

CM RESEARCH CORONA VIRUS TRACKER WAVE 3

What is the continued impact of COVID-19 on the veterinary industry

23rd April 2020

By CM Research

CM Research

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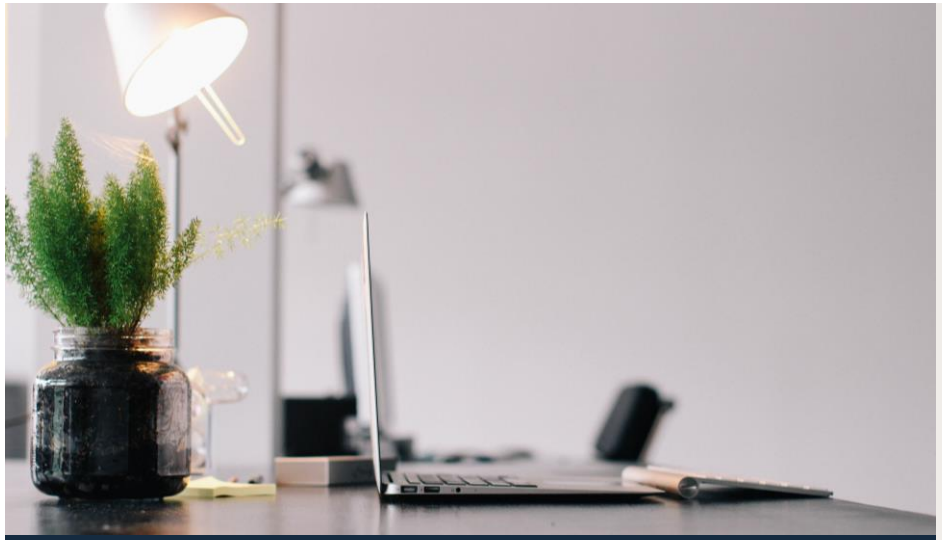
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01 Objectives

What did the research look to achieve?

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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

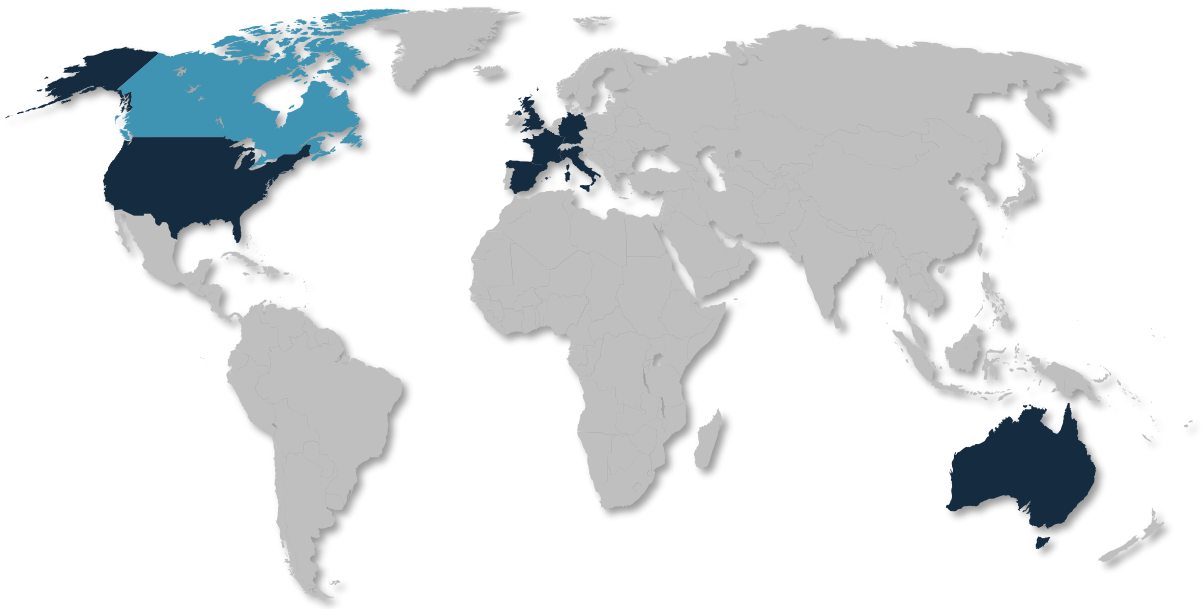
02 Methodology

What did we do?

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METHODOLOGY

Online survey run among Vetspanel companion animal veterinarians in 8 countries (7 countries in Wave 1 and 2). 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.

The final wave will concentrate on how vets see the "new normal" and how Covid-19 has changed them and their practice.

Sample size	Wave 1 *14th – 18th March*	Wave 2 *27th March – 2nd April*	Wave 3 *17th – 23rd April*
UK	208	183	182
France	125	109	112
Germany	133	114	104
Italy	140	91	111
Spain	193	129	106
US	177	161	187
Australia	80	83	69
Canada	-	-	100

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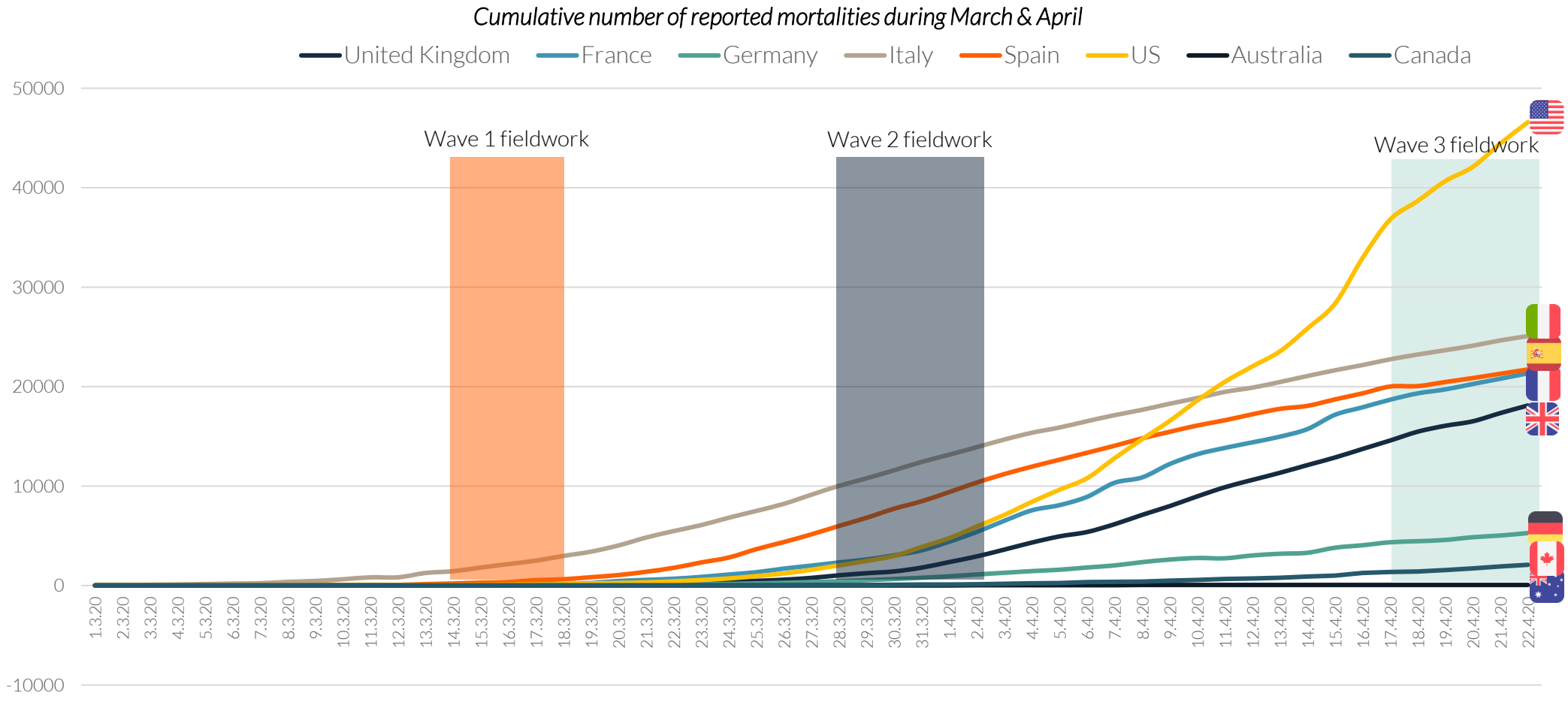
03 Executive summary

What did the survey findings tell us?

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CONTEXT: THE CURVE HAS STARTED TO FLATTEN IN EU, AS US CLIMBS

Since the second wave we have seen a sharp increase in mortalities in the US, making it by far the worst affected in pure number terms. The gap between Spain and France has narrowed, whilst the UK and Italy continue a similar trend. Germany, Canada and Australia have remained behind the curve



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EXECUTIVE SUMMARY

WE SEE A LEVELLING OUT OF CONCERN, AS PRACTICES ADAPT TO NEW WAYS OF WORKING

- Compared to waves 1 and 2 we now see veterinarians showing less personal and professional concern.
    - In Italy and France in particular we see the levels of "extreme" professional concern at half the rate they were in wave 1, though personal concern in France continues to increase.

- Despite huge increases in cases and mortalities in the US, overall there is little change vs. last wave for this country.

- There is an expectation that the impact of the crisis will stay around about the same in the next couple of weeks, in contrast to wave 1 and wave 2 where many expected things to get at least slightly, if not significantly, worse.

PRACTICES HAVE SETTLED INTO THEIR NEW POLICIES

- Hygiene policies remain at a similar level as wave 2 across all markets
- The US, France and Germany are reporting more measures relating to keeping patient numbers down, as we begin to see fewer staff in practices
- The UK, Italy, France and Canada are more likely to be seeing just emergency cases, whereas this is not widespread in other markets.

IMPACTS ON REVENUE, STOCK AND APPOINTMENT NUMBERS REMAIN NEGATIVE – BUT AREN'T FALLING SO SHARPLY

- Overall there is still an average decrease in all areas; though the rate of decline has slowed when it comes to revenue and number of clients in clinic.
- The UK remains the market reporting the biggest impact on footfall and revenue, closely followed by Italy.

EXECUTIVE SUMMARY

CLIENTS ARE STOCKING UP LESS AND CANCELLING FEWER APPOINTMENTS, BUT ARE STILL ADDING TO THE BURDEN OF VETERINARIANS

"People are asking to not pay for services due to coronavirus. We have not received any government assistance to date. The stimulus package in Australia is not overly helpful for a very small business." **Wave 2, AU**

Some really lovely support from most of our clients but some really unpleasant reactions due to the selfishness of human nature… This is going to have a massive impact on jobs and pet welfare I foresee many abandoned animals" **Wave 2, UK**

"Owners use animals to be able to leave the house" **Wave 3, IT**

"Clients have migrated to either the understanding and reasonable camp to the utterly rude and increasingly demanding camp with very little middle ground. Interesting times." **Wave 3, AU**

VETERINARIANS ARE NOT FEELING SUPPORTED BY GOVERNMENT, THE INDUSTRY OR THEIR EMPLOYERS

- The support expected from manufacturers has remained similar to wave 2; they still expect regular updates on stock and payment flexibility above other measures
- Spain remain very dissatisfied with their governments response and dissatisfaction increases in the UK too
- Based on findings in the vets own words, we also suggest that any emotional support and outreach would be appreciated at the moment

"It is draining financially, and emotionally. Together we can beat this." **Wave 1, UK**

"We are not going to receive any type of aid from the state, such as VAT relief or taxes, during this period of confinement, so the economic impact will be brutal." **Wave 2, ES**

"I was shocked how quickly my boss was ready to consider laying off staff." **Wave 2, UK**

"Stress, stress, stress! Impact on community with business closures is just sad, I predict that with the 'no money' in the community that domestic violence will increase, crime will increase, it is just sad, suicide likely increase as well. it is not good." **Wave 2, AU**

"The lack of disinfectants is extremely problematic. I don't understand why our chamber doesn't care. Disinfectants should be organized especially for veterinarians, ideally centrally." **Wave 2, DE**

04 Detailed insights

A more in-depth view of the survey findings.

