interests and get peer and client recognition. Thus, two distinct systems of veterinary specialisation have developed alongside each other.
- 4.30 The two systems divide up the realm of veterinary expertise somewhat differently. Both include a set of specialisms that take a whole animal approach to an individual or group of species (cattle, pigs, poultry, sheep, goats, deer, and fish). The RCVS additionally recognises a series of mainly clinically-based specialisms, based around either a body system (e.g. ophthalmology) or technique (e.g. anaesthesia), that may be applicable to different species. The BVA, in contrast, includes a range of specialist occupational divisions (such as government veterinarians and industrial veterinarians) not recognised as specialisms by the RCVS.
- 4.31 Specialisation is undeveloped within the veterinary profession. This is out of step with modern thinking about professional expertise and may be limiting the scope for market specialisation and differentiation of veterinary services. Information about what counts as specialisation is unclear and confused and is not customer-oriented. In Chapter 6, I consider the possibility of introducing a Veterinary Development Council. Clarifying the basis and establishing a framework for veterinary specialisation would seem to be a suitable object for such a body.

The veterinary team

- 4.32 One way in which veterinary services could be delivered in a more differentiated and cost-effective fashion would be through greater use of para-professionals and specialised technicians. The term ‘technicians’ denotes someone whose occupation involves training in a specific technical process, while ‘para-professional’ denotes a trained worker who assists a professional. Use of this type of support is poorly developed in the veterinary field, and especially so in farm animal work.
- 4.33 The main group employed by vet practices besides veterinarians are veterinary nurses. Veterinary nursing, conceived initially as a para-profession, has developed to the point where it is effectively recognised as a profession in its own right, although the Veterinary Surgeons Act has not yet caught up with this fact. However, nurses are seldom involved in farm animal work.
- 4.34 One of the clearest messages that I received from farmers was the potential they saw for making greater use of veterinary technicians. Clearly, this is mainly motivated by the need to reduce costs, an entirely legitimate consideration for the customers of veterinary services. Veterinary technicians are also valued by farmers for the skill and enthusiasm they bring to the sometimes laborious technical tasks that veterinarians may view as routine.

I was told by the National Farmers' Union (NFU) that the animal health officers employed by the Animal Health Agency are held in high regard for their knowledge and skills and for the quality of their work. The NFU said they wanted to see the veterinary organisations taking a more proactive approach to facilitating the role of the trained veterinary technician, ideally as part of an integrated veterinary team, working as a para-professional under veterinary supervision or direction.

- 4.35 The Veterinary Surgeons Act has not kept pace with changes in demand for veterinary services and places constraints on the development of the broader veterinary team. In its evidence to the recent EFRACom inquiry into the Act, Defra identified the regulation of veterinary technicians (or para-professionals) as a key part of any new legislative framework. Currently, it is only through the making of exemption orders under the Veterinary Surgeons Act that non-professionals can perform any invasive procedures on animals. Even then, this can only take place under circumscribed conditions. Such orders, for example, allow suitably trained or experienced non-veterinarians to carry out artificial insemination of cattle and mares and ultrasound scanning and epidural anaesthesia of cattle. Varying degrees of veterinary supervision may be required (although not for artificial insemination). Within government, animal health officers are trained and authorised to carry out TB testing; otherwise, this must be done by registered veterinarians. Government can also use technical staff to carry out sampling and blood testing, but only during disease outbreaks. It is difficult not to conclude that the system that currently governs the work of veterinary technicians is backward-looking and overly restrictive.
- 4.36 Any relaxation of these rules is likely to be greeted with alarm by some in the profession. However, provided the right safeguards are put in place to protect both animals and customers, the availability of trained and experienced veterinary technicians would allow progressive veterinary practices to build a more diversified service for their customers, delivered by a flexible, cost-effective team of veterinary surgeons, nurses and technicians.
- 4.37 Formal recognition of the role of the veterinary technician would allow for suitable training and regulation to be put in place. Currently, this falls to Defra, which is responsible for the approval of training courses and for maintaining registers of those who have undergone approved training. Drawing up and policing training protocols for rectal ultrasound scanning technicians does not strike me as an appropriate function for Whitehall civil servants. Defra itself is increasingly uncomfortable with the role. The department has expressed an interest to me in allowing commercial sectors to define their own standards, with third party accreditation of training courses and examinations.
- 4.38 Currently, veterinary practices that want to employ technical support staff must make their own provision for training and staff development. The working group heard from one veterinarian who had long employed para-professionals. The practice recruited technicians with farming experience and who were at ease around animals, and trained them up to do blood testing, field work, farm data recording and milk testing and to carry out routine revisits to farms to follow up veterinary treatment. So integral were they to the business that the veterinarian felt his technical staff would be the most difficult to replace of all the members of his practice.
- 4.39 Likewise, a large veterinary company I visited employed technical support staff in a variety of jobs including farm data collection, foot trimming, milking parlour maintenance and herd vaccination. The veterinary director of the company was adamant that he could engage many more farmers in herd health surveillance if only his para-professionals were allowed

to collect blood samples (currently, approved technicians are restricted to blood testing for disease detection purposes only). These two examples illustrate that trained and qualified technical support need not present a threat to the veterinary profession; rather, it can complement the work of the existing veterinary team and help generate additional custom for the practice. However, I learned that such an outlook is the exception rather than the rule.

- 4.40 Some veterinary practices choose not to employ veterinary para-professionals on the grounds that they would have to reduce the number of veterinarians that they employ. This in turn would make it more difficult for them to manage the out-of-hours rota. I recognise the difficulties here and accept that this may be another factor driving veterinary practices to become larger.
- 4.41 The debate as to how veterinary practices should provide emergency cover is a matter for the profession. It involves issues of professional ethics and responsibility as well as having very real practical implications for veterinary businesses, particularly those located in more remote parts of the country. The RCVS recognises these implications and is clarifying its advice. Some farmers may have an unrealistic expectation of how much it costs to provide 24/7 cover. Traditionally, practices have subsidised the provision of emergency services. For some, costs are increasing due to longer travelling times. Whatever the outcome of the debate, veterinary practices are entitled to charge a realistic price for providing an emergency service. Customers need to recognise that emergency call-outs will be more costly, just as householders appreciate that an emergency call to, say, a plumber will incur a premium charge.
- 4.42 More generally, some practices may fear that employing veterinary para-professionals will reduce their earning power and weaken relationships with clients. To overcome this concern, veterinary practices should ask their customers how they feel services could be improved. Greater use of para-professionals should allow veterinary surgeons to concentrate on providing the more business-focused advice that farmers seek, including on preventative medicine and herd health planning. Vet practices that do not go down this route may become uncompetitive, locked into a pattern of providing routine services that could be more efficiently and cheaply provided by suitably trained technicians.
- 4.43 Much depends on whether veterinarians are prepared to seize the initiative and take ownership of this issue. It is in their interests to do so. Change in this area is probably inevitable. Major customers for veterinary services in government and the farming industry are pressing for it. The challenge for the profession is to proactively shape its future, ensuring the right safeguards are in place, rather than cling on to the status quo. This would enable it to play a key role in the training of veterinary para-professionals and in setting standards and accrediting qualifications.

An American business model: Kansas

The Abilene Animal Hospital in Kansas has six partners, each providing species-based expertise and a specific business-focused skill (e.g. HR, IT, finance, marketing), thereby negating the need to employ a practice manager. All the partners receive the same salary, irrespective of how much business they bring into the practice. The practice is able to adjust its services to follow business trends. It puts its success down to having more partners, more technology and good links to diagnostic services. The key success factor is the entrepreneurial nature of practice and the diversity of services offered.

- 4.44 The veterinary profession should take a leading and progressive role in the development of training and career structures in veterinary services. Defra, the RCVS, the BVA, the NFU and Lantra should work together to investigate the scale of and demand for veterinary technical services for farm animals and the food sector, identifying training needs and obstacles to the wider development of specialist technicians and para-professionals. This work could be done under the auspices of the proposed Veterinary Development Council (see Chapter 6).

Chapter 5: The Public Good Functions of Food Animal Veterinarians

- 5.1 Throughout much of the 20th century, the wider public role of veterinarians was defined in terms of boosting agricultural productivity. That function remains important, but the UK government now sees this as a private, rather than a public, objective. Other public good functions have come to the fore, and these are the basis on which a private profession must stake its claim to the public privileges it enjoys. These functions include: animal welfare; the prevention, detection and control of animal diseases; and public health and food assurance.
- 5.2 Veterinarians see themselves as essential to these functions, and I am convinced that they should be. However, it is not clear that their contribution is widely recognised or publicly understood. The public does not realise that veterinarians, through their relationships with clients, are central to animal welfare, bio-security, disease prevention and surveillance, and therefore play an important role in protecting public health and assuring the safety and quality of food. The profession's public good arguments and functions need to be renewed, and veterinarians should be more explicit about the part they play in delivering these benefits. Even amongst themselves, there is a lack of clarity regarding veterinarians' specific responsibilities for these public good functions.
- 5.3 To give some illustrative examples, a leading veterinarian who is a trustee of the British Veterinary Association's (BVA) Animal Welfare Foundation has referred to the veterinary profession's role 'as the principal and leading source of trusted advice on animal welfare in society'.⁴³ Yet the government's Animal Welfare Delivery Strategy makes no mention of veterinarians.⁴⁴ Later in this chapter, I examine the fundamental disagreement between the government and the veterinary profession on the role of private veterinarians in disease surveillance. Public health is also widely recognised as the 'Cinderella' of UK veterinary education and practice.

