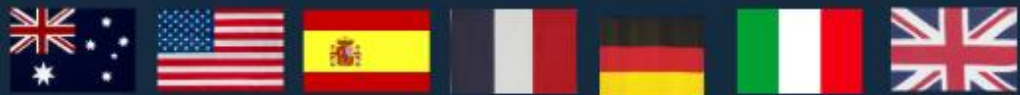


Coronavirus Survey Wave 2

*What is the impact of COVID-19 on
veterinary professionals and their
practices?*

2nd April 2020





CONTENTS

What is included in this report

- 01| OBJECTIVES p.3
- 02| METHODOLOGY p.5
- 03| EXECUTIVE SUMMARY p.7
- 04| DETAILED INSIGHTS p.12
- 05| APPENDIX p.36
- 06| CONTACT DETAILS p.38

01

Objectives

What did the research look to achieve?



THE OBJECTIVES

Over the coming weeks and months we are going to see the veterinary industry impacted more and more by COVID-19. We are therefore running this tracker to understand how things are changing for veterinarians and to advise on how we can all adapt to these new challenges.

TRACKER TOPIC COVERAGE

1. HOW IS CLIENT BEHAVIOUR CHANGING?

Including: cancellations, home visits, increased hygiene concerns, stocking up.

2. WHAT ARE PRACTICES THEMSELVES DOING?

Including: hygiene policies, limiting appointments, contingency planning for shortages, staff cancelling holiday, online consultations.

3. THE IMPACT OF COVID-19 ON PRACTICES

Including: revenue, other finances, availability of staff, drug, cleaning and medical supply availability

4. SUPPORT RECEIVING & EXPECTED

Including: Satisfaction with support and advice received from governments and veterinary bodies, what vets expect from manufactures

5. SOURCES OF INFORMATION

Including: websites, WHO. Veterinary bodies, social media, colleagues, friends and family, news, other media

6. FUTURE PROJECTIONS

Including: perceived impact in the next couple of weeks, current level of concern for self and for business

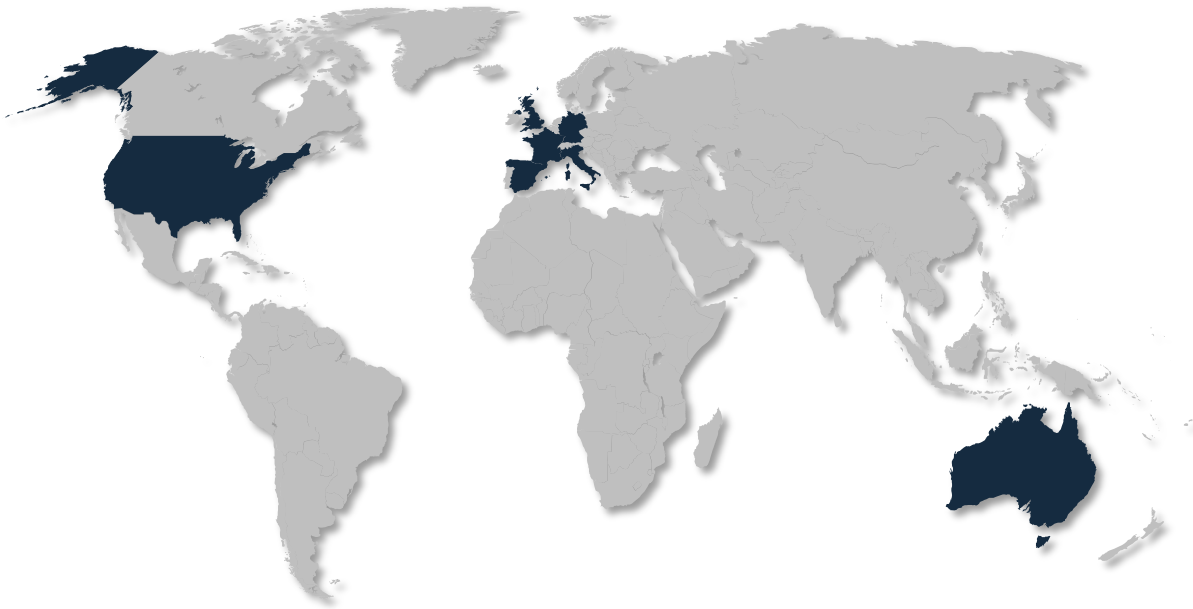
02

Methodology








What did we do?

METHODOLOGY

Online survey run among Vetspanel companion animal veterinarians in 7 countries. The sample consists of a mix of owners and partners, from small and large, independent and corporate practices.



The survey will be repeated every 2-3 weeks for as long as the outbreak continues.

Sample size		Wave 1 14 th – 18 th March	Wave 2 27 th March – 2 nd April
UK		208	183
France		133	109
Germany		125	114
Italy		140	91
Spain		193	129
US		177	161
Australia		80	83

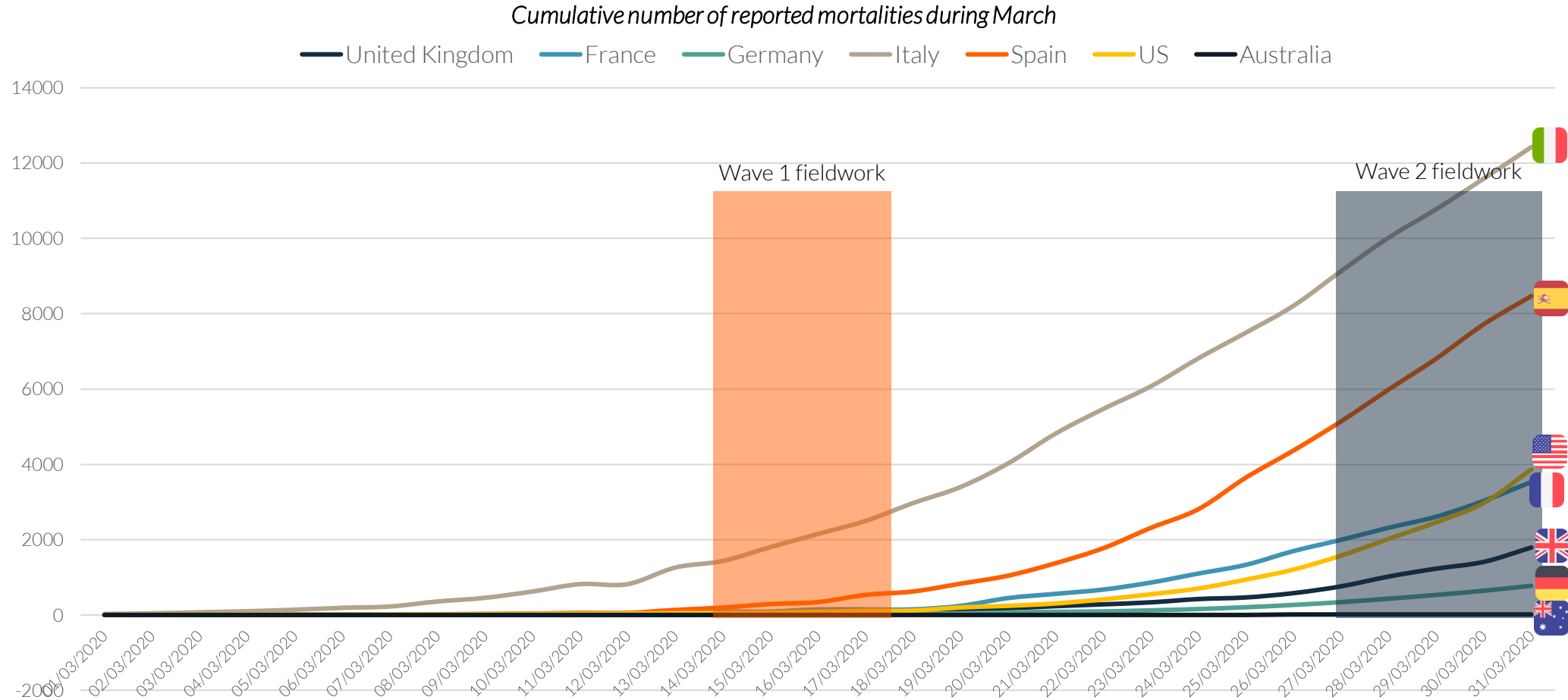
03

Executive summary

What did the survey findings tell us?

CONTEXT: THE THREAT OF COVID-19 CONTINUES TO GROW

Since the first wave of this study we have seen significant increases in cases and mortalities in all countries. Italy remains the worst affected, but Spain has seen more sharply rising figures in recent days. France and the UK have seen more lockdown measures put in place, whilst the US is beginning to see more and more cases.



EXECUTIVE SUMMARY

AS THE CRISIS WORSENS, SO DOES THE IMPACT ON THE VETERINARY INDUSTRY

- Veterinarians now show increased levels of both personal and professional concern, with professional concern outweighing personal concern in all countries except the US.
 - The majority still expect the situation to get worse, but the proportion saying “significantly worse” has dropped in favour to “slightly worse” in some countries.
- Countries more adversely affected since wave 1 report a bigger impact on their clinics across the board. Over 9 in 10 vets in the UK, FR, ES and IT now report a negative impact on number of appointments offered and – as a result – on revenue. The average reported decrease in revenue is between 50% and 60% lower than the past week in these countries.
 - Since last wave much more stringent measures have been put into place in the UK and France for vet clinics, and we are seeing this reflected in the survey
- Germany, despite a growing number of cases of Covid-19, remains the least affected EU country
- Whilst we see some increase in the impact that Covid-19 is having on the US and Australian veterinary industries, veterinarians in those countries continue to report lower impact levels in almost all key areas.