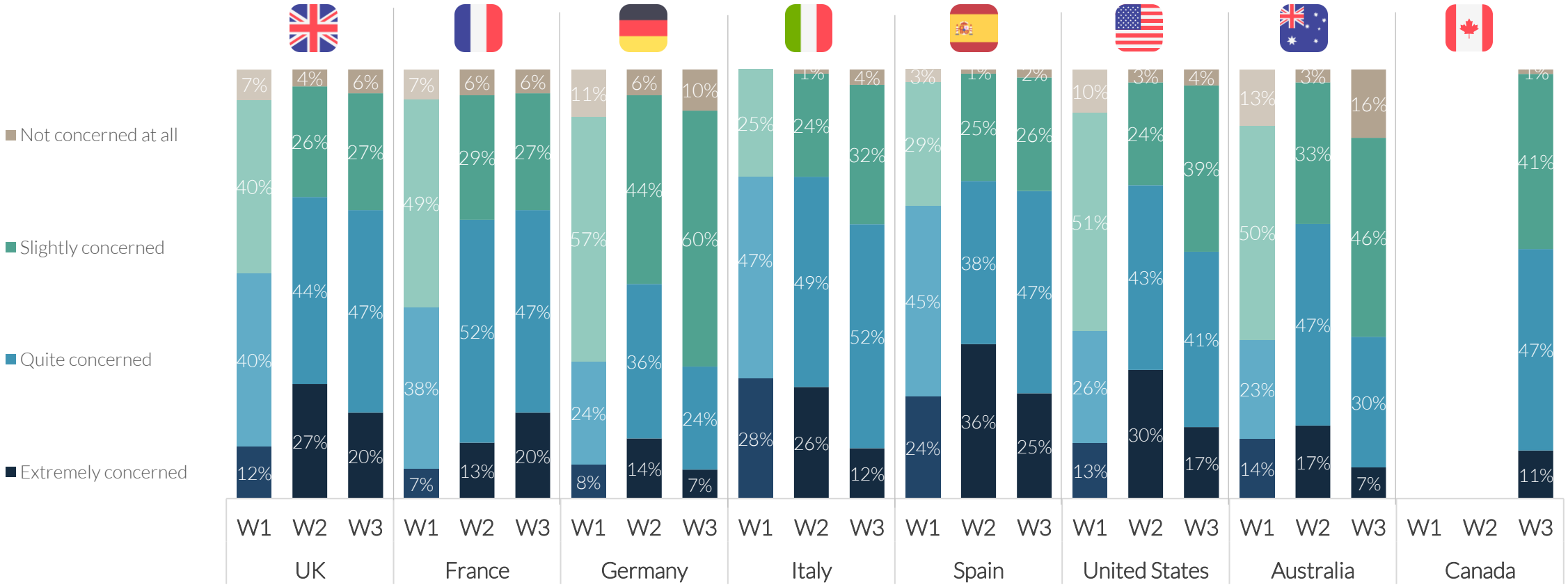
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4.1 Veterinarian perception of Covid-19 crisis

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PERSONAL CONCERN ON RISK OF CORONAVIRUS OUTBREAK

In most countries the levels of personal concern have declined, with France being the exception. Interestingly in Italy levels have seen a marked decline in line with the number of new Covid-19 cases.

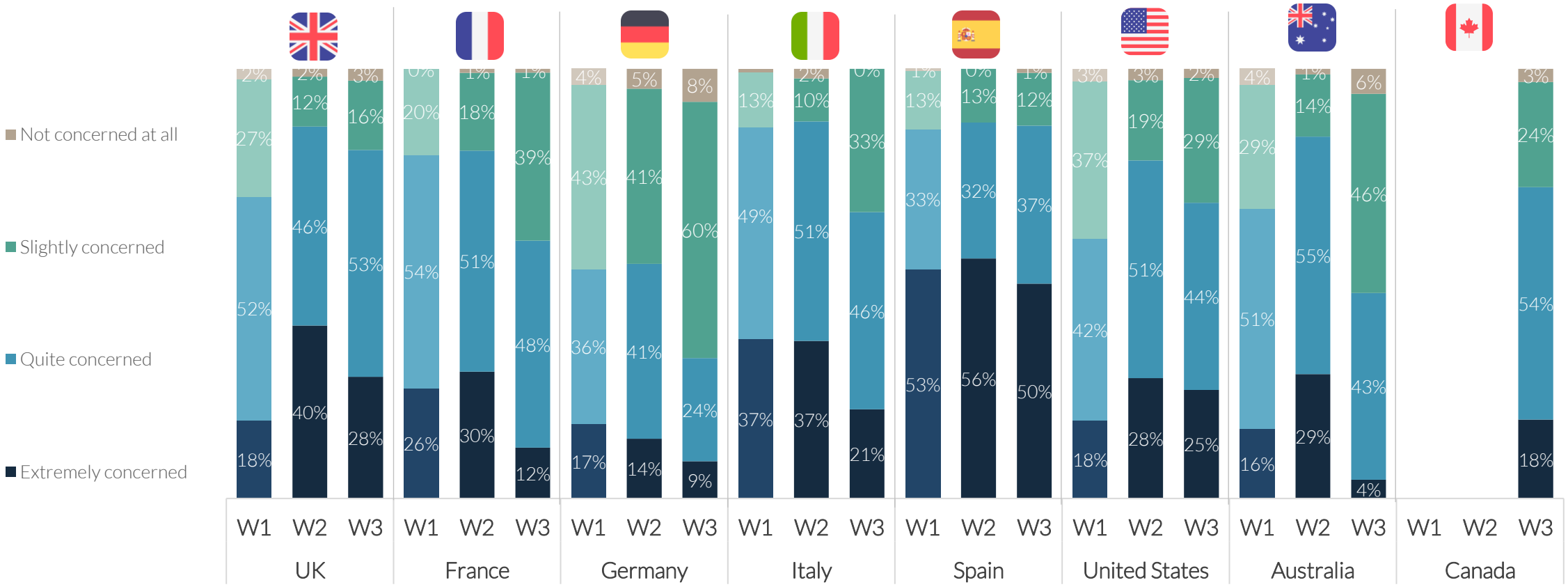


Q12: How concerned are you about the risks posed by the coronavirus outbreak from a personal perspective?

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PROFFESSIONAL CONCERN ON RISK OF CORONAVIRUS OUTBREAK

As in previous waves professional concern was already higher than personal concern. All countries see an improvement. In Germany and Australia those just moderately concerned, or not at all, are, for the first time the majority. Canada shows similar levels of concern to the USA.

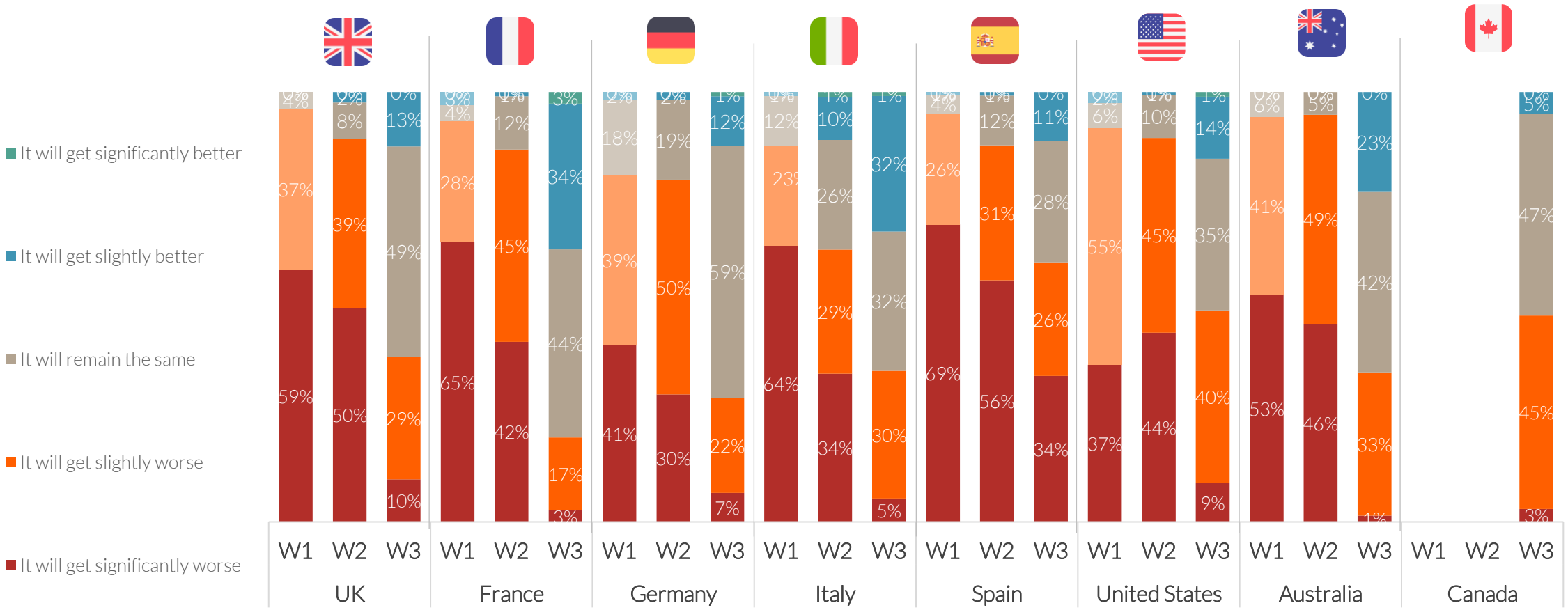


Q13: How concerned are you about the risks posed by the coronavirus outbreak from the perspective of your practice and its business?

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ANTICIPATED IMPACT OF CORONAVIRUS – NEXT 2 WEEKS

Across ALL countries there is a dramatic drop in those anticipating the impact to get worse. However, this does not mean they think it will get better any time soon as the prevalent feeling is that "**it will remain the same**". Australians and Germans are the most optimistic.



