



# CM Research Coronavirus Survey – Wave 1

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



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By CM Research

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## 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

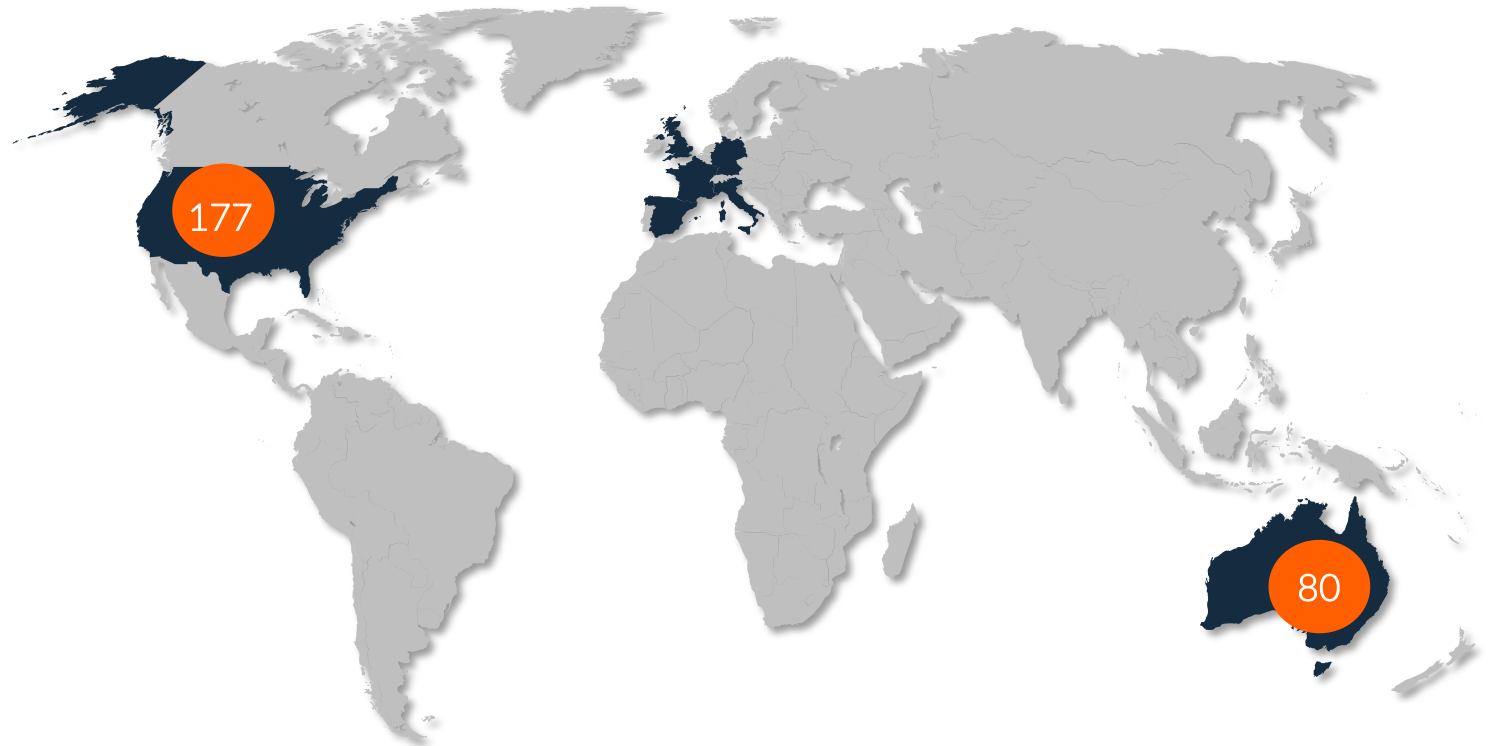
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## Methodology

*What did we do?*

# METHODOLOGY

Online survey run among Vetspanel companion animal veterinarians between the 13<sup>th</sup> and 17<sup>th</sup> of March across the following 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.

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## **Executive summary**

*What did the survey findings tell us?*

# EXECUTIVE SUMMARY

- As would be expected, countries that have “shut down” or have seen the largest impact of Covid-19, have seen a large number of clients appointment cancellations.
- Clients are generally asking vets for advice. Clients are not only stocking up on food for themselves but also on medication and food for their pets. Australia seems to be only exception where pet owners are not taking these precautionary measures.
- Social distancing is most frequent in countries that have been most affected by the outbreak, we expect to see this impact across all countries that choose to adopt these measures. The use of protective clothing is also highest in these counties.
- Overall, Australia stands out as the country that has seen less change in client behaviour.
- Most practices have implemented additional policies around personal hygiene and disinfecting of the practice.
- Vets in the UK and US report most that staff have been asking about their pay in case the practice needs to close, though this is significantly less in Europe.
- The social distancing measures adopted in Spain and Italy have resulted in an increased use of online tools to deliver advice to clients. These countries are also pre-screening clients to make sure they have a real need to go to the practice as numbers of daily clients has been limited, and in some cases only emergencies are being seen.
- A large number of vets in the UK and Australia have already cancelled holiday plans, most likely in anticipation of what is to come. On a positive note very few practices have closed and very rarely are staff refusing to treat certain patients.



## EXECUTIVE SUMMARY CONT.

- Across most countries there has been a marked decline in the number of clients visiting the practice. Australia is the least affected, for the moment, with Italy being the most. Some practices are also limiting the number of client they see, particularly in Spain and Italy. This has had a negative effect on revenue.
- The availability of cleaning supplies has also been negatively affected while stock deliveries have seen a slight decline (more in Spain and Italy).
- Almost a quarter of practices have seen a reduced number of staff available, higher in Italy.
- When clients ask questions related to Covid-19 they tend to be related to transmission between pets and humans, suggesting that there is a string case for national veterinary associations to out pet owners fears of transmission to rest.
- If national governments forced veterinary practices to close for a short period of time most of them would be able to continue operating but a small 5% would potentially close. The main effect would be cost cutting measures. Some would require additional financial help (more so in Germany where practices are smaller) and about a third would be able to absorb the repercussions.
- Most vets report that they would be able to cope if staff went absent for a period of time. However, this is less the case in countries with higher COVID-19 prevalence suggesting maybe that actual experience is harsher than expectations.
- The belief that the pandemic will get worse is almost universal, even in countries where it has been present for longer (e.g. Italy and Spain) - only about 1% think things are improving.

# EXECUTIVE SUMMARY CONT.

- Vets are relying almost equally on National Government websites and news/media for guidance and advice on the outbreak. The WHO website is also of importance, as are veterinary bodies and associations.
- Satisfaction with the advice vets have received from the National Government is high, but it could be better – a quarter report not being satisfied. National veterinary associations don't fare better, particularly in Germany. The performance of Local Governments are better in some countries (Spain, Italy and United States).
- Overall, veterinarians are concerned about the risks of the outbreak but this concern is highly correlated with experience. This suggest that concern will only increase in countries where prevalence is not high at the moment.

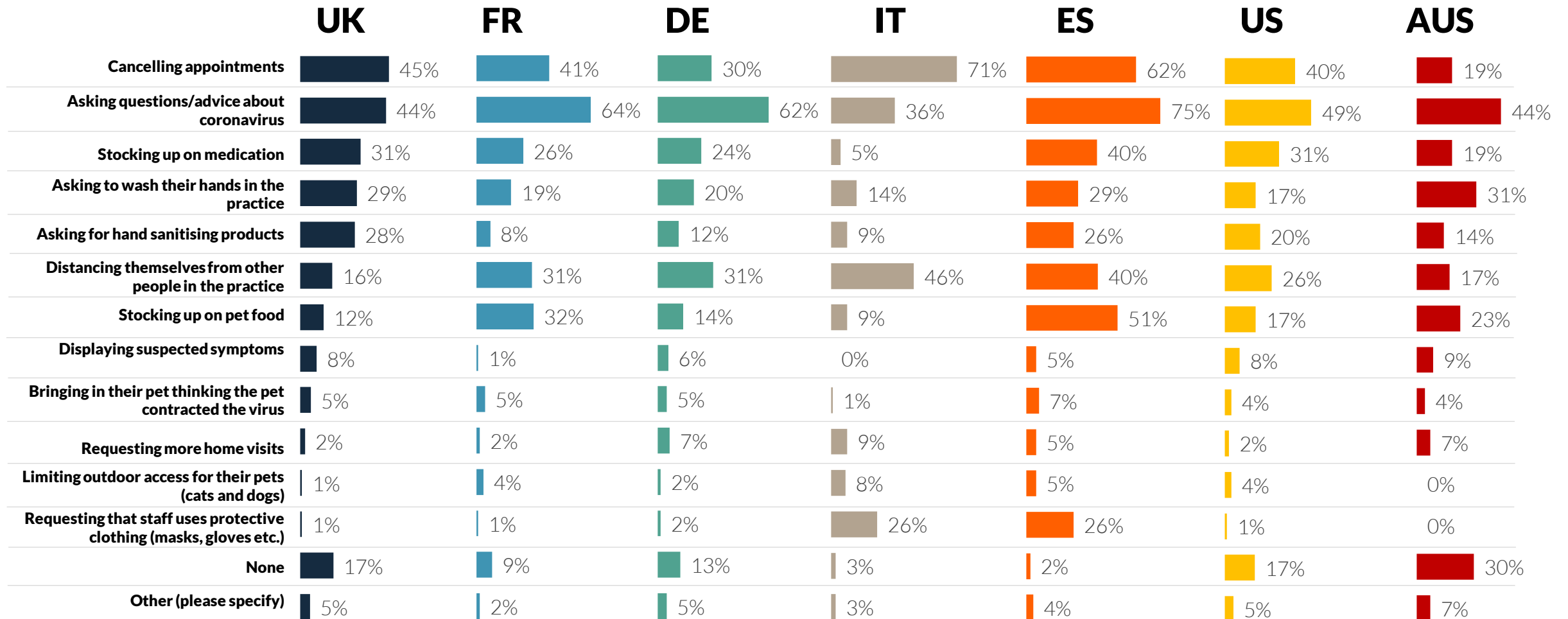
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## Detailed insights

