



CM RESEARCH CORONA VIRUS TRACKER WAVE 4

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



21st May 2020

By CM Research



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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 veterinarians 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

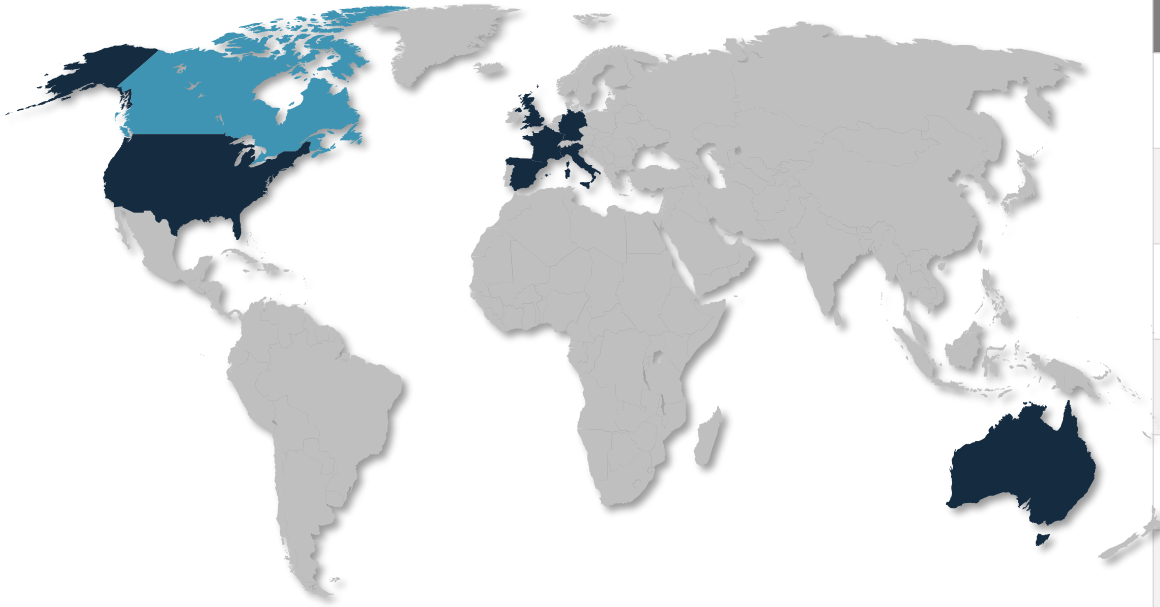
02

Methodology

What did we do?

METHODOLOGY

Online survey run among Vetspanel companion animal veterinarians in 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 veterinarians see the “new normal” and how Covid-19 has changed them and their practice.

Sample size		Wave 1 14 th – 18 th March	Wave 2 27 th March – 2 nd April	Wave 3 17 th – 23 rd April	Wave 4 15 th – 21 st May
UK		208	183	182	139
France		125	109	112	105
Germany		133	114	104	88
Italy		140	91	111	105
Spain		193	129	106	103
US		177	161	187	134
Australia		80	83	69	55
Canada		-	-	100	45

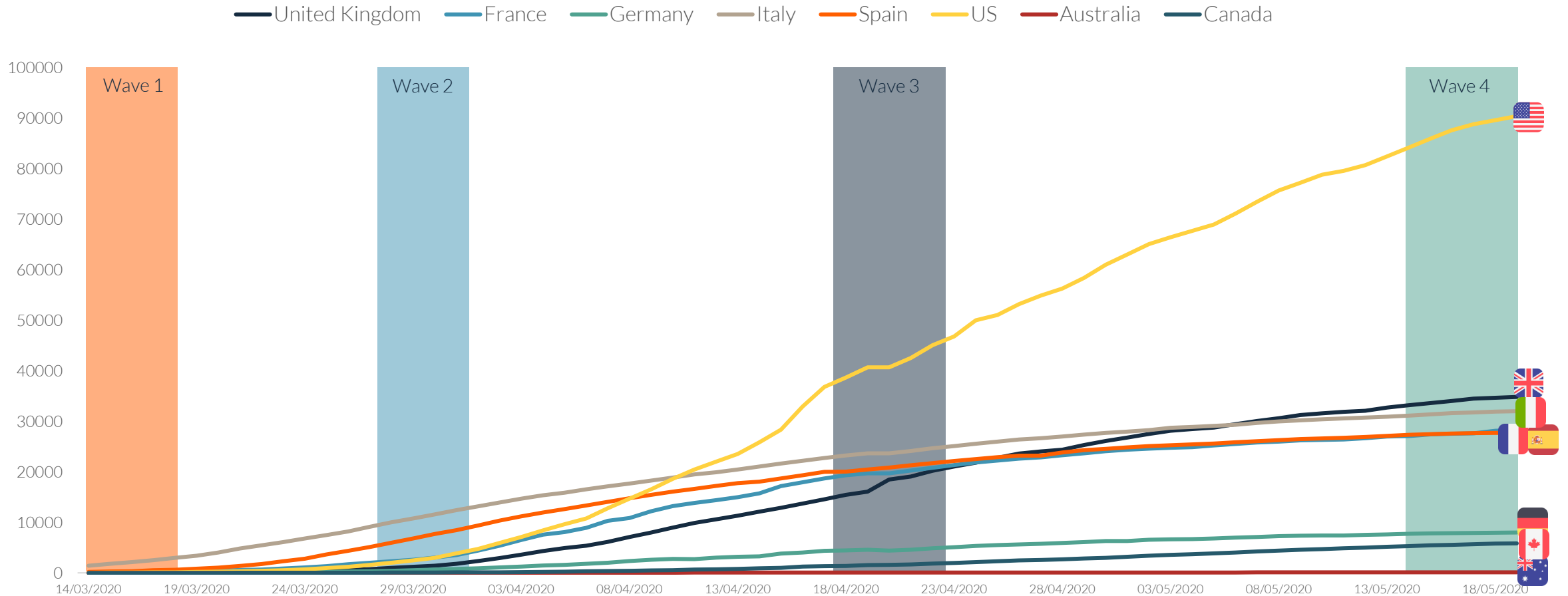
03

Executive summary

What did the survey findings tell us?

CONTEXT: **REPORTED MORTALITIES BY COUNTRY**

The increases in number of fatalities is less steep in most countries; the US and UK are rising above other markets



EXECUTIVE SUMMARY

THE INDUSTRY CONTINUES TO ADAPT TO THE CHALLENGES PRESENTED BY COVID-19, BUT VETERINARIANS THEMSELVES ARE REALLY FEELING THE IMPACT

- In all countries the level of personal concern has shown a consistent decrease since wave 2. Professional concern is also trending downwards, but remains higher than personal concern in most countries, especially the UK and Spain.
 - Spain however has seen a significant drop in professional concern compared to previous waves.
- The outlook for the future overall is looking brighter, with all countries seeing an increase in those stating that they expect things to get better over the next couple of weeks.
- Despite the positive signs for the future, a high proportion of veterinarians are reporting that they have lost some income of their job, and many, especially in the UK, are working remotely.

*“Currently 2 days on, 2 days off with another team we are separated from, which is difficult as **we miss our friends!** Our roles have completely changed, having initially to cover ALL roles in the clinic, and as veterinarians **we weren't even aware of half of them** or how to go about doing them!”*

*“We are **really struggling** to cope with the increasing work load with so few of us present in the practice. We **need more staff** to come off furlough but the Regional Director is not in agreement. The staff are working under a **great deal of stress** doing **long hours** and under difficult conditions”*

MANY MEASURES AIMED AT REDUCING FOOTFALL AND SOCIAL CONTACT REMAIN IN PLACE, BUT *SOME* ARE SHOWING SIGNS OF BEING LIFTED

- Wearing PPE remains one of the most widespread measures in all markets, apart from Australia.
- There has been a slight decline in the % of veterinarians reporting staff on sick leave due to Covid-19.
- In Italy and Spain, we see a decrease in those reporting that only emergency cases are allowed in the practice.
- Telemedicine and only accepting card payments remains much more widespread in English speaking markets.

A RECOVERY IN NUMBERS OF CLIENTS IN CLINIC IS REPORTED, ALONG WITH SOME TENTATIVE GAINS IN REVENUE

- In France especially, clinics are reporting increases in the % of clients in clinic, revenue and staff availability
- Spain is also reporting similar, but less sizeable, increases
- Overall decreases in all areas are less stark in May than they were in March or April.

EXECUTIVE SUMMARY

MANY ROUTINE PROCEDURES HAVE BEEN REDUCED OR STOPPED ENTIRELY DUE TO CORONAVIRUS - ONLY EUTHANASIAS REMAIN LARGELY UNAFFECTED

- Vaccinations in particular are reduced or stopped, especially in France where 4 in 10 veterinarians say they have stopped vaccinations completely
- The vast majority of veterinarians in all countries except Germany have entirely stopped sales rep visits - and they are not a priority activity to restart

CLIENTS REMAIN CAUTIOUS BUT STOCKPILING BEHAVIOUR IS REDUCED

- Social distancing is still happening, especially in the UK, and in all countries asking questions is still common
- However, there has been a decrease in stocking up on medicines and pet food, and there are fewer cancellations this wave

SATISFACTION IN GOVERNMENT RESPONSE CONTINUES TO DECLINE IN THE US AND UK

- As other countries see stability or a slight increase in satisfaction with government response, the UK and US are seeing a steady decrease over the past 3 waves

VETERINARIANS ARE NOT GETTING THE SUPPORT THEY NEED

- While most expectations remained stable since the previous wave, there is a decrease in rationing expectations as well as flexibility on payment.
- This may be linked a new measure this wave; what support are veterinarians actually receiving? There's a gap between what is most wanted and what is being delivered.
 - Whilst webinars are popular, more veterinarians report having this support type than those who actually want it
 - Conversely there is a gap where far fewer than those requesting the support are actually getting it; updates on stock, increased customer support, payment flexibility, advice on managing shortages and client facing materials