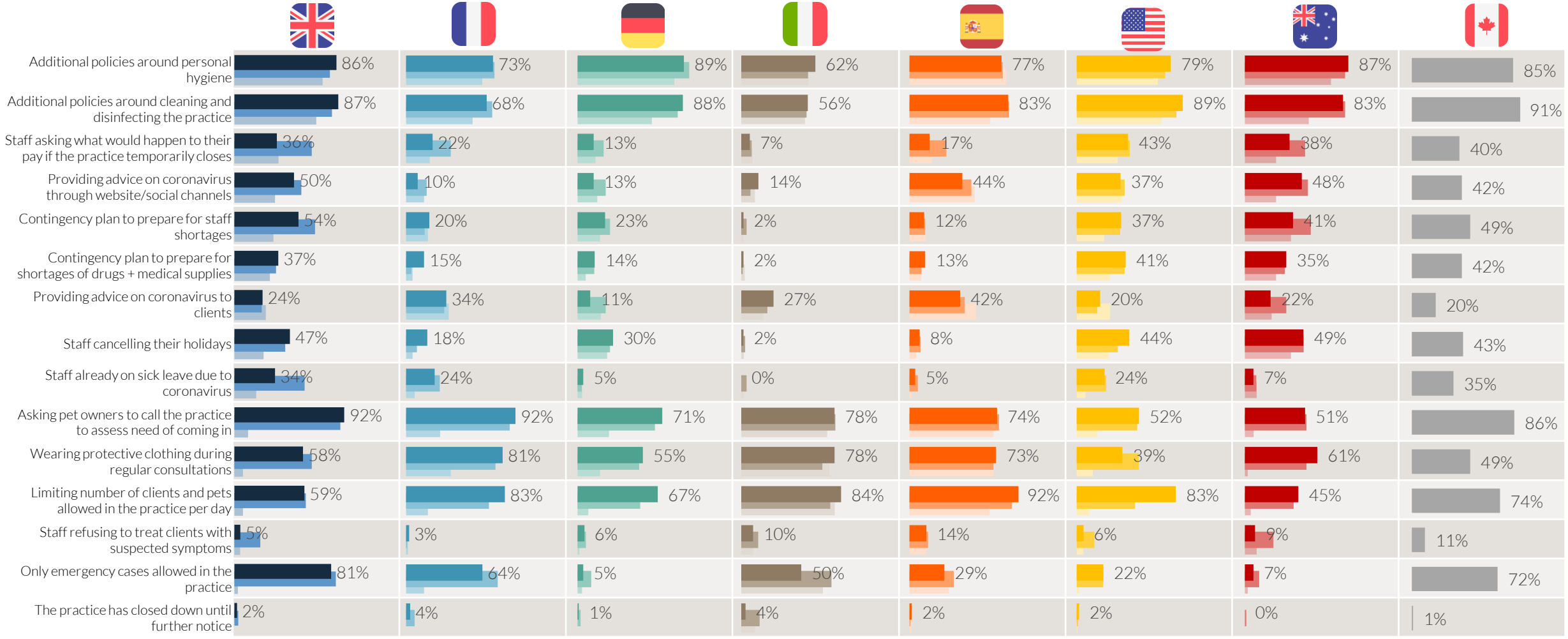
Q9: How do you anticipate the impact of the coronavirus outbreak on your practice will change, if at all, over the next couple of weeks?

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4.2 How are practices responding and what is the impact?

PRACTICE RESPONSE TO COVID-19

The speed of change has slowed as most of the measures that have been implemented have now weeks in practice. The one area that has seen some change was clinics increasingly limiting the number of clients(particularly in the US). Staff pay issues have been mostly addressed.



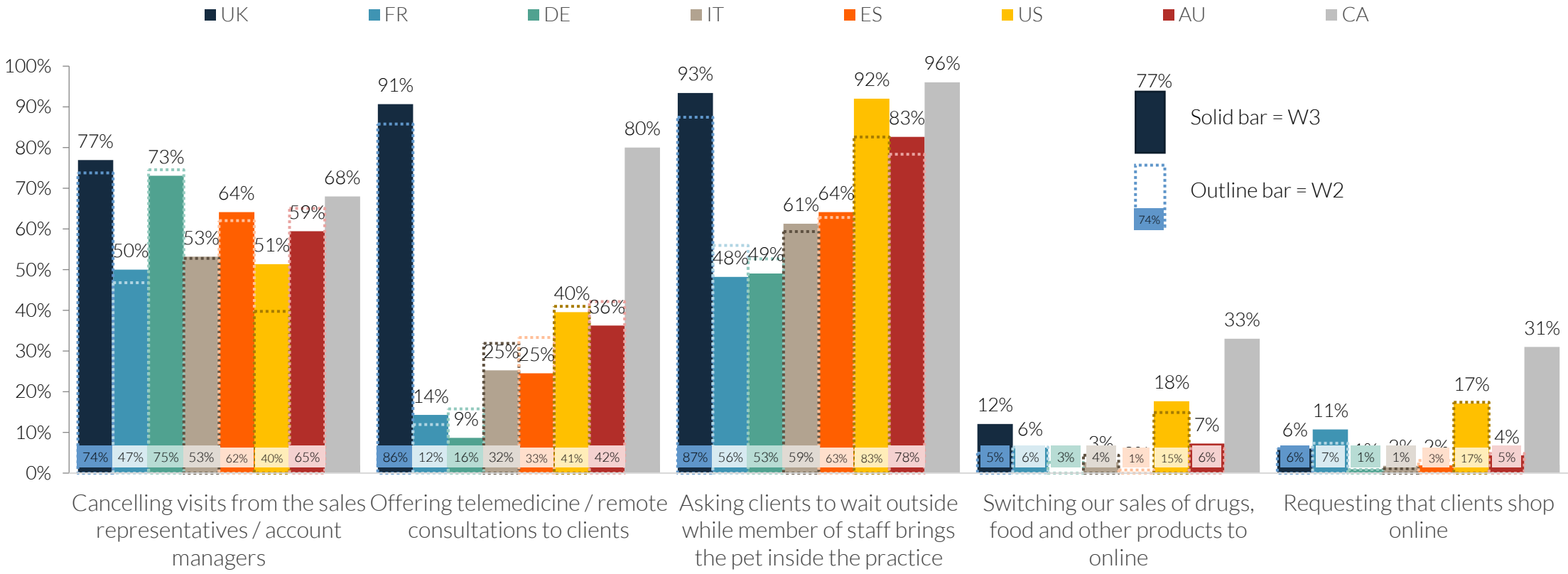
Q2: Which, if any, of the following have happened in your practice in relation to COVID-19 outbreak?

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PRACTICE RESPONSE TO COVID-19, W2 + 3 NEW QUESTIONS

Sales rep/Account manager visits continue to be cancelled by at least half of practices. Telemedicine consultations are increasing in IT, ES and AU, but the UK still leads the way.

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



Q2: Which, if any, of the following have happened in your practice in relation to COVID-19 outbreak?

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SUMMARY OF COVID-19 IMPACT ON KEY AREAS – WAVE 2

The UK, France and Spain have caught up with Italy on reported decreases in the 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:

	UK	FR	DE	IT	ES	US	AU
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%

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SUMMARY OF COVID-19 IMPACT ON KEY AREAS – WAVE 3

The rate of decrease has markedly slowed down in most countries

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	-40%	-31%	-9%	-33%	-27%	-11%	-1%	-23%
Number of appointments offered to clients	-35%	-23%	-2%	-14%	-14%	-10%	-9%	-28%
Revenue	-37%	-31%	-13%	-37%	-31%	-17%	-5%	-22%
Staff availability	-25%	-20%	-7%	-10%	-5%	-10%	-1%	-14%
Availability of cleaning supplies	-11%	-9%	-16%	-8%	-4%	-17%	-14%	-20%
Availability of drugs and medical supplies	-8%	-9%	-10%	-8%	-7%	-14%	-10%	-15%
Deliveries of stock (e.g. pharmaceutical products, pet food)	-9%	-6%	-7%	-12%	-3%	-9%	-1%	-12%

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%

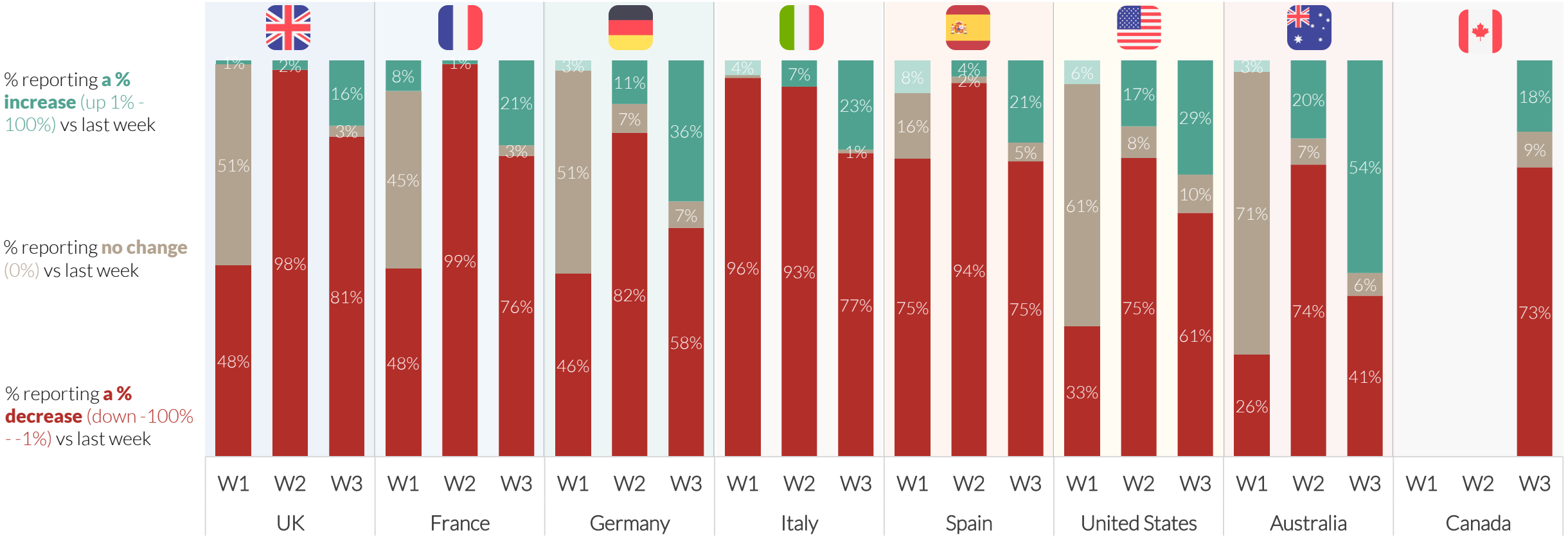
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COVID-19 IMPACT ON NUMBER OF CLIENTS VISITING

All countries, except Australia, are reporting more a decrease in the number of clients visiting the practice. We are however seeing some early signs of recovery as the numbers reporting an increase are steadily growing.