PRACTICE MEASURES SHIFT FROM MOSTLY HYGIENE POLICIES TO REDUCING IN CLINIC CONSULTS

- In wave one the most common new policy in most practices was “additional policies around personal hygiene”. It is now asking pet owners to phone in rather than come in, or limiting to only emergency appointments
 - We are also hearing reports of “kerbside” consultations in the US and AU, and will add this to the next wave
- Protective clothing is another policy that has seen a huge increase since wave 1, rising from 15% to 70% in France and 7% to 60% in the UK.

CLIENT BEHAVIOUR ALSO FOCUSES MORE ON KEEPING OUT OF CLINIC

- In line with increased social distancing measures we are now seeing more reports of clients cancelling appointments, avoiding other people in clinic and stocking up on both food and medicine products

EXECUTIVE SUMMARY

VETS ARE NOW EXPECTING MORE INDUSTRY SPECIFIC INFORMATION AND ADVICE

- In wave 1 vets were looking for information more from mainstream news outlets and the government. Whilst these are still highly consulted sources of advice, veterinary bodies are now the top source of information in the UK, Spain, US and Australia and rank high on the list in all other countries too.
- Satisfaction with the advice and guidance given by national veterinary associations has improved across the board, especially in the UK, US and AU.
 - Satisfaction levels in France and Germany are lower than other countries, but there has still been a significant increase, especially in Germany
- Satisfaction in the advice and guidance from national government has improved in the UK and Germany, whilst Spain and France have seen a drop in satisfaction levels.

SUPPORT DEMANDS ON MANUFACTURERS HAVE INCREASED

- There are higher expectations on manufactures in wave 2, now that countries are taking measures that are significantly impacting on the day to day running of clinics
- The majority of veterinarians are still looking for advice and updates on stock availability, but price caps and increased payment flexibility are now much more broadly expected
- Australian vets are less likely to want information from their manufacturers than they were in wave 2, but are expecting a higher level of increased support and no changes to the speed of turnaround on diagnostic test
 - UK and German vets are also now more likely to expect no change in diagnostic test turn around

04

Detailed insights

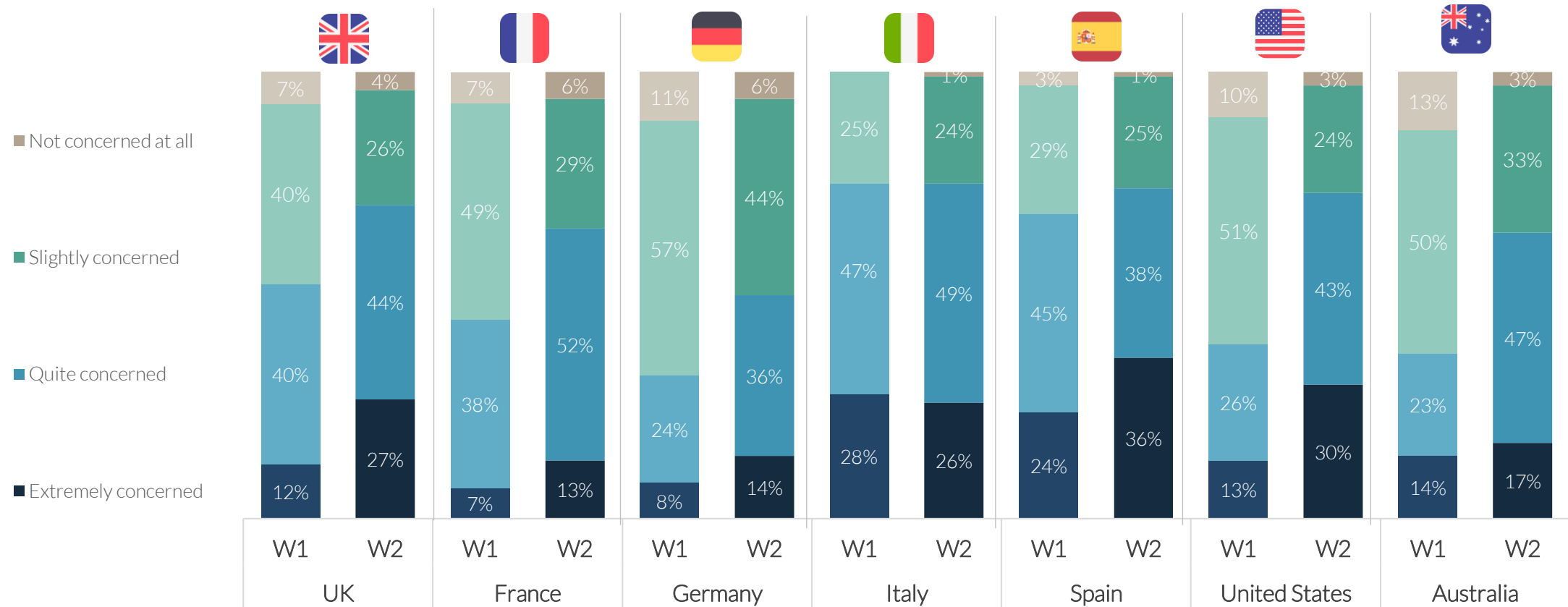
A more in-depth view of the survey findings.

4.1

Veterinarian perception of Covid-19 crisis

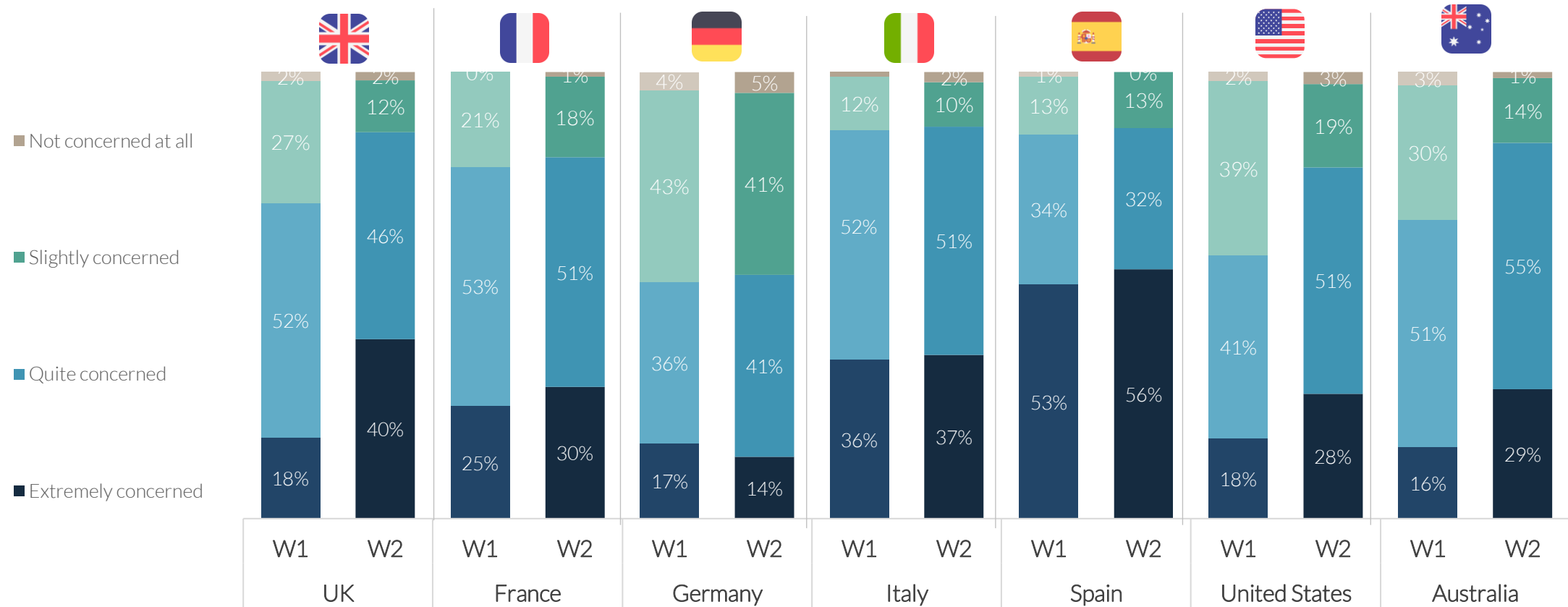
PERSONAL CONCERN ON RISK OF CORONAVIRUS OUTBREAK

Italy has maintained the high level of concern we saw in wave 1 while all other countries appear to be catching up as the level of concern has increased significantly. Now, only a tiny percentage in each market claim to be completely unconcerned.