04

Detailed insights

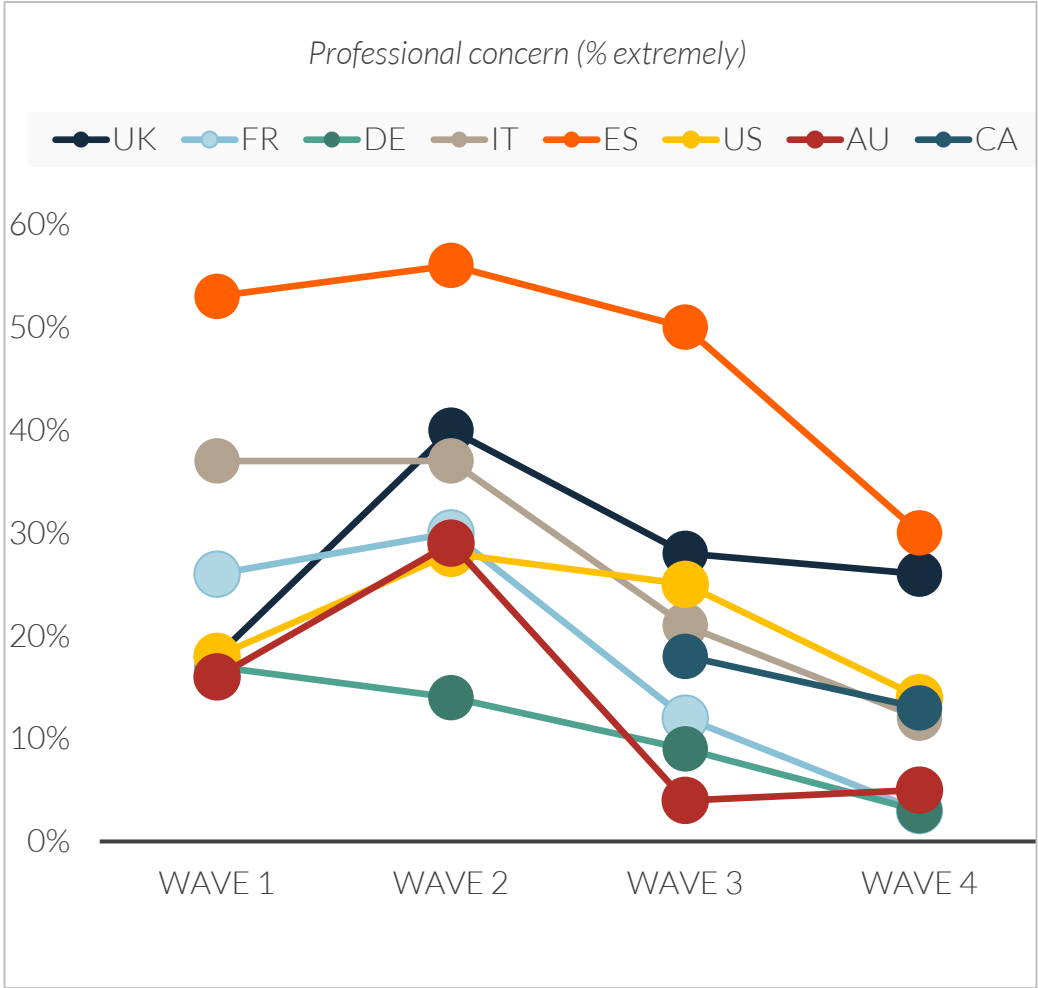
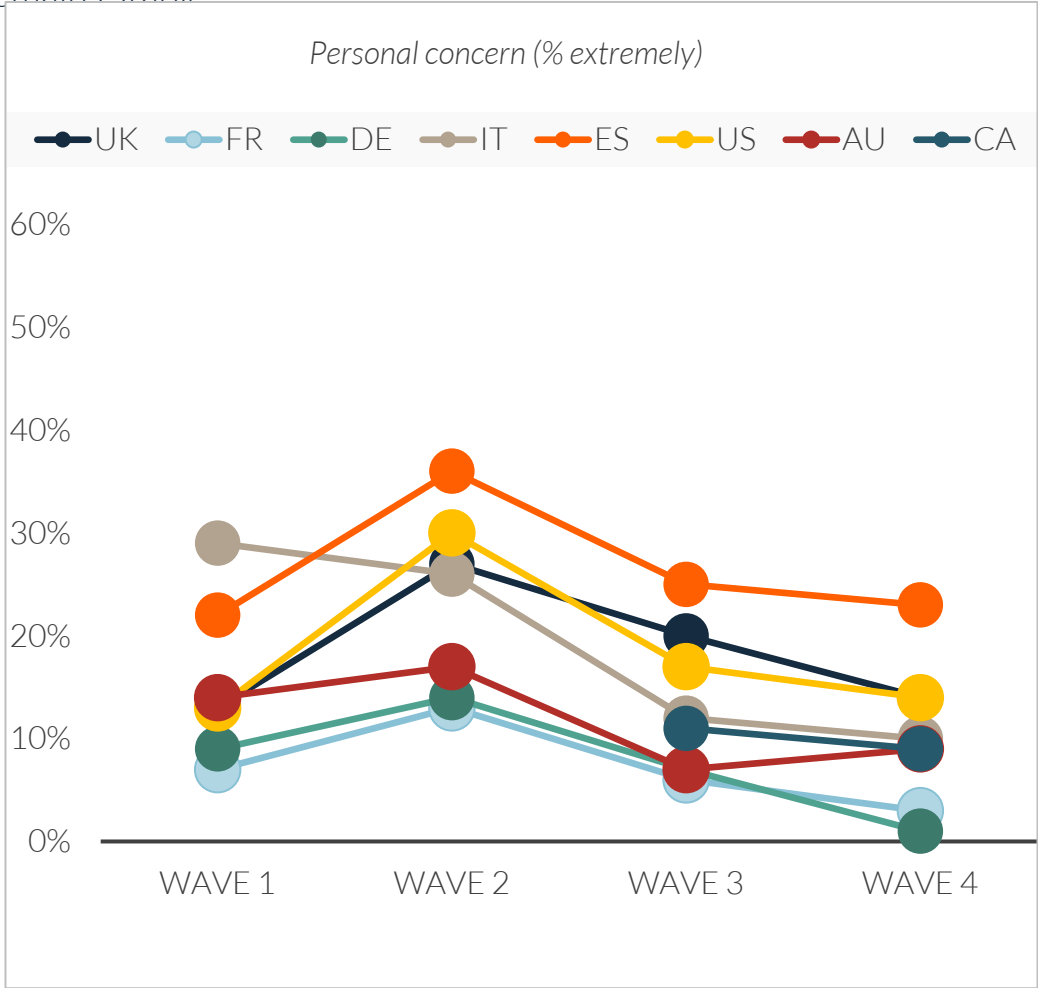
A more in-depth view of the survey findings.

4.1

Veterinarian perception of Covid-19 crisis

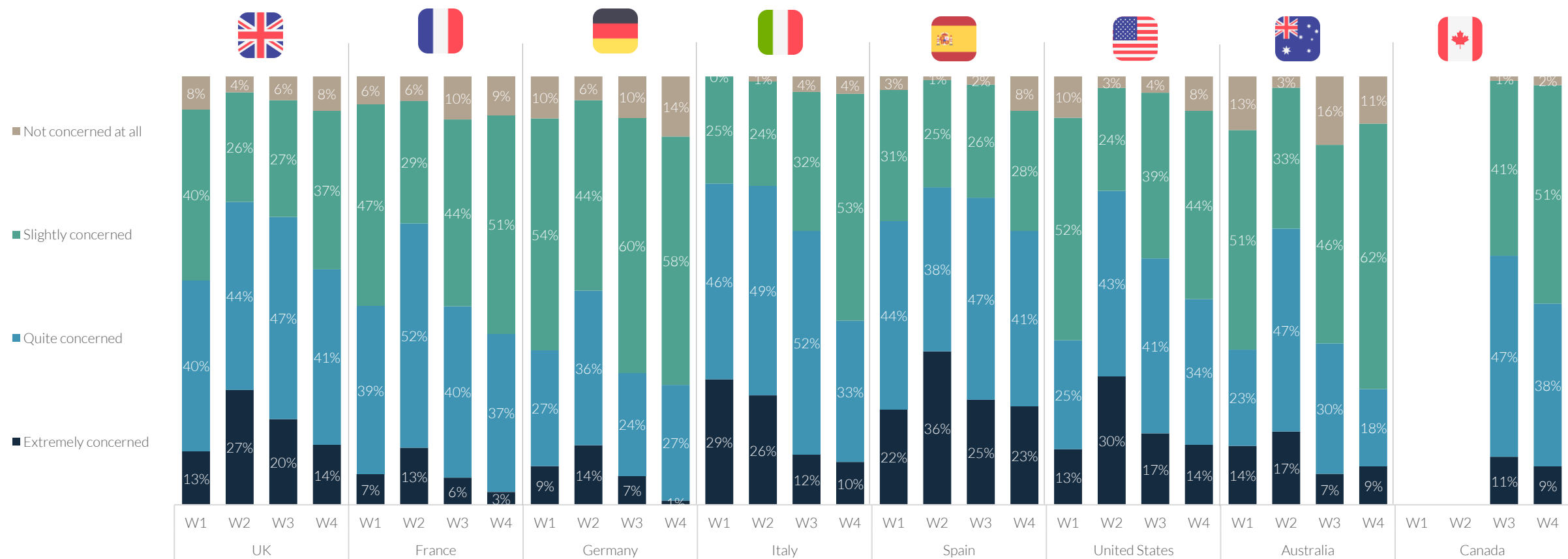
PERSONAL AND PROFESSIONAL CONCERN: SUMMARY

In most countries the levels of personal concern continue to decline with Spanish veterinarians remaining most concerned and German veterinarians least. Likewise, as restrictions lift, professional concerns also fall in all markets except for the UK and Australia where the level remains stable



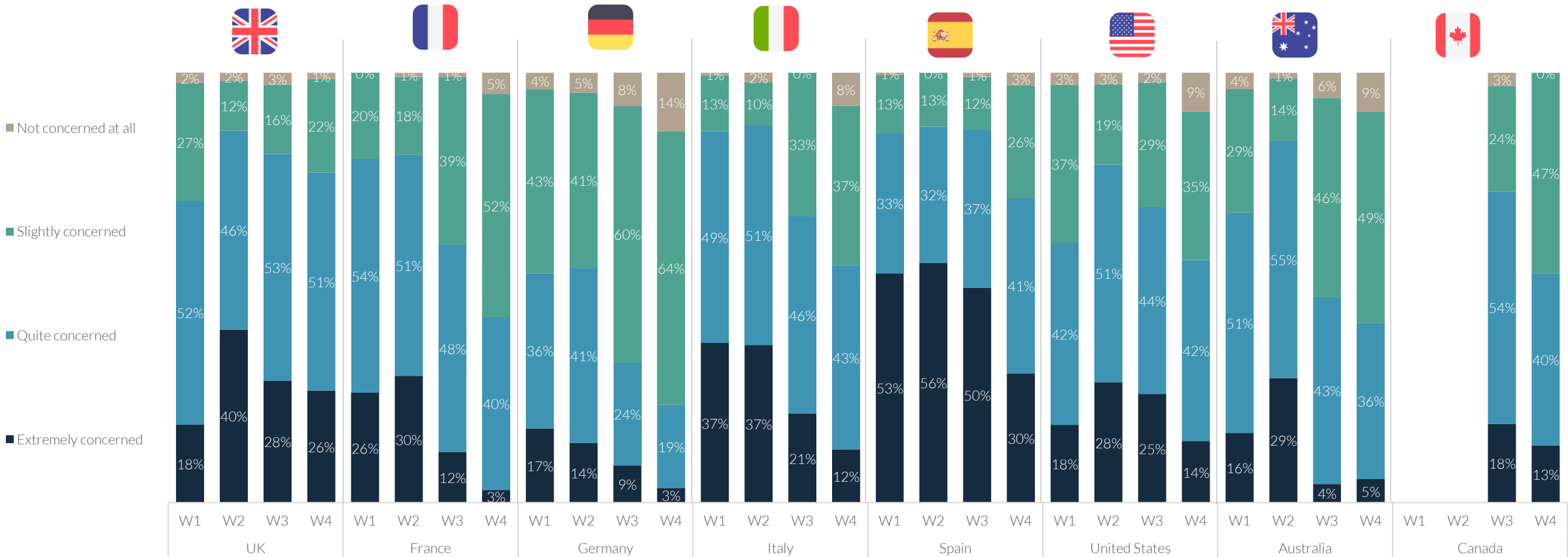
PERSONAL CONCERN ON RISK OF CORONAVIRUS OUTBREAK

In most countries the levels of personal concern continue to decline with Spanish veterinarians remaining most concerned and German veterinarians least.