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

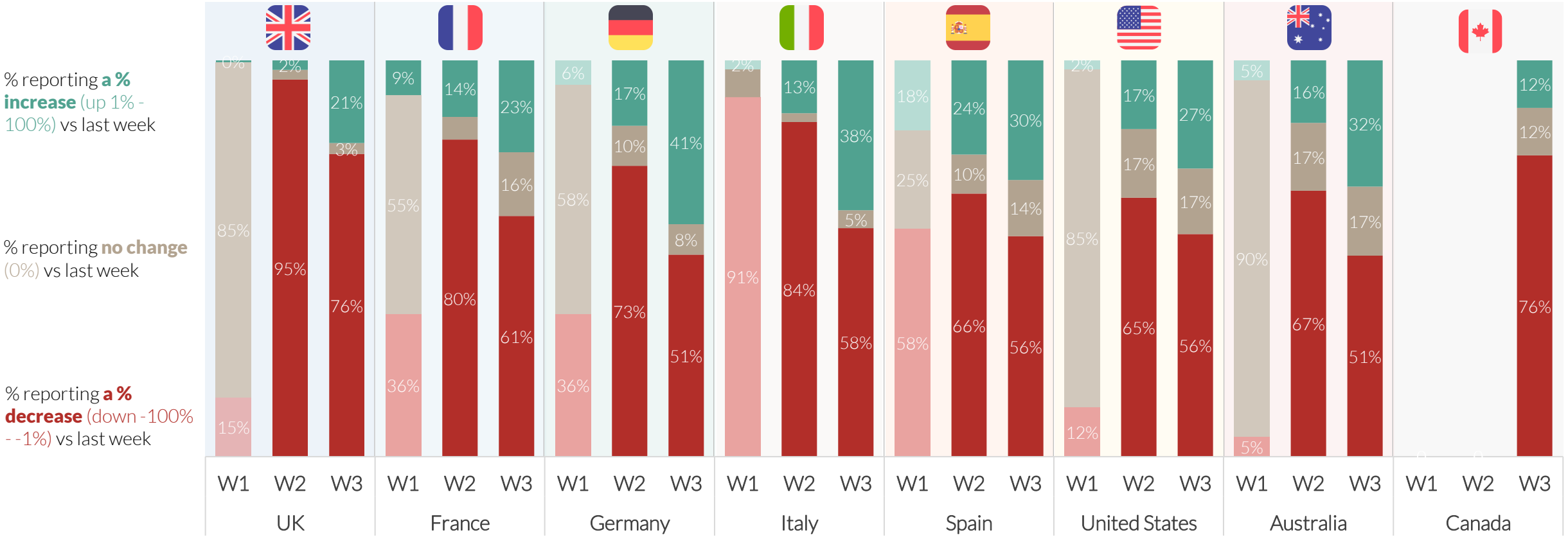
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COVID-19 IMPACT ON APPOINTMENTS OFFERED TO CLIENTS

And while most countries are also seeing the numbers of appointments offered to clients mostly decreasing (even in Australia) the numbers that are increasing are steadily growing.

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 & 3: 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

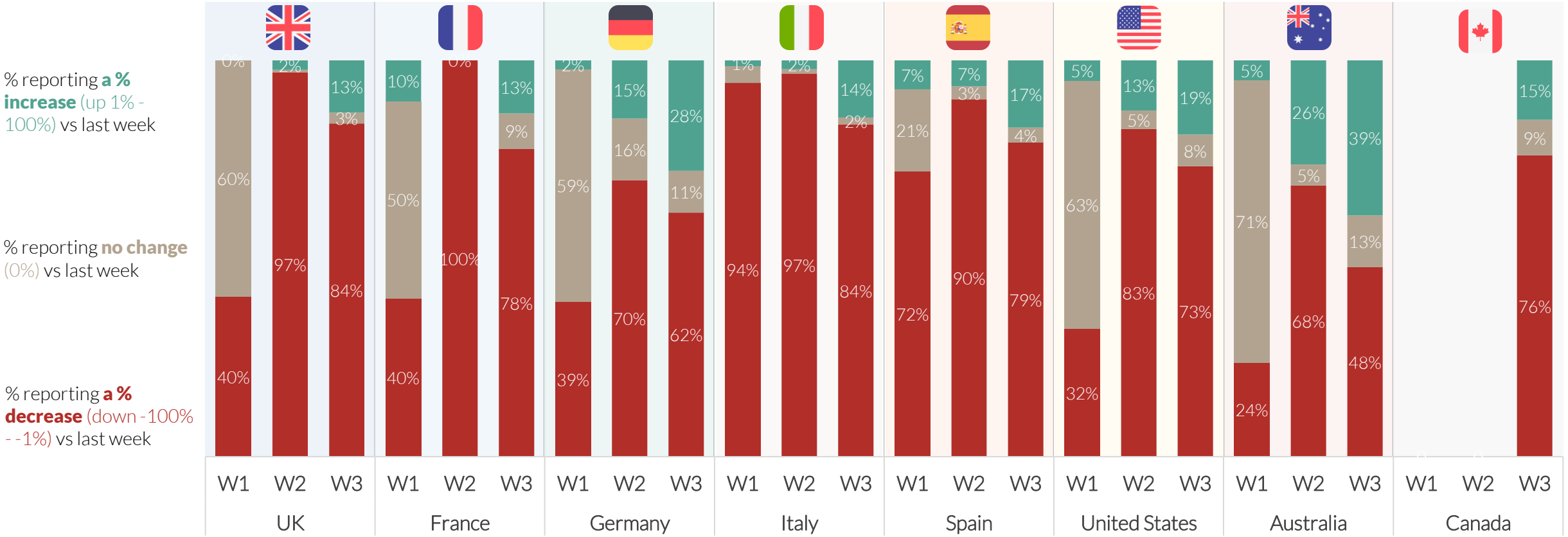
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COVID-19 IMPACT ON REVENUE

It's clear that revenue has been an area that has seen huge declines and this wave has been no different. In most countries (except Australia) more than three quarters of practices have been reporting a decline. On a positive note the numbers that have seen an increase in revenue are growing, but overall revenue is lagging far behind number of clients.

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 & 3: 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

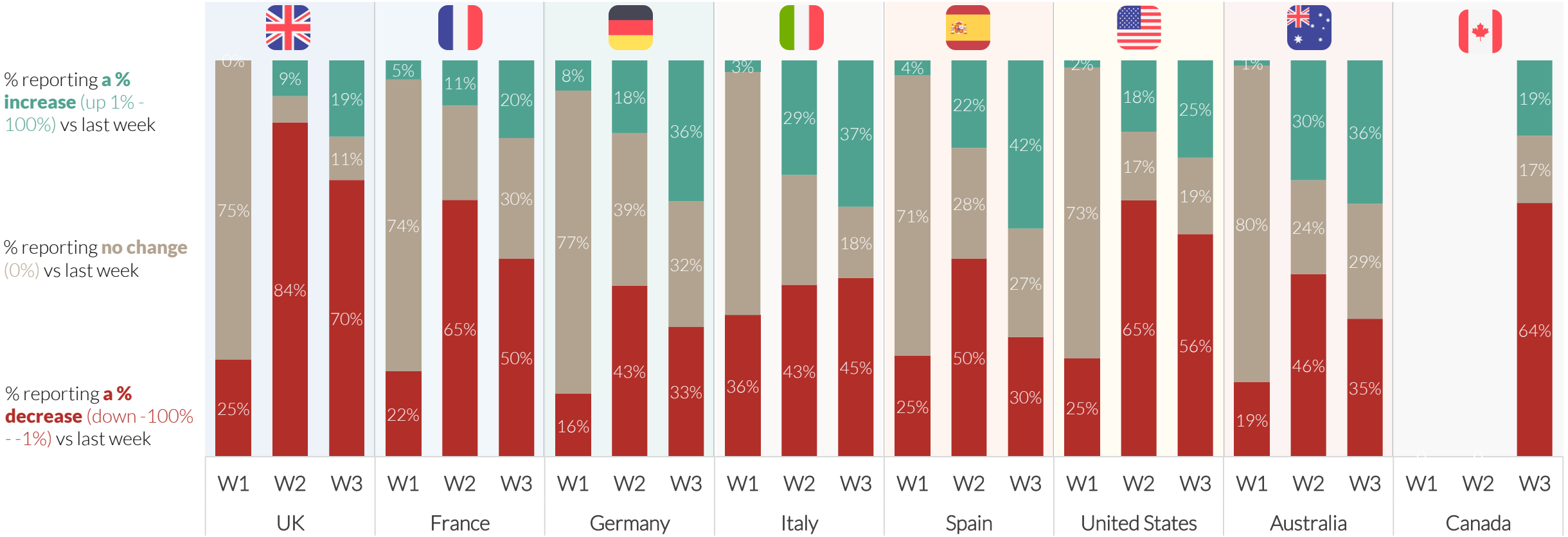
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COVID-19 IMPACT ON STAFF AVAILABILITY

Staff availability has seen consistent improvements although there are still a larger number that are reporting decreases. Germany and Spain are the only countries where there is a net increase.

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 & 3: 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

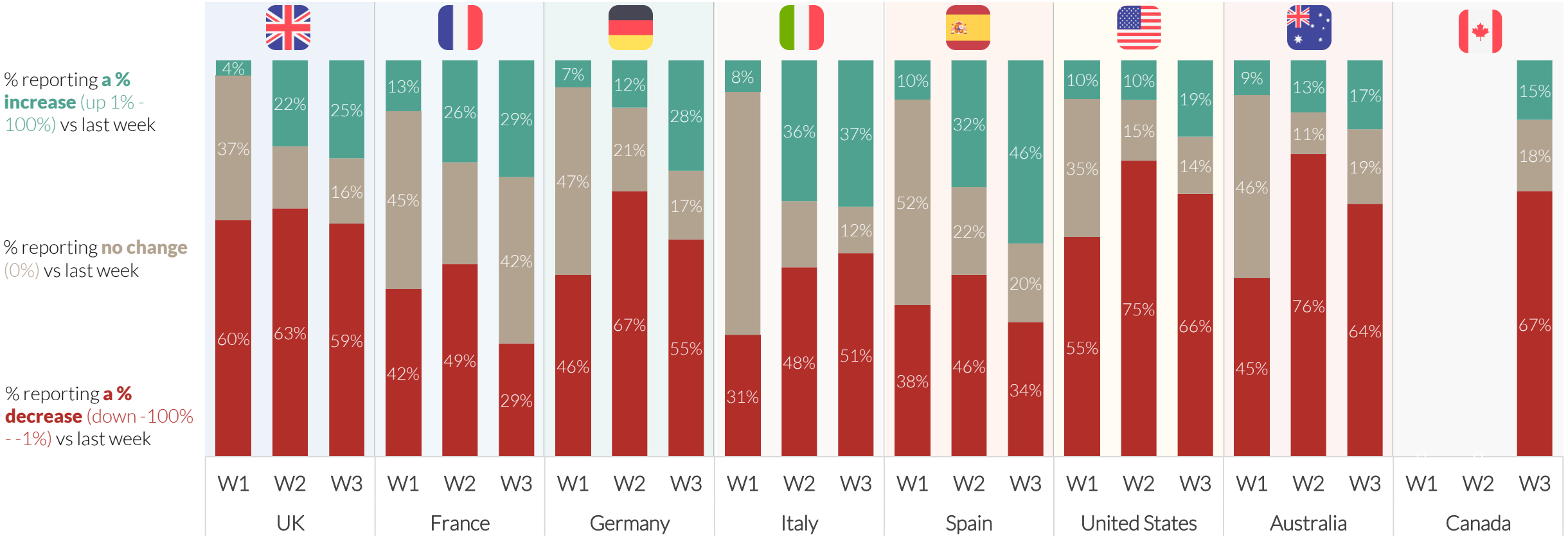
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COVID-19 IMPACT ON AVAILABILITY OF CLEANING SUPPLIES

There has been a slow improvement in the availability of cleaning supplies although most still report a decrease

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 & 3: 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