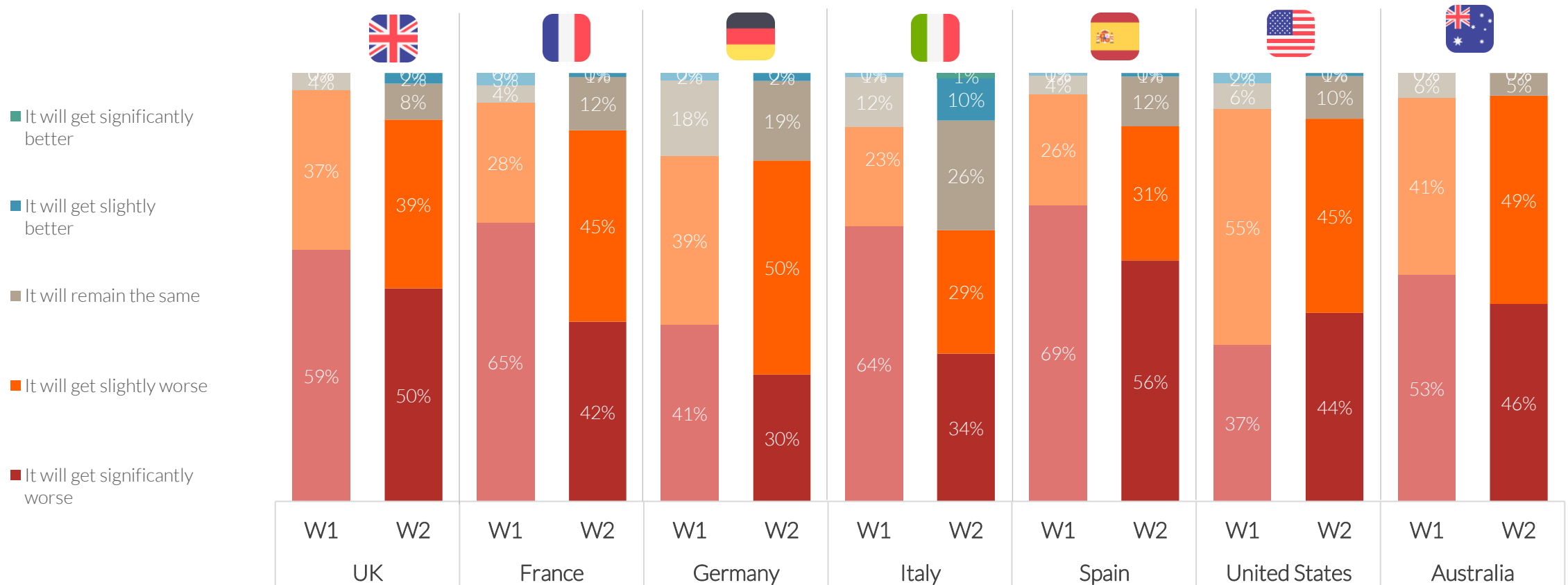
PROFESSIONAL CONCERN ON RISK OF CORONAVIRUS OUTBREAK

Professional concern was already higher than personal concern in wave 1, so we have not seen the same dramatic increases here. In most of Europe concern has remained steady but in UK, United States and Australia there has been a notable increase.



ANTICIPATED IMPACT OF CORONAVIRUS – NEXT 2 WEEKS

Across almost all countries there is a slightly more positive outlook in comparison to wave 1; less expect the situation to get significantly worse and in Italy there is a dramatic increase in people expecting it to get better. However, there has been no positive change in the United States

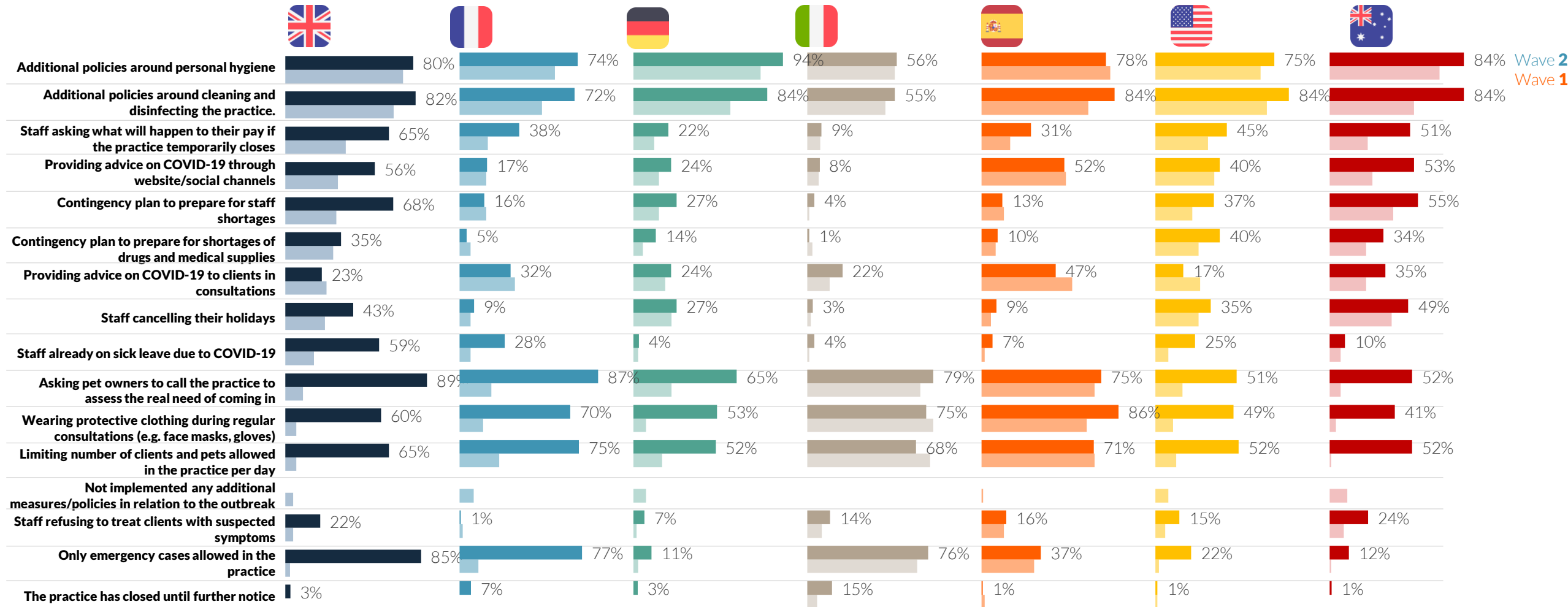


4.2

How are practices responding and what is the impact?

PRACTICE RESPONSE TO COVID-19

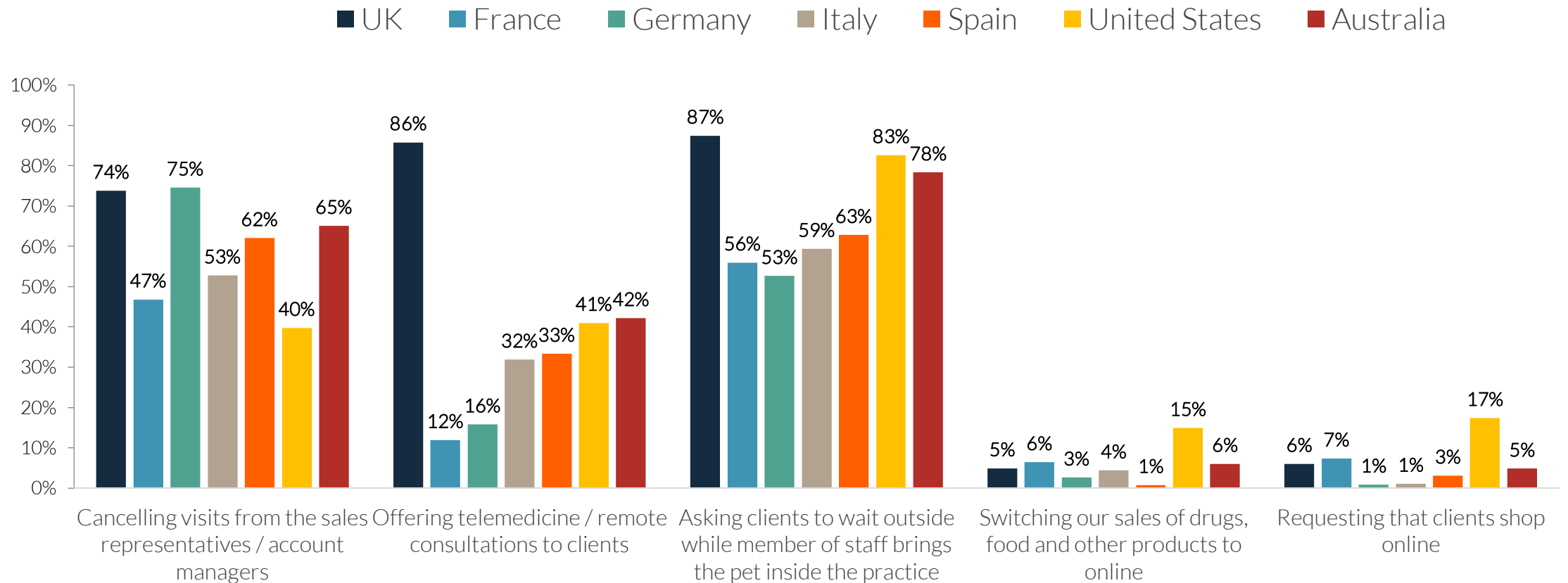
There has been a significant rise in practice's adopting more additional covid-19 measures (limiting cases, using PPE). Whilst vets in Italy and Spain were already adopting these measures, now UK, France and Germany are on parallel. United States and Australia are on a similar trajectory



PRACTICE RESPONSE TO COVID-19


The UK is leading the way in adopting telemedicine to conduct consultations, while the majority of practices in all countries we sampled are cancelling unessential visits and asking clients to wait outside during the consult. However, moving sales online is not a commonly used approach – except in a small proportion of US practices.

Practice response to covid-19 (e.g. % of respondents)

























SUMMARY OF COVID-19 IMPACT ON KEY AREAS

The UK, France and Spain have caught up with Italy on decreases in number of clients visiting the practice. Italy reports the highest negative impact on revenue, with UK, FR and ES not far behind. Germany reports a lower impact compared to other EU5 countries. US & AU report lower impact across all areas apart from availability of cleaning supplies.