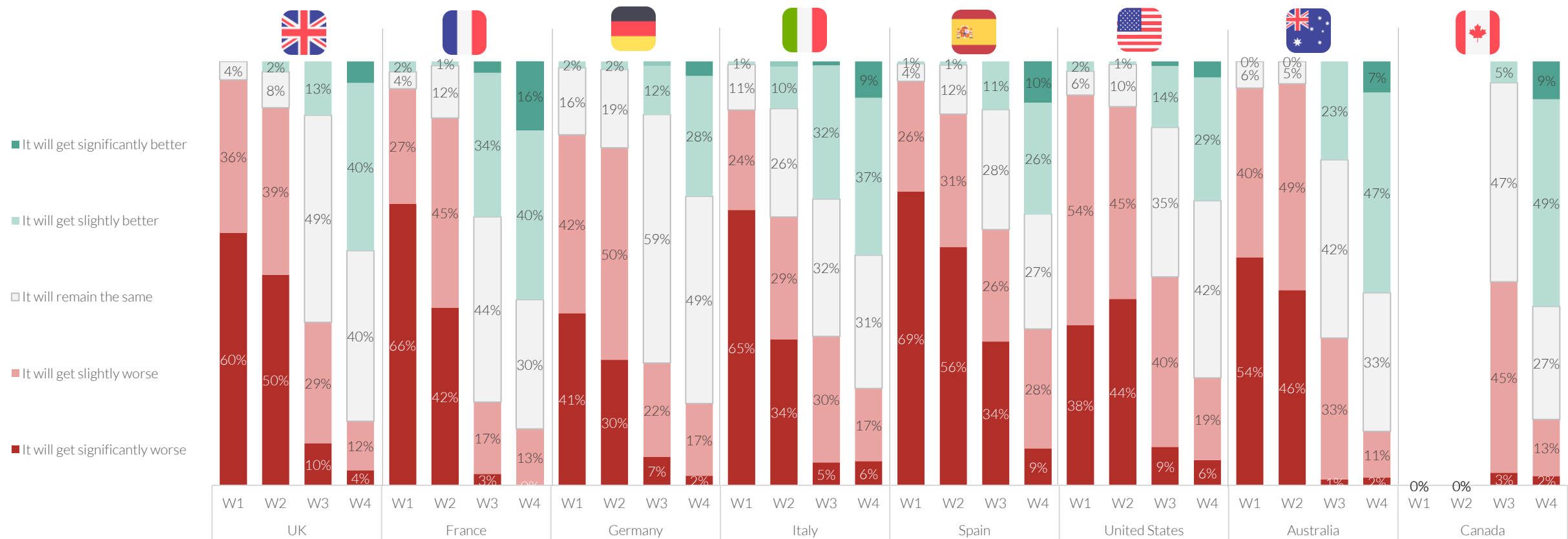
PROFESSIONAL CONCERN ON RISK OF CORONAVIRUS OUTBREAK

Professionally, veterinarians across all markets become more optimistic about the risks posed to their practices



ANTICIPATED IMPACT OF CORONAVIRUS – NEXT 2 WEEKS

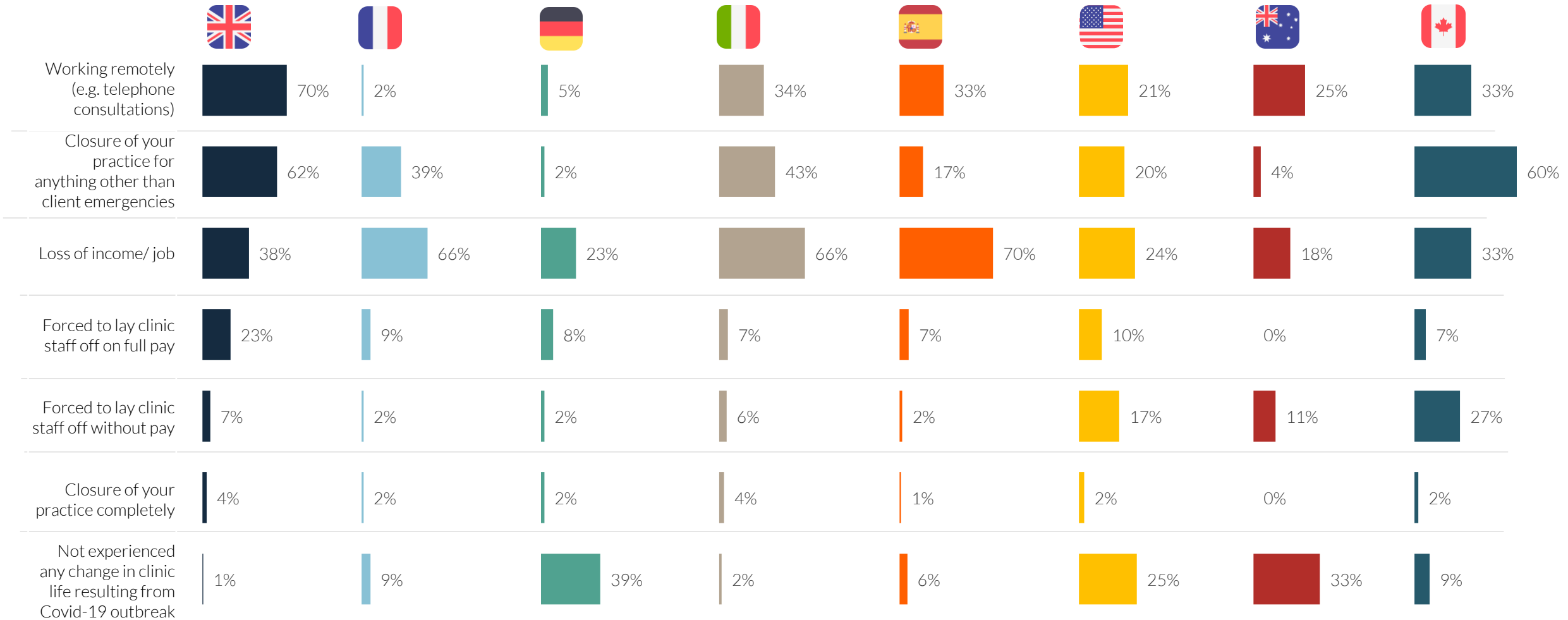
Across ALL countries, veterinarians anticipate an improvement in the effect of Coronavirus on their practice over the next couple of weeks, especially so in the UK, France, Italy Australia and Canada. While some veterinarians in Germany and the US foresee some improvement, the over-riding sentiment in these markets is the situation will remain unchanged for the immediate future.



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?

DISRUPTION EXPERIENCED AS RESULTS OF COVID-19

Some veterinarians managed to work remotely during the outbreak, however a high proportion are claiming a loss of income / job as a result of the Covid-19 outbreak. Around a third of German and Australian veterinarians are claiming that they haven't experienced a change in clinic life.

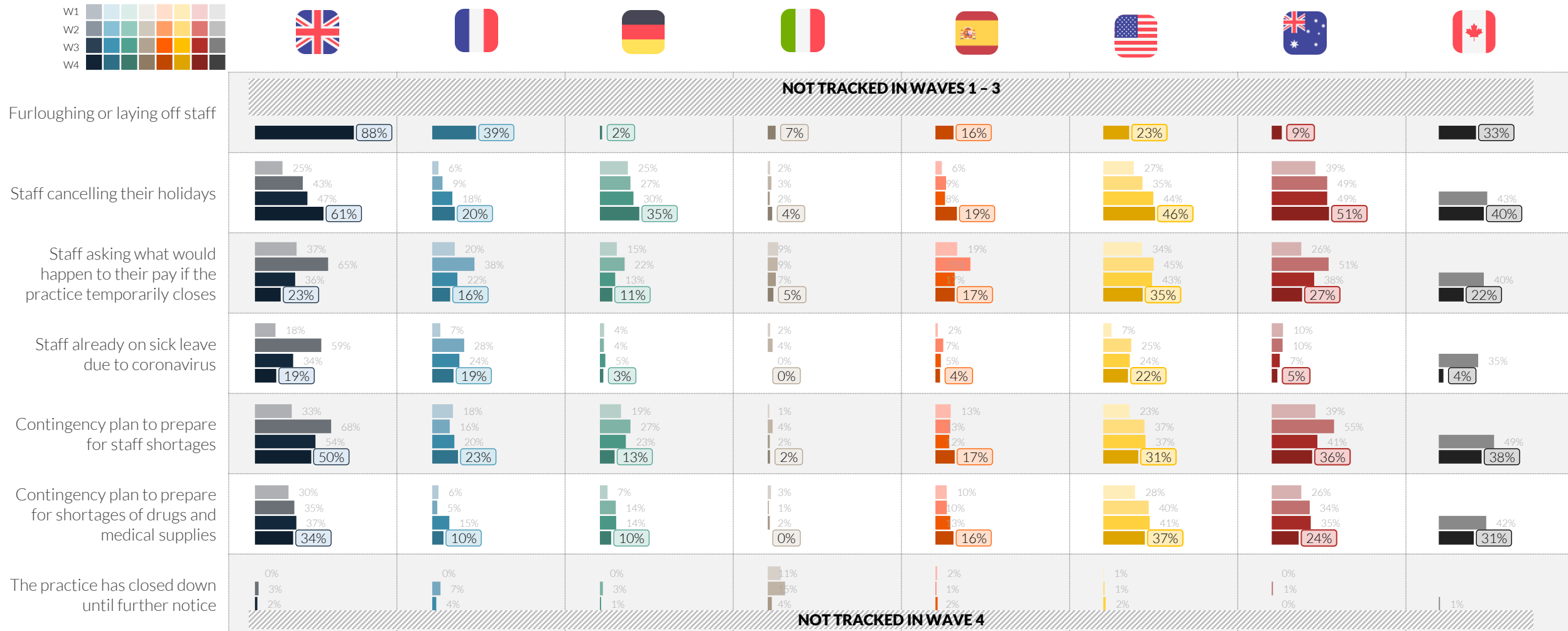


4.2

How are practices responding?