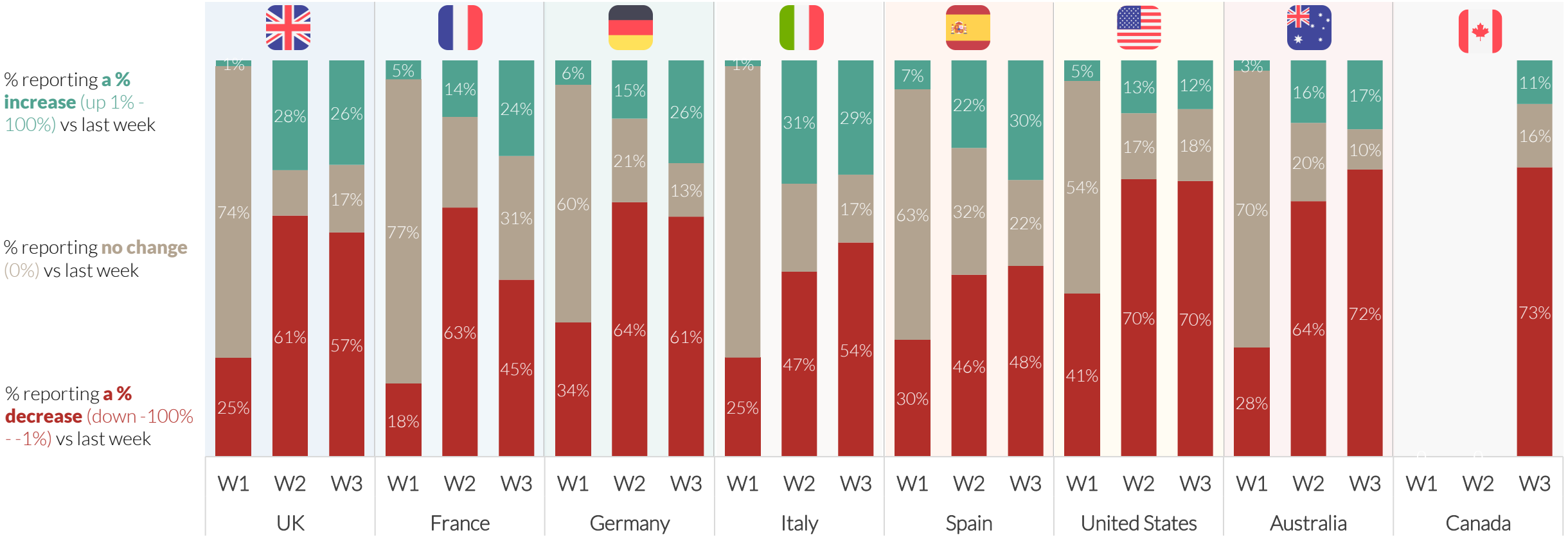
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COVID-19 IMPACT ON AVAILABILITY OF DRUGS/MEDICAL SUPPLIES

Improvements in France, Germany and Spain, in all other countries no change. Overall still poor availability.

Reported impact on availability of drugs and medical 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 drugs

Wave 2 & 3: 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 drugs

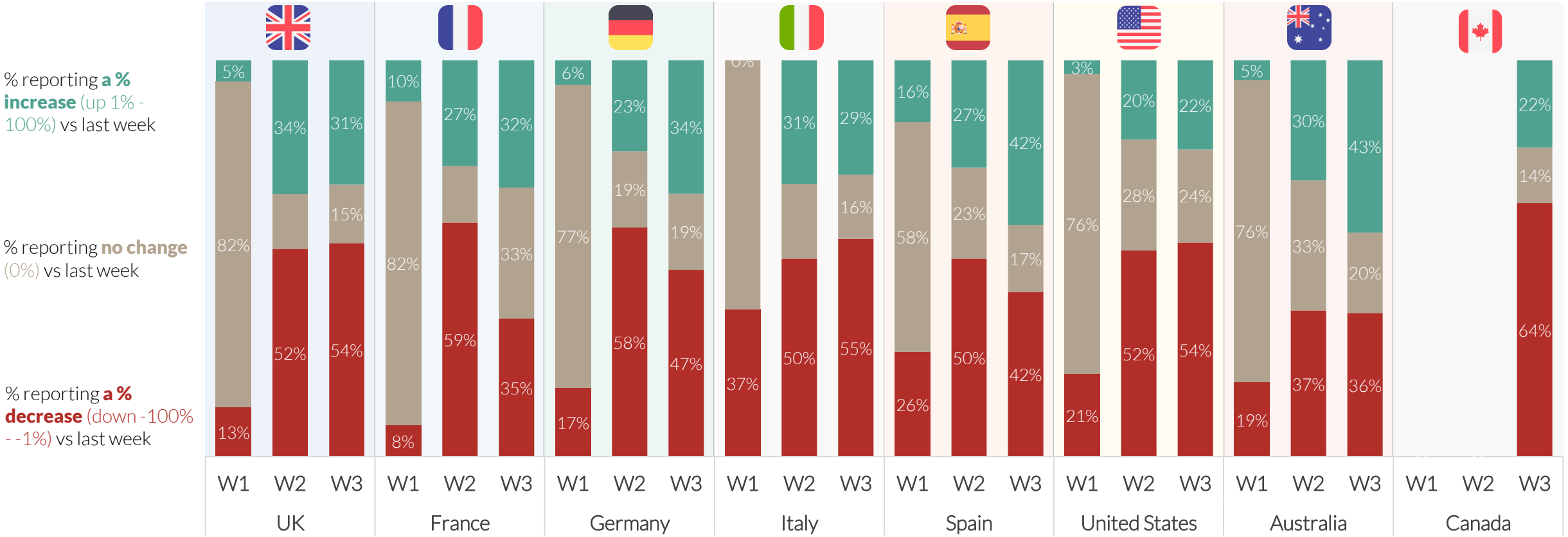
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COVID-19 IMPACT ON STOCK DELIVERIES

Stock deliveries not as impacted as drugs/medical supplies but most still having problems.

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

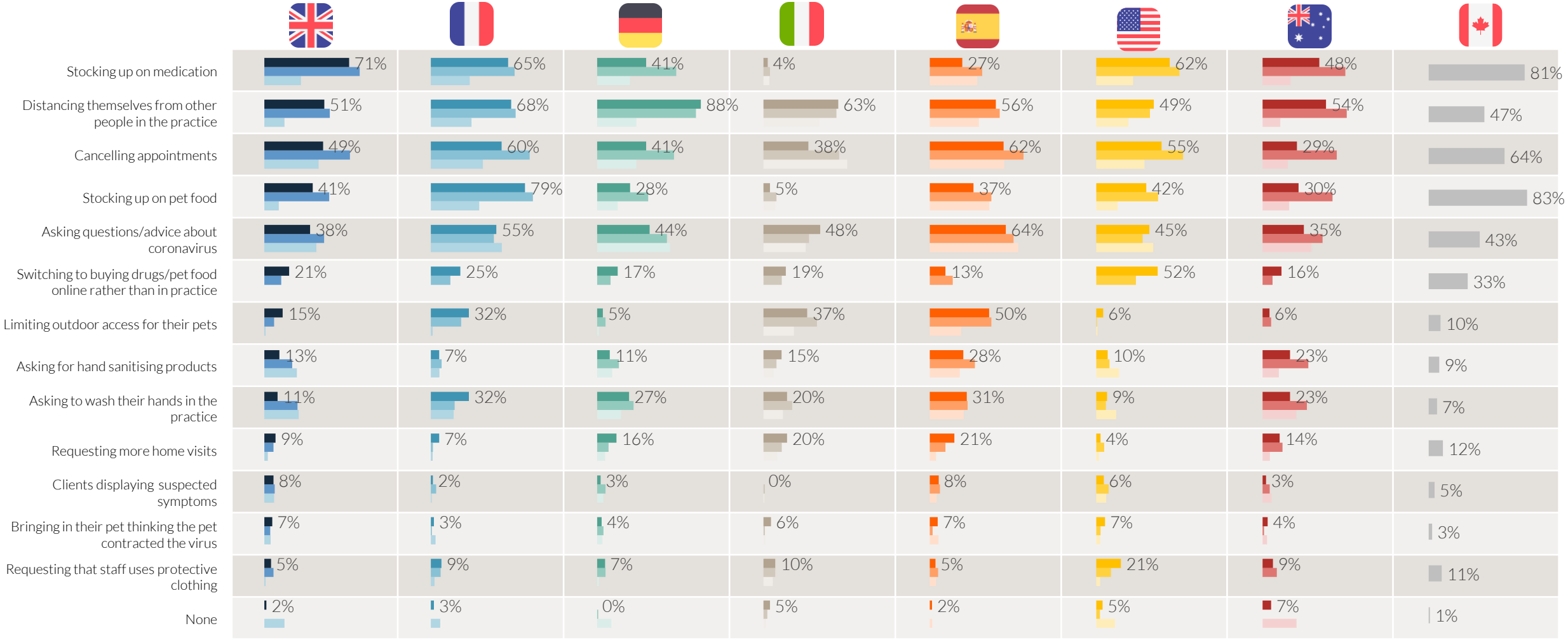
Wave 2 & 3: Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Stock deliveries

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4.3 Client responses and behaviours

CLIENT RESPONSE TO COVID-19

Clients response has remained stable, with little or no change. If anything the numbers cancelling appointments has fallen, but that is most likely due to the fact they didn't have an appointment in the first place. Stocking up (medicines or food) has also seen a decline. Panic over?



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...

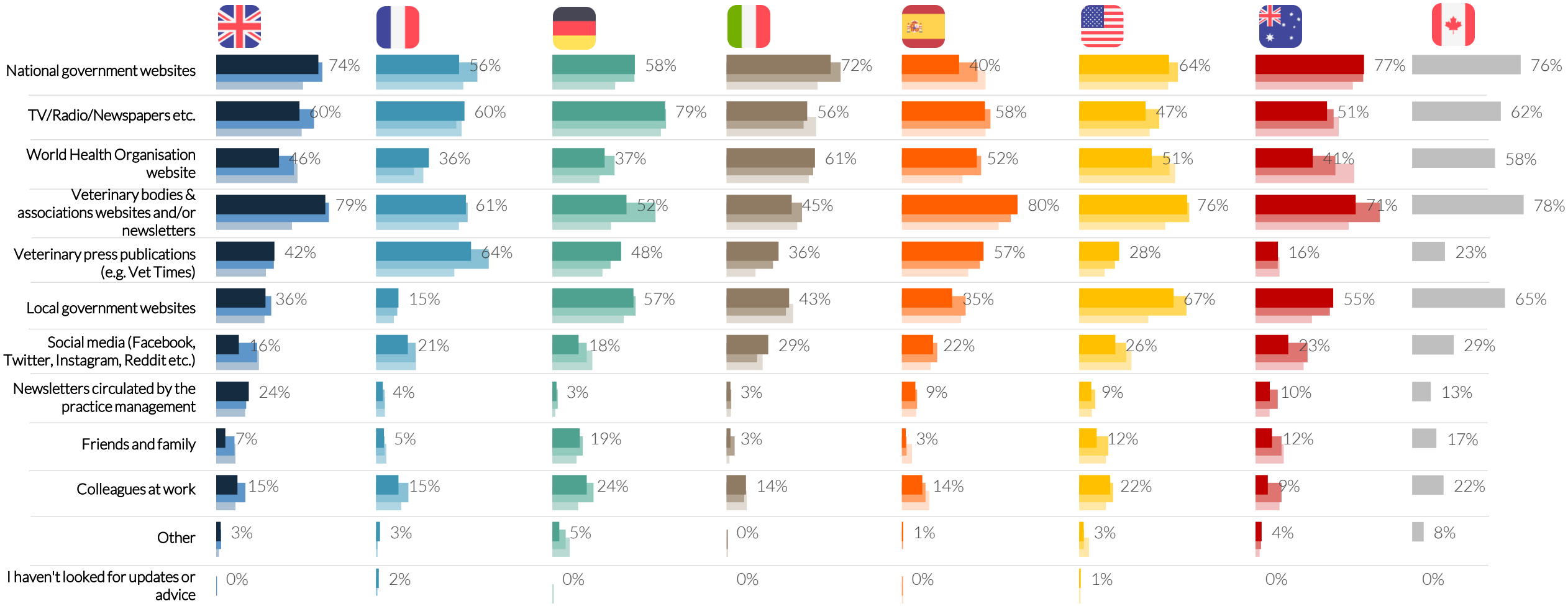
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4.4 Accessing information and support

Wave 1
+
Wave 2
+
Wave 3

SOURCES USED BY VETS FOR UPDATES ON OUTBREAK

Veterinarians using fewer sources in comparison to wave 2. Use of veterinary bodies and associations has stayed the same for most markets but decreased substantially in Australia, Germany and Italy. The picture in Canada is similar to the US but with greater reliance on updates from veterinary bodies and press publications.