Animal welfare

- 5.4 The Animal Health and Welfare Strategy recognises that good health and welfare of farmed animals make a major contribution to the sustainability of the livestock industry and calls for an enhanced level of knowledge and skills among all those with responsibility for the care of animals. The Animal Welfare Act puts the primary responsibility for animal welfare firmly on the owner/keeper of the animals, opening up important opportunities and creating new requirements for veterinary practice on farms.
- 5.5 However, the roles, responsibilities and even the basic training and competence of veterinarians in relation to the welfare of farm animals are unclear. All veterinarians make a formal commitment, on joining the Royal College of Veterinary Surgeons (RCVS), to the welfare of animals in their care. That applies as much to farm animals as to pets. However, there is little information or guidance on how this commitment is or should be carried out.

⁴³ Wensley, S., *Veterinary Record*, 2007, Vol. 161, pp.541-542

⁴⁴ Defra, 2007.

- 5.6 The veterinary profession has been criticised for having an outmoded concept of welfare that equates good welfare with good physical health.⁴⁵ The Animal Welfare Act establishes a duty of care on owners and keepers of animals that goes beyond simply the avoidance of suffering. This opens up opportunities and, indeed, a need for veterinarians to advise animal keepers on positive steps they can take to care for their animals. The first strategic goal of the government's Animal Welfare Delivery Strategy is to ensure that 'Those who care for or have contact with animals have the necessary skills and knowledge to ensure appropriate standards of animal welfare'.⁴⁶
- 5.7 Of course, it is essential that veterinarians themselves are appropriately trained in this regard. Recently, the BVA Animal Welfare Foundation, having identified a gap in the training of veterinarians, provided pump-priming funding for the establishment of animal welfare lectureships at Bristol, Liverpool and Glasgow, with some provision to support teaching at the other vet schools. The Foundation also holds an annual two-day conference for graduates. These are admirable initiatives, but one is nevertheless left with the impression that training remains patchy and optional. I have some doubt that new graduates are sufficiently prepared to handle the difficult judgments and dilemmas that animal welfare issues can pose.
- 5.8 Veterinarians must understand which factors in the conditions, treatment and rearing of animals are likely to compromise their welfare, and which are conducive to high standards of welfare. This understanding should inform their routine advice to farmers. Veterinarians have a responsibility to draw farmers' attention to any welfare problems and the steps needed to deal with them. Veterinarians also have a role in showing farmers how improved welfare can enhance the profitability of their business. The Chairman of the Farm Animal Welfare Council (FAWC) presented to my working group a framework for linking together high welfare standards, product development and marketing as a value-added strategy for livestock farmers. Relating high welfare standards as expressed, for example, in quality assurance schemes to the condition of farm animals, farm health planning and the design of livestock systems seems an important area in which veterinarians could promote their expertise to farmers.
- 5.9 According to FAWC, the single most important influence on the welfare of farm animals is stockmanship – livestock keepers' knowledge, skills and experience of animal husbandry. In the light of its concerns about the quality of British stockmanship, FAWC has recently produced a report on stockmanship and farm animal welfare, which looks at how education and training in stockmanship could be improved.⁴⁷ The report found little evidence of formal training: instead, there was a strong tradition of learning on the job and handing down knowledge and skills, and a strong preference amongst livestock keepers for on-farm training.
- 5.10 FAWC makes a number of recommendations, including:
- 'the livestock industry and Government [should] develop improved accredited programmes for education and training of stockmen' (para. 75)
 - 'vocational qualifications for livestock farmers and stockmen should be simplified so that training and certification is largely undertaken on-site' (para. 76), and

⁴⁵ Vet Record 2007, Vol. 161, pp.541-542

⁴⁶ Defra (2007), Animal Welfare Delivery Strategy, para 3.1.

⁴⁷ FAWC (2007), Report on Stockmanship and Farm Animal Welfare.

- ‘the universities, land-based colleges, the Royal College of Veterinary Surgeons and the livestock industry should keep under review the provision and supply of professionals with knowledge of animal husbandry to educate and train stockmen’ (para. 79).

- 5.11 It seems to me that there are considerable opportunities here for the veterinary profession to extend its role in the provision of training to livestock keepers. FAWC itself envisages farm veterinarians playing a leading part in the general upgrading of stockmanship.
- 5.12 Structured and progressive in-house training of stockmen by farm veterinarians is becoming more common in larger livestock farms, especially in the poultry, pig and dairy sectors. Specific areas covered include farrowing or calving, foot or beak trimming, and body condition scoring. Several tools are also available for use by veterinarians to support on-farm training, such as interactive CDs.
- 5.13 FAWC concludes that ‘Veterinary surgeons have a particularly valuable role in educating and training stockmen about animal husbandry’. However, they also express concern about ‘a potential shortage of professionals capable of providing leadership and training in animal husbandry’ due in part to reduced emphasis on husbandry skills in the formation of veterinarians.⁴⁸
- 5.14 The role of the veterinarian should largely be a positive one, based around giving advice and training to livestock keepers. If unacceptable conditions or cases of animal suffering are encountered, livestock keepers should be reminded of their legal duties and warned of the possibilities of prosecution. Formal enforcement of minimum animal welfare standards is the responsibility of Animal Health, local authorities and some animal welfare charities. In compliance with European legislation, Animal Health carries out both random welfare checks and targeted checks in response to welfare complaints. Since 2007, the agency has also carried out cross-compliance inspections (i.e. inspections to check that those receiving farm payments under the Common Agricultural Policy are in compliance with minimum EU legal standards for animal welfare).
- 5.15 I have found that there is some confusion between the profession, farmers and regulatory bodies about how inspections are handled, how private veterinarians work with enforcement agencies and how they prepare for potential prosecutions. I believe that all would benefit from a mature debate on roles and responsibilities.
- 5.16 The roles, responsibilities and training of veterinarians in the welfare of farm animals are unclear. I invite FAWC to undertake a review of the role of veterinarians in farm animal welfare, including their undergraduate training, their regulatory and surveillance responsibilities, and their potential advisory, training and developmental roles.

⁴⁸ para.78.

Combating animal disease

- 5.17 Private veterinarians should play a broader public role in the prevention, detection and control of animal disease.

Biosecurity

- 5.18 Responsibility for biosecurity lies with the livestock farmer, not just during disease outbreaks but at all times. Due to their close involvement with livestock keepers and knowledge of animal diseases, private veterinarians are best placed to promote and advise on biosecurity. This will mean reviewing and understanding the potential means by which disease might enter a farm holding, and taking steps to mitigate the risks. The benefits are not just to the particular livestock keeper but also those in the surrounding area whose flocks and herds might be at risk through subsequent local spread of the disease.
- 5.19 Disease control legislation imposes biosecurity requirements for the movement and transport of farm animals and when animals are gathered together such as at markets or shows.⁴⁹ But statutory biosecurity requirements on farm only apply when there is an outbreak of notifiable disease. Surprisingly, there is no body of law that lays down formal duties on livestock keepers to maintain minimum biosecurity standards. This means that there is no scope to make biosecurity standards a cross-compliance condition for receipt of farm payments under the Common Agricultural Policy (as there is for reinforcing minimum welfare and environmental standards).⁵⁰
- 5.20 An amendment to the Animal Health Act 1981 made in 2002⁵¹ introduced a responsibility on Defra's Secretary of State to prepare guidance on the appropriate biosecurity measures to be taken in relation to foot-and-mouth disease and such other disease as the Secretary of State by order specifies. This advice, which applies to all exotic disease outbreaks, has been published on Defra's website⁵² and applies to everyone who enters a farm or premises with farm animals or enters land used for grazing or keeping farm animals.
- 5.21 The guidance describes the benefits of good biosecurity and sets out practical measures for minimising the spread of diseases between different premises via contaminated clothes, boots, vehicles and equipment.

'Biosecurity' is the prevention of disease-causing agents entering or leaving any place where farm animals are present (or have been present recently). Defra guidance leaflet.

Defra also provides guidance on checking the health status of animals being brought on to a farm. This stresses the importance of farmers making a herd/flock plan with their veterinarians. Farm health planning provides a specific means of linking consequent improvements in animal health and welfare to improvements in farm productivity and food quality, and is discussed in detail in Chapter 6.

⁴⁹ The Disease Control (England) Order 2003, the Transport of Animals (Cleansing and Disinfection) (England) (No. 3) Order 2003 and the Animal Gatherings (England) Order 2006.