 Area most heavily impacted in indicated country

 Country with highest impact score for indicated area

Average % change reported compared to the *past week* in the following areas:

							
Number of clients visiting the practice	 -64% 	 -62%	 -27%	-58%	 -56%	-21%	-16%
Number of appointments offered to clients	-63% 	-40%	-20%	-46%	-23%	-19%	-15%
Revenue	-56%	-54%	-20%	 -62% 	-51%	 -24%	-12%
Staff availability	-27%	-32% 	-10%	-17%	-16%	-15%	-5%
Availability of cleaning supplies	-17%	-17%	-25% 	-14%	-11%	-23%	 -25% 
Availability of drugs and medical supplies	-11%	-16% 	-14%	-10%	-9%	-13%	-9%
Deliveries of stock (e.g. pharmaceutical products, pet food)	-10%	-14%	-7%	-17% 	-7%	-8%	0%

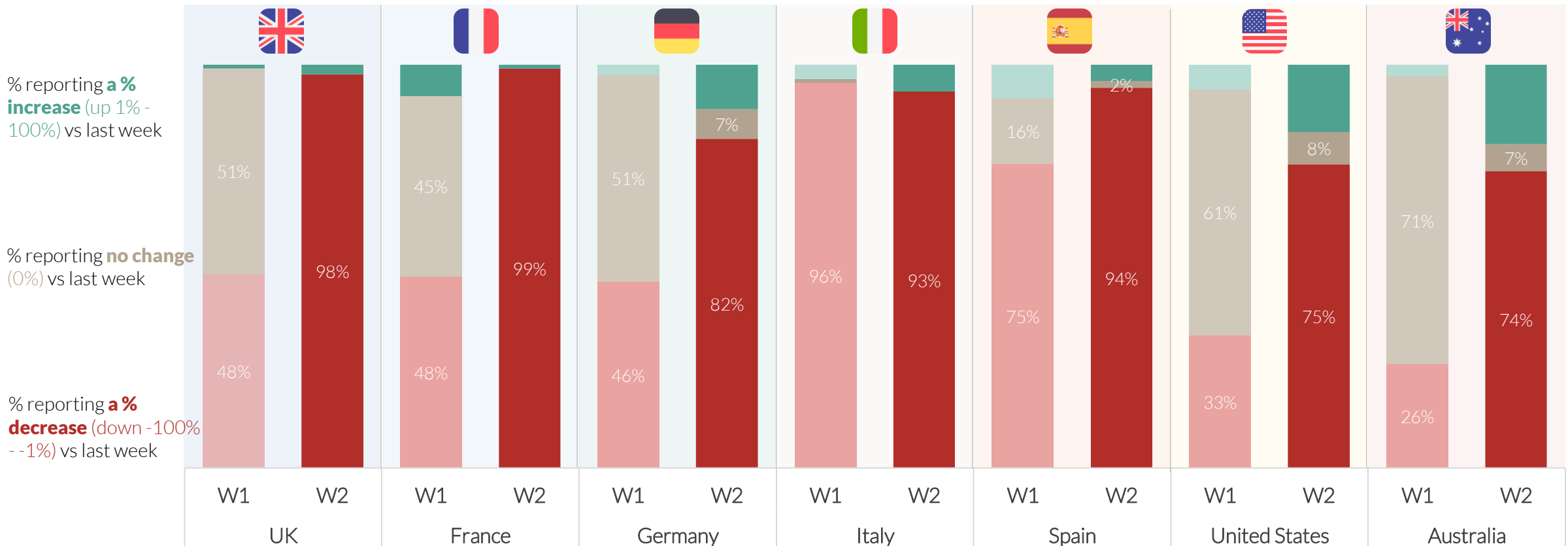
Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Respondents were shown a scale from -100% to +100%

COVID-19 IMPACT ON NUMBER OF CLIENTS VISITING

Compared to wave 1, all countries except Italy are reporting a much higher decline in number of clients visiting. Almost all vets in UK, France and Spain are reporting fewer clients than usual. In the US and Australia there is both an increase in the % of vets reporting fewer clients and more clients

Reported impact on number of clients visiting the clinic

NB - question changed between first and second wave, so data may not be directly comparable*



*Wave 1: Q3. How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? Number of clients visiting the practice.

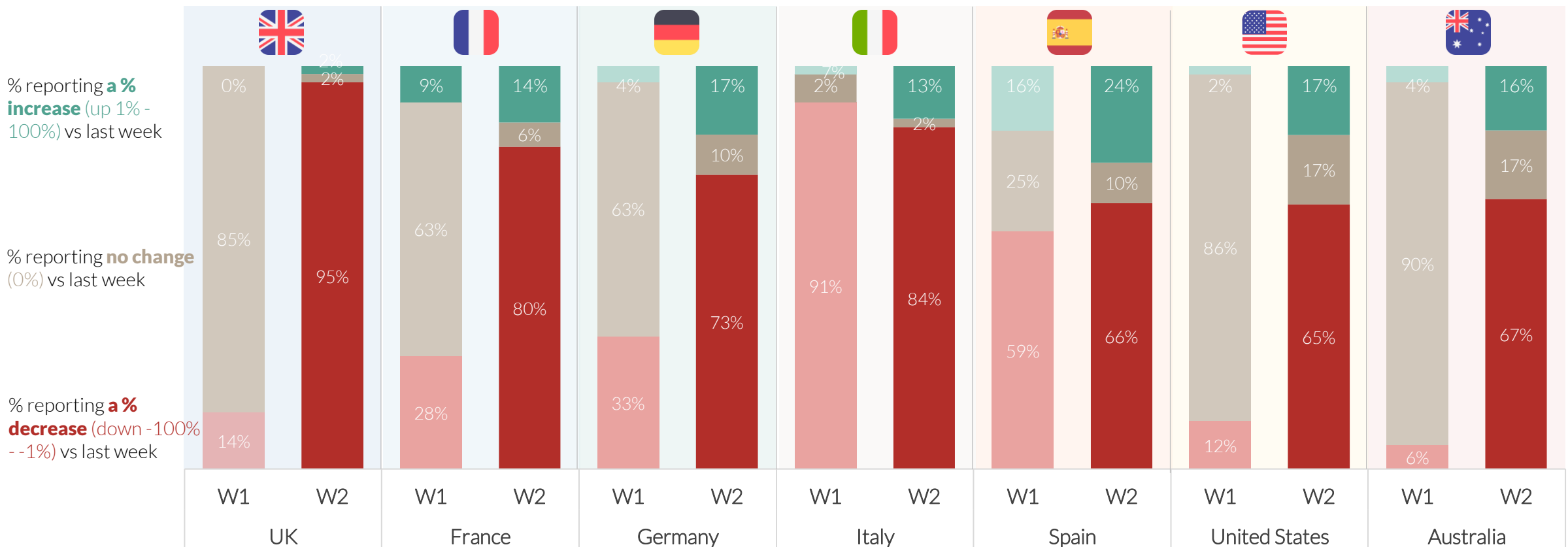
Wave 2: Q3a. Thinking about the past week only, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Number of clients visiting the practice

COVID-19 IMPACT ON APPOINTMENTS OFFERED TO CLIENTS

The vast majority of vets in all countries are reporting some level of % decrease in the number of appointments offered to clients compared to last week. This is especially high in the UK, where new measures were brought into place recently. In Spain nearly a quarter report a % increase on the previous week, though most continue to report a decrease.

Reported impact on number of appointments offered to clients

*NB - question changed between first and second wave, so data may not be directly comparable**



*Wave 1: Q3. How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? Number of appointments offered to clients

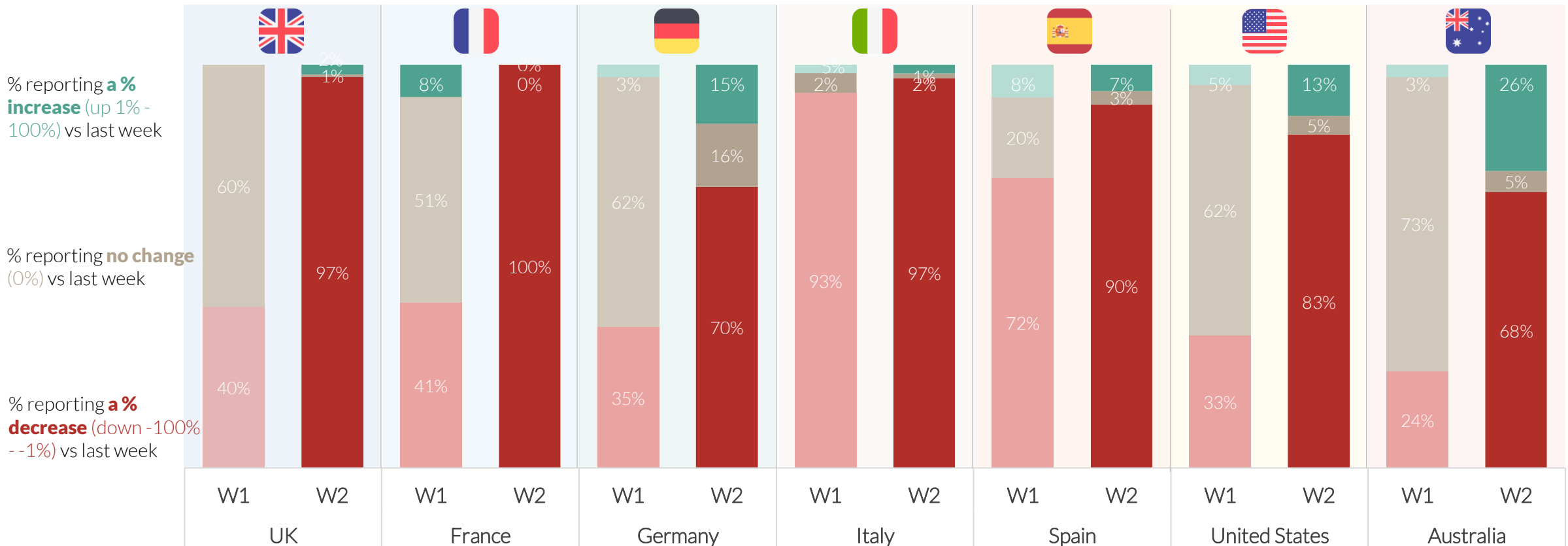
Wave 2: Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Number of appointments offered to clients

COVID-19 IMPACT ON REVENUE

The impact to revenues in the veterinary industry is clear to see, with almost all reporting a % decrease vs. the past week. DE and AU, the countries with the current lowest death toll have seen the lowest impact to revenue, but still report a significant negative change compared to the past week.