*A more in-depth view of the survey findings.*

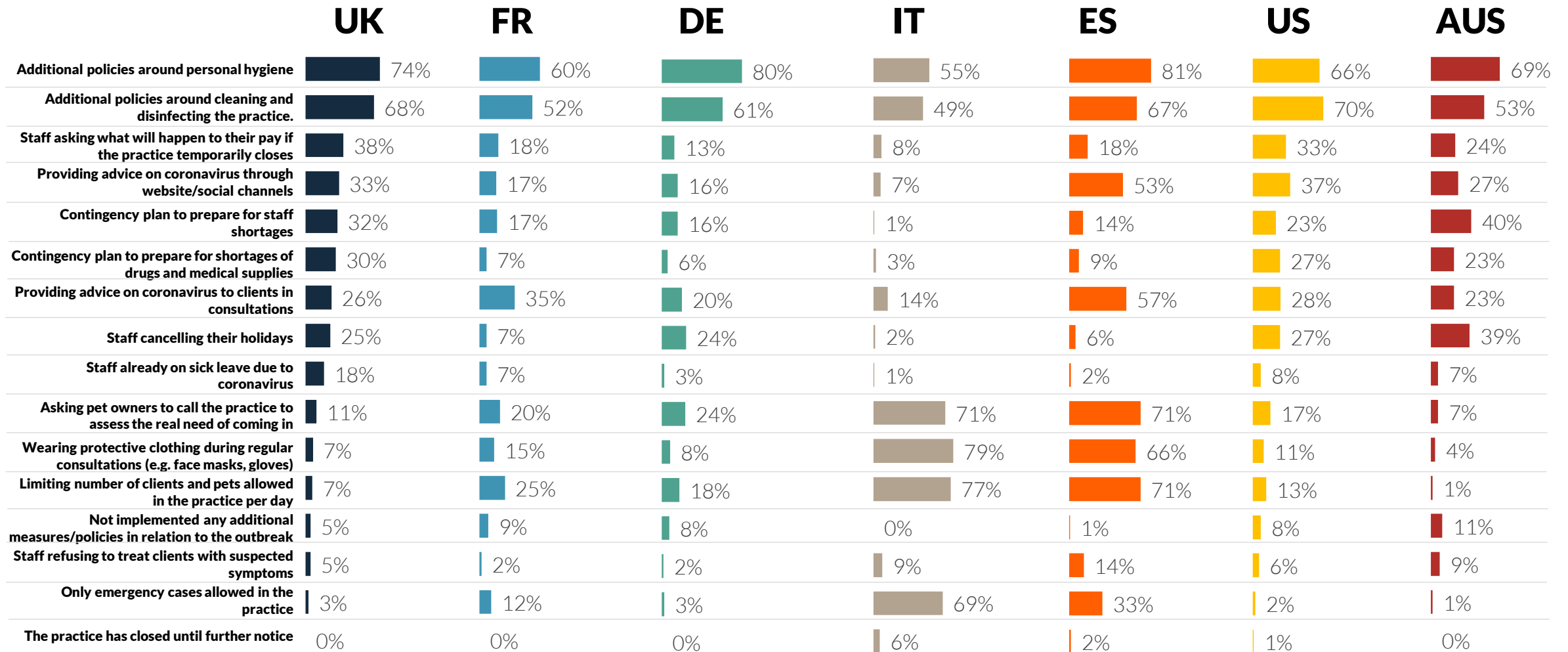
# CLIENT RESPONSE TO CORONAVIRUS

All the vets we surveyed are widely advising their clients on the outbreak – highest in Spain, France and Germany. Vets in Spain and Italy look to be taking more precautionary measures such as wearing protective clothing and distancing themselves from others.



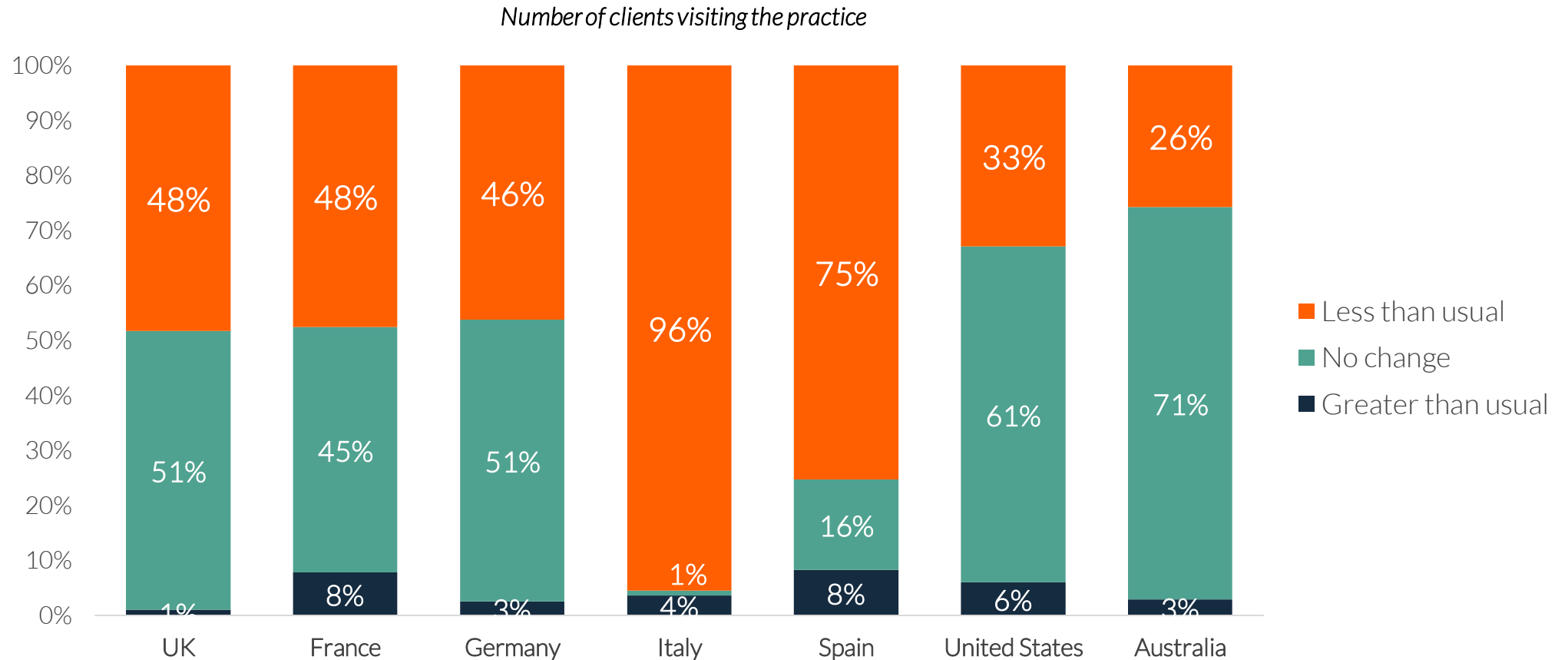
# PRACTICE RESPONSE & IMPACT OF CORONAVIRUS

Most countries report new policies around personal hygiene and practice cleanliness, whilst vets in Italy and Spain look to be adopting more severe measures to minimise the outbreak. Vets in Spain are under more pressure from pet owners to provide advice, both online and in-person.