⁵⁰ The Disease Control (England) Order 2003, the Transport of Animals (Cleansing and Disinfection) (England) (No. 3) Order 2003 and the Animal Gatherings (England) Order 2006.

⁵¹ Animal Health Act 2002, s.16.

⁵² www.defra.gov.uk/animalh/diseases/pdf/biosecurity_guidance.pdf,
<http://defraweb/animalh/diseases/pdf/biosecleaf.pdf>,
http://defraweb/animalh/diseases/pdf/bio_poultrykeep.pdf

- 5.22 Good biosecurity makes sound business sense, as well as being a collective and public good. The University of Reading has produced cost/benefit models⁵³ that estimate the costs associated with various diseases and the benefits of preventing or treating them. The models allow the user to input farm-specific details, and can be used as a demonstration tool to farmers. The risk of costly incidents of disease has been recognised for many years, particularly in the pig and poultry sectors, and thus levels of biosecurity tend to be high in the larger, integrated pig and poultry enterprises. Other sectors have placed a greater or lesser emphasis on preventative medicine over the years.

Surveillance

- 5.23 The UK Veterinary Surveillance Strategy, published in October 2003, describes veterinary surveillance as a ‘package of activities which provides early warning/prompt detection of animal health and welfare problems’ and ‘helps minimise the economic, social and environmental damage that can be inflicted by outbreaks of animal diseases’.⁵⁴ Veterinary surveillance does not only apply to the traditional infectious diseases but also to newly emerging ones and incidences of chemical contamination/toxicity.
- 5.24 The strategy states that the government’s vision is of ‘a future where the risk of significant damage to human health, animal health and the rural economy is mitigated by the provision of faster and better informed disease control measures. A future where we are identifying emerging risks faster; because our surveillance activity is fully justified, open, transparent, effectively prioritised, and founded on surveillance data of known quality’.⁵⁵
- 5.25 For government, surveillance information is vital for those devising policy on animal health and welfare, food safety, and human health protection. For the farmer, surveillance provides evidence which they and their veterinarian can use to decide how best to protect the health of their animals. However, there seems to be a divergence of opinion between the veterinary profession and Defra about what information should be collected, how it should be collected and how it should be disseminated. I cannot rule on the essential rights and wrongs of this issue but it may help if I highlight those areas where I feel action could be taken to better define the role of the vet.
- 5.26 Currently, veterinary surveillance is conducted in a variety of ways and by a variety of people and organisations. There are private laboratories and some veterinary practices with laboratory facilities that conduct testing and therefore hold disease information on in-house databases. Surveillance is also conducted through the National Animal Disease Information System (NADIS) which consists of a private network of veterinary practices and UK veterinary schools.
- 5.27 Farmers and private veterinarians often submit samples or dead animals for testing/examination to the Veterinary Laboratories Agency in England and Wales and to the Scottish Agricultural College in Scotland. The Meat Hygiene Service (MHS) also compiles data regarding the post-mortem inspection of all animals slaughtered for human consumption. The Veterinary Medicines Directorate coordinates surveillance programmes for monitoring both the presence of residues of veterinary medicines in food and unexpected reactions to veterinary medicines in both animals and people, via the Suspected Adverse Reaction Surveillance Scheme.

⁵³ www.reading.ac.uk/fhpmmodels

⁵⁴ para.1.1.1.

⁵⁵ Executive summary.

- 5.28 Defra also funds surveillance and control measures for the monitoring of Salmonella and other food-borne toxins/pathogens including Melamine, Botulism and Campylobacter. Official Veterinarians are paid by the government to carry out disease surveillance on its behalf. TB in cattle is perhaps the best-known example.
- 5.29 The Veterinary Surveillance Strategy sets out to combine all of these different and varied forms of surveillance. It has resulted in the formation of the Rapid Analysis and Detection of Animal-related Risk (RADAR) IT system. This draws together existing sources of data to enable the identification, analysis and tracking of disease threats. It also aims to provide a channel for surveillance data which can be accessed by interested parties.
- 5.30 The RCVS provided the working group with a paper outlining its concerns about the existing arrangements for surveillance. The College sees the strategy as a welcome step towards more positive and planned arrangements for gathering and using surveillance information. However, it argues that collecting additional information from targeted surveillance (e.g. from visits to test for bovine TB) would help to form a more reliable picture of the incidence of endemic disease. The College feels that Defra is reluctant to use information based on clinical observations as distinct from laboratory tests. Such information, they suggest, could be amalgamated relatively easily from large numbers of practices, with incentives offered to ensure accurate and timely submission of reports.
- 5.31 The RCVS also notes that farmers are likely to associate surveillance with compulsory interventions by government. They ask if there is scope for the profession to increase its role in educating and training farmers to play an active part in disease surveillance. The RCVS points to successful commercial incentives in the dairy sector which helped secure a reduction in bulk milk cell counts and asks if this might be a model in other areas of disease surveillance.
- 5.32 The working group considered surveillance at its second meeting. There was some concern among members that the strategy was not harnessing the sort of information that would be useful to the livestock industry, and that achieving this could require a more sophisticated system of data collection. It was felt that some useful information was missing, and that the information that was being collected was more likely to be of interest to Defra than to veterinary practices. Although Defra pointed out that RADAR helped to analyse trends, it was clear from the discussion that the system was not seen as providing much information of value to veterinary practices.
- 5.33 RADAR excludes a number of types of veterinary surveillance, including post-mortem data provided by the MHS. While private veterinarians complained that they could not access this important data, it seems that even within government this information is hard to access. Government is viewed as traditionally concentrating its resources on surveillance for notifiable rather than non-notifiable diseases. However, there are government-funded surveillance schemes already in operation for non-notifiable diseases/conditions (Campylobacter, Botulism, Melamine in feed) and so perhaps government should become better at promoting its work to the veterinary profession.
- 5.34 There are two categories of surveillance. Targeted surveillance is designed to answer a specific question about a defined disease or condition, using agreed mechanisms for detection. Scanning surveillance monitors an animal population of concern in order to detect the undefined or the unexpected. The role of the private vet is not defined in the Surveillance Strategy, an omission that should be addressed. There is, after all, a certain natural division of labour: the private vet patrols their own patch and scrutinises the

animals in their care, while the government scans threats to the national herd and food consumer. This naturally gives rise to a divergence of interests, with private veterinarians more interested in endemics while the government is more concerned with zoonoses and exotic diseases.

- 5.35 The working group discussions did not come up with clear answers to the questions posed by the RCVS paper. The challenge for government is to prioritise the surveillance that it is prepared to commission from private veterinarians. The challenge for the veterinary profession is to find ways of selling the benefits of good quality surveillance information to their clients and to secure their participation.
- 5.36 The initial suspicions that sparked many of the main exotic disease investigations were initially reported by the farmer either directly to Animal Health or to their private veterinarian who then reported it to Animal Health. Although the farmer in some of these cases called in the private veterinarian, who then subsequently reported suspicion of notifiable disease, it must not be overlooked that the farmers themselves proved valuable in detecting illness within their animals. It is a matter of dispute whether there is a need for private veterinarians to visit farms more frequently in order to detect notifiable diseases that the farmer has missed. (This dispute overlooks the potentially much more important role of veterinarians in advising/training farmers to more effectively spot the early signs of sickness.)
- 5.37 The preliminary findings of the Vet Sentinel Network Project (currently unpublished) are of interest. The network paid both farmers and veterinarians for their participation. Although no complaints were received from farmers, veterinarians regularly commented that the pay, set at the Official Veterinarian rate, was too low to justify their continued or routine engagement. Nevertheless, most veterinarians did participate for most of the duration of the project.
- 5.38 Initial analysis of this project suggests that it is unlikely to be cost-effective to pay for specific visits to enough farms on a regular basis to capture routine data on disease levels. However, it is hoped that data gathered by veterinarians during visits carried out in the course of their normal business might yield useful information for surveillance purposes. Taking a wider view, the evidence on disease incidence (and how this changes) generated during farm health planning can be collated and used to supplement other surveillance outputs in order to inform decisions about future investment in research and development.
- 5.39 It is imperative that government and the veterinary profession reach a common position on surveillance. There must also be recognition that surveillance data is available and can be utilised for commercial benefit. Although much work has been done to deliver the ideals of the Surveillance Strategy, more clearly needs to be done; not only to advertise the fact that a wide range of surveillance is being carried out but also to ensure that the information generated meets the needs of both industry and government.

Contingency planning

- 5.40 A key public good role of veterinarians is the fighting of exotic diseases that threaten the food supply or public health. The lead responsibility here is with the Animal Health Agency. The government recognises that in medium to large outbreaks of notifiable exotic disease, government veterinary resources will be overwhelmed, and it will become necessary to draft in additional veterinarians from other state veterinary services or from private practice.