PRACTICE RESPONSE TO COVID-19: **STAFF MEASURES**

Covid-19 continues to make the most impact on staff measures in the UK, US, Australia and Canada and the least in Italy and Spain. Furloughing of staff continues to be an issue in the UK. Holiday cancellations grow across all markets (except Italy). Concerns about pay through clinic closure reduce as most practices effected by this will have already closed.



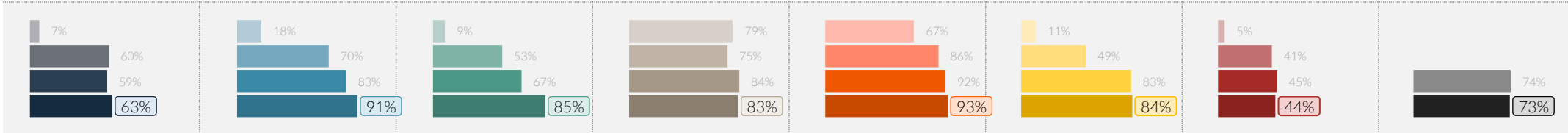
Q2: Which, if any, of the following have happened in your practice in relation to COVID-19 outbreak?

PRACTICE RESPONSE TO COVID-19: **PROTECTION AND ADVICE**

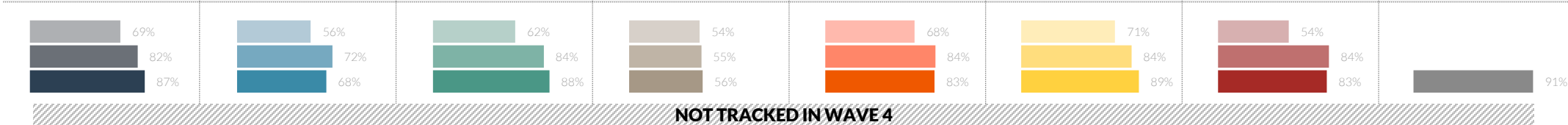
No real changes in the level of PPE worn in consultations and cleaning and personal hygiene policies or the provision of covid-19 advice. veterinarians in Australia remain least likely to be wearing PPE, Italians, least likely to have introduced additional cleaning policies and



Wearing protective clothing during regular consultations (e.g. face masks, gloves)

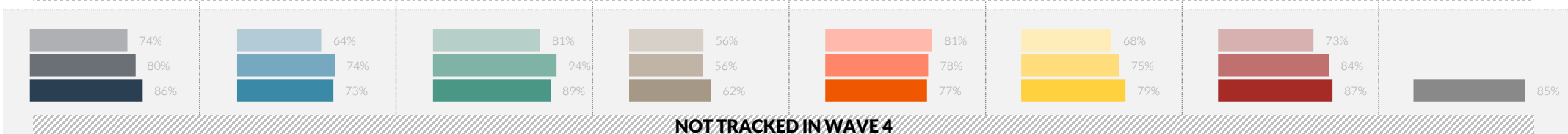


Additional policies around cleaning and disinfecting the consult rooms, reception, public areas, kennels etc.



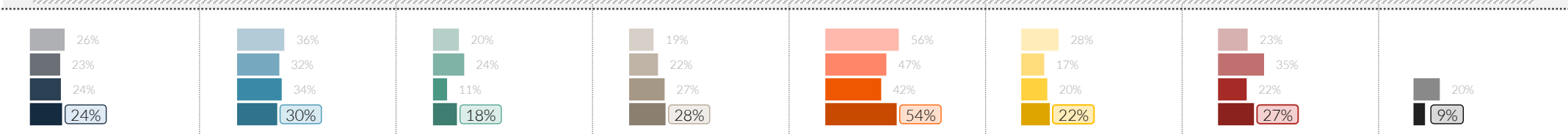
NOT TRACKED IN WAVE 4

Additional policies around personal hygiene (e.g. washing and sanitising hands more often etc.)

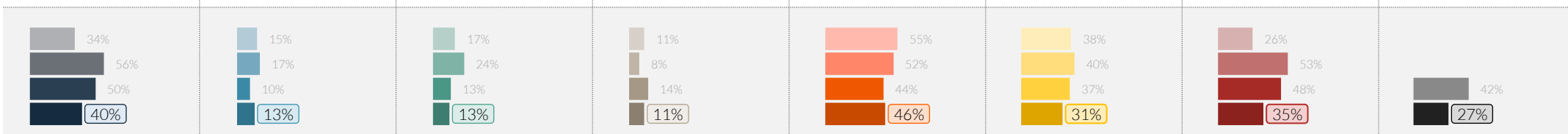


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Providing advice on coronavirus to clients in consultations



Providing advice on coronavirus through website/social channels

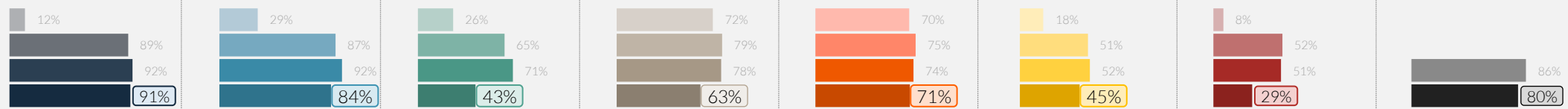


PRACTICE RESPONSE TO COVID-19: **LIMITING FOOTFALL**

The majority of veterinarians in most markets continue to be implementing some client footfall limiting practices, but this is lessening Germany. Principally these measures continue to be phoning to assess urgency and asking clients to wait outside while staff assess pets inside the clinic. More veterinarians are seeing non-emergency cases now.

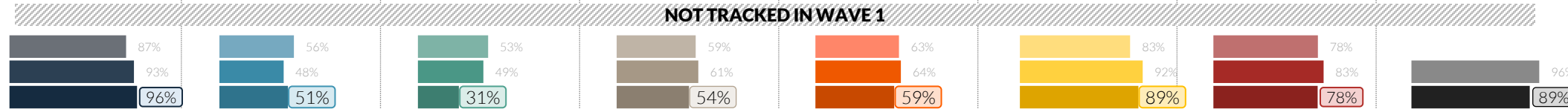


Asking pet owners to call the practice to assess the real need of coming in

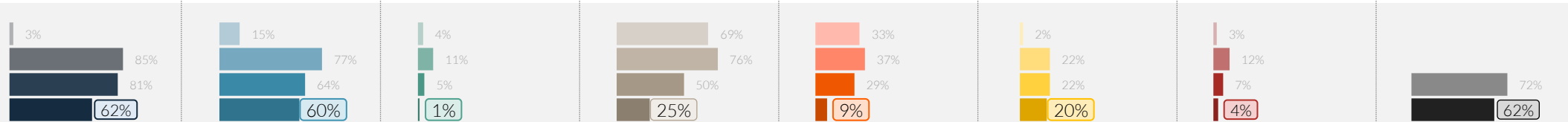


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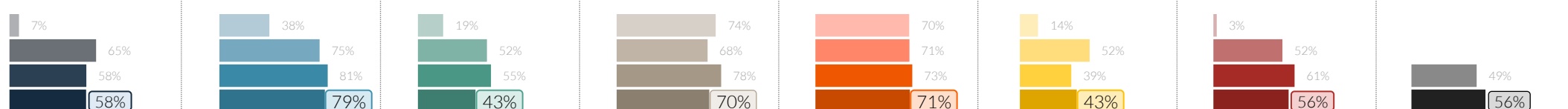
Asking clients to wait outside while member of staff brings the pet inside the practice



Only emergency cases allowed in the practice

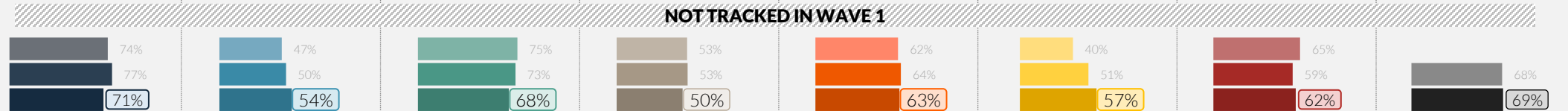


Limiting number of clients and pets allowed in the practice per day



NOT TRACKED IN WAVE 1

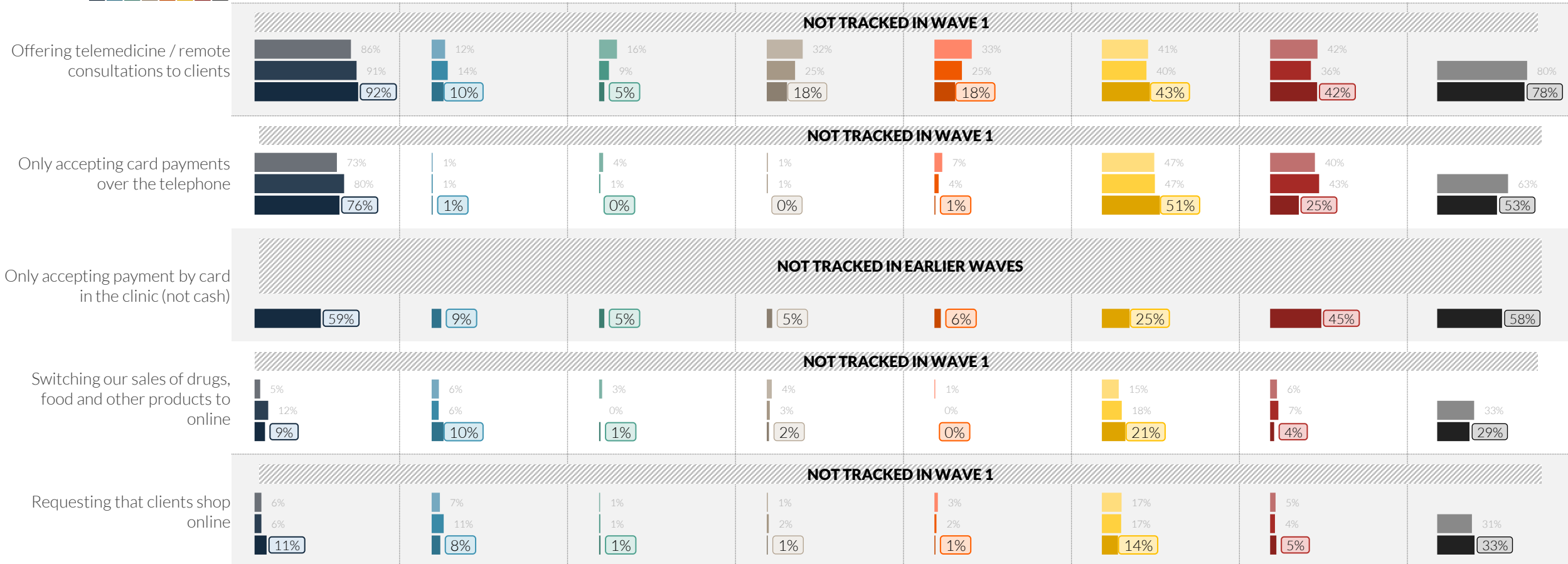
Cancelling visits from the sales representatives / account managers



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

PRACTICE RESPONSE TO COVID-19: **TELEMEDICINE AND ONLINE PAYMENTS**

Telemedicine services and online payments have only really been embraced by UK veterinarians and to a lesser extent veterinarians in the US, Australia and Canada.