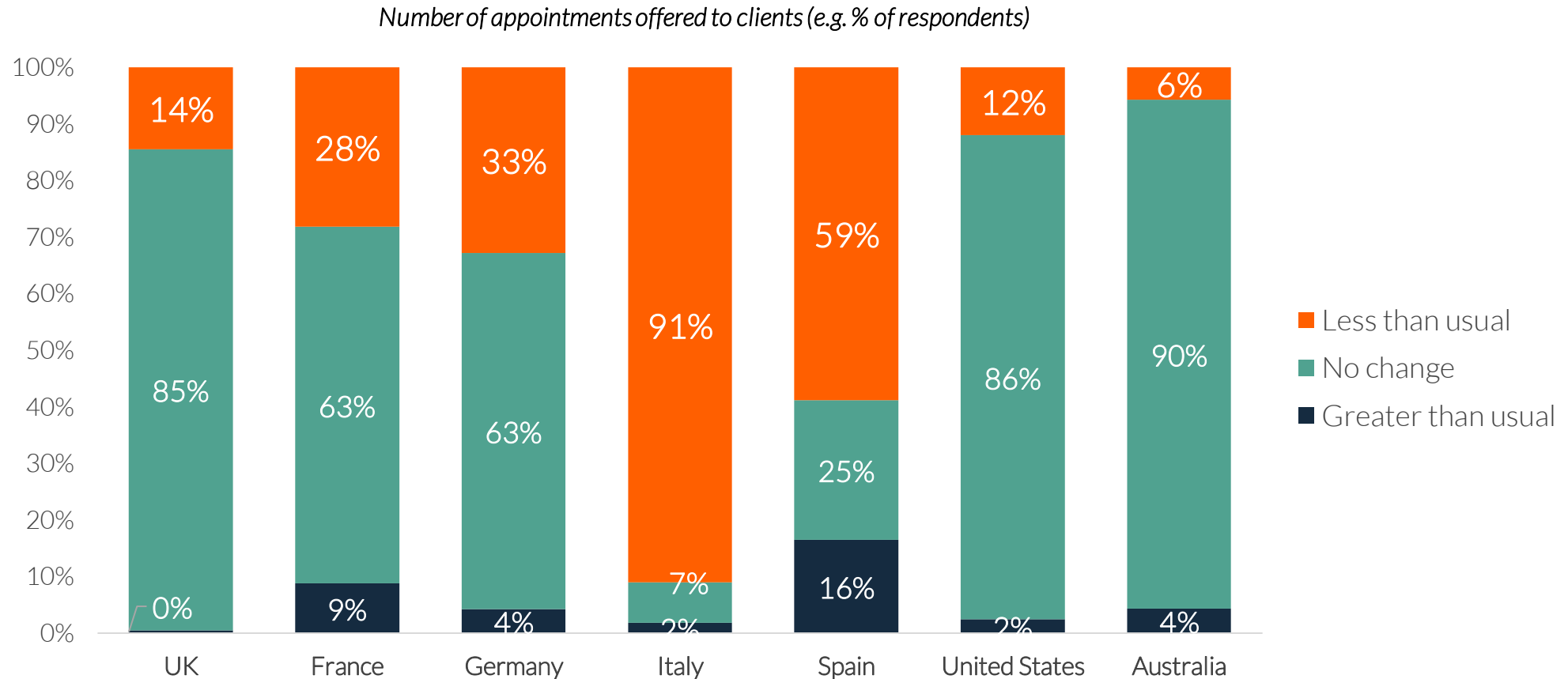
# CORONAVIRUS IMPACT ON NUMBER OF CLIENTS VISITING

All countries have seen some impact on the number of clients visiting the practice. Italy and Spain are the most affected countries due to more extreme measures in these markets, whilst other European countries are far less effected.



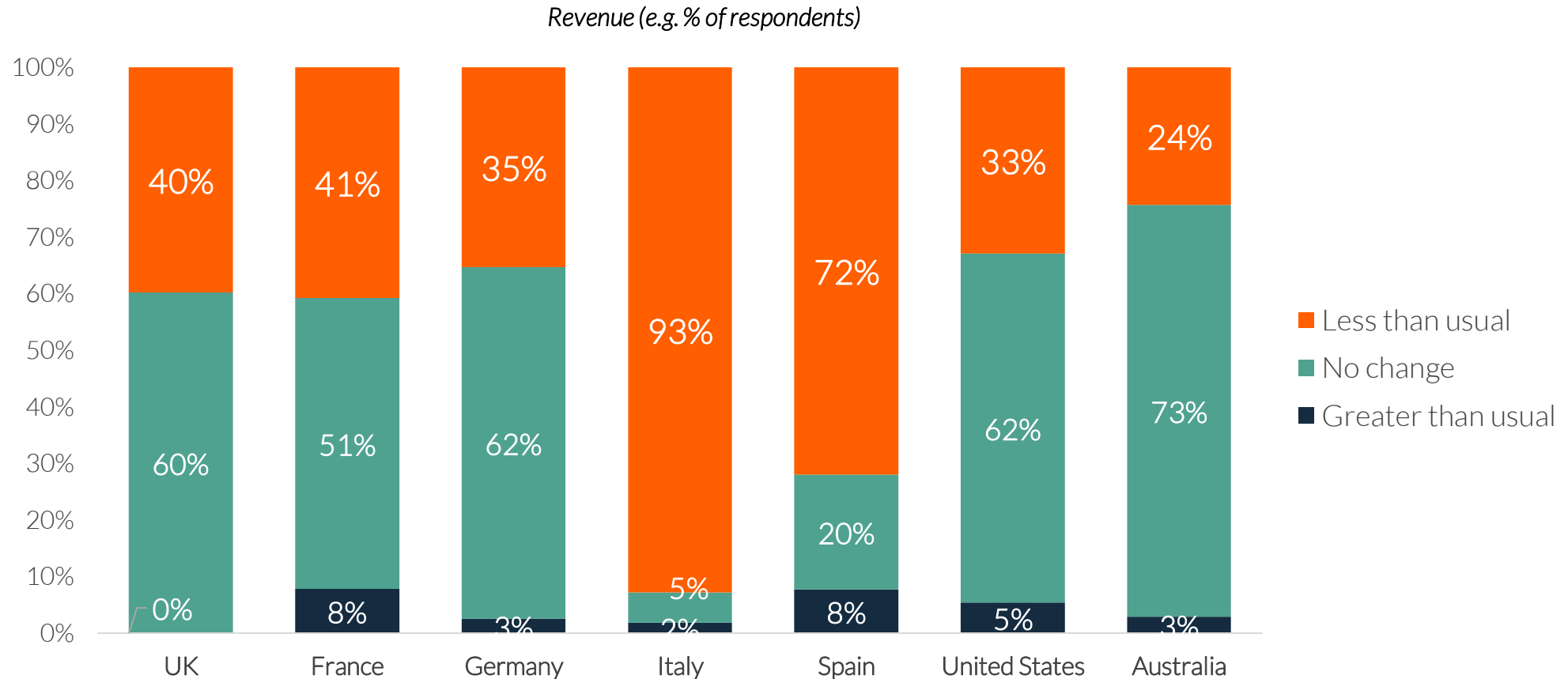
# CORONAVIRUS IMPACT ON APPOINTMENTS OFFERED TO CLIENTS

Although clients are cancelling appointments and not visiting the practice as often, vets report there is mostly no change in the number of appointments offered to clients. Vets in the UK, US and Australia report highest levels of 'business as usual' likely due to the fieldwork taking place prior to official social distancing measures in these markets.



# CORONAVIRUS IMPACT ON REVENUE

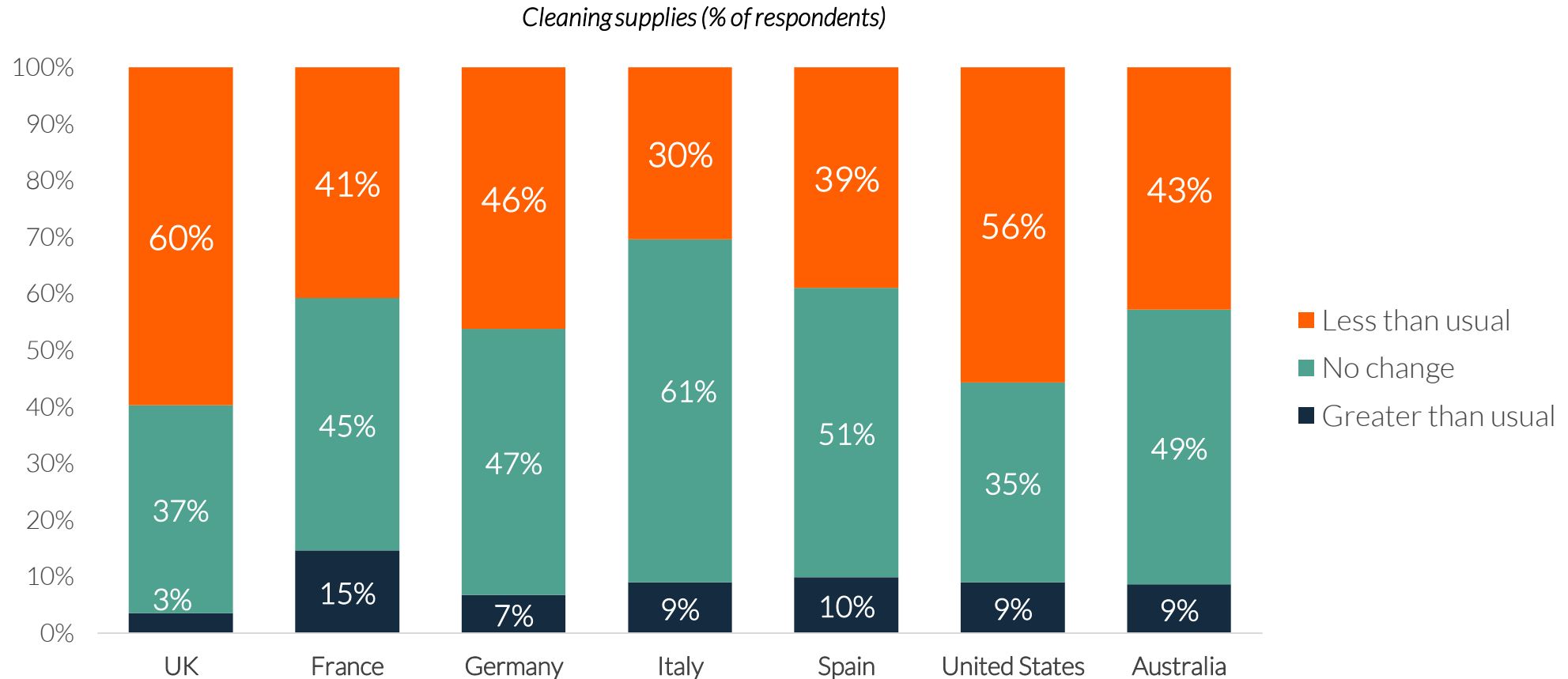
Italian practices are suffering most, with only 5% of vets reporting no change on their revenue stream. The UK, France, Germany and the US are broadly on par, though expected to change in response to new government advice on social distancing.