Reported impact on revenue

*NB - question changed between first and second wave, so data may not be directly comparable**



*Wave 1: Q3. How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? Number of appointments offered to clients

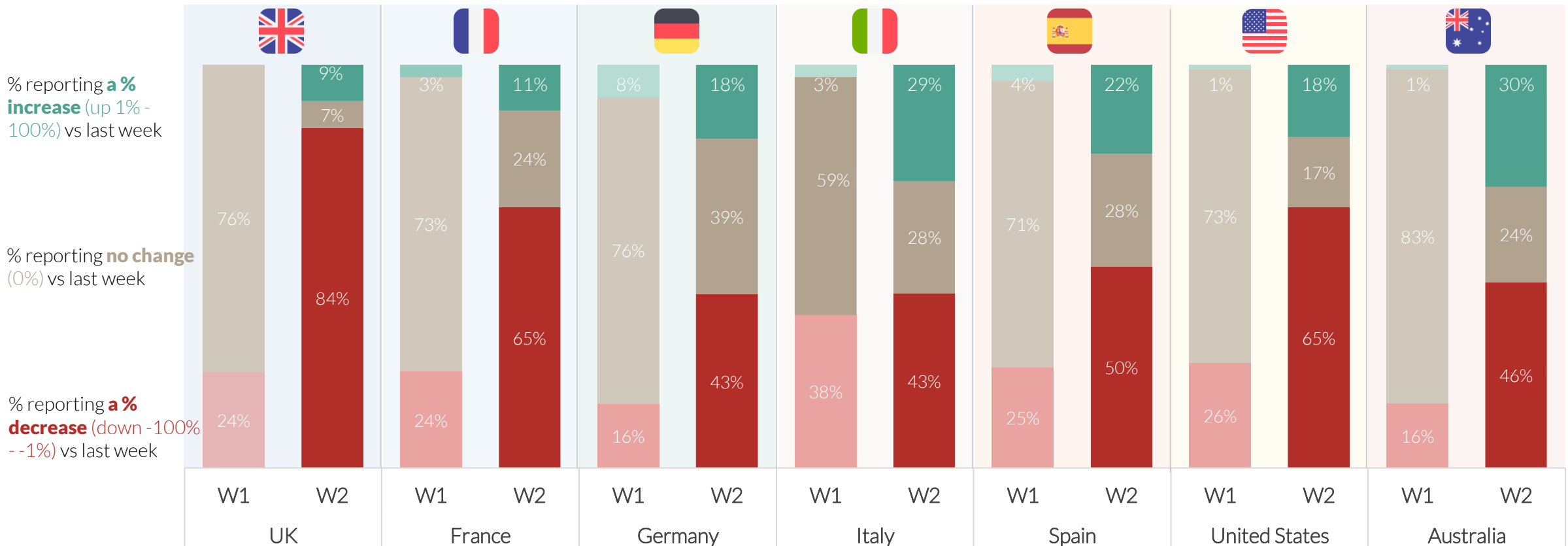
Wave 2: Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Number of appointments offered to clients

COVID-19 IMPACT ON STAFF AVAILABILITY

All countries have been somewhat impacted by staff availability. Over a third of Italian vets' report that they have less staff than usual, yet with most vets also reporting appointment cancellations and a decrease in client visits this may not be a huge issue for owners/partners.

Reported impact on staff availability

*NB - question changed between first and second wave, so data may not be directly comparable**



*Wave 1: Q3. How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? Staff availability

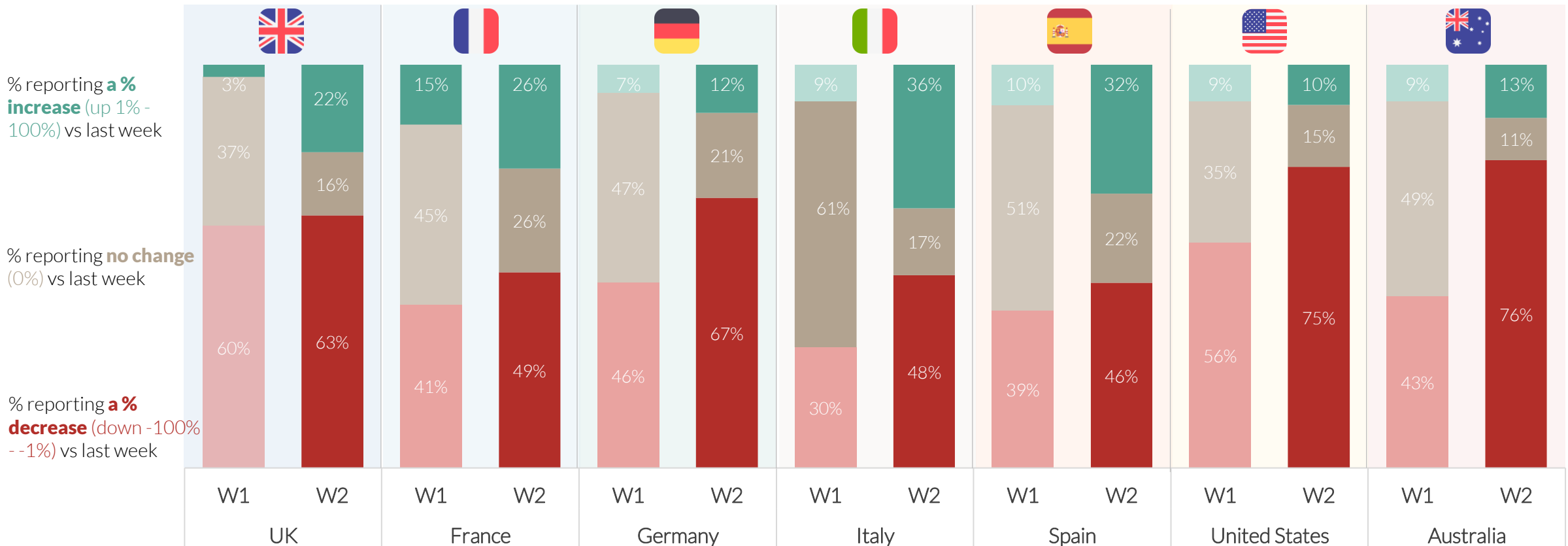
Wave 2: Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Staff availability

COVID-19 IMPACT ON AVAILABILITY OF CLEANING SUPPLIES

Whilst the majority of vets continue to report a decline in availability of cleaning supplies, there are also signs of recovery in the area for some vets in IT, ES, FR and UK, with more reporting an increase in availability.

Reported impact on availability of cleaning supplies

*NB - question changed between first and second wave, so data may not be directly comparable**



*Wave 1: Q3. How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? Availability of cleaning supplies

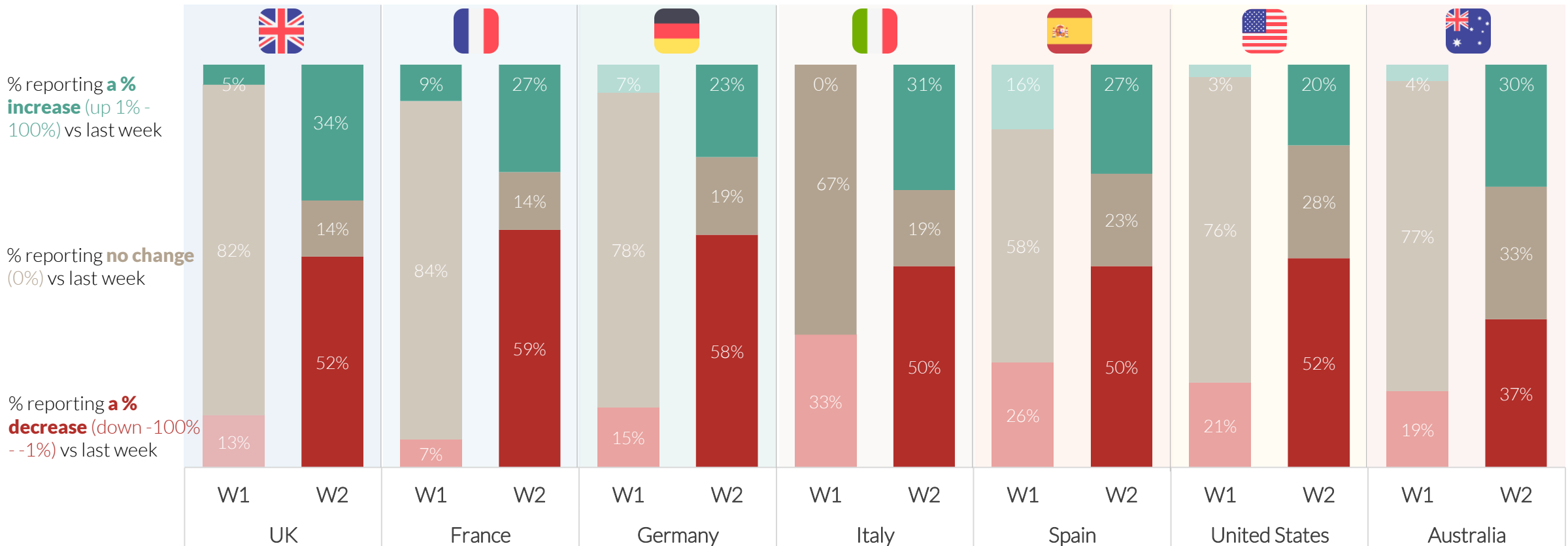
Wave 2: Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Availability of cleaning supplies