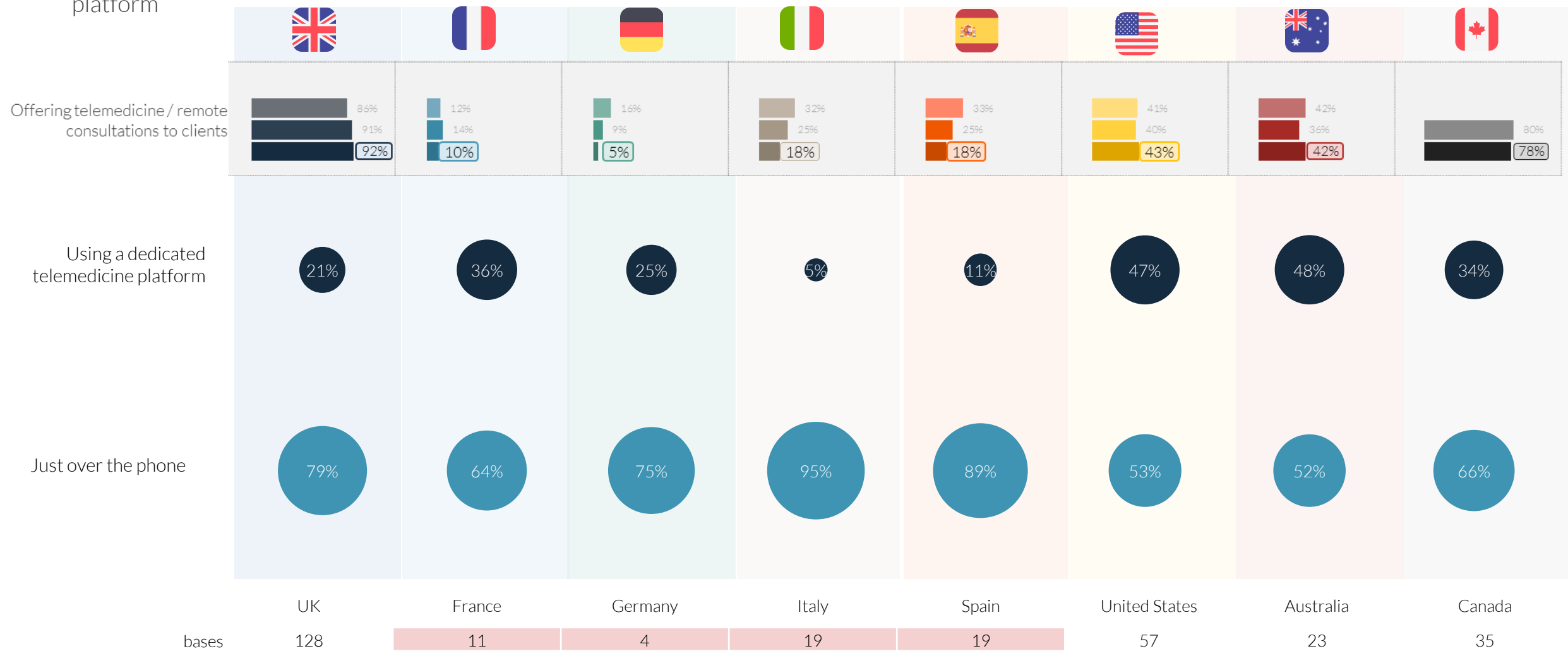


Q2: Which, if any, of the following have happened in your practice in relation to COVID-19 outbreak?

4.3 | Telemedicine focus

TELEMEDICINE OR OVER THE PHONE?

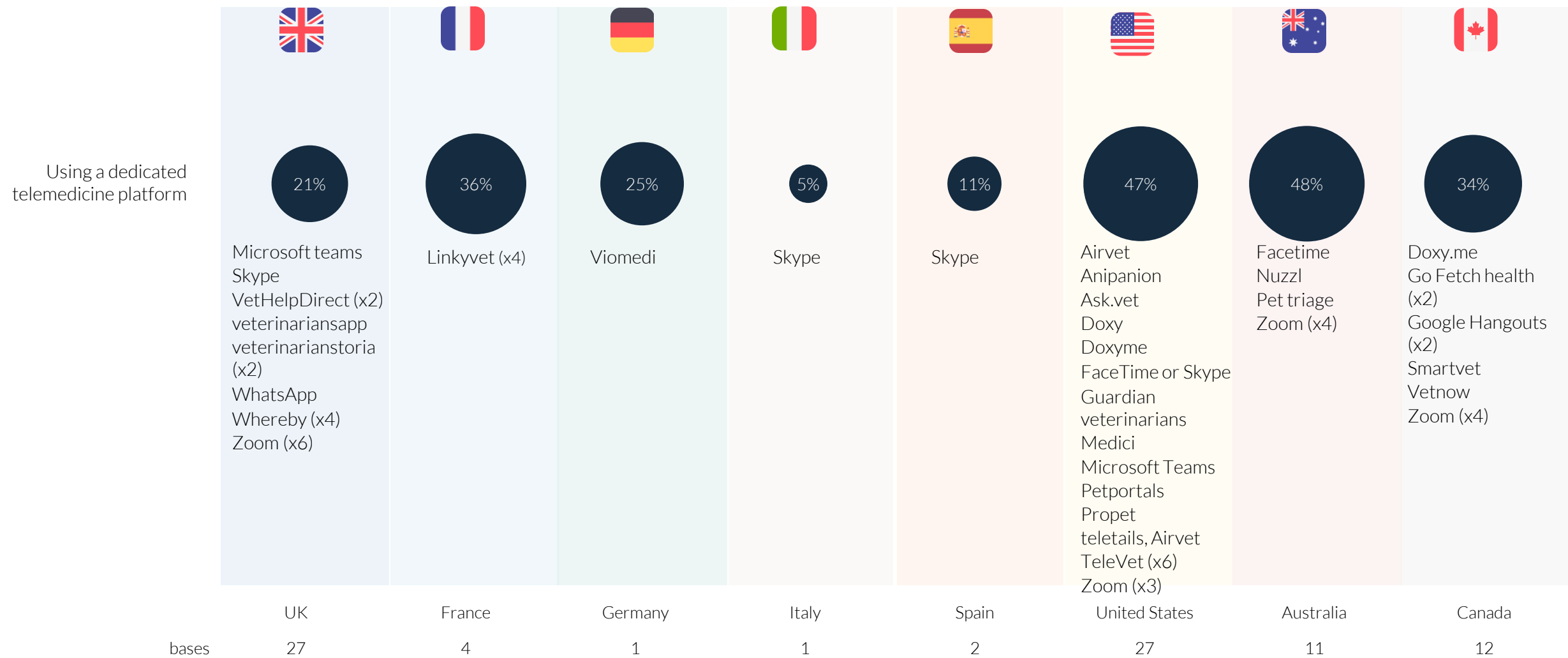
In some countries (e.g. France, Germany, Italy, Spain) very few veterinarians offered telemedicine consultations to their clients. In countries where they did, most consultations were carried out over the phone except in the US and Australia where nearly half were conducted using a dedicated platform



Q2b: You mentioned that you have been offering telemedicine consultations /remote consultations to clients. Are these....?
Q2c: Please tell us the name of the platform you are using

TELEMEDICINE PLATFORM USED

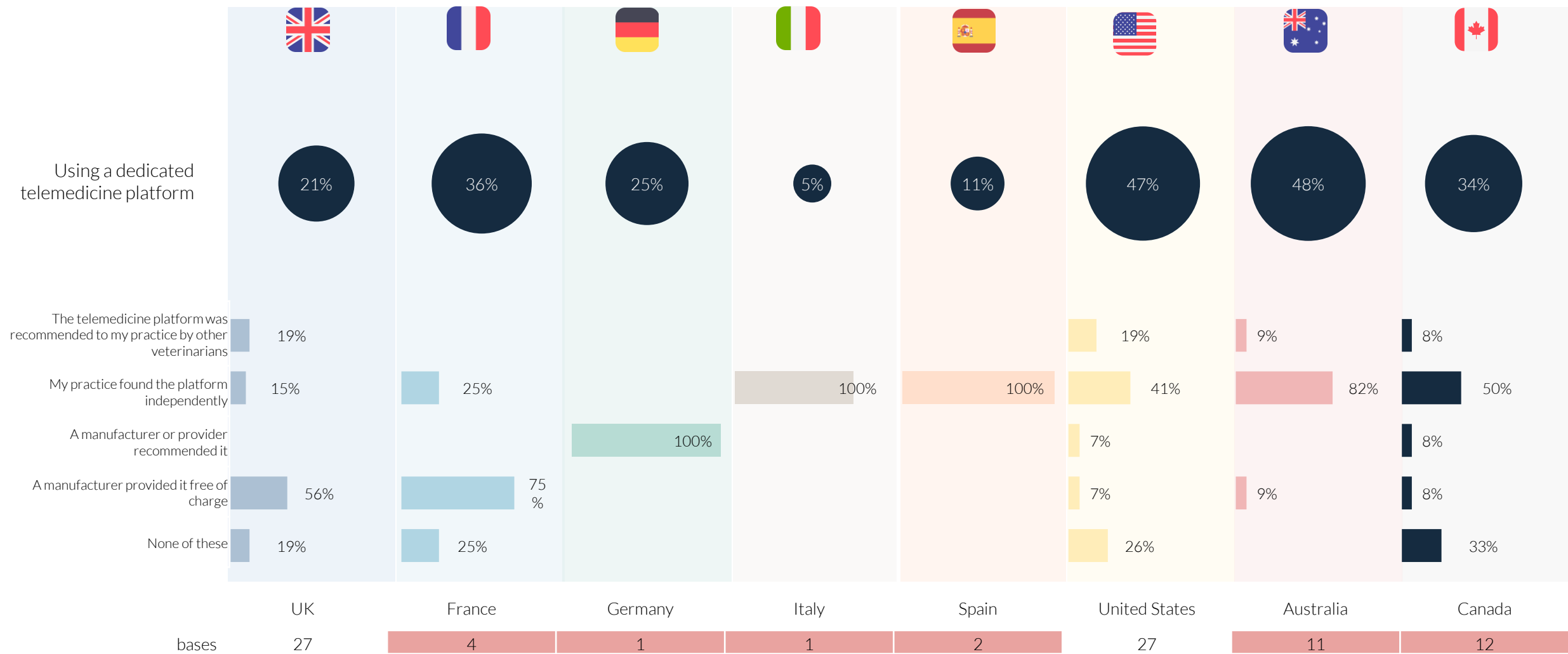
veterinarians in the UK, US and Canada appear to have access to some veterinary specific telemedicine platform. However, some veterinarians are using more mainstream platforms such as Zoom or Skype