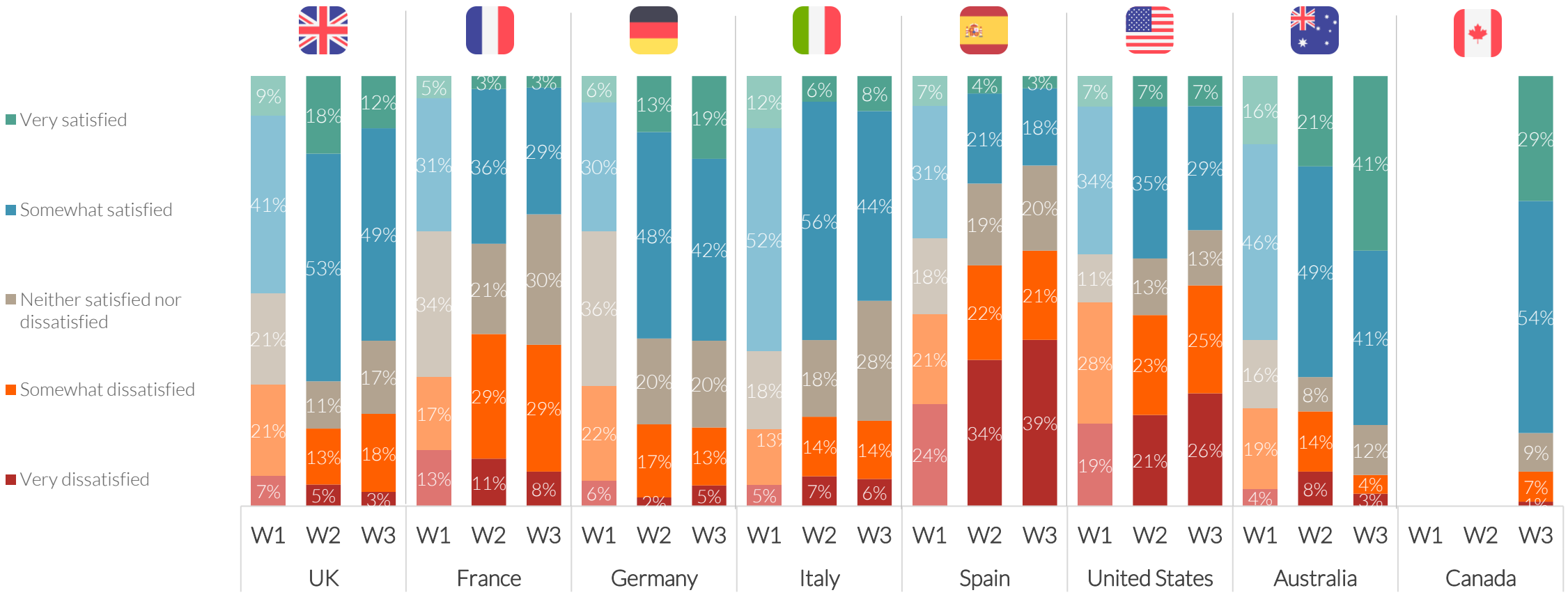


Q7: When looking for the latest updates and advice on the coronavirus outbreak, which sources of information do you use? Please select all that apply

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ADVICE SATISFACTION FROM NATIONAL GOVERNMENT

Satisfaction from the national government has dropped in almost all counties except Germany (which has remained the same) and Australia, which has increased markedly. Canada is currently very satisfied with the level of advice – on par with Australia.

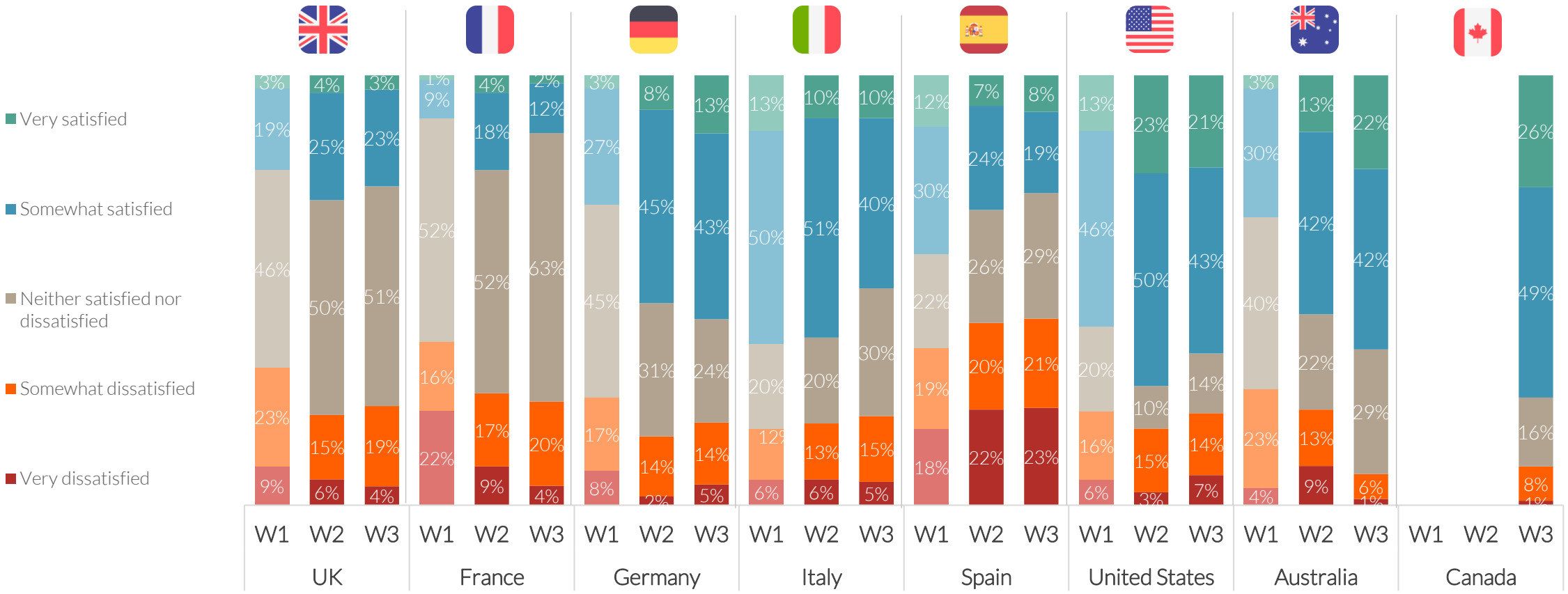


Q10: How do you feel about the level of advice and guidance provided by...? National government

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ADVICE SATISFACTION FROM LOCAL GOVERMENT

The trend for satisfaction in local government guidance mirrors satisfaction in national government. Most countries are less satisfied than wave 2, with the exception of Germany, which has risen slightly and Australia which is looking very positive. Satisfaction in Canada is again high. In the US, there is a marked contrast between satisfaction with national and local government.

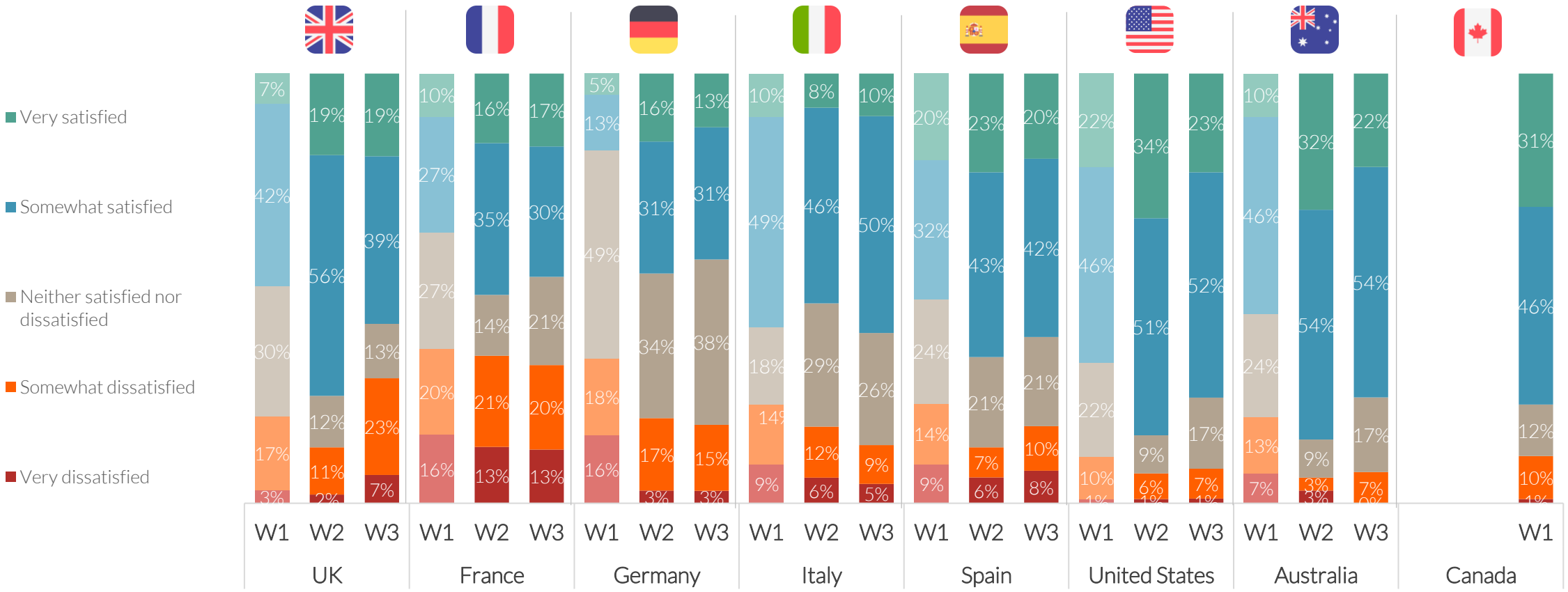


Q10: How do you feel about the level of advice and guidance provided by...? Local government

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ADVICE SATISFACTION FROM NATIONAL VETERINARY ASSOCIATIONS

In Wave 2 we saw a significant rise in satisfaction across the majority of markets. This wave, we see signs that satisfaction is steadily dropping again. Dissatisfaction levels have doubled in the UK.