- 5.41 Approximately 90 private veterinarians (equivalent to about a third of Animal Health's veterinary complement) have been recruited and trained to assist in an outbreak, the aim being to utilise their local knowledge by deploying them to work closely with the administrative teams based in the local disease control centre. These contingency veterinarians proved valuable during the 2007 outbreaks of Foot and Mouth and Highly Pathogenic Avian Flu.
- 5.42 The role of additional private veterinarians during a disease outbreak has not been formalised and my understanding is that this would only be specified as and when an outbreak is of such a scale that significant numbers of them need to be recruited to act as Official Veterinarians. Given their extensive experience of dealing with farmers, it would be unwise not to make use of their diagnostic and on-farm communication skills. There is, however, a risk that, where the outbreak involves a disease that does not stop or at least reduce the daily work of the private veterinarian, they may be less willing or able to assist.
- 5.43 I understand that Animal Health and the BVA have for some time been engaged in a major fees review that includes agreeing a daily rate for private veterinarians working as Official Veterinarians during outbreaks of animal disease, along with a clear statement of terms and conditions such as allowances and mileage rates. I consider this to be an important development and believe that Animal Health needs to give further consideration to how private veterinarians can be engaged to deliver 'on the ground' assistance during large outbreaks. In particular, the anticipated role of private veterinarians in an emergency should be clarified.
- 5.44 The way private veterinarians deliver services on behalf of government is currently under review in the form of Animal Health's Official Vet Reform Programme. The primary objective of the programme has been to formalise the customer and business relationship between Animal Health and private veterinarians appointed to act as Official Veterinarians. The programme has also reviewed and improved the communication channels between the agency and Official Veterinarians, and is improving the consistency and standard of training given to new appointees. The programme will not review the nature or volume of work that private veterinarians undertake on behalf of Animal Health. During my discussions with the profession a number of areas of work were identified where increased input from private veterinarians might lead to improved efficiency. There is a case for a wider review.

Public health and food assurance

- 5.45 The key function of food animal veterinarians is to protect public health and assure the safety and integrity of food through helping to combat zoonotic diseases of livestock and food-borne health risks. As with the other public good functions, there is a core regulatory responsibility which in this case is largely fulfilled by the MHS.
- 5.46 The MHS is an Executive Agency of the Food Standards Agency (FSA) and is responsible for the regulation of fresh meat premises. It employs about 460 veterinarians, either directly or via service providers. The regulatory duties of the MHS – which are focused on food safety – begin at the abattoir as livestock enter the food processing system. However, pursuing an anticipatory and preventative approach to food and public health risks requires a holistic 'farm-to-fork' perspective to risk assessment, mitigation and reduction. This in turn requires broader and more co-ordinated involvement of veterinarians in both the private and public sectors, and co-operation across the farm animal health/food safety divide. It is

unacceptable that the attention of one stops at the farm gate and of the other starts at the abattoir door, when it is the integrity of the human food chain that is at stake.

- 5.47 Conservatism in the relationship between farmers and veterinarians has contributed to the complacency surrounding this unsatisfactory state of affairs. As we have seen in Chapter 3, comments made by the National Farmers' Union (NFU) suggest that they see the role of the veterinary practitioner as largely ending at the farm gate. In dairy practice, though, where the food product is visible and subject to hygiene controls on the farm and payment based on quality parameters, there has been scope for the veterinary practitioner to engage with the wider issue of food quality – milk bacterial count and mastitis control being the most obvious examples.
- 5.48 However, in sheep and beef cattle production farmers have typically been paid on a per-head basis at market or in line with some other basic characteristic (such as dressed weight) at slaughter. Where, as in the past, this was compounded by a per head subsidy, the UK livestock industry was under little pressure to lift its game to develop a high quality end product. This made the traditional customer base in the UK less discerning and accounts for a rather blinkered attitude to the potential for veterinary input to assure product quality.
- 5.49 For its part, the veterinary profession has been too complacent in 'giving the client what they want' rather than showing them where they ought to be. Indeed, just as the farmer might imagine his customer to be the auctioneer or the abattoir manager, the veterinarian may be in danger of thinking that the end customer for his/her services is simply the farmer rather than the consuming public.
- 5.50 However, the technical and legal requirements for assuring the safety and quality of food are expanding, with consequences for the demand for veterinary skills and knowledge along the food chain. Food safety concerns figure ever more strongly in public policy, and many of the intractable problems – such as Salmonella, Campylobacter and E-coli – cannot be solved through a narrow focus on animal or public health.
- 5.51 There is, moreover, a commercial imperative as well as a public good logic in veterinarians responding to the demands of the food chain. The proportion of the value captured by basic agricultural commodities in the food chain continues to diminish. Farmers need to be assisted in pursuing quality niches and value-added strategies. Retailers' desire to show links between producer and product and so establish their 'local', 'organic', 'green' or 'welfare-friendly' credentials represents considerable opportunities. Veterinarians have a potentially crucial role to play in helping ensure the connection between healthy animals, public hygiene and safety and the healthy, quality-assured food that consumers want.
- 5.52 There is thus considerable scope for veterinarians to give farmers better, broader advice that will help them add value to their products as well as taking a more joined-up approach to animal welfare. This advice could help farmers meet quality and retail standards, keep up with the technical and legal requirements placed on them as food chain suppliers and, generally, better understand retailer and consumer concerns and expectations. The food chain also offers veterinarians opportunities to diversify, seeking out other clients, including retailers and food processors.

- 5.53 However, there are major obstacles to be overcome to realise these strategic opportunities and to turn the farm-to-fork rhetoric into reality. The most fundamental is that the centralised development of the MHS has led to an operational and functional separation from veterinary practice. This has created a cultural and organisational gulf between animal health and public health veterinarians in the food chain: one group is oriented to farms, privately and locally organised, and largely UK-trained; while the other is oriented to meat premises, publicly and centrally organised, and largely foreign-trained. If co-operation and co-ordination of veterinary perspectives is to be achieved across the food chain, deliberate steps must be taken to bridge the gulf between the MHS and private veterinarians. These could include active liaison, shared commitments to joint training and a programme of professional exchanges.
- 5.54 Meanwhile, the drive for greater co-ordination and sharing of information along the food chain gathers pace. The recent EU food hygiene regulations are underpinned by a farm-to-fork approach to food safety and by the concept of food chain information. This places a growing obligation on food business operators to obtain information about and make a judgment on the health status of animals which are destined to enter the food chain. Their ability to do so will depend heavily on the availability and organisation of information about the animal health and welfare status of a livestock holding. While this currently applies only to the poultry and pig industries, there are plans to extend it to cover cattle and sheep holdings in 2010.
- 5.55 Another requirement in the regulations – to send back post-mortem data on animals from the abattoir to the producer and the producer's veterinarian – should also help forge links along the food chain and promote constructive exchanges. I have seen that at least one private veterinary group is actively planning how they will relate abattoir information back to their farm clients and to their food retailing customers. At the moment, however, there is no generalised system that would allow the information to be shared in either direction along the food chain. The MHS is addressing the issue with the development of a new database.
- 5.56 While the requirement to fully implement the new regulations by 2010 should mean that information about animal health and food quality will flow more easily, simply developing databases is not enough to secure the full public and commercial benefits. Veterinarians need to see themselves as providing a valuable and unique service for the food chain. To achieve this, additional training and awareness-raising activities may be required to ensure that veterinarians fully understand the new context and the potential opportunities it creates.
- 5.57 Veterinarians have a crucial role in making the connections between healthy animals and healthy food. The MHS, the FSA and the BVA need to consider how to promote mutual exchange and common training between public and private veterinarians to achieve co-ordinated veterinary perspectives on the food chain.

Chapter 6: Unlocking Potential – Models for Change

Renewing relationships with government and farmers

- 6.1 The changing agenda for veterinary services and the advent of new governance models are leading to changing roles and relationships between private veterinarians and government on the one hand and veterinarians and their clients on the other.
- 6.2 Through the 20th century, there was a largely hierarchical relationship between government, the veterinary profession and the farmer. Veterinarians derived their authority partly from their professional expertise and partly from their role as agents of the state. The proxy use of private veterinarians enabled state power to be extended deep into the private world of UK farming, in the cause of eradicating first major epidemic diseases of livestock and then major endemic diseases that constrained livestock productivity and threatened public health. This hierarchical system for farm animal disease control was in place prior to the establishment of the post-war framework of interventionist farming policy and was absorbed into that framework.
- 6.3 The period since the 1980s has seen a steady retreat from that interventionist farming policy, and in 2004 this changing tide swept through animal disease control with the publication of the Animal Health and Welfare Strategy. The strategy laid responsibility firmly on the livestock keeper, and signalled a major shift away from government taking the lead.
- 6.4 The move away from the hierarchical relationship might suggest that veterinarians would no longer be the linchpin in animal health policy. Arguably, though, these developments call for new leadership beyond government and are dependent upon the effective availability – to business and public agencies – of good professional advice and expertise. They therefore present a considerable challenge and opportunity for the private veterinary profession, none more so than the Responsibility and Cost Sharing agenda.