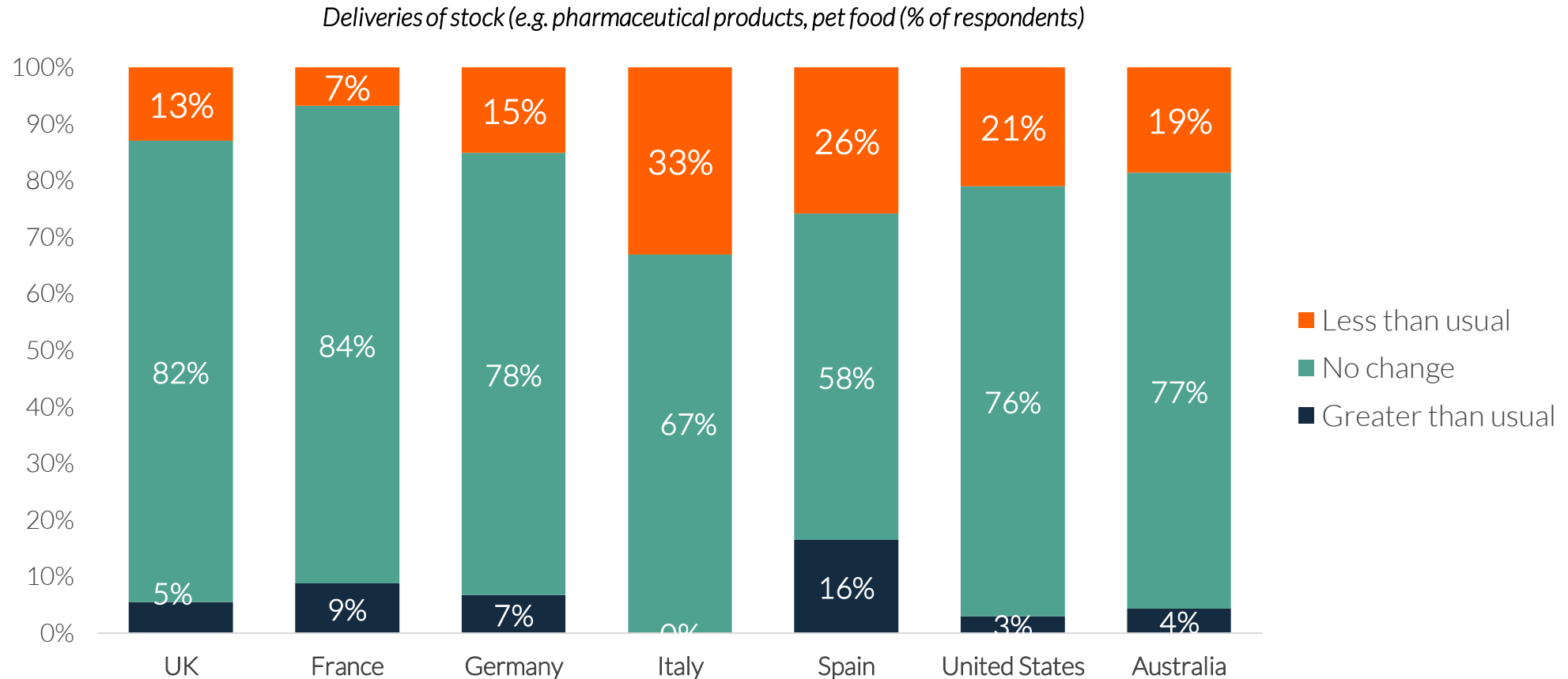
# CORONAVIRUS IMPACT ON AVAILABILITY OF CLEANING SUPPLIES

There is a mixed availability of cleaning supplies worldwide, with vets in the UK and US finding it particularly difficult to source what they need. Positively, Spain and Italy (the most impacted by the outbreak) are struggling the least.



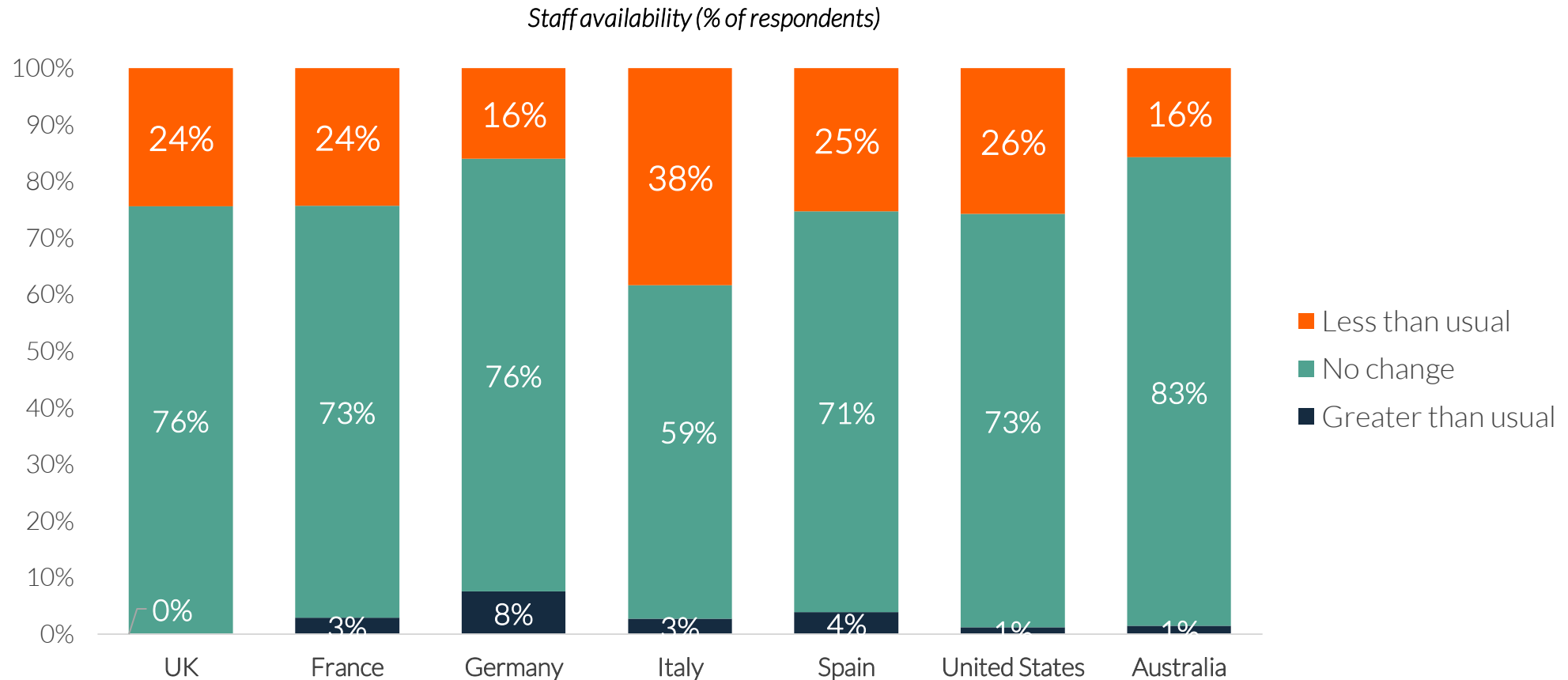
# CORONAVIRUS IMPACT ON STOCK DELIVERIES

As of yet, few practices are being negatively impacted by the outbreak in terms of stock.



# CORONAVIRUS IMPACT ON STAFF AVAILABILITY

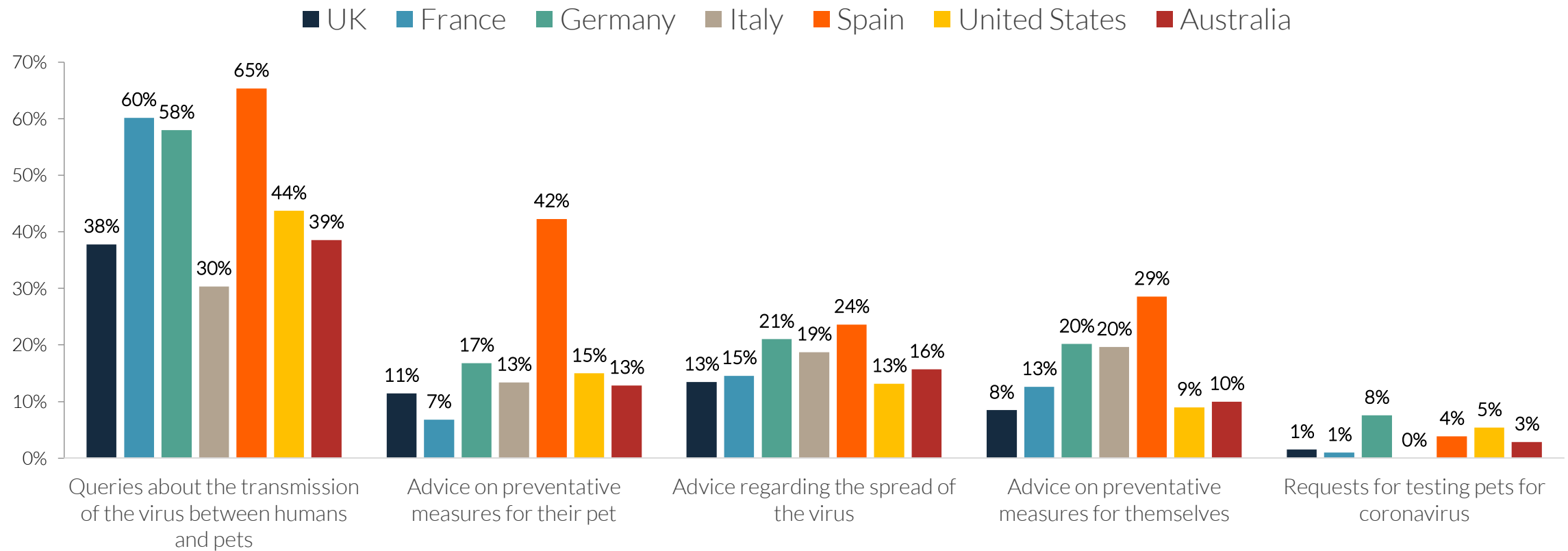
All countries have been somewhat impacted by staff availability. Over a third of Italian vets' report that they have less staff than usual, yet with most vets also reporting appointment cancellations and a decrease in client visits this may not be a huge issue for owners/partners.