COVID-19 IMPACT ON STOCK DELIVERIES

Over half of vets in all countries except Australia report some level of negative impact on their stock deliveries, whilst between one fifth and a third report an increase compared to last week

Reported impact on stock deliveries

NB – question changed between first and second wave, so data may not be directly comparable*



*Wave 1: Q3. How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? Stock deliveries

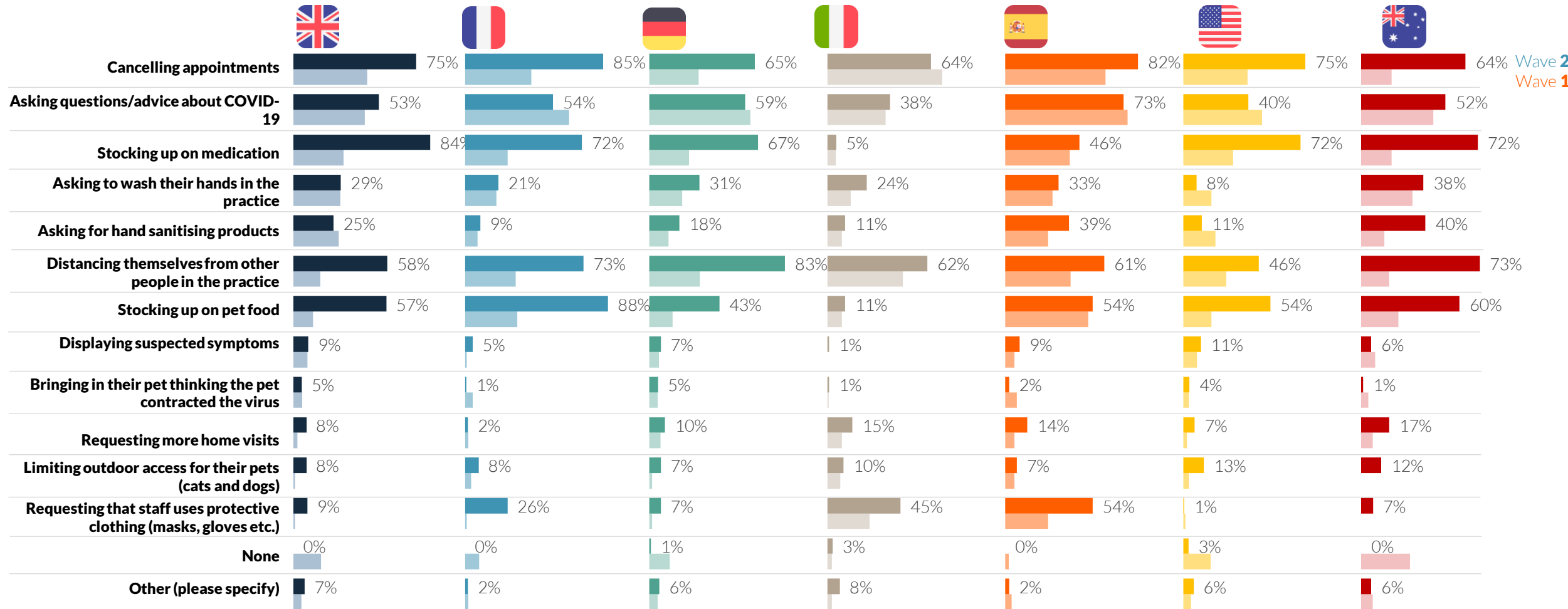
Wave 2: Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Stock deliveries

4.3

Client responses and behaviours

CLIENT RESPONSE TO COVID-19

Although the number of veterinary professionals providing advice about covid-19 has remained fairly steady, there has been a noticeable increase in reported changes in client behaviour (cancelling appointments, stocking up, distancing themselves from others) across all markets.



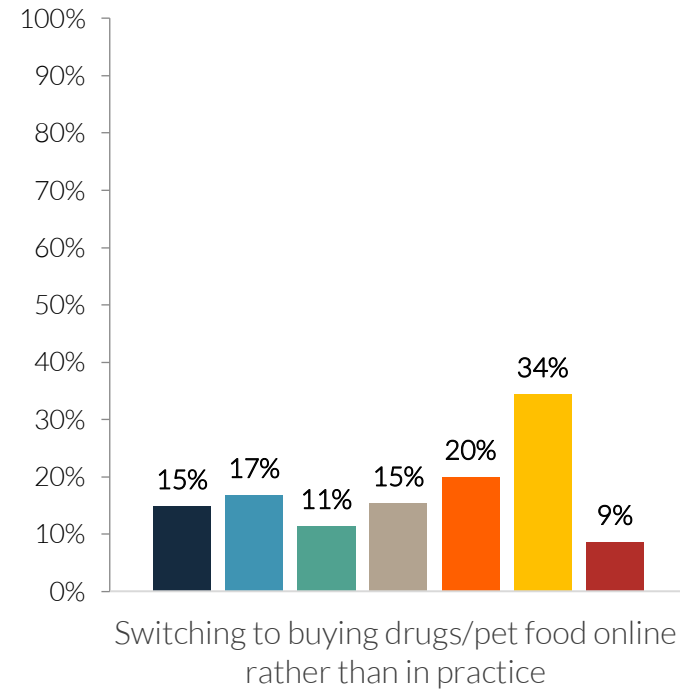
Q1. Which of the following have you experienced/observed amongst the clients in your practice in relation to COVID-19 outbreak? The clients have been...

CLIENT RESPONSE TO COVID-19

The US has seen a 1 in 3 clients purchasing their pharmaceutical or pet diet products online instead of in practice. Other countries have observed this move to a lesser extent.

Client response to covid-19 (% of respondents)

■ UK ■ France ■ Germany ■ Italy ■ Spain ■ United States ■ Australia

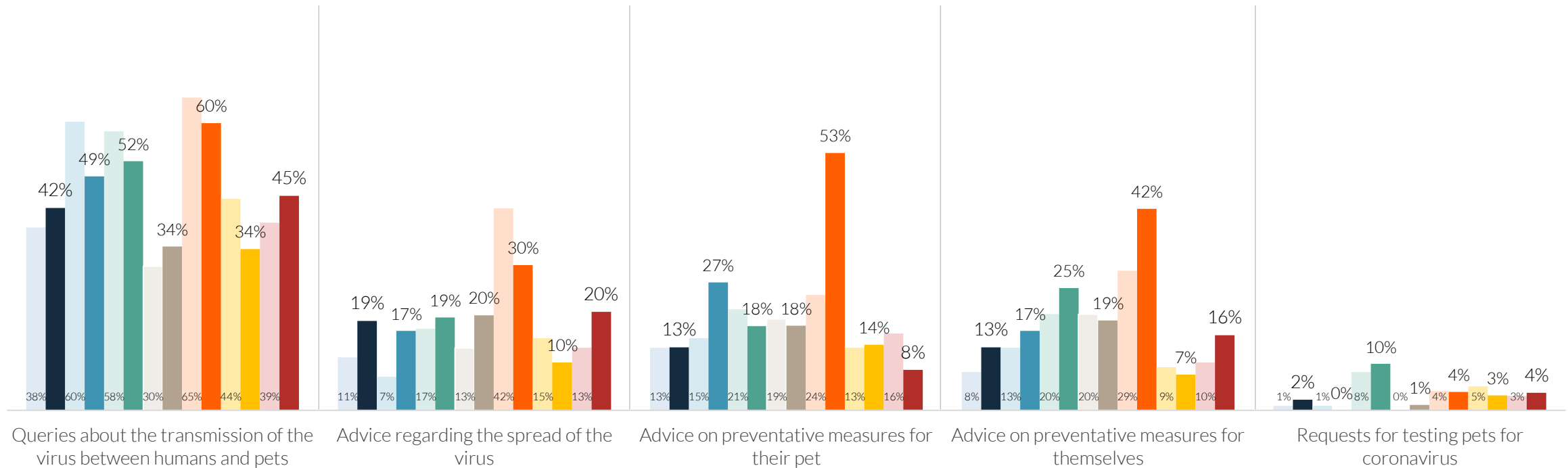


CLIENT QUESTIONS DURING COVID-19 OUTBREAK

In all countries apart from Italy and Australia there has been a decline in % of vets who have been asked about transmission between humans and pets, though this remains the most popular question asked of vets by their clients in most countries. In Spain there is a marked increase in % of vets being asked questions about preventative measures.