Responsibility and Cost Sharing

- 6.5 Government proposals on Responsibility and Cost Sharing are still taking shape but, with Defra expecting a draft Bill in early 2010, the profession is facing fundamental changes in the way it interacts with its main customers, the livestock industries and government. Although the devolved administrations in Scotland and Wales and Defra are taking differing approaches, these initiatives build on principles set out in the Animal Health and Welfare Strategy and have the potential to transform the management and to some extent the delivery of livestock health services across Great Britain. Through the sharing of responsibilities, government wants to achieve better management of animal disease risks so that the overall risks and costs are reduced and rebalanced between government and industry. Industry will assume a greater responsibility for developing policy and deciding what forms of intervention might be needed. Farmers will have greater ownership of the risks, but will face less of a regulatory burden.

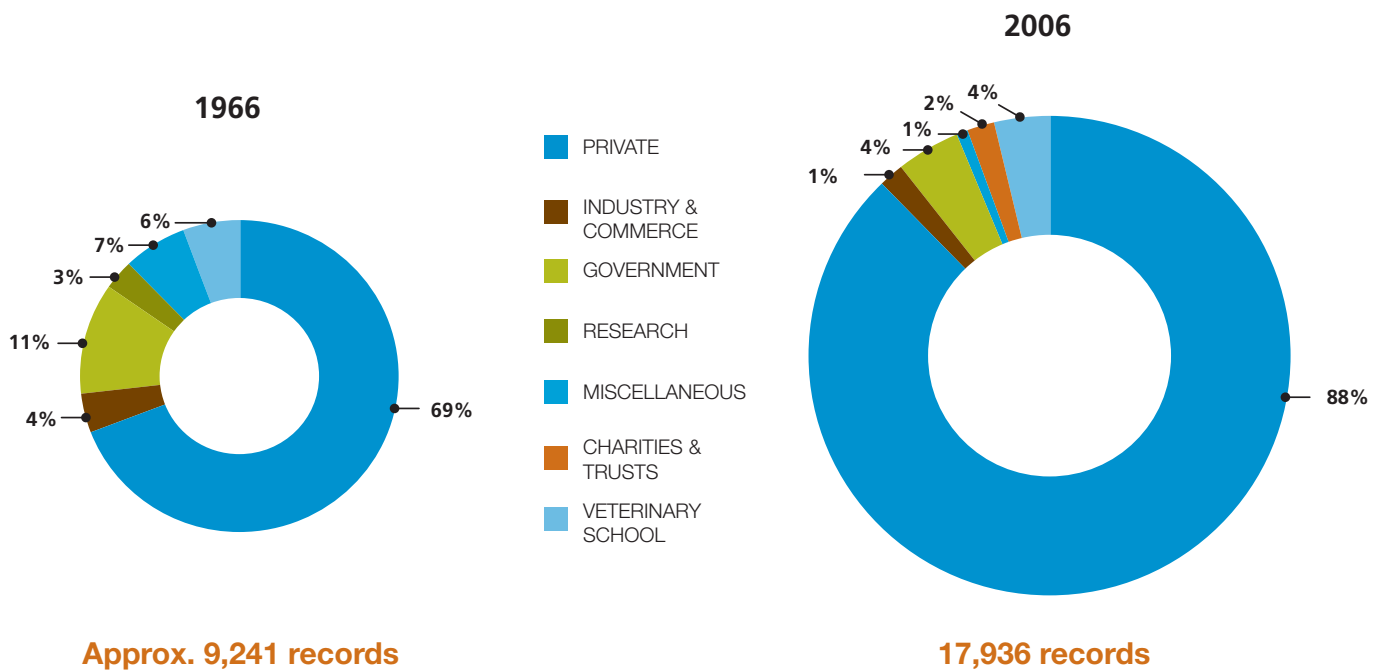
- 6.6 Our working group heard from Defra about a range of different governance models that could operate when Responsibility and Cost Sharing is introduced. The Defra consultation, issued on 30 March 2009, put forward proposals for a new independent body for animal health which will have responsibility for all animal health policy in England. It is proposed that a strategic board of between eight and ten part-time independent people will govern the body. The board will need to command the confidence of a wide range of stakeholders and the public. Views are invited on whether the body should be a non-ministerial department or a non-departmental public body. Animal welfare policy would be retained within Defra, but the new body would be legally required to have regard for animal welfare concerns in fulfilling its animal health functions. The proposals also include detail on raising a levy via an agricultural livestock registration system. Whichever model is chosen, the veterinary profession needs to see where expert advice fits in, and be able to provide this in a clear and consistent way. It is vital that the profession plays a full part in advising and guiding the new body.
- 6.7 The devolved administrations have been closely involved in policy discussions on Responsibility and Cost Sharing, together with their key industry stakeholders. They are still reviewing the available options, but wish to ensure continued co-operation and co-ordination across the UK. The Animal Health agency will in any case continue as a separately managed delivery organisation with a capability across Great Britain. Although UK policy on Responsibility and Cost Sharing is still in development, changes to financing arrangements are unavoidable. As part of the review of European animal health policy, the European Commission is set to table proposals in 2010 on a mandatory framework for Responsibility and Cost Sharing.

Veterinarians' relationship with government

- 6.8 The relationship between government and the veterinary profession is complex and longstanding, but has come under strain in recent years. There is an atmosphere of mutual recrimination around the UK's patchy record in animal disease control. Changing governance models have inevitably brought upheaval. Government has considerable interest in the continued existence of a network of flexible veterinary practices that can meet the needs of their customers and deliver broader public good functions. Government also relies on local veterinary practices to deliver certain technical or enforcement functions, which contribute to national disease control programmes. It is important that the relationship between the government and the veterinary profession be renewed, and placed on a sounder footing as a partnership that more clearly recognises respective roles and mutual dependences.
- 6.9 Some of the tensions are inherent in the relationship between a small-scale, private-based profession and big government (the relationships with the devolved administrations seem noticeably less fraught). In the post-war years these tensions were largely resolved through government acting as patriarch for the profession – setting policy, making regulation, directing and paying for task-based rather than professionally-based services. The Ministry of Agriculture, Fisheries and Food was seen as the sponsor of the veterinary profession within government, responsible even for veterinary manpower planning. In many respects, the Chief Veterinary Officer was seen as the leader of the profession, and not just within government. This hierarchical relationship was held in place by a much greater proportion of veterinarians being employed in government and a much greater proportion of veterinarians' income coming from the public purse than is the case today. That relationship could have continued to evolve as it has developed in the medical field

but proposals to establish a veterinary version of the NHS put forward in the early 1960s did not materialise.⁵⁶ Instead, the growth in the vet profession since then has been entirely in the private sector which now represents 88 per cent of all veterinary activity in the UK. At the same time the whole centre of gravity of the profession – in private practice, teaching and research – has moved away from farm animal concerns towards the care and treatment of companion animals.

Figure 6.1: – The changing profile of the veterinary profession in the UK



Source: RCVS survey, Vet Record 1966

6.10 To meet its legal obligations while not expanding its own veterinary establishment, government has accessed necessary veterinary expertise from the private sector. It relies on about 5,100 practising veterinarians in Great Britain to support delivery of a range of statutory requirements such as farm animal disease control and food assurance.⁵⁷ However, this has not been an entirely happy relationship. On the one hand, government has been challenged in administering and quality assuring services provided by a diverse group of small enterprises. In doing so, it has not always been sensitive to the small business structure of the veterinary profession or conscious of the effects of its own monopoly-client position. On the other hand, some of the veterinary practices that have taken up statutory work may have come to regard long-term government health programmes as a revenue source on which they could depend. The consequence may be dismay when policy changes or strategy switches, as recently occurred on Brucellosis testing. More fundamentally, the task-based and hierarchical nature of the relationship seems not to have fully engaged the problem-solving capacity of private veterinarians as a network of field-based experts, with extensive first-hand knowledge of the state of livestock and in face-to-face contact with farmers.

⁵⁶ MAF (1963), Report on the Working Party set up to Consider a Nationalised Veterinary Service, National Archives, 287/01.

⁵⁷ Animal Health data, 2007.