# CLIENT QUESTIONS DURING CORONAVIRUS OUTBREAK

Spanish vets report more queries from their clients than any other country surveyed with over twice as many vets reporting that they have given advice on preventative measures for their pets – just under 1 in 3 also report giving personal advice to clients,

Client questions on coronavirus outbreak (e.g. % of respondents that were asked a question by a client)

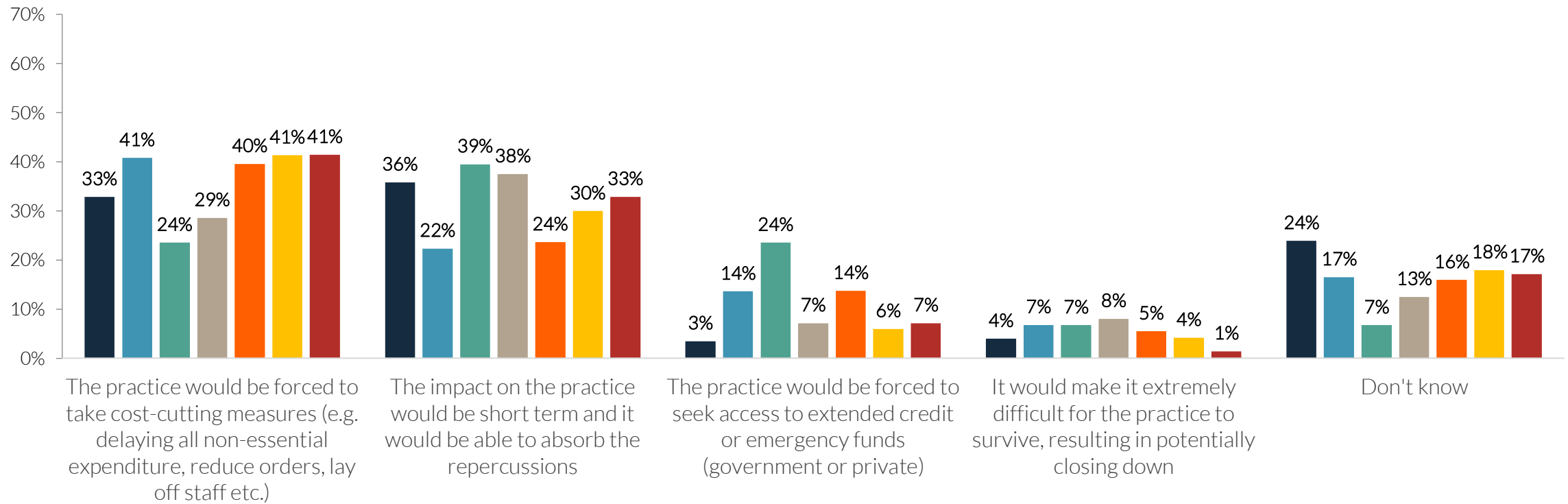


# FINANCIAL IMPACT OF PRACTICE CLOSURE

Most vets report that their practice would have to take cost-cutting measures in the outcome of practice closure. Yet German vets are most likely to state their practice would be forced to seek funds to keep operating. Positively, only a small proportion report a potential closure.

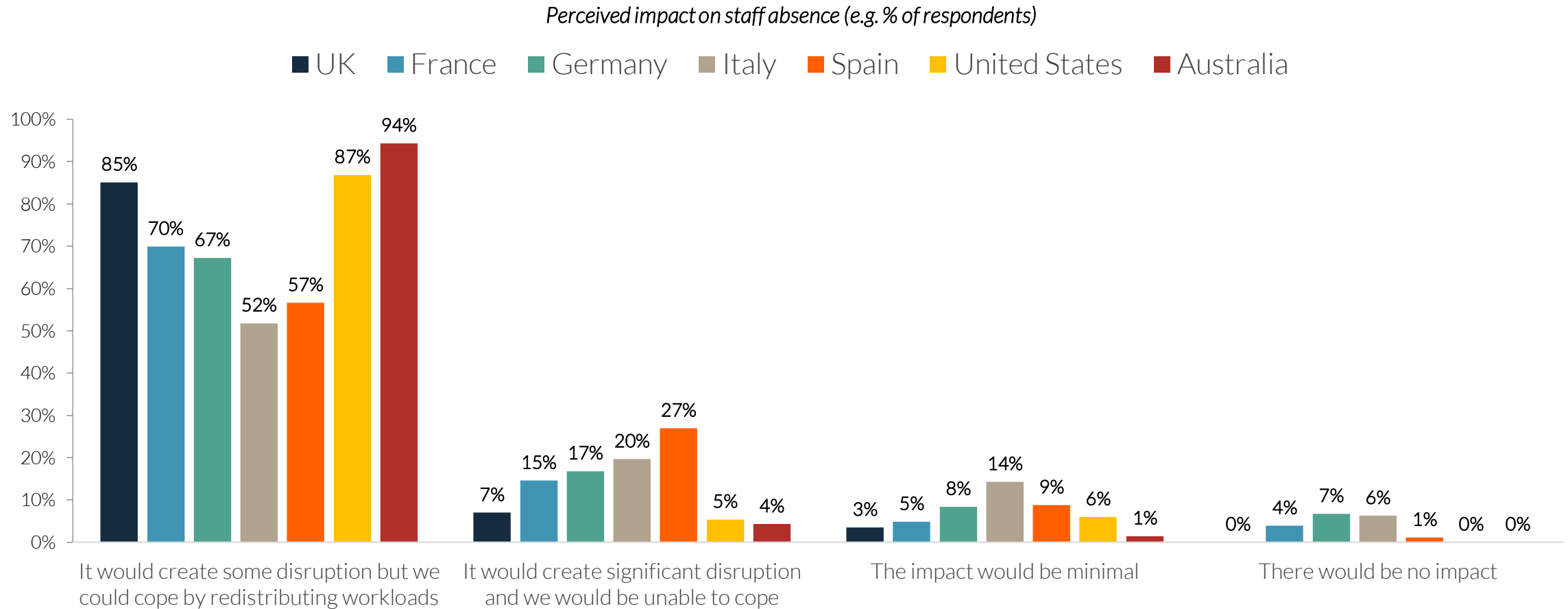
Financial impact on 2-week practice closure (e.g. % of respondents)

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



# IMPACT ON STAFF ABSENCE

In the event of staff absences most vets feel confident that they would be able to cope. Whilst in Spain the impact of absences would potentially mean the business would not be able to cope, in Italy the impact is less significantly due to decreased footfall.

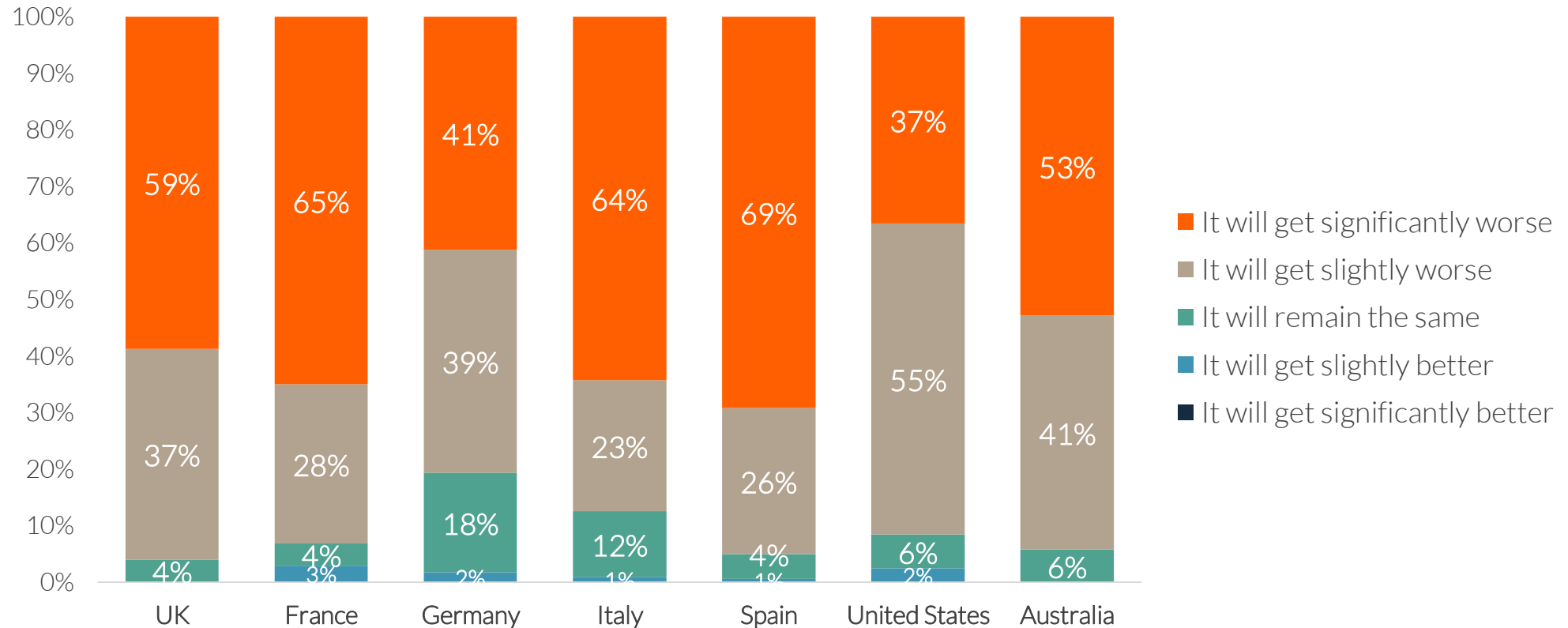


# ANTICIPATED IMPACT OF CORONAVIRUS – NEXT 2 WEEKS

A significant proportion of vets feel that the impact of coronavirus will be worse over the next 2 weeks – this is still high in Italy which is a country that has already seen largescale impact nationally.