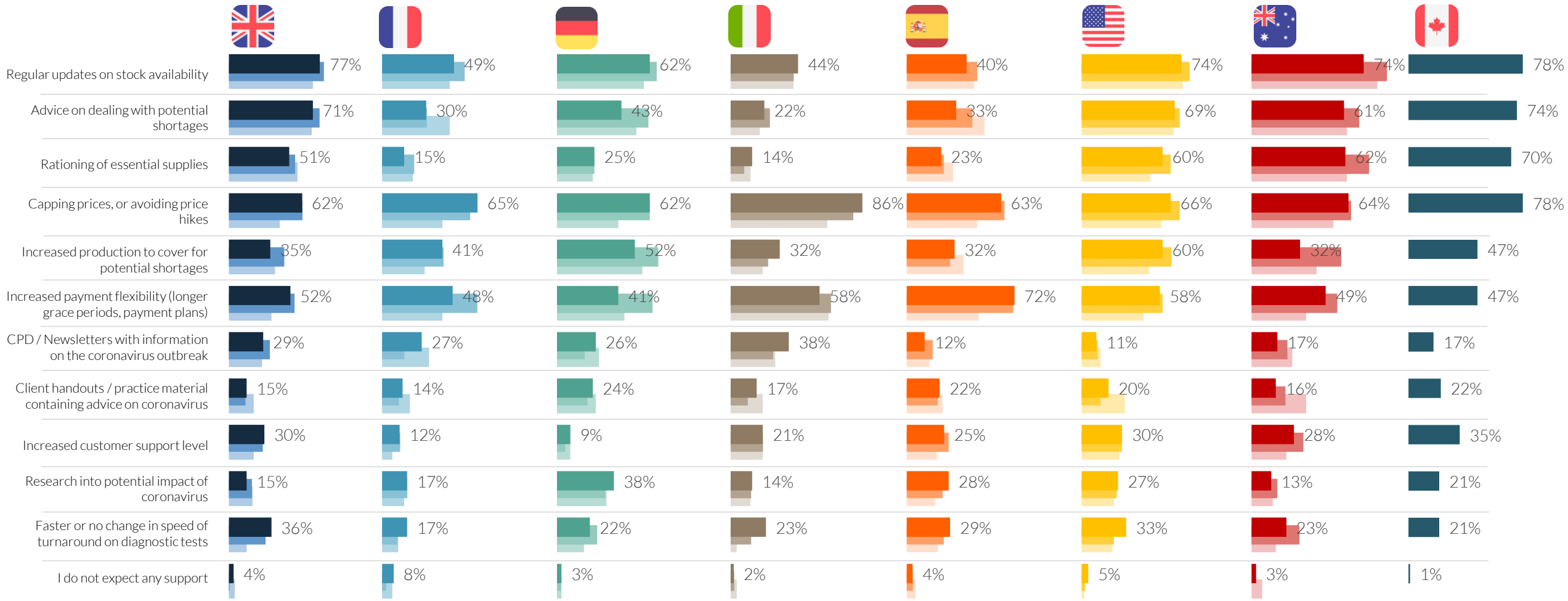
Q10: How do you feel about the level of advice and guidance provided by...? National veterinary associations

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Wave 1
+
Wave 2
+
Wave 3

EXPECTED SUPPORT FROM MANUFACTURERS & SERVICE PROVIDERS

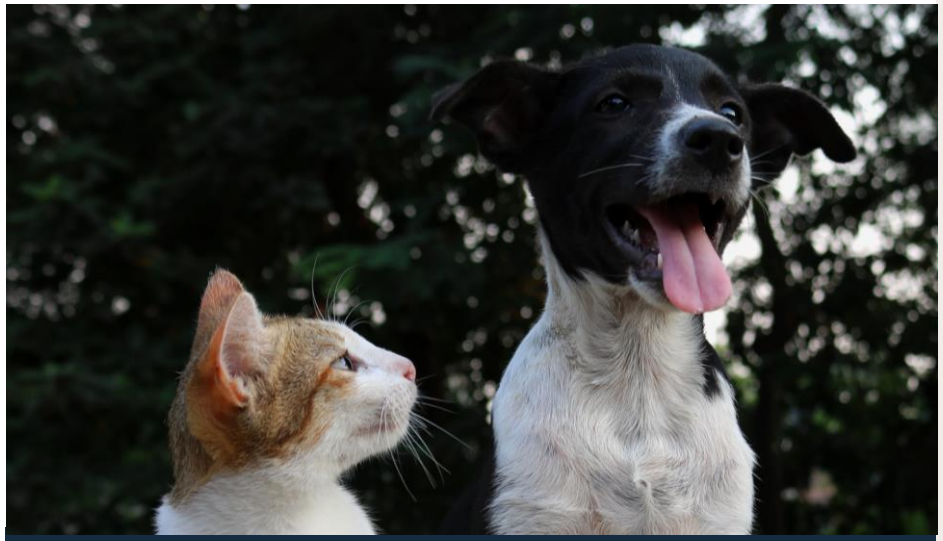
Since the last wave, expectation around support from manufacturers has remained largely steady, with decreases in some cases. Expectations around stock availability, capping prices and payment flexibility remain highest overall.



Q11: What kind of support do you expect from the veterinary manufacturers and service providers in the face of the coronavirus outbreak?

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4.5 In veterinarians' own words



Thank you for sharing

For the first time we have included some verbatim comments from veterinarians who took part in our Coronavirus survey.

Some of them are heart-breaking. Some exude deep frustration and anger, while others – profound concern and sense of powerlessness.

They all matter and we would love to include them all, but here are the select few.

Overall, vets express their frustration with (often oblivious) clients, chronic deficit of supplies and PPE, lack of support from authorities and high stress levels. They worry about the future, the aftermath of the current situation and its severe consequences on them as professionals, individuals, their families and the situation globally.

Thank you for sharing your thoughts so openly.

UK (1)

"Our support staff are down from 6 to 1 and our nurses from 12 to 2 due to the need to be home for childcare (single parents and so far not considered essential works by government), or due to being in high risk category. This means that the vets are now doing reception, nursing and accounts which is putting a huge strain on us all."

Wave 2

"My work has disappeared completely; I do not qualify for any help above £90.- and can't really afford to wait for June to find out if I might get some financial support."

Wave 2

"I feel that this is a public health problem and, although animal welfare is obviously very important to the veterinary profession, human health must come first. I work for CVS and I still feel they are putting the business before our safety"

Wave 2

"Letting us see the good, bad and ugly of people's response to this. Some really lovely support from most of our clients but some really unpleasant reactions due to the selfishness of human nature… This is going to have a massive impact on jobs and pet welfare I foresee many abandoned animals."

Wave 2

"As a locum with 2 children I am likely to have no income at all in the coming months. I have the opportunity to work but that is impossible without childcare. I was advised to work through a limited company when I started locuming a year ago but that seems to now mean I am entitled to little or no financial help during this crisis. Deeply concerned doesn't get close to how I am feeling right now."

Wave 2

"I was shocked how quickly my boss was ready to consider laying off staff."

Wave 2

"I feel the use of Telemedicine is necessary for now but we Must Not relax policy on Telemedicine long term or we will find profitability of practices will decline."

Wave 2

"We are a brand new independent which only opened our doors on 2nd March 2020. We had 2 RVNs and 2 full time vets. Currently one vet and both RVNs have had to be furloughed."

Wave 2

"I think the veterinary profession should be recognised firstly as an essential service and secondly receive due accolades for providing the service they do."

Wave 2

UK (2)

"I've found the advice and guidelines produced by both the RCVS and BVA to be incredibly poor, and the timing of each release to be really thoughtless and unhelpful ie a Sunday webinar by the BVA which caused uproar, and left practices no time to satisfy and reassure colleagues. A release on the Thursday afternoon just before a 4 day holiday weekend was poorly judged, again leaving no time or press-back/queries from MRCVS to either the BVA or RCVS. The timing of each release seems to be cowardly."

Wave 3

"Clients are being horrendous during this time. No understanding to what actually constitutes an emergency or urgent case. They are demanding, rude, impatient. I hope the RCVS and VDS are prepared to defend vets now more than ever against this disgusting treatment against the profession "

Wave 3

"Most staff furloughed. Managing with 2 teams of 4 alternating during days and night team of 2. "

Wave 3

"I'm concerned that the minimal improvement to working hours from the last years will disappear completely. Wages will come down. I really do not want to be a vet anymore!"

Wave 3

"[The crisis] has highlighted some of the limitations of telemedicine, often if it is ambiguous the animal needs to come in anyway. Only good for lameness/skin or obvious, clear wounds."

Wave 3

"Strain on mental health of employees. Lack of firm guidelines from professional bodies causing chaos dealing with difficult customers. Absolute rules should be implemented for everyone, or some vets ultimately abuse their positions, then everyone has to. RCVS needs to grow a pair..."

Wave 3

"I wish the staff realised how grave it really is..."

Wave 3

"Clients have been expressing unhappiness about what would constitute an emergency (e.g unhappy cannot bring cat in for routine nail clip)"

Wave 3

"We have furloughed 2/3 of the staff, we have just been seeing emergencies but now started to offer vaccinations to puppies and kittens. Most clients are very understanding of the situation but a few are not and are abusive over the phone."

Wave 3

FRANCE

"The discrepancies between the directives of the ministry and those of the Order are worrying. We are caught between the fear of an infection of our staff and that it turns against us, this despite the protective measures taken (depending on the means available, shortage of masks ... and the situation) and on the other hand the duty of continuity of care and supply of animal feed and the fear of very serious economic consequences for our [practice]."

Wave 2

"I am very concerned for the future of small independent practices"

Wave 3

"Clients do not all have a sense of urgency and [do not adhere to] security measures. For many nothing has changed ..."

Wave 3

"Currently, for economic reasons, our three veterinary employees are completely unemployed. Of our 8 assistants, 3 are on sick leave from corona virus, 3 are partially unemployed (risk linked to their age). ... and we toast. We estimated our shortfall at € 60,000 in turnover over the 2 and a half months of confinement. 2 and a half months during which my associates and I will receive no income."

Wave 2

"I note that the Order of Veterinarians [governing veterinary body in France] is on the front line to limit our activity but does not provide us with any moral support (communication on our availability to the public, encouragement, thanks ...), health support (means of protection: masks ...) or financial support (deferral of payment of contributions)"

Wave 2

"As often, at the end of the crisis, those who were rich will become even richer, and those who had difficulties will be even more penalized."

Wave 2

Answers translated from the native language using GoogleTranslate.

GERMANY

“Above all, I expect [from manufacturers] hand and surface disinfectants to be delivered, no matter which.”

Wave 2

“There is no financial aid or I would have to go bankrupt before I can get any financial help. Then it's too late. A loan doesn't help me because I can't repay it.”

Wave 2

“Personally, I enjoy the general 'deceleration' that the situation brings. Suddenly nobody is in a hurry anymore because the next appointment is waiting and a lot of things come into perspective again. It would be desirable if a little of it survived the corona crisis.”

Wave 3

“The lack of disinfectants is extremely problematic. I don't understand why our chamber doesn't care. Disinfectants should be organized especially for veterinarians, ideally centrally.”

Wave 2

“Revenue has dropped significantly and I don't think this loss can be made up for (neither in 2020 nor later). It will remain a loss and I will not receive any compensation from the state, including any discounts. I always have to pay as a small self-employed person, I never get help. Nobody is interested in the fact that I am a single parent, I am not supported in any way either.”