- 6.11 One legacy of the hierarchical relationship is a lack of a sense of confidence or even competence in government in knowing how to form a mature and constructive relationship with a sector that predominantly comprises self-made professional businessmen and women. Despite new approaches on stakeholder engagement and new structures that separate Animal Health and Welfare policy (Defra) from operational delivery (Animal Health) or diagnostic and research work (Veterinary Laboratories Agency), the relationship with the profession remains uncomfortable. Indeed, it is debatable whether much of the profession even comprehends the new segregations of government with which it occasionally works. On the food assurance side the Food Standards Agency (FSA) is consumer-focused and its responsibilities for regulating fresh meat processing are kept operationally separate from the Meat Hygiene Service (MHS). (I myself struggled with some of these distinctions and still do not understand why Animal Health has nothing to do with farm health planning.) A crucially significant point is that the majority of full-time government veterinarians now sit out in these delivery arms and are themselves increasingly removed from core policy-making.
- 6.12 Defra should be charged to draw up a code of conduct, in consultation with the British Veterinary Association (BVA) and the Better Regulation Task Force, as a guide for government bodies on how to deal with veterinary businesses in ways that respect and do not undermine their status as small private firms.
- 6.13 The old State Veterinary Service had extensive and direct links with the private veterinary profession at various levels, ensuring coordination in operational matters, but these links have become fragmented since the Service disappeared. Liaison between Defra and the BVA is no substitute. It is important that veterinarians in private practice and veterinarians in the delivery agencies do not drift apart. Effective delivery of Responsibility and Cost Sharing in key operational areas is likely to depend on a good working relationship between them, and they have common interests, including common career paths, overlapping skill sets (see Figure 2.6) and shared interests in continuing professional development (CPD). Public veterinarians have a strong interest in private veterinarians fully understanding the technical and legal requirements for animal and public health of the delivery agencies, as private veterinarians are key agents for keeping farmers informed. On my American visit, I was impressed by examples of practical cooperation between veterinarians across the food chain. For example, vet staff of the USDA Food Safety and Inspection Service and the Animal and Plant Health Inspection Service were teaching on summer schools for trainee veterinarians specialising in large animal work, out of an interest that future Official Veterinarians would be well prepared to work hand in hand with their agencies. The UK delivery agencies in conjunction with the BVA should review how they cooperate with private veterinarians in training, professional development and knowledge exchange.
- 6.14 I was also struck by the way in which veterinarians in US in the agricultural, food production and regulatory fields had banded together to form the Food Supply Veterinary Medicine Coalition to promote their common interests. As well as raising the public profile and importance of veterinarians in the safe supply of food, the coalition has pressed for improved training and supply of veterinarians in the food system. The US veterinary profession seems intent on renewing the public good arguments for veterinary medicine and actively countering the otherwise seemingly inexorable drift toward a preoccupation with companion animals. In my opinion, the leadership of the UK veterinary profession could learn important lessons from this example. There is an equal urgency in the UK for the veterinary profession's public good arguments and functions to be renewed. Veterinarians see their expertise as central to animal welfare, biosecurity, disease surveillance and public

health. It is not at all evident that their potential role and contribution to these fields is widely understood or even acknowledged outside the profession. It is time for the profession to be clearer and more assertive in how they can and should deliver these benefits.

- 6.15 It also seems to me that the veterinary profession could usefully review the way it develops and communicates its messages for government. I was impressed by the leadership shown by the American Veterinary Medical Association. Employing a chief executive of considerable experience and standing gives the organisation great authority and continuity. In the UK, it is essential that the veterinary profession position and equip itself as a key player in the development of the Responsibility and Cost Sharing agenda, and is able to exert the fullest possible influence. This is important at a national level through organisations like the BVA, but also at a regional level through locally-based initiatives that could well be led by veterinary practices.
- 6.16 Once a strategic board for Responsibility and Cost Sharing is in operation, the profession should help shape the ongoing agenda and influence long-term developments. Decision-sharing is already evident through the way that the livestock industry and the veterinary profession have worked in partnership with the government to formulate and implement the control of Foot and Mouth Disease, Bluetongue and Avian Influenza. Policies that emerge in this way should enjoy greater shared ownership, and be better proven as to their practicality and economic impact. The proposal for the strategic board to oversee the animal health and welfare budget will open up to scrutiny the process of budgetary decision-making and prioritisation.
- 6.17 Delivery is currently the responsibility of government, but as industry picks up its share of the tab, the cost and quality of the service (whether this is through government agencies, Official Veterinarians or the normal interaction between veterinarian and customer) will come under ever closer scrutiny. All parties can expect to be subject to greater accountability. Priorities and strategies will undoubtedly change. The profession should not underestimate the impact this may have on the way government commissions inspection, certification and other services. Those providing veterinary services must expect to be more subject to such processes as competitive tendering and auditing.

Veterinarians' relationship with the farming and food sectors

- 6.18 The relationship between private veterinarians and farmers must also be renewed. Working group discussions have been noticeable for the lack of a clear endorsement of the veterinary profession's list of concerns about the future of farm animal veterinary services from their primary customer, farmers.
- 6.19 Farmers see a need for a more differentiated service, with more routine functions delegated to veterinary technicians. The National Farmers' Union (NFU) has said that the main concerns expressed by their members are the cost of veterinary services and price transparency. I also get the impression from farmers that veterinarians are too often viewed as 'regulators' whose default position is to seek government intervention (see Chapter 3). I am also worried that, in the eyes of some farmers, some veterinary surgeons do not see themselves as service providers, seemingly wary that preventative work like farm health planning may do them out of business.
- 6.20 Marketing is, therefore, a crucial requirement for veterinary surgeons. Veterinarians need better to understand and anticipate their clients' needs and then demonstrate and sell skills and services. Farmers' expectations are rising due to changes in their commercial

environment, and they are becoming more discerning. In response, veterinarians must become more consumer-centric, finding out from their clients their specific needs and regularly checking they are satisfied. Farmers should want to turn to their veterinary surgeon as a recognised source of expertise in caring for animals and adding value to their business. To secure the custom of farmers, veterinary surgeons need to actively demonstrate a differentiated service that is both more specialised and more competitive.

“We could push ourselves more in the preventative line, but I think we have always had this fear of interfering.” Vet, Aberdeenshire, Provision of Rural Veterinary Services Report, George Street Research

Service quality itself can be an effective means of differentiation, helping to ensure satisfaction and loyalty. This will require marketing and communication skills at a level higher than that which some members of the profession currently have, but these skills can be acquired through training and support from others.

- 6.21 At its most fundamental, Responsibility and Cost Sharing implies putting industry more in control of animal health and welfare policy. To retain its influence, the veterinary profession will have to nurture its connections with livestock sectors, the food industry and other stakeholders. Its advice and leadership will be provided against a background of increased deregulation and an industry-led focus on controlling costs and maintaining standards. The veterinary profession may therefore have to work harder to influence its partners and come up with solutions that rely less on regulation and enforcement, and more on a collaborative approach and expert leadership. To do so, it will need to provide clear and considered expert advice and follow-through options for the delivery of veterinary services. That implies a strengthened capacity for coordination of the profession locally, regionally and nationally. It also calls for a strategic marketing outlook at profession/sector level to complement that at the vet practice/farm level. My proposal for a Veterinary Development Council is meant to provide a structure in which the veterinary profession can work together with its key customers/partners on the strategic development of veterinary services.
- 6.22 The organisation of the various veterinary species interest groups under the BVA umbrella may not always be helpful and their working relationship with some industry sectors appears ill-suited to achieving common health and welfare goals. In their defence, these organisations arose principally as interest groups for veterinarians to improve their clinical practice in a period when individual animal treatment was largely accepted and expected. Their role and function should be reviewed to ensure that they offer a basis for a modern, customer-oriented system of specialisation.

A Veterinary Development Council

“...we never really think of ourselves as businessmen”. Vet, Aberdeenshire, Provision of Rural Veterinary Services Report, George Street Research

- 6.23 Currently in the UK, professional regulation and professional development are separated within health professions such as medicine and dentistry. Regulation is controlled by a registering authority which determines who is fit to practise. The regulating authorities are distinct from the institutions that promote the development of the profession. The UK veterinary profession, however, is something of an anomaly in not having a separate body responsible for professional development. This may have impeded the long-term strategic

progress and development of the profession. For example, veterinary medicine has been very slow and conservative in its approach to the establishing of specialist practitioners distinct from general practitioners. Further, whilst other health professions have actively encouraged and promoted the establishment of para-professionals to perform roles that were previously the exclusive domain of the traditional professional, veterinary medicine also lags behind in this regard. This has important consequences for the veterinary profession's ability to meet and anticipate consumer and public demand for the services and expertise it can provide.

- 6.24 To overcome these shortcomings I propose the establishment of a Veterinary Development Council, charged with guiding the long-term development of vet services. This would supersede the present Vets and Vet Services Working Group. It would bring together representatives of the professional bodies for veterinary services, the major customers/clients for these services and those who provide veterinary training for both professionals and technicians. Inclusion of the demand side (from the private sector as well as public sector clients) is vital. The element I find lacking in the present system is any structure for articulating the demand for veterinary services. This is a crucial flaw that lies behind many of the problems I have come across during my chairmanship. Given the shifts in responsibility to the animal keeper spelt out in the Animal Health and Welfare Strategy and to the farming and food sectors prescribed by Responsibility and Cost Sharing, it could become a fatal flaw if not addressed strategically and audaciously.
- 6.25 The Veterinary Development Council would establish a consensus on the future of demand for veterinary services with the aim of creating a clear framework within which to consider how that demand should be translated into the training and professional development of veterinarians, and the appropriate development of the roles of specialised veterinarians and veterinary technicians. As well as pursuing this national-level agenda, it should also promote a positive animal health and development agenda at local and regional levels, encourage good practice on farms and in food businesses, and promote the importance of veterinary expertise in practice.