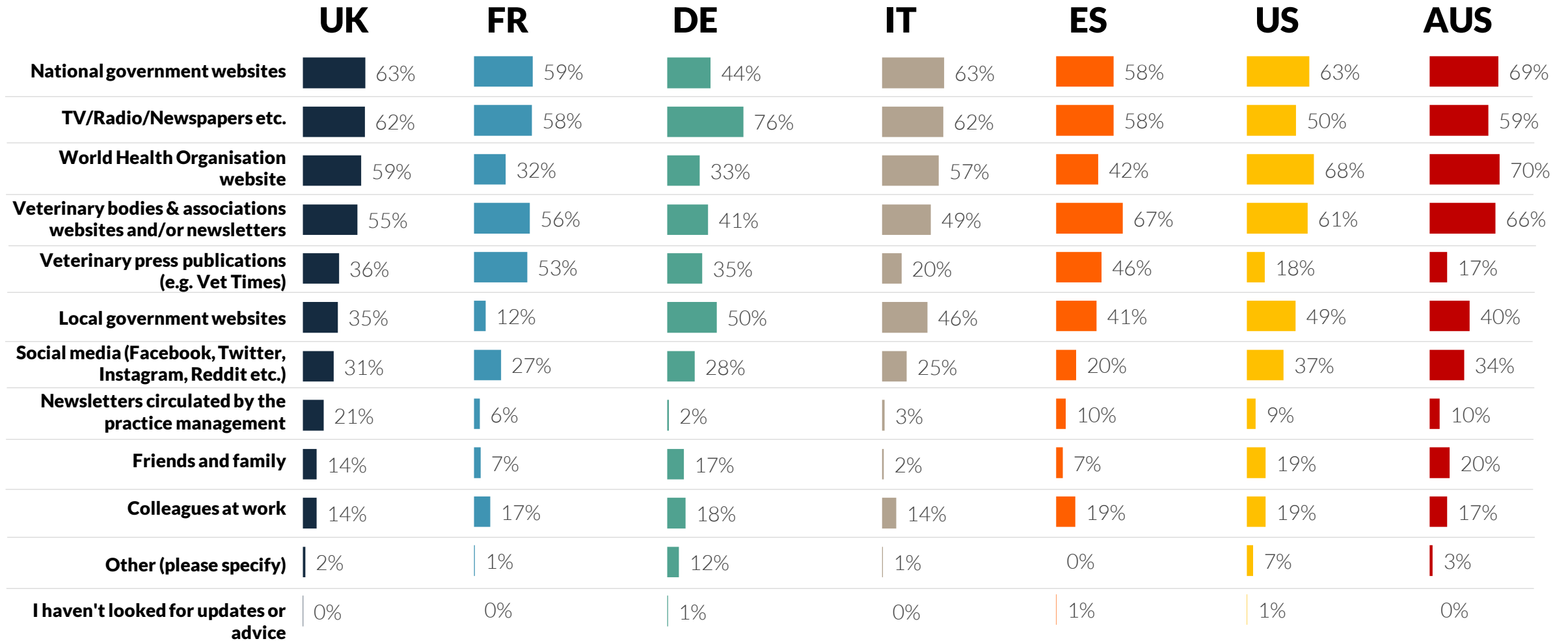
**T2B**  
**B2B**

<b>96%</b>	<b>93%</b>	<b>81%</b>	<b>88%</b>	<b>95%</b>	<b>92%</b>	<b>94%</b>
<b>0%</b>	<b>3%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>2%</b>	<b>0%</b>



# SOURCES USED BY VETS FOR UPDATES ON OUTBREAK

Vets use a broad range of sources to keep up with the latest news and update on the outbreak. Veterinary publications, bodies and associations are well used sources in vet's repertoire, though publications aren't used as often by American and Australian vets.

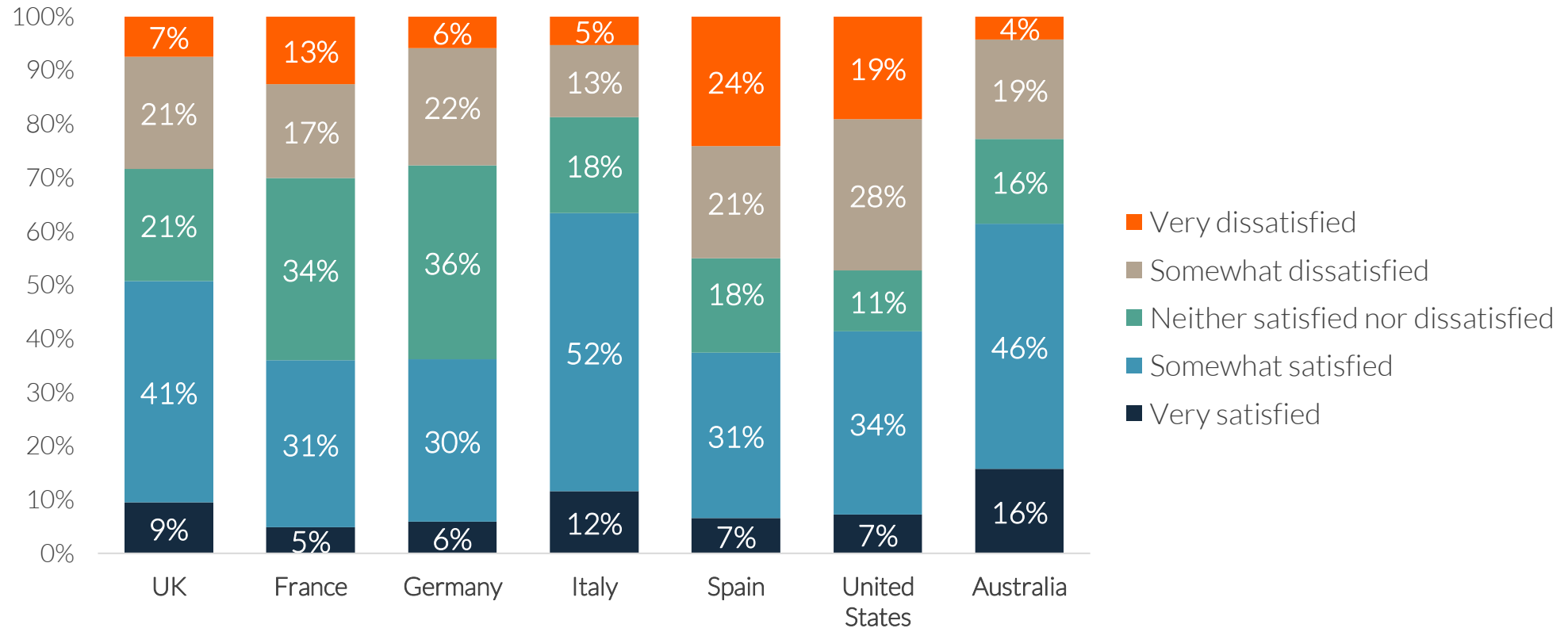




# ADVICE SATISFACTION FROM NATIONAL GOVERNMENT

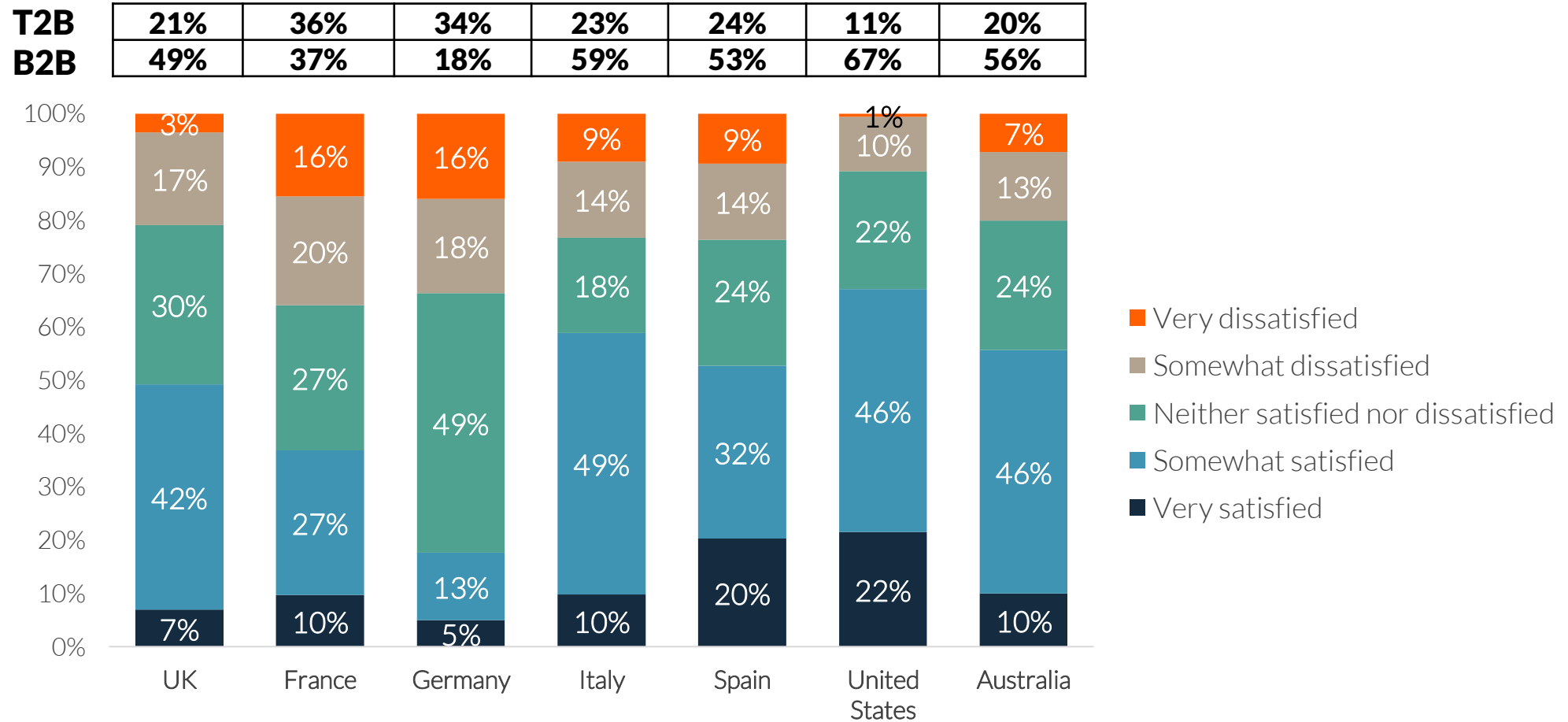
As the source most used for news and updates, the National Government could improve the guidance given to veterinary professionals. This is particularly the case for Spain and US where nearly half of vets feel dissatisfied with the guidance they receive.