Q2b: You mentioned that you have been offering telemedicine consultations /remote consultations to clients. Are these....?
Q2c: Please tell us the name of the platform you are using

TELEMEDICINE PLATFORM SOURCE

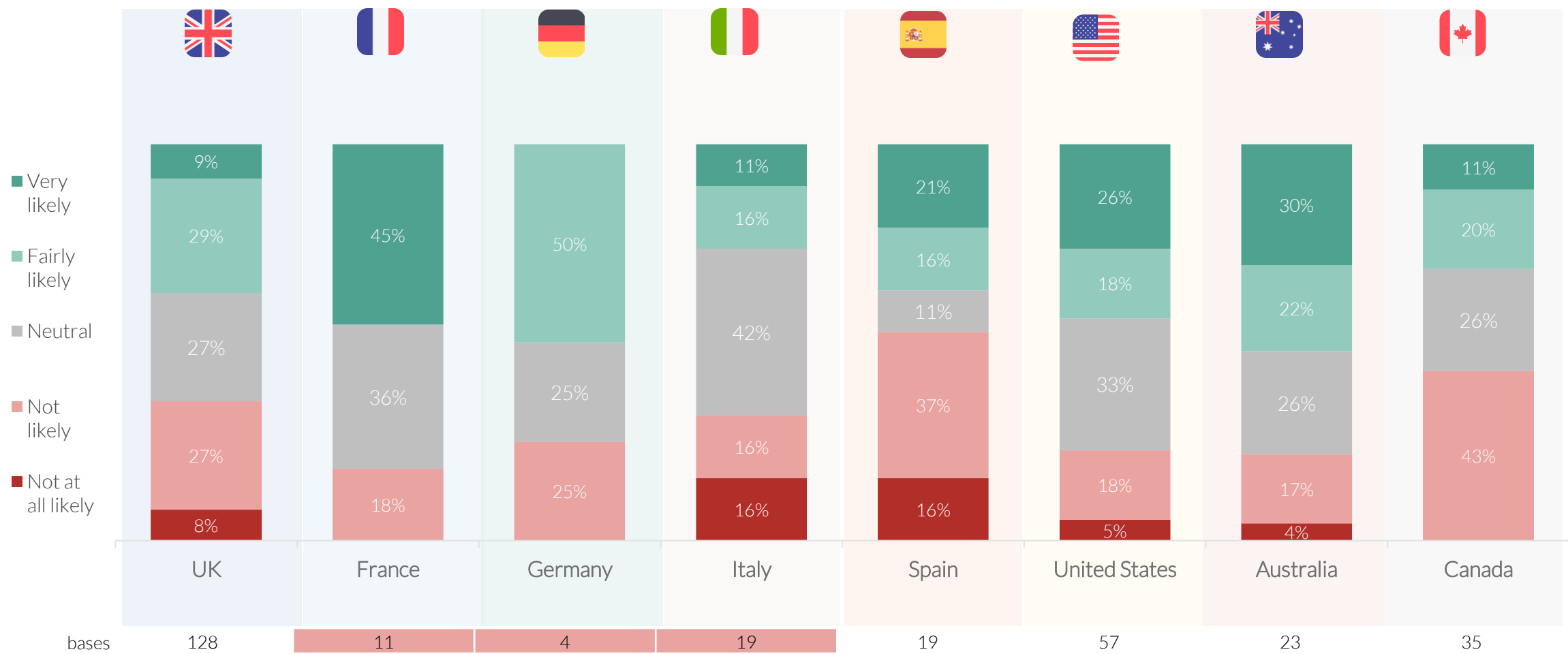
Around half of UK veterinarians who used a platform used one provided free of charge by a manufacturer



Q2b: You mentioned that you have been offering telemedicine consultations /remote consultations to clients. Are these....?
Q2d: And which, if any of the following statements apply?

LIKELIHOOD TO CONTINUE USING TELEMEDICINE

While some veterinarians are keen to keep using telemedicine once the outbreak is over, other need further convincing, esp, in the UK, Italy, Spain and Canada.

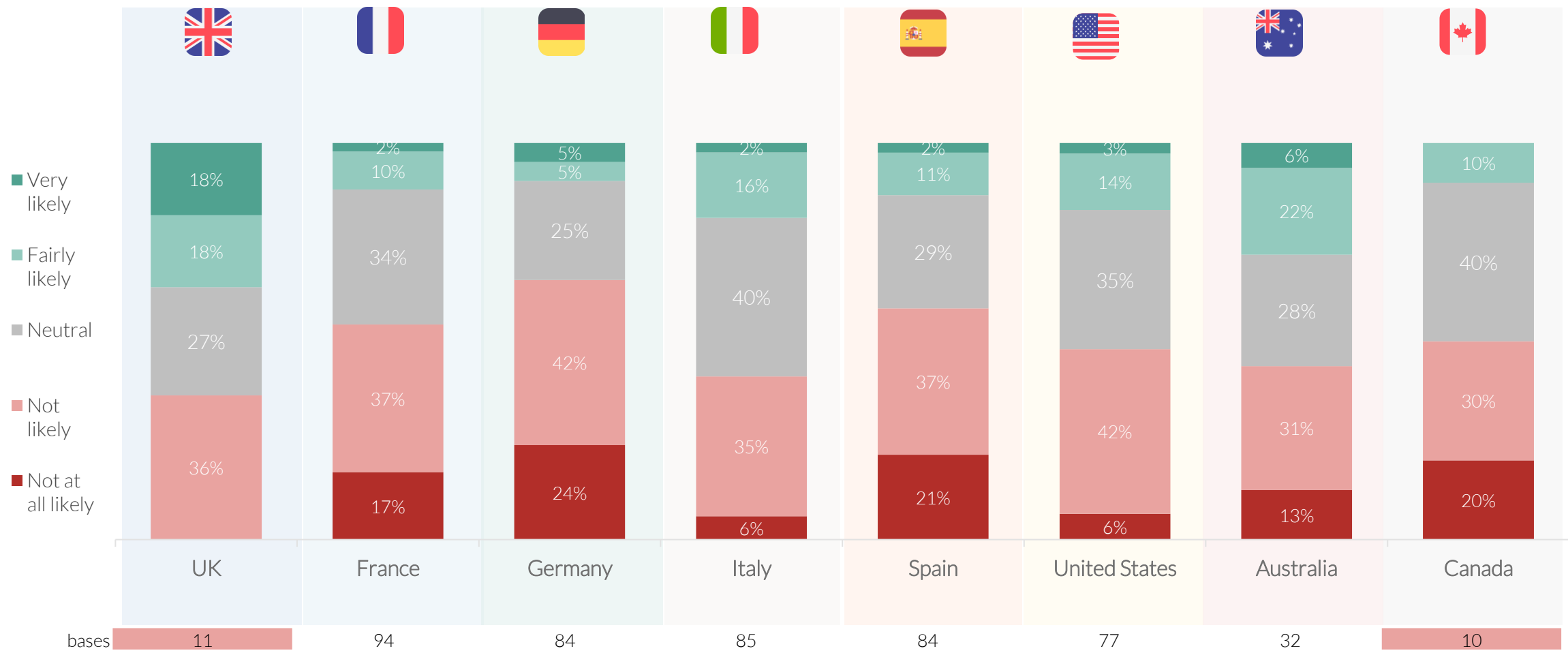


Q2b: You mentioned that you have been offering telemedicine consultations /remote consultations to clients. Are these....?

Q2e: How likely are you to continue using telemedicine once your practice is operating more like it was before COVID-19?

LIKELIHOOD TO START USING TELEMEDICINE

Current non-users of telemedicine will also need to be convinced of the benefit of use. However, nearly a third of UK and Australia veterinarians appear keen to give it a go



Q2b: You mentioned that you have been offering telemedicine consultations /remote consultations to clients. Are these....?
Q2F: How likely would you be to offer telemedicine consultations in the future?

4.4









Impact on clinic finances and activities

SUMMARY OF COVID-19 IMPACT ON KEY AREAS – WAVE 4

Some real signs of recovery, particularly in France and Spain where lockdown measures have been eased vs. last wave.