Animal health and development

- 6.26 Achieving significant improvements in animal health and realising the economic benefit calls for coordination across farms. Here is a major opportunity for veterinarians to take the initiative, in collaboration with farmer groups, industry bodies and regional and delivery agencies. Farm health planning may be an important component and I review this below. While farm health planning focuses on improving the animal health status of individual farms, it should also promote coordination as veterinarians draw on their knowledge of disease patterns on similar holdings and in the surrounding area to advise individual farmers on preventative measures. Bigger and more extensive benefits may be achievable through the active coordination of groups of producers. In principle, the focus of such coordination within an area or sector could be improved biosecurity or public health or contingency planning or market developments, which would necessarily engage a range of other different partners.
- 6.27 Governments and the English Regional Development Agencies have funds (including from the EU) to support the economic improvement of the livestock sector. This is opening up opportunities for regional collaboration between the livestock sector and local veterinarians to promote animal health and welfare as a contribution to regional development. Effective schemes call for strategic planning and innovative thinking and action, and provide much scope for imaginative veterinary leadership.

- 6.28 Rural development grants, for example, are helping to support ambitious training programmes. I was told by one large specialised practice of a training initiative for farmers with 250 talks planned for the year. All veterinarians within the business are actively encouraged to participate in running the training sessions. The British Cattle Veterinary Association has provided training for its members to deliver the farm health planning services sought by livestock owners. The Lancashire Veterinary Association, working with Liverpool and Bristol University, has trained veterinarians in small group facilitation skills and supported them in using these skills with farmers.
- 6.29 The Northwest Regional Development Agency is running a livestock initiative funded under the Rural Development Plan for England which aims to improve both the commercial prospects and livestock health of farming businesses in the region. The initiative provides for subsidised business or veterinary advice for farmers in preparing a business development plan focussing on one or more of the following objectives: the commercial development of the business; animal health and welfare; and nutrient management. Farm businesses that have completed the business planning process, incorporating an animal health plan, are eligible for a £10 million small grants scheme to support their plans.
- 6.30 The Animal Health and Welfare Strategy advocates using private veterinarians and their 'local networks' in local disease surveillance. Such local networks of private veterinarians, food producers and staff of government delivery agencies would seem to be relevant not only for surveillance but also for public health and contingency planning. This whole area is likely to gain increasing prominence under the Responsibility and Cost Sharing agenda, where it is possible that, in future, incentives may be available for those businesses that are prepared to take steps to increase biosecurity standards.
- 6.31 An interesting initiative is the new Welsh Regional Veterinary Centre which is a joint venture between the Royal Veterinary College (RVC) (London), the Veterinary Laboratories Agency, Carmarthenshire College (Coleg Sirgar), the Dairy Development Centre, the University of Wales and the Welsh Assembly Government. The Centre offers training and experience in real farm contexts for undergraduates and graduate vets. It does this by providing services for local farmers that complement those offered by local veterinary practices, including research, education, consultancy and herd health planning advice. This model that effectively combines skill development, investigation and knowledge transfer for animal health and development regionally should be evaluated and promoted more widely. The RVC is keen to see further centres established throughout the UK and is drafting a strategy for the development of regional veterinary centres. I am also aware of parallel efforts in Scotland through collaboration between the Scottish Agricultural College and Glasgow University.
- 6.32 Coordinated action should not be limited only to animal health matters but should embrace public health and animal welfare concerns too. For example, joint action by farmers, food processors, retailers and regulators is needed to tackle intractable problems such as E.Coli. Only through such coordination by veterinarians of animal health and animal product assurance will it be possible to realise holistic, 'farm-to-fork', risk prevention.

Farm health planning

- 6.33 In other parts of this report I have referred to the need for the veterinary profession to develop new business models that take account of changing demands for veterinary services, as articulated by livestock owning clients. I have been impressed by the willingness

of veterinarians to consider departing from traditional service models (which included heavy reliance on the sale of medicines) to embrace new approaches in which the sale of professional advice tailored to individual farm businesses features more prominently.

6.34 Farm health planning is a major vehicle for this professional advice, to promote improved biosecurity and preventative medicine at the farm level. The key components are:

- increased understanding of the health of livestock on a holding, and its effects on production costs and business income
- increased earlier recognition and identification of illness, and links to changes in husbandry practices
- increased prioritisation of the risks to the health of livestock through injury, toxins and infections, and
- a responsible approach to the use of pharmaceuticals in livestock.

6.35 Defra invested £2.8 million in 2006-08 to pump prime industry-led initiatives aiming ‘to promote and encourage the widespread adoption of farm health planning by all major livestock sectors as a basis for achieving higher standards of animal health and welfare’. The various initiatives are wrapping up and reporting now and, besides demonstrating that farm health planning can work, it appears they have delivered a range of benefits, including tools and templates, increased awareness and skills and networks of enthusiasts and industry champions. It is vital that the lessons learned be extracted and widely disseminated.

6.36 In Scotland, a somewhat different approach has been taken. Under the Land Management Contract Menu Scheme farmers can receive support for implementing an individual Animal Health and Welfare Management programme. This entails the farmer making a five-year commitment to taking a proactive approach to raising livestock health and welfare standards, improving farm business profitability on the basis of individual veterinary advice and forward planning. There are specific supported activities, including compulsory action on disease prevention and control, along with possible voluntary activities on benchmarking, biosecurity, disease testing and forage analysis. Government support of up to £1,500 per farm is available, and a quarter of all those eligible for the scheme signed up in the first year.

6.37 The Welsh Assembly Government has produced an Animal Health Planning framework in conjunction with Farming Connect Development Centres and Farm Assured Welsh Livestock. A number of related initiatives have been introduced. One of these concentrated on measurable improvements in herd health and productivity on selected dairy farms, linked to higher standards of welfare and longevity in animals in these herds. Subsidised advice was given to each herd on management practices, structural changes, and preventive treatments.

6.38 I was struck by the point made by the British Cattle Veterinary Association that while the overall guiding principles may be common to many livestock holdings, nevertheless it is the interaction between farmer and vet at the individual business level that will achieve positive improvements by drawing on the knowledge of the historical disease pattern on the premises and in the area, and relating this to current and proposed husbandry methods and business plans. I am aware that, in some cases, non-veterinary advisers (such as nutritionists) do work closely with owners, and there is a strong case for the role of the vet in ensuring that advice obtained from all sources is brought together in a coherent form.

- 6.39 Veterinary advice should incorporate state-of-the-art biosecurity and other health promotion measures as standard, and measurable, production practices. The development of standards and transfer of best practice is a task for the specialist professional veterinary associations working in concert with industry sector bodies.
- 6.40 It seems very clear to me that there is a definite role for veterinarians in providing a farm health planning service to their clients. This is most likely to succeed when it is in the form of tailored advice drawing upon the evidence and records from the livestock farm involved and relating this both to benchmarks for performance in similar enterprises and to tangible increases in the profitability of the client's farm business.

Veterinarians as agents of knowledge exchange

- 6.41 In Chapter 4, I referred to veterinary practices as examples of knowledge intensive business services – that is, businesses that rely heavily on the high quality clinical and technical skills of those they employ. This is in fact their key business asset: the way they market and deploy this asset is the foundation of their effective performance; and the way they nurture and renew it is fundamental to their future. Increasingly, it will be important that vets are valued for the expertise they can bring to bear in helping clients overcome pressing problems and plan the development of their business.
- 6.42 As government withdraws from managing disease risk and hands over the responsibility to business, so vets have to rethink the services they provide to new and existing customers. Veterinary work should be conceptualised as an integrated suite of services for livestock and food producers, including knowledge transfer, evaluation and planning. Knowledge management and getting expert advice to where it is needed will be absolutely critical to the effectiveness of risk management and responsibility sharing strategies. The new external challenges facing farming and food production (climate change, potential shifts in disease patterns, economic and energy concerns, and an emerging policy focus on food supply and risk) place a premium on knowledge that is up-to-date, authoritative, practical, and targeted.
- 6.43 However, at a time when the onus is increasingly placed on responsible and informed livestock producers and food chain operators, what is deeply disturbing is the striking absence of formal policies, strategies and structures of knowledge transfer. The veterinary profession, research establishments, and government need to work together with the farming and food industries to improve this situation.
- 6.44 Government is a major funder of science for animal health, spending millions annually on research, monitoring and surveillance activities. However, budgets are declining and tend to concentrate on 'public good' controls (e.g. Bluetongue, Foot and Mouth and TB) to inform government policy. Endemic disease research is mainly carried out by universities and industry. While university research funded by the research councils focuses on advancing basic science, industry-sponsored research focuses on applications that can be commercially appropriated, for example in the form of pharmaceuticals or genetic improvements. There is a distinct lacuna in research funding aimed at tackling endemic diseases through changes in husbandry practices and farming systems – the sort of research that would underpin the progressive development of farm health planning and promotion of biosecurity.