<b>T2B</b>	<b>28%</b>	<b>30%</b>	<b>28%</b>	<b>19%</b>	<b>45%</b>	<b>47%</b>	<b>23%</b>
<b>B2B</b>	<b>51%</b>	<b>36%</b>	<b>36%</b>	<b>63%</b>	<b>37%</b>	<b>41%</b>	<b>61%</b>



# ADVICE SATISFACTION FROM NATIONAL VETERINARY ASSOCIATIONS

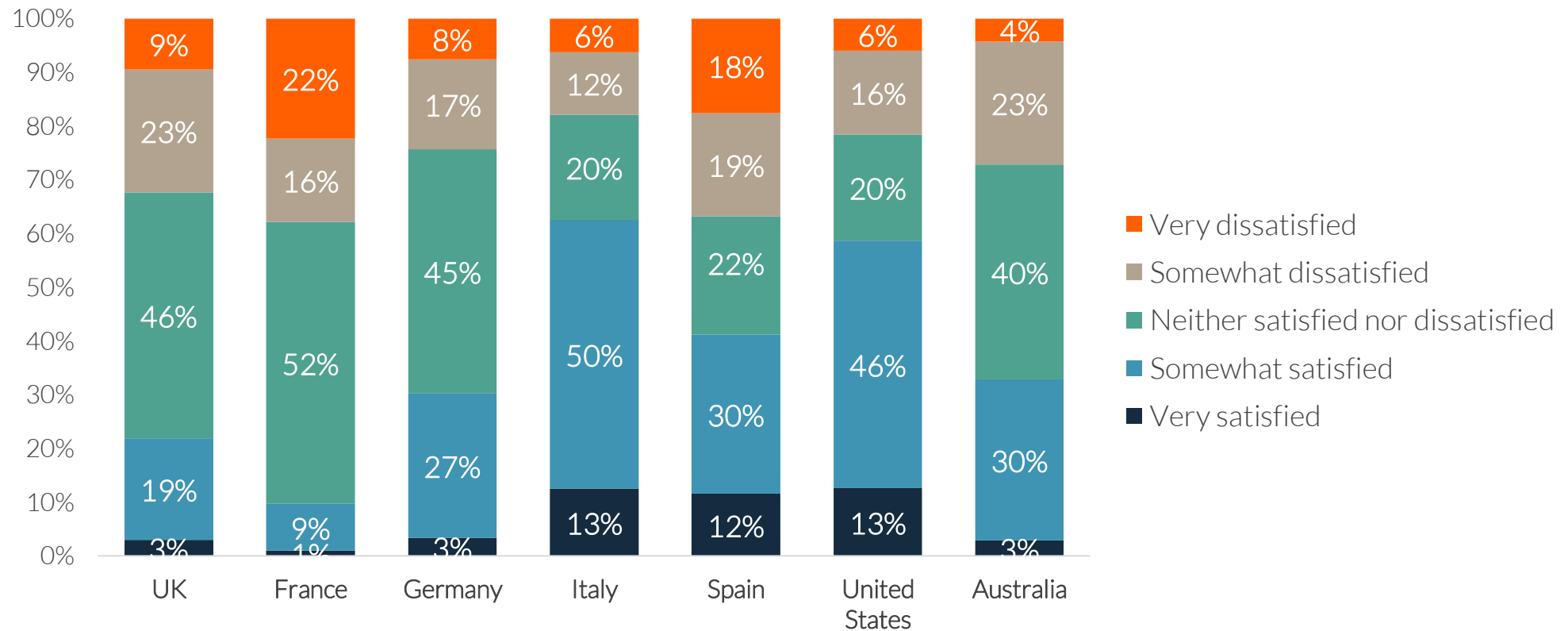
As a frequently used source for news updates, vets feel that the advice they receive from national veterinary associations is mostly adequate – though this could be improved, particularly in France and Germany.



# ADVICE SATISFACTION FROM LOCAL GOVERNMENT

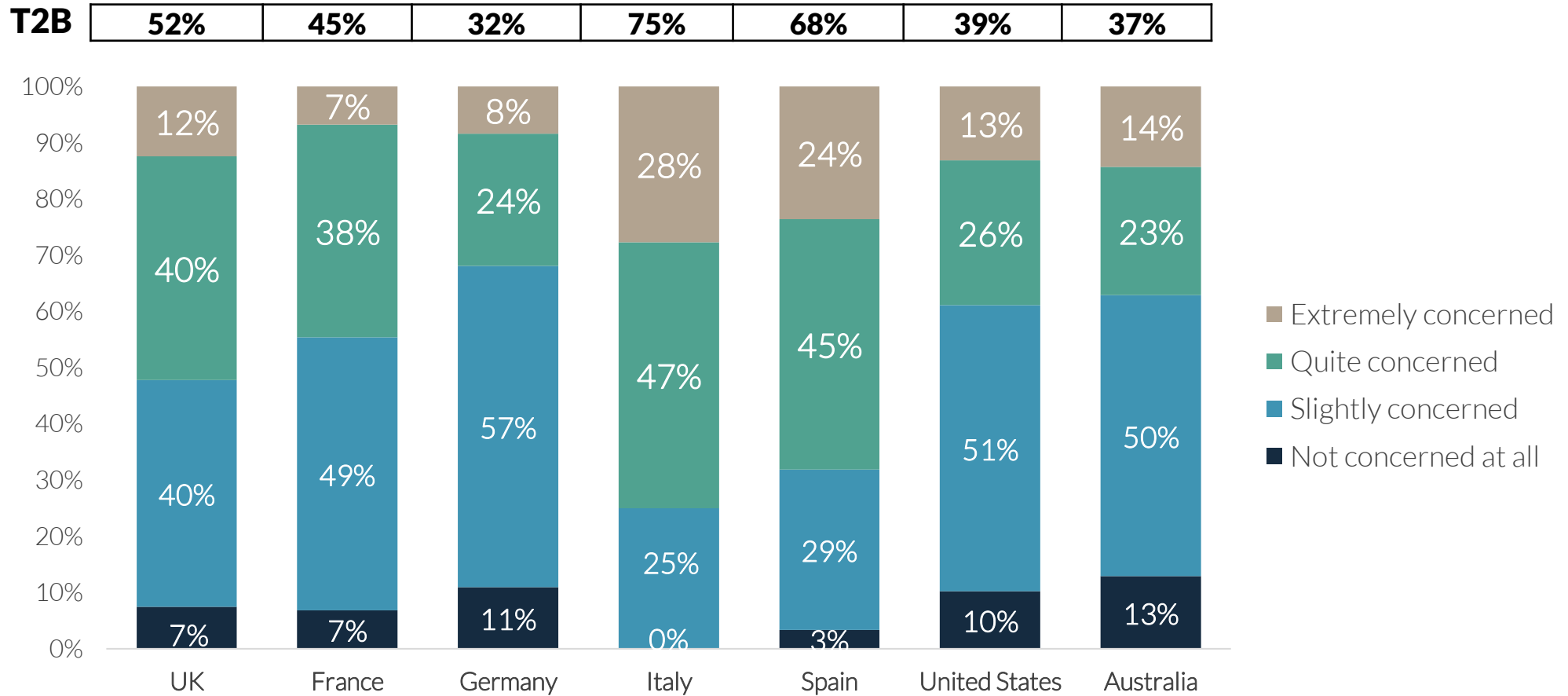
Italian vets are most satisfied with the level of advice and guidance that they are receiving from their government, with 2 in 3 stating so. Local Governments in France and Spain could be doing a better job...