- ⬆️ 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	⬆️ -8%	+19%	-4%	-7%	+4%	+5%	+2%	-9% 🏆
Number of appointments offered to clients	-6%	+22%	+4%	+3%	+5%	-3%	-3%	⬆️ -9% 🏆
Revenue	-6% 🏆	+13%	-5%	⬆️ -11% 🏆	No change	+1%	+2%	-11% 🏆
Staff availability	-3%	+12%	-2%	-1%	+6%	-5% 🏆	+3%	-3%
Availability of cleaning supplies	No change	+3%	⬆️ -10%	-2%	+3%	⬆️ -12% 🏆	⬆️ -11%	-6%
Availability of drugs and medical supplies	-2%	No change	-7%	-7%	+1%	-11% 🏆	-5%	-3%
Deliveries of stock (e.g. pharmaceutical products, pet food)	-3%	+3%	-1%	-6% 🏆	No change	-8% 🏆	-1%	No change

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% 🏆

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

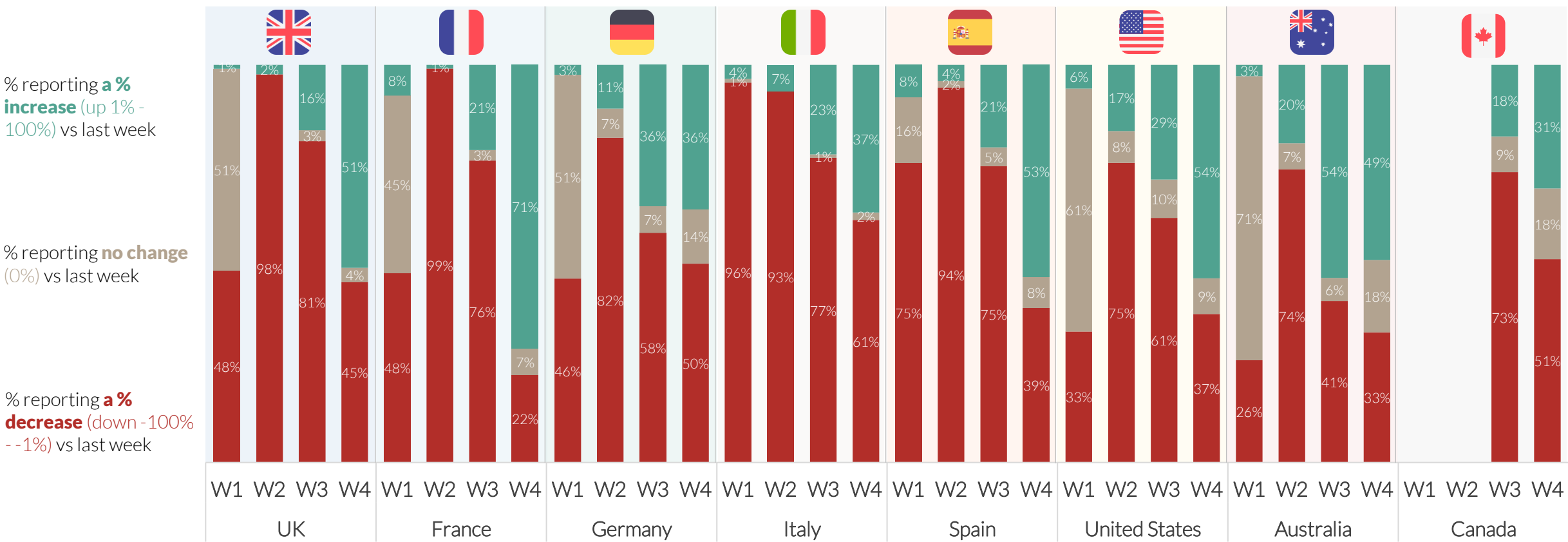
Average % change reported compared to the *past week* in the following areas:

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%

COVID-19 IMPACT ON NUMBER OF CLIENTS VISITING

We can see signs of recovery with a steady increase in the reported number of client visits. France, UK, Spain and the US have seen a particularly large increase since the previous wave.

Reported impact on number of clients visiting the clinic
NB – question changed between first and second wave, so data may not be directly comparable*



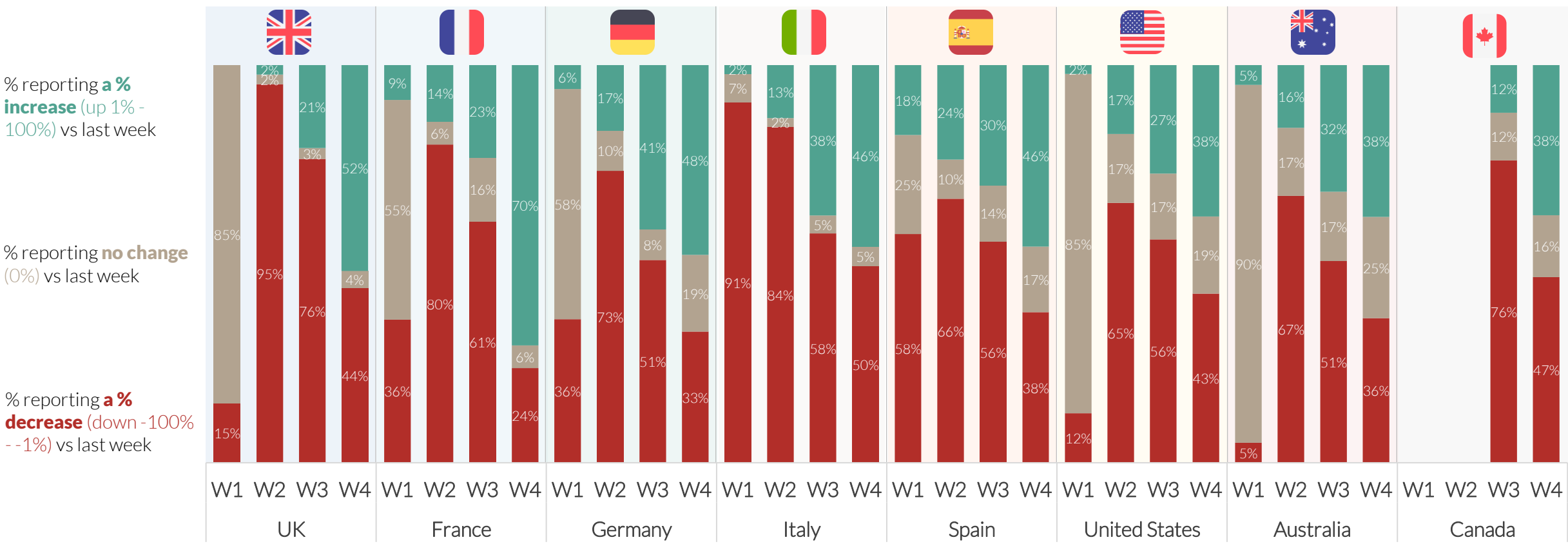
*Wave 1: Q3. How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? Number of clients visiting the practice.

Wave 2:, 3, 4 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

And the number of appointments offered to clients is steadily increasing in all countries. The biggest jump is seen in the UK and France.

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

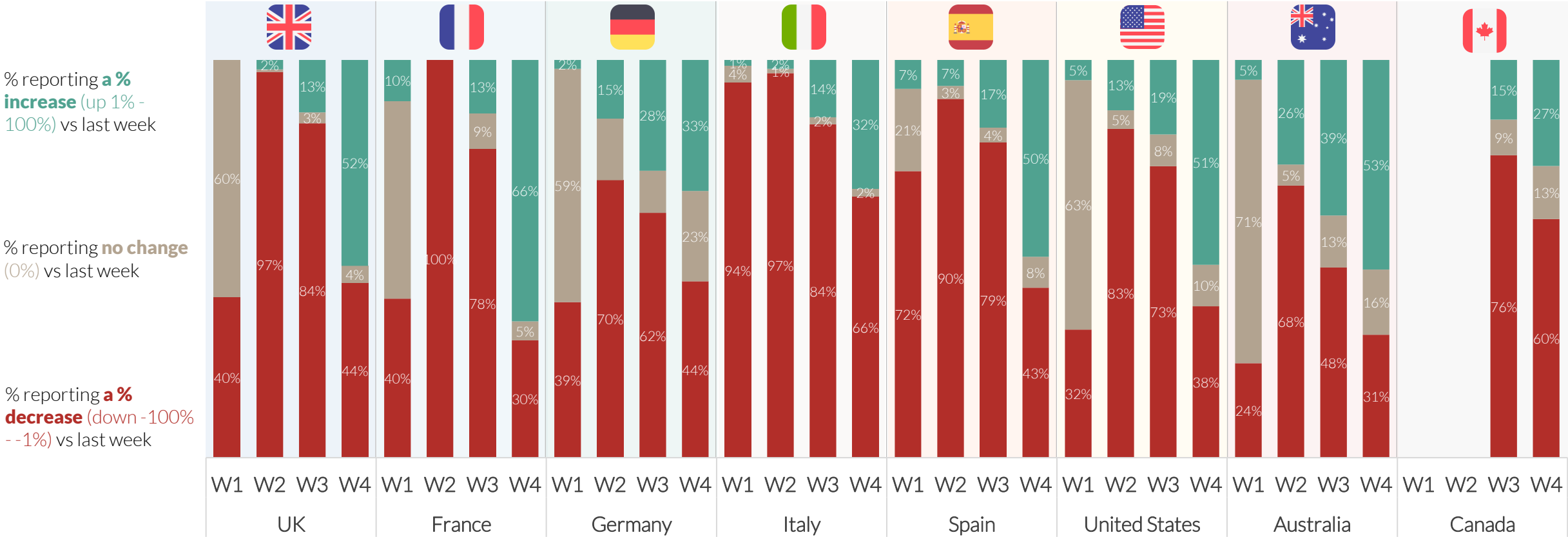
Wave 2, 3, 4: Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Number of appointments offered to clients

COVID-19 IMPACT ON REVENUE

While there is still a decline in revenue for a good proportion of veterinarians, some can see the light at the end of the tunnel with a reported increase in revenue. UK, France, Spain and the US showing the largest increase since the previous wave.

Reported impact on revenue

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



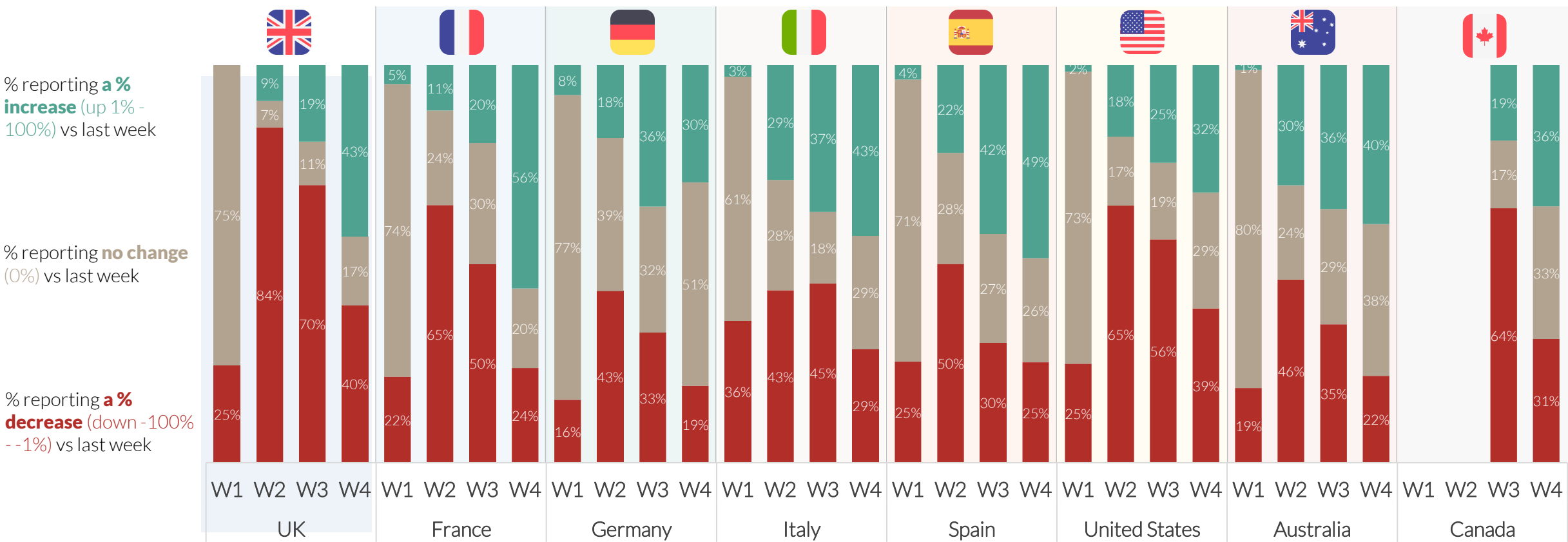
*Wave 1: Q3. How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? Number of appointments offered to clients
Wave 2,3,4: Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Number of appointments offered to clients

COVID-19 IMPACT ON STAFF AVAILABILITY

All countries (apart from Germany) are continuing to see an increase in staff availability. Germany is not seeing much of an increase but German veterinarians are more likely to report no change than a decrease.