- 6.45 Currently there is a great deal of concern about the impact of much research funded by government and the research councils. This concern has highlighted the inadequacy of existing means of knowledge transfer, particularly the so-called linear model whereby research dissemination, in the form of technical advice or products, is conceived as a distinct and subsequent stage that follows the completion of the research itself. Not only does such an outlook fail to capture the recursive way knowledge is generated through the interaction of research and practice, it has also proved unsatisfactory in recruiting the interests of potential users of research.
- 6.46 Experience suggests that the engagement of stakeholders with the research itself, including helping to set the objectives and design of the research, leads to much greater interest in and take-up of the results. Government and the research councils need to take a fresh approach to knowledge transfer and research dissemination, incorporating knowledge transfer objectives into the design and conduct of research programmes and projects, dedicating a portion of project funding to knowledge transfer activities and involving stakeholders upfront in the research process. In these regards, in the fields of animal and public health, private veterinarians have crucial roles to play.
- 6.47 Vets are scientifically-trained professionals and mainly field-based practitioners and they derive and renew their expertise from these dual contexts: science and practice. Beyond their initial training, the profession gives insufficient thought as to how vets update their scientific knowledge and clinical understanding. Professional bodies, such as the BVA, do communicate knowledge to their memberships via their websites, publications (including the Vet Record), and specialist and territorial divisions via local meetings – many of which have a professional development element. However, formal continuing professional development provision and requirements do not fully capture the range of ways that practising vets can and should be seeking to keep their expertise up to scratch.
- 6.48 There is need to build up a culture where knowledge is transferred rapidly via veterinarians to farmers and food producers. Farmers and animal keepers look to veterinarians to absorb complex ambivalent messages and ‘translate’ them into terms they can understand. Veterinarians will also take into consideration other factors when imparting this information, including bio-security, local geography, regional differences and the ecology of disease, as well as the technical capabilities and commercial objectives of the farm business. They are thus not simply transferors of knowledge from other experts. They combine and repackage information and draw on their own accumulated field knowledge to tailor it to the circumstances of the individual farmer. Above all, an experienced vet knows what advice will work on a farm. It is for these reasons that I refer to vets as agents of knowledge exchange; as creators, not just conduits, of knowledge. As the knowledge professionals in animal health, they should be much more actively involved in the design and execution of programmes of research and knowledge management in animal disease and public health.

Annex 1: Schedule of Working Group Meetings

A series of one-day meetings was held to gather firm evidence and identify pragmatic and achievable solutions. The meetings focused on the following key themes:

- Veterinarians as businesses (12 November 2007, Defra, London).
- The 'public good' functions of rural veterinarians (30 January 2008, Inverness).
- New governance models in farming and food production (15 February 2008, Cardiff).
- Long-term issues affecting the future of the livestock industry and demand for veterinary services (27 June 2008, RCVS, London).
- Animal welfare from 'farm to fork' (21 July 2008, BVA, London).

Annex 2: Membership of the Vets and Vet Services Working Group

Philip Lowe OBE (Chairman)

Brian Aldridge (Royal Veterinary College)

David Catlow (British Veterinary Association)

Sandy Clark (veterinary surgeon)

Neil Cutler (National Farmers Union)

Paul Dray (Defra)

Richard Drummond (Defra)

Julie Fitzpatrick (Moredun Research Institute)

Christianne Glossop (Chief Veterinary Officer, Wales)

Peter Jinman (veterinary surgeon)

Catherine McLaughlin (National Farmers Union)

Charles Milne (Chief Veterinary Officer, Scotland)

Bobby Moore (Royal College of Veterinary Surgeons)

Rob Paul (Animal Health Agency)

Megan Power (Defra)

Adam Quinney (beef farmer)

Iain Richards (Society of Practising Veterinary Surgeons)

Dick Sibley (Animal Health and Welfare Strategy England Implementation Group)

Alick Simmons (Deputy Chief Veterinary Officer, Defra)

Gordon Struth (Scottish Government)

Michael Weaver (sheep farmer)

Secretariat to the Working Group – Defra

Paul McDonald

Tricia Olagunju

Aroon Korgaonkar

Editorial support

Paul Dray

Megan Power

Robert Bell and Co Communications

Annex 3: Personal visits and interviews

United Kingdom

Henrietta Alderman (British Veterinary Association)
Justin Armstrong (Newcastle University)
Emma Beech (Defra, Responsibility and Cost Sharing)
Richard Bennett (Animal Health and Welfare Strategy England Implementation Group)
Nick Blayney (British Veterinary Association)
Yvonne Boyd (Defra, Research)
Helen Browning (Chair, Animal Health & Welfare Strategy England Implementation Group)
David Buxton (Moredun Research Institute)
Jackie Cardwell (Royal Veterinary College)
David Church (Royal Veterinary College)
Kenneth Clarke (Food Standards Agency)
Andrew Clayton (Defra, Bluetongue Policy)
Martin Cox (Defra, Responsibility & Cost Sharing)
Sheila Crispin (Royal College of Veterinary Surgeons)
Andrew Curwen (XLVets)
Huw Davey (Maesglas Vets)
Matthew Dobbs (WestPoint Vet Group)
Jane Downes (Meat Hygiene Service)
Richard Drummond (Defra)
Sandra Edwards (Newcastle University)
Tony Edwards (Animal Health Agency)
Gareth Enticott (Social Scientist, Cardiff University)
Andrew Frost (Defra Surveillance)
Richard George (National Farmers Union)
Nigel Gibbens (Chief Veterinary Officer, UK)
Jeff Gill (Royal College of Veterinary Surgeons)
Christianne Glossop (Chief Veterinary Officer, Wales)
John Griffiths (Welsh Dairy Development Centre)
Margaret Griffiths (Welsh Assembly Government)

Peter Gripper (Anval Ltd.)
Brian Harding (Defra – Director)
John Heffernan (Animal Health and Welfare Strategy England Implementation Group Secretariat)
Sarah Hibbert (Veterinary Practice Managers Association)
Gordon Hickman (Animal Health Agency)
Alastair Johnston (Livestock Advisor, National Farmers Union)
Hugh Jones (Welsh Assembly Government)
Moss Jones (Quality Welsh Food)
Elizabeth Kelly (Defra, Animal Welfare)
Fred Landeg (ex-Deputy Chief Veterinary Officer)
William Lawrence (National Farmers Union)
Ruth Layton (Research and Development Director, Food Animal Initiative)
Ifan Lloyd (St James Vets)
Lizzie Lockett (Royal College of Veterinary Surgeons)
Anthony Lowe (Fenton Vets)
Ruth Lysons (Defra, Surveillance)
Quintin McKellar (Royal Veterinary College)
Peter Martin (Lantra)
Nigel Miller (Scottish National Farmers Union)
Charles Milne (Chief Veterinary Officer, Scotland)
Charlie Moir (Animal Health Agency)
Prys Morgan (Hybu Cig Cymru)
Roy Norton (Defra, Animal Welfare)
Jill Nute (Royal College of Veterinary Surgeons)
Peter Orpin (Park Vet Group)
Bill Parish (Defra, Disease Policy)
Dirk Pfeiffer (Royal Veterinary College)
Emma Paul (Defra, VENDU)
Nicky Paull (BVA)
Matthew Pugh (Belmont Veterinary Centre)
Marion Rawlins (Defra, Farm Health Planning)
Linda Reay (Defra Exotic Disease Policy)
Debby Reynolds (ex-Chief Veterinary Officer, Defra)
Frances Rowe (ONE Northeast)
Ken Roy (Commission for Rural Communities)
Alick Simmons (Deputy Chief Veterinary Officer, Defra)

Philip Sketchley (National Office of Animal Health)
Clare Smith (Farm Assurance Advisor, National Farmers Union)
Frank Steven (British Veterinary Association, Scotland)
Graeme Swanson (Veterinary Surgeon)
Paul Temple (Vice President, National Farmers Union)
John and Celia Thomas, Farmers
Iestyn Tudor-Jones (Welsh Lamb and Beef Producers)
Roger Turner (Commission for Rural Communities)
Christopher Wathes (Chairman, Farm Animal Welfare Council)
Steven Van Winden (Royal Veterinary College)
Sarah Wolfensohn (Animal Health and Welfare Strategy, England Implementation Group)
Abigail Woods (Imperial College)
Brian Wright (Veterinary Practice Managers Association)

United States of America

Fred Chollick (Dean, College of Agriculture, Kansas State University)
Ron DeHaven (Executive Vice President, American Veterinary Medical Association)
Ronnie Elmore (College of Veterinary Medicine, Kansas State University)
Paul Grosdidier (State Veterinarian, Kansas)
Kevin Gwinner (College of Business Administration, Kansas State University)
Steven Henry (Abilene Animal Hospital, Kansas)
Kimberley Kirkham (Veterinary Medical Officer, APHIS, US Department of Agriculture)
David Procter (Centre for Engagement and Community Development, Kansas State University)
Ralph Richardson (Dean, College of Veterinary Medicine, Kansas State University)
David Ripple (Veterinarian, Dodge City, Kansas)
Bonnie Rush (Department of Clinical Medicine, Kansas State University)
Roger Saltman (Director, US Cattle Veterinary Operations, Pfizer)
Lyle Vogel (Assistant Executive Vice President, American Veterinary Medical Association)
Michael Whitehair (Abilene Animal Hospital, Kansas)
Ken Winter (Winter Feed Yard)