<b>T2B</b>	<b>32%</b>	<b>38%</b>	<b>24%</b>	<b>18%</b>	<b>37%</b>	<b>22%</b>	<b>27%</b>
<b>B2B</b>	<b>22%</b>	<b>10%</b>	<b>30%</b>	<b>63%</b>	<b>41%</b>	<b>59%</b>	<b>33%</b>



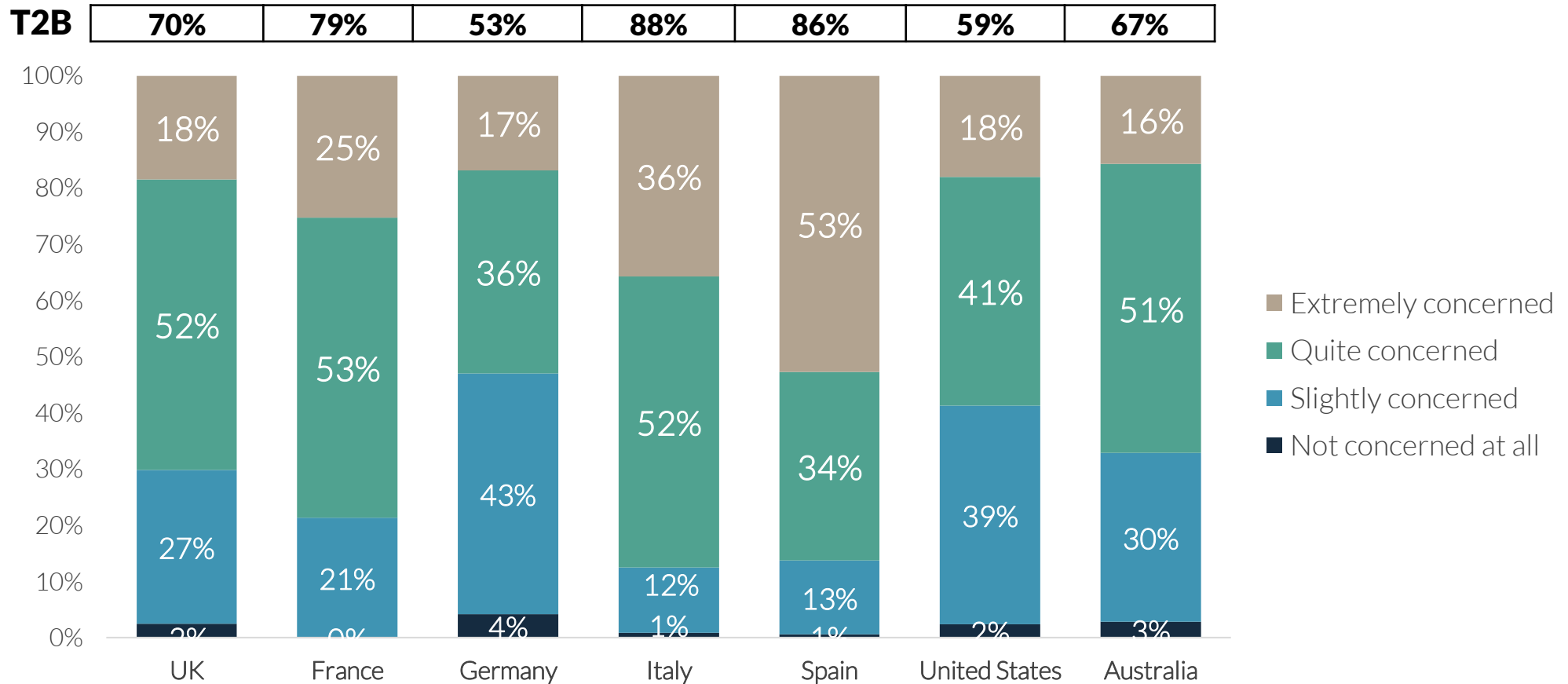
# PERSONAL CONCERN ON RISK OF CORONAVIRUS OUTBREAK

The level of concern by veterinarians follows the severity of coronavirus cases in each country – Italy leads, followed by Spain. Vets in Germany are keeping calm, whilst over half of UK vets are experiencing high levels of concern.



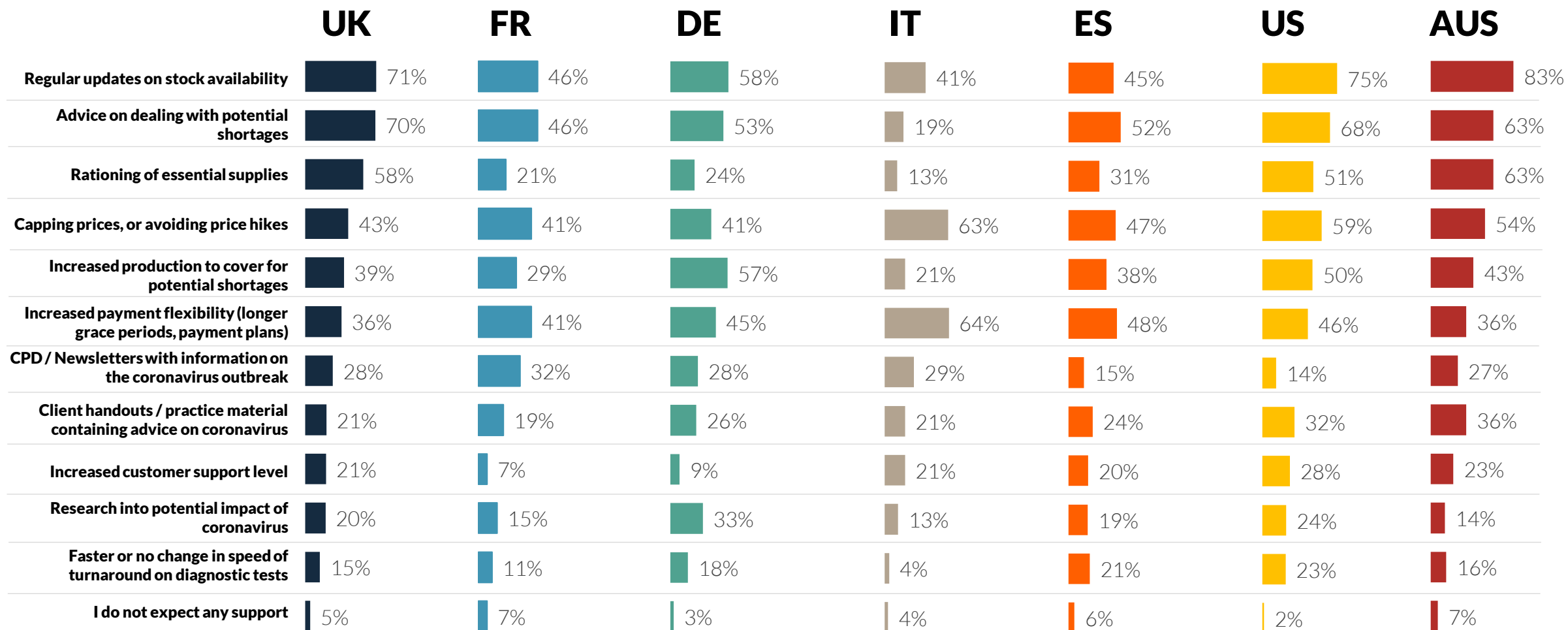
# PROFESSIONAL CONCERN ON RISK OF CORONAVIRUS OUTBREAK

Compared to personal concern, veterinarians are significantly more concerned about the impact the outbreak will have on their practice – in Spain, over half of vets are extremely concerned about the potential impact whilst German vets are again less concerned...



# EXPECTED SUPPORT FROM MANUFACTURERS & SERVICE PROVIDERS

Nearly all the vets we spoke to expected some level of support from manufacturers and service providers, most expect regular updates and advice though a few expected manufacturers to go further by offering discounts and flexibility in making payments.



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Appendix

# SURVEY QUESTIONS

Question number	Question text
Q1	Which of the following have you experienced/observed amongst the clients in your practice in relation to coronavirus outbreak? The clients have been...
Q2	Which, if any, of the following have happened in your practice in relation to coronavirus outbreak?
Q3	How, if at all, has the coronavirus outbreak impacted your veterinary practice on the following?
Q4	You mentioned that clients ask you questions regarding the coronavirus outbreak. What do their questions relate to specifically?
Q5	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	When looking for the latest updates and advice on the coronavirus outbreak, which sources of information do you use? Please select all that apply
Q8	If a member of staff is suddenly not able to work due to coronavirus (e.g. due to illness, childcare etc.), how would it impact your practice?
Q9	How do you anticipate the impact of the coronavirus outbreak on your practice will change, if at all, over the next couple of weeks?
Q10	How do you feel about the level of advice and guidance provided by...?
Q11	What kind of support do you expect from the veterinary manufacturers and service providers in the face of the coronavirus outbreak?
Q12	How concerned are you about the risks posed by the coronavirus outbreak from a personal perspective?
Q13	How concerned are you about the risks posed by the coronavirus outbreak from the perspective of your practice and its business?



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**THANK YOU!**

*Contact details*

# WHO IS **CM** RESEARCH?

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

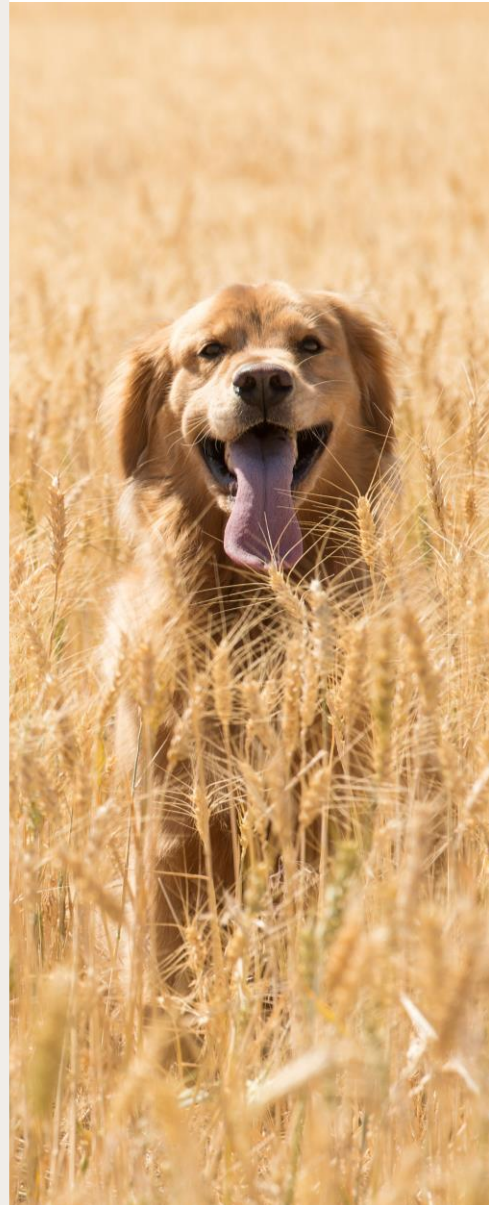
We run quantitative & qualitative, syndicated & sponsored, global & local projects for most of the top veterinary pharmaceutical companies and testing laboratories.

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