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

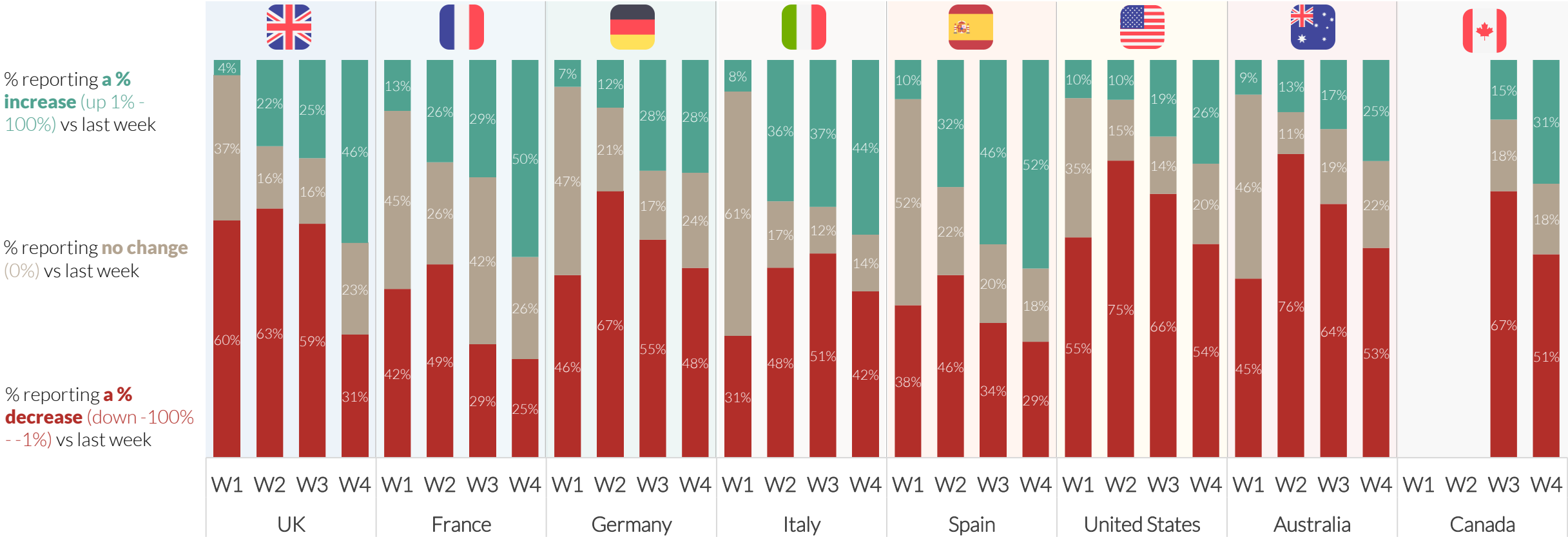
Wave 2, 3, 4: Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Staff availability

COVID-19 IMPACT ON AVAILABILITY OF CLEANING SUPPLIES

Aside from the UK and France, where availability of cleaning supplies appears to have increased, most countries report similar trends to the previous wave

Reported impact on availability of cleaning supplies

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



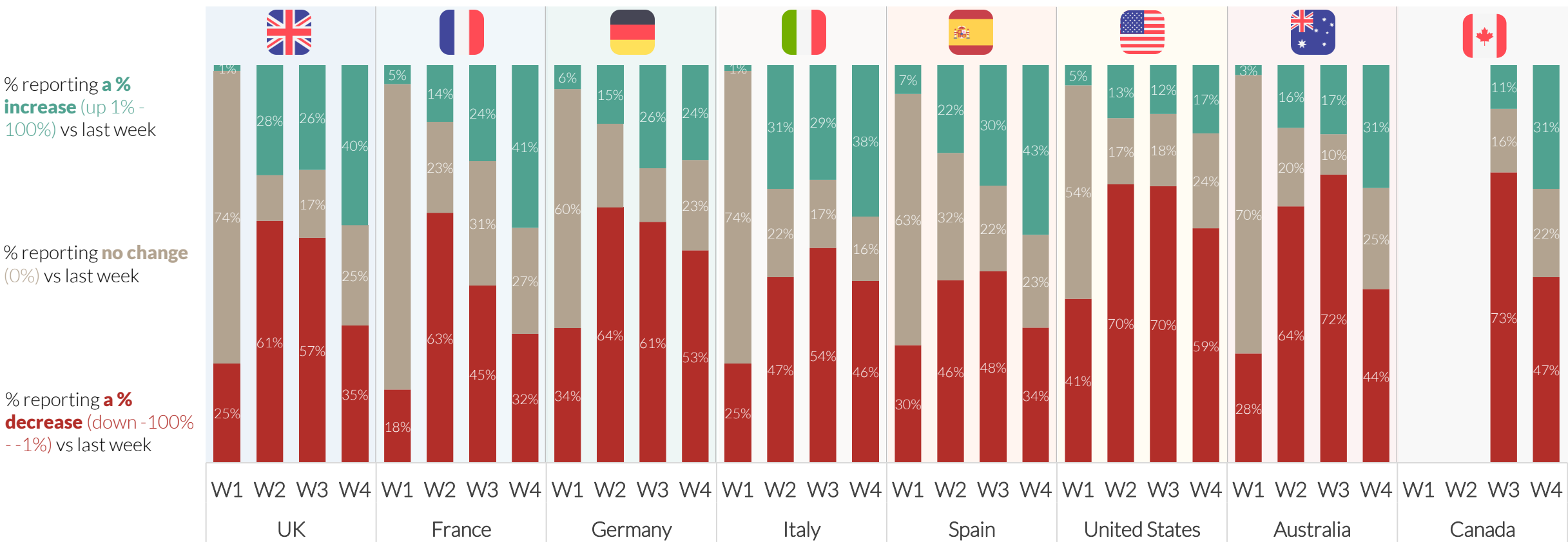
*Wave 1: Q3. How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? Availability of cleaning supplies

Wave 2, 3, 4: 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 AVAILABILITY OF DRUGS/MEDICAL SUPPLIES

There has been some improvement in drug / medical supplies since the previous wave. However, there is still some progress to be made in all countries.

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

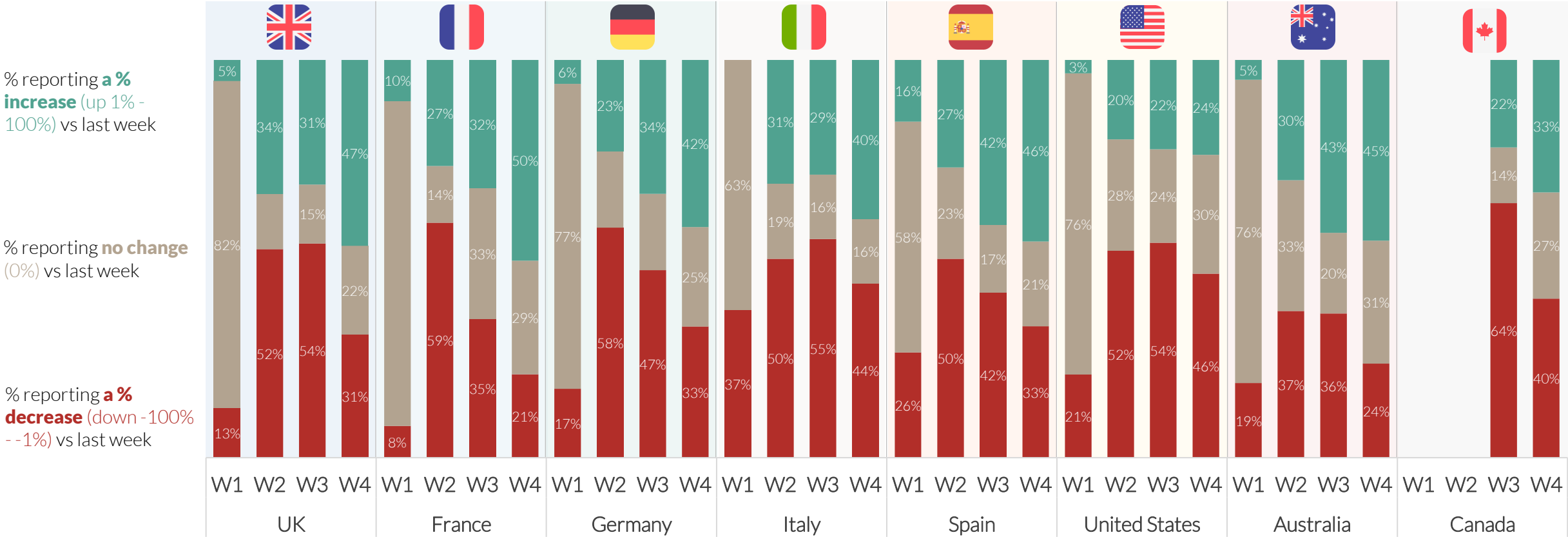
Wave 2, 3, 4: Q3a. Thinking about the **past week only**, what impact, in percentage (%) terms, has the COVID-19 outbreak had on each of the following areas? Availability of drugs

COVID-19 IMPACT ON STOCK DELIVERIES

Stock deliveries seem to have clearly improved in a few countries such as the UK, France and Canada. There are still efforts to be made in the other countries where trends appear similar to last time

Reported impact on stock deliveries