■ UK ■ France ■ Germany ■ Italy ■ Spain ■ United States ■ Australia

(Wave 1 figures in transparent bars, Wave 2 figures in solid colour bars)

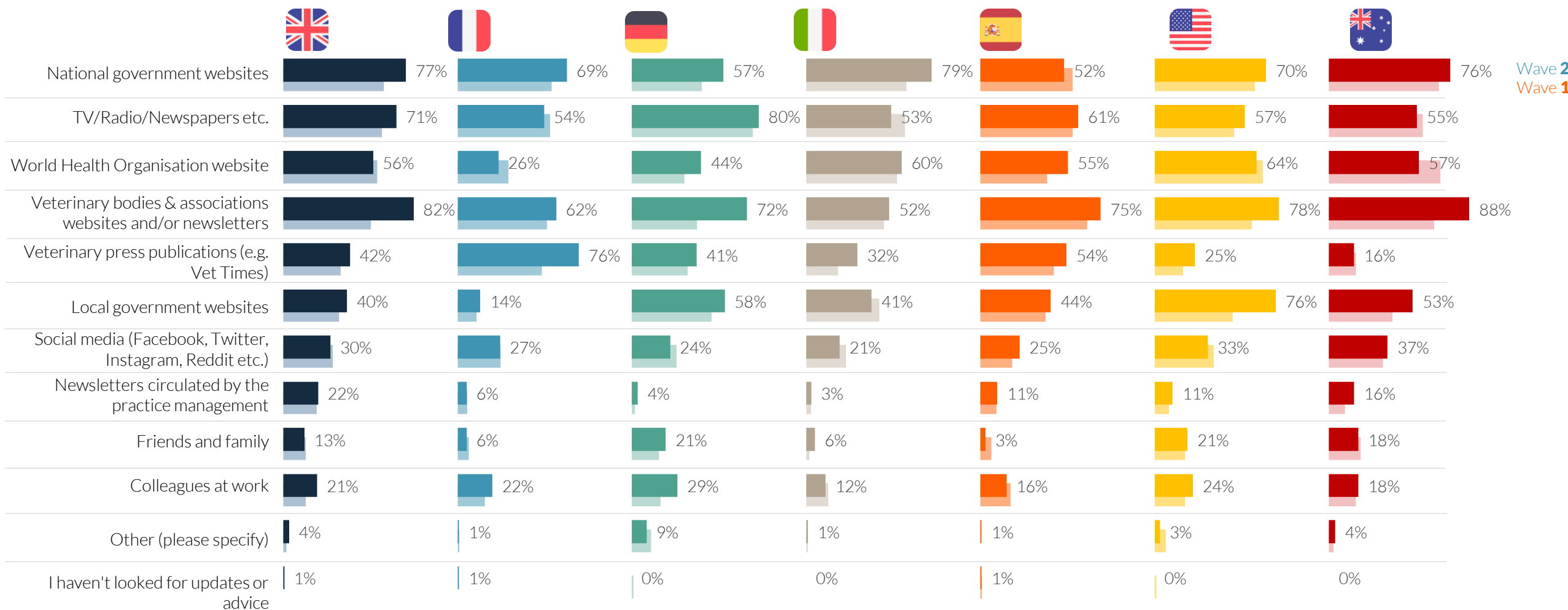


4.4

Accessing information and support

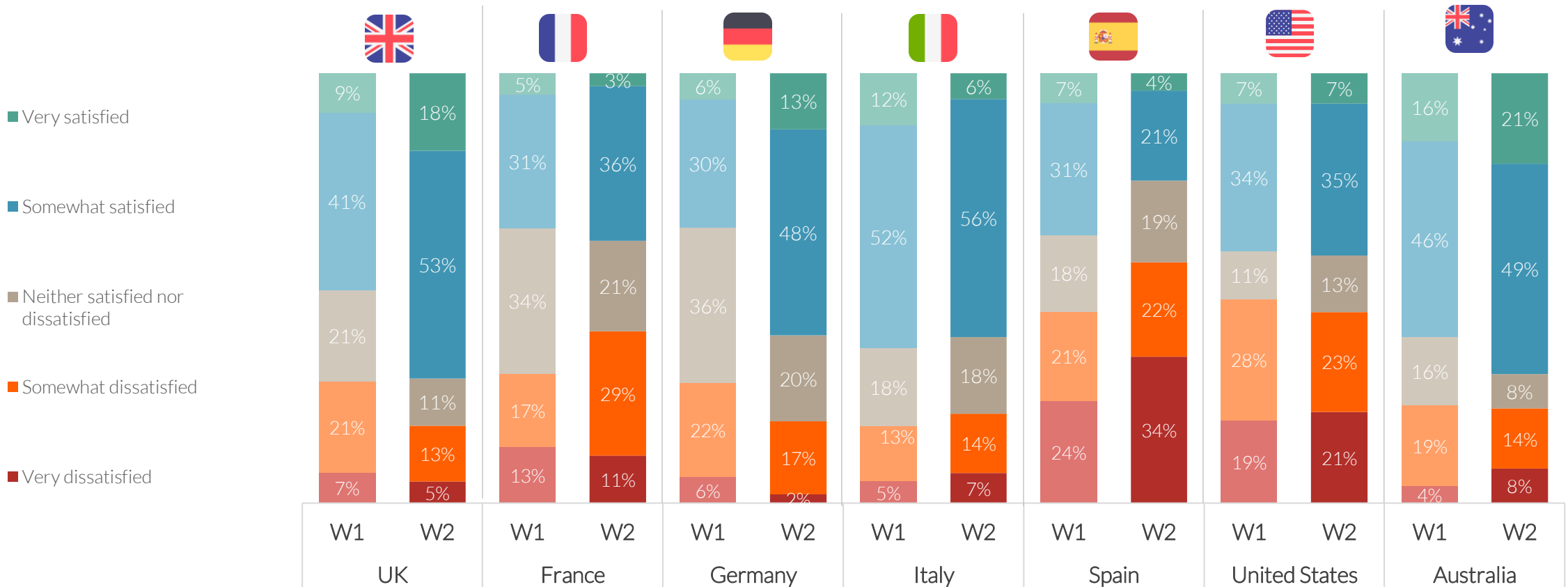
SOURCES USED BY VETS FOR UPDATES ON OUTBREAK

In wave 2 vets are using a wider range of sources than they were in wave 1. Use of veterinary bodies and associations has jumped since last wave in UK, DE, US and AUS and is now competing with national government websites as the overall top source of advice.



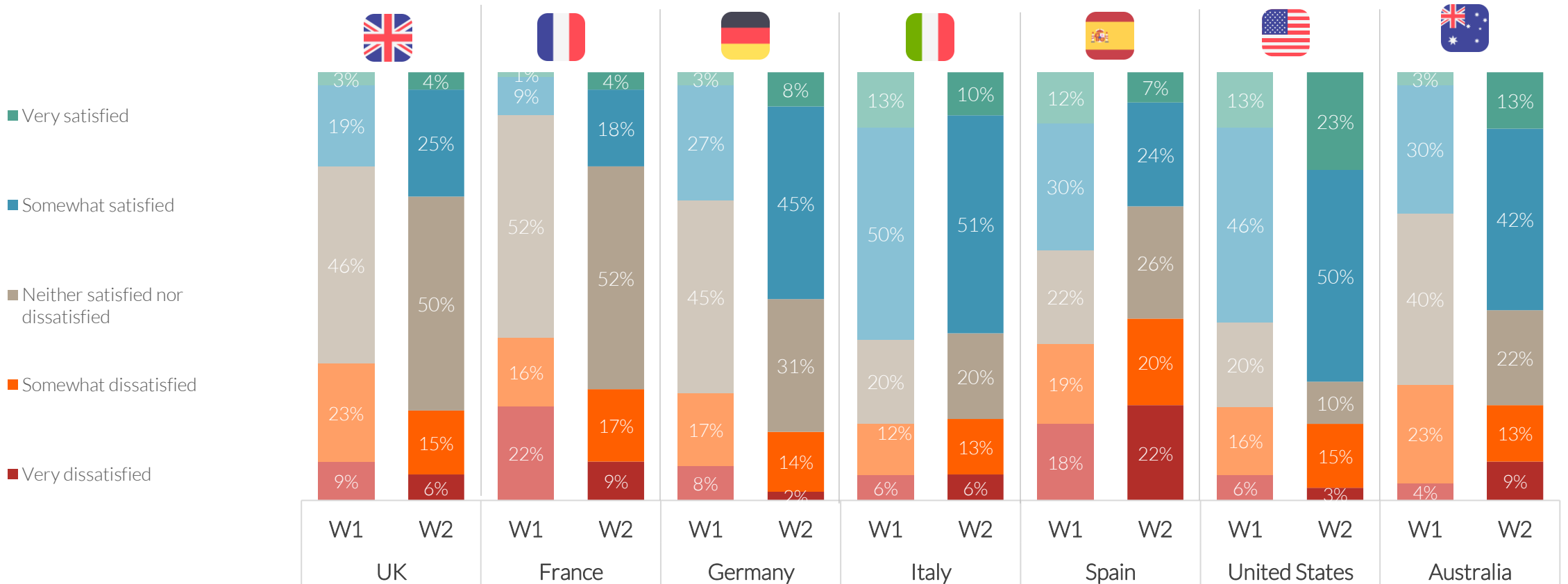
ADVICE SATISFACTION FROM NATIONAL GOVERNMENT

Although UK, Germany and Australia are showing higher levels of satisfaction in national government advice (in comparison to wave 1) there is a drop in satisfaction in France and Spain – indicating that there are clear improvements to make in these countries. Perception of national government advice in the United States remains relatively poor.