Wave 3

“We are operating more than before the Corona pandemic because pet owners are more flexible in scheduling. Together with the increased sales of medicines, March was stronger in sales than in previous years.”

Wave 2

“It seems that the pet owners who now spend more time at home are paying more attention to their animals and are therefore more likely to go to the practice.”

Wave 3

"It is very difficult to get hand disinfectants. Nevertheless, the chamber demands that we set up disinfectant dispensers for the clients. This is not possible for us because the disinfectant is hardly enough for us. The same applies to masks.
The chambers should ensure that disinfectants and masks are made available to veterinarians, or at least let them know where you can get such things.“

Wave 3

Answers translated from the native language using GoogleTranslate.

ITALY

"I would expect manufacturers to provide MAXIMUM FLEXIBILITY ON THE PURCHASE PLANS TAKEN BEFORE the coronavirus"

Wave 2

"Obviously the whole routine of both visits and surgeries is reduced even if several people ask "urgently" to be able to come and cut their nails....."

Wave 2

"The real impact will be in the next half year when people will not be able to pay for services and surgeries will not be able to meet expenses."

Wave 2

"Owners use animals to be able to leave the house"

Wave 3

"The economic impact on my business will be very severe."

Wave 2

"I would like more economic support for the resumption of veterinary activities by the Italian government and considering the great crisis that will affect Italy I would like the 22% VAT on veterinary services to be reduced to help people care for their animals."

Wave 2

"We'll make it!"

Wave 3

Answers translated from the native language using GoogleTranslate.

SPAIN

"We are not going to receive any type of aid from the state, such as VAT relief or taxes, during this period of confinement, so the economic impact will be brutal."

Wave 2

"WE ARE NOT HAVING SOCIAL RECOGNITION AND VISIBILITY AT THE SOCIAL LEVEL OF ALL THE WORKS WE DEVELOP AND THE EFFORTS THAT WE EMPLOY ON A PERSONAL AND PROFESSIONAL LEVEL (ON THE OTHER HAND, MENTIONED ON SOME OCCASIONS OF ANIMAL STORES)."

Wave 2

"They do not talk much about what happens to employees who have reduced their working hours by 50% or more, as they are sanitary and essential and do not want to do an ERTE but the salary decreases dramatically."

Wave 3

"I do not know how it will affect when the supply of gloves, masks and disinfectants is canceled due to lack of stock in warehouses. That worries me a lot. The fact that even if you want to work you cannot for lack of security measures"

Wave 2

"I WORK ALONE. IF I AM SICK, I WOULD HAVE TO CLOSE."

Wave 3

"Our government will lead us to ruin or to the grave as it continues to act as it has been until now. INCOMPETETENTS. It has not deigned to attend to the offer of help by health workers such as the veterinary collective."

Wave 3

"Lack of disinfection and personal protection material is a huge problem."

Wave 2

"Where the hell are the masks ?????? and bio alcohol, enzymatic cleaners ??? "

Wave 2

"It is very important to highlight the lack of protective material. Our regular suppliers do not have masks, protection screens or certain disinfectant products in stock. In pharmacies the price of the masks that I have found was 10 times higher than usual, an expense that for professional use is unfeasible. At no time has my company worried about whether or not we have protection material, it is I who do it and the company ignores our situation in this area.."

Wave 3

Answers translated from the native language using GoogleTranslate.

UNITED STATES

"There is a great deal of variation on how individuals are interpreting essential services. More guidance/mandate would be nice."

Wave 3

"I am concerned that not all staff members have taken proper precautions to limit spread of coronavirus in their lives outside work. Also, The owner of the practice has stopped seeing clients due to his fear and yet has fought some of our suggestions (based on reputable veterinary sources or outright legal mandates by New York State). We are seeing too many cases.....and the staff is stressed, even though we cut hours, eliminated Saturdays, and do curbside service. A large number of clients have been idiots, complaining we won't schedule nail trims. It appears that some have learned how to exaggerate symptoms, so we allow the pet to come in as an emergency when it really didn't warrant that.....and oh, by the way, can you trim the nails while we are here??"

Wave 3

"I do worry that with so many pets not getting their vaccinations or heartworm, that we will see an increase of infectious diseases among pets. I also worry that when people get back to work, they will get rid of pets. We have had all the animals adopted in our area. This has never happened before.."

Wave 3

"I'm in [X] in the USA, our Governor has just down all services that our not essential. Most of our services are essential so we work but income is down 45% The social isolation leads to poor communications and therefor poor histories and client education. Our government is paying unemployment to staff that is greater than they can make working fulltime."

Wave 3

"Things will never be the same when this is over. While we are being cautious, it has been overall exhausting. The financial hit to my practice and the community at large (everyone losing their jobs) is overwhelming."

Wave 3

"As a relief Vet, I am very worried about how the impact on the economy will effect job availability, and pay."

Wave 2

"Everyone one except the vets in the industry are sitting at home working, and instead of them calling me, to reassure me, etc, I've gotten NOTHING from X,Y, Z [name of manufacturers listed] and many more."

Wave 2

"Sadly, called [name of manufacturer] today and was told they still want my complete contract money for the month even if I were to close. Guess who is dumping them as soon as contract is over in 2 years..."

Wave 2

"State Board needs to get their act together on recommendations and our concerns other than telling us to "practice like we want to". This is very disappointing and painful."

Wave 2

"As an ER doc we have seen a dramatic rise in patients recently but I do expect this to slow down over the next coming weeks. I feel that many people are home "staring at their pets" and coming up with reasons to come to the vet. We have however also seen many true emergencies."

Wave 2

AUSTRALIA

"The govt response and the economic and health impacts these measures will wreak on individuals far outweighs the risks posed by the Coronavirus. The follow-on effect of people suffering financial hardship is more animals in shelters - greater numbers surrendered and fewer animals adopted."

Wave 2

"Stress, stress, stress! Impact on community with business closures is just sad, I predict that with the 'no money' in the community that domestic violence will increase, crime will increase, it is just sad, suicide likely increase as well. it is not good."

Wave 2

"People are asking to not pay for services due to coronavirus. We have not received any government assistance to date. The stimulus package in Australia is not overly helpful for a very small business."

Wave 2

"Clients have migrated to either the understanding and reasonable camp to the utterly rude and increasingly demanding camp with very little middle ground. Interesting times."

Wave 3

"All staff are more stressed. All of us are walking approximately 2-3 times more each day. As clients not allowed on premises, there are insufficient staff to restrain animals, answer phone bookings, arrival bookings, outside enquiries."

Wave 3

"Unfortunately the govt here is supporting unemployed people & those businesses severely affected by COVID-19. But if you are in the zone of reduced turnover from 1-29% you get very little support. This range basically allows you to pay staff but not yourself. A little short-sighted IMHO."

Wave 3

"I have been cut completely due to COVID19 as my employment is on casual basis now for 4 yrs and I can get no Jobseeker support as the practice has not dropped any income."

Wave 3

CANADA

"Clients are at home staring at their pets, wanting to treat chronic conditions that have been left unchecked for X months."

Wave 3

"It is draining financially, and emotionally. Together we can beat this."

Wave 3

"Lots of support for manufacturing representatives. Gave rebate cheques out early to help with cash flow. "

Wave 3

"Our clinic has delayed elective procedures whenever possible to conserve PPE, but we are going to run into a crisis for spays/neuters once it is over. We are delaying about 4 procedures per day. We have also become increasingly an emergency clinic and are very overwhelmed with the volume of patients, we ended up getting a bunch of animals from other clinics which have reduced hours and we were already short staffed for vets since Feb due two two full-time vets moving, but the coronavirus initially helped to slow total numbers as people cancelled annual exams but we are now just as busy as ever. With staff out due to colds etc. we are really stretched thin."

Wave 3

"The corporation that owns my clinic is very concerned about labour costs and decreased revenue and has already laid off 5 staff members"

Wave 3

"Our practice is busier because many veterinarians are not seeing the same amount of cases it's very difficult for us to maintain social distance is recommended because of our location and the size of the practice it's very stressful for us all."

Wave 3

"I do not believe the financial impact to the large corporation who owns the clinic is as bad as they are saying. Staff have been laid off and those that remain have reduced hours yet as a clinic we are bring in the same amount of revenue. The numbers don't add up."

Wave 3

"Euthanasias have become even more heartbreaking as in the ER the clients are not currently allowed to be with their pets, and if they want to witness it it is either on facetime or through the window into the euthanasia room. Have had clients sobbing through the glass, very disturbing and no doubt going to cause PTSD for some vets and techs as well as clients. Corporate genuinely looking after staff vs concerned with liability. Long term damage not being considered. Staff are divided. Work is more stressful than ever. Considering ending locuming although it is a significant part of my income. Would LOVE to see a survey and results on how clinics across the globe are handling this issue. I am in [X], Canada which has had an outbreak however by no means an epicenter. Rumors of PPE shortage, however have not actually experienced this, so is it necessary to have such non compassionate rules around euthanasia? Also not allowing visitations before hand."

Wave 3

05 APPENDIX

CM Research

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

CM Research

WHO IS **CM RESEARCH?**

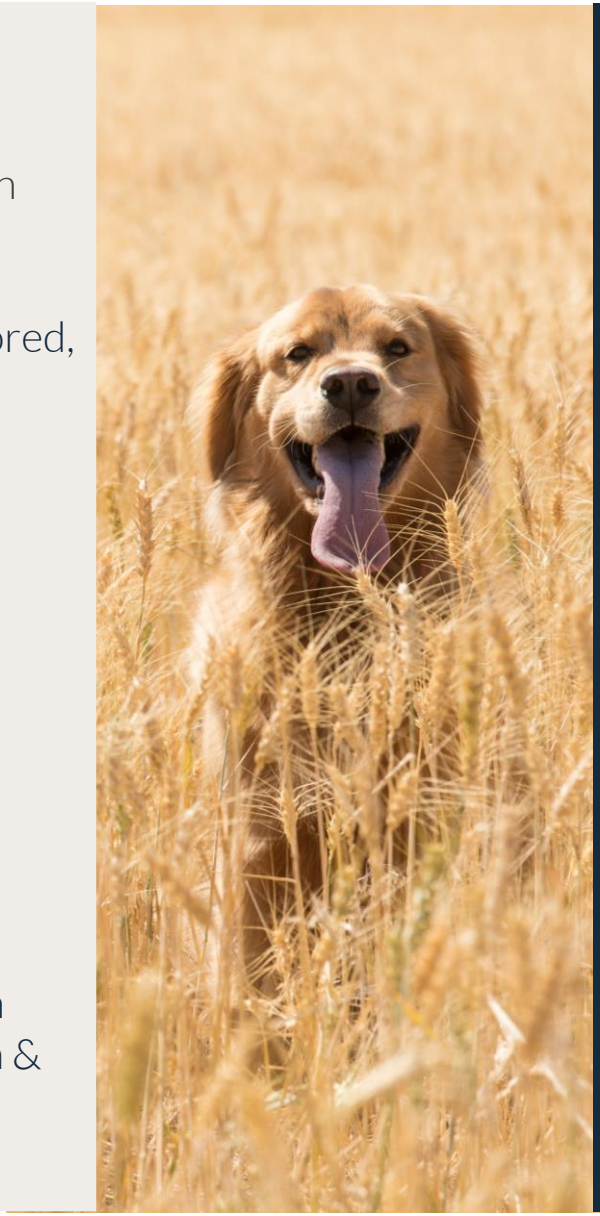
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