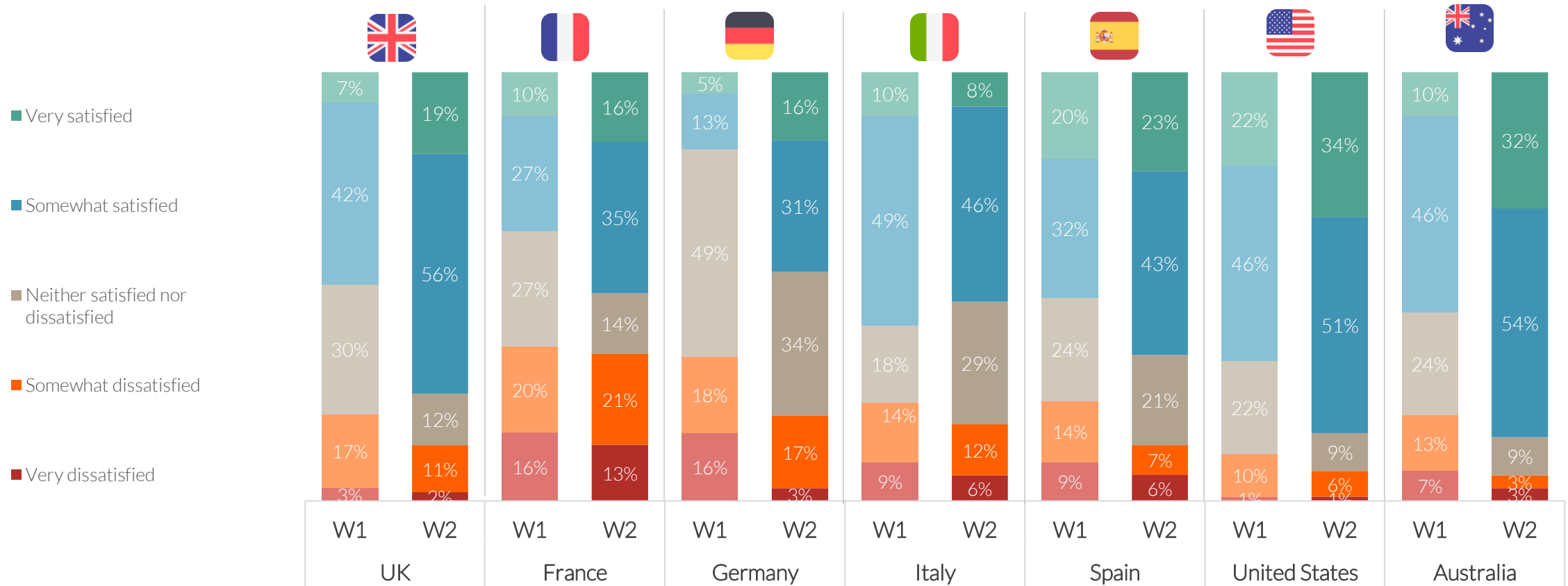
ADVICE SATISFACTION FROM LOCAL GOVERNMENT

US and Italian vets are most satisfied with the level of advice and guidance that they are receiving from their government. Although improving satisfaction in the UK and France is still poor. Germany and Australia have seen dramatic increases in satisfaction with local government advice – but there is still room for improvement.



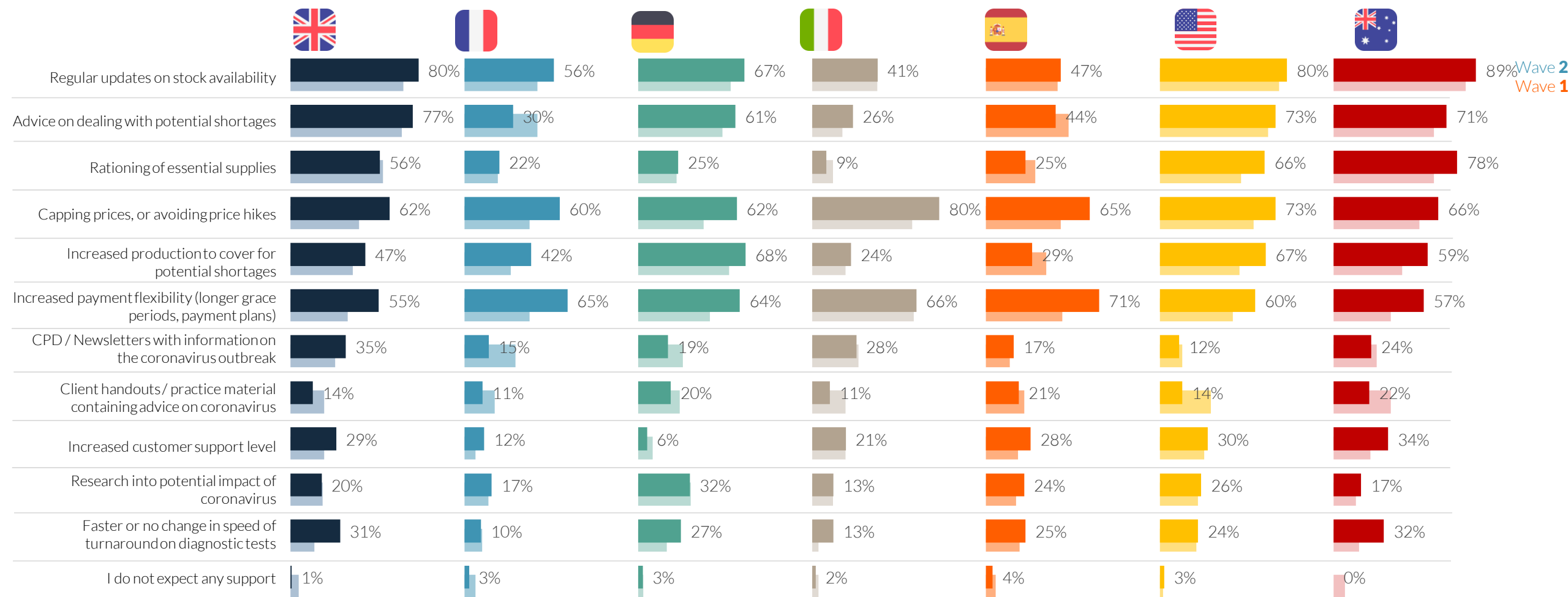
ADVICE SATISFACTION FROM NATIONAL VETERINARY ASSOCIATIONS

In comparison to the first wave, most countries are showing greater satisfaction in the advice they are receiving from national veterinary associations – and in many cases, this is a significant improvement. In Italy there has been little change.



EXPECTED SUPPORT FROM MANUFACTURERS & SERVICE PROVIDERS

Manufacturers and service providers are now expected to give more support, especially then it comes to capping prices and giving increased payment flexibility



05

APPENDIX

SURVEY QUESTIONS

Question	Added in wave	Question text
Q1	One	Which of the following have you experienced/observed amongst the clients in your practice in relation to COVID-19 outbreak? The clients have been...
Q2	One	Which, if any, of the following have happened in your practice in relation to COVID-19 outbreak?
Q3	One	How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? [replaced with below question in wave 2]
Q3a	Two	Thinking about the past week only , what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the
Q4	One	You mentioned that clients ask you questions regarding the COVID-19 outbreak. What do their questions relate to specifically?
Q5	One	If your veterinary practice was forced to close for two weeks due to the preventative measures taken by the government, how would it be affected financially?
Q7	One	When looking for the latest updates and advice on the COVID-19 outbreak, which sources of information do you use? Please select all that apply
Q8	One	If a member of staff is suddenly not able to work due to COVID-19 (e.g. due to illness, childcare etc.), how would it impact your practice?
Q9	One	How do you anticipate the impact of the COVID-19 outbreak on your practice will change, if at all, over the next couple of weeks?
Q10	One	How do you feel about the level of advice and guidance provided by...?
Q11	One	What kind of support do you expect from the veterinary manufacturers and service providers in the face of the COVID-19 outbreak?
Q12	One	How concerned are you about the risks posed by the COVID-19 outbreak from a personal perspective?
Q13	One	How concerned are you about the risks posed by the COVID-19 outbreak from the perspective of your practice and its business?

06

QUESTIONS?

Contact details

WHO IS **CM** RESEARCH?

CM Research is a market research agency specialized in the **veterinary and pet owner sector**.

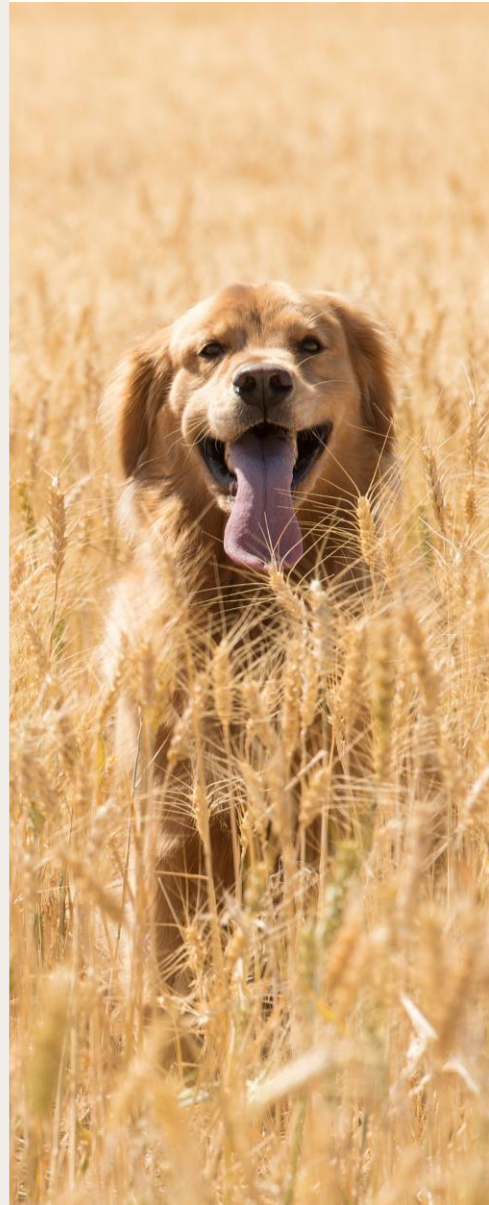
We run quantitative & qualitative, syndicated & sponsored, global & local projects for most of the top veterinary pharmaceutical companies and testing laboratories.

We own the largest independent veterinary panel, Vetspanel, with over 28,000 veterinary professionals across the world.

Types of projects we do are predictive models for new products, concept testing, sales rep performance, veterinary support needs, pharmaceutical range development, brand tracking....and much more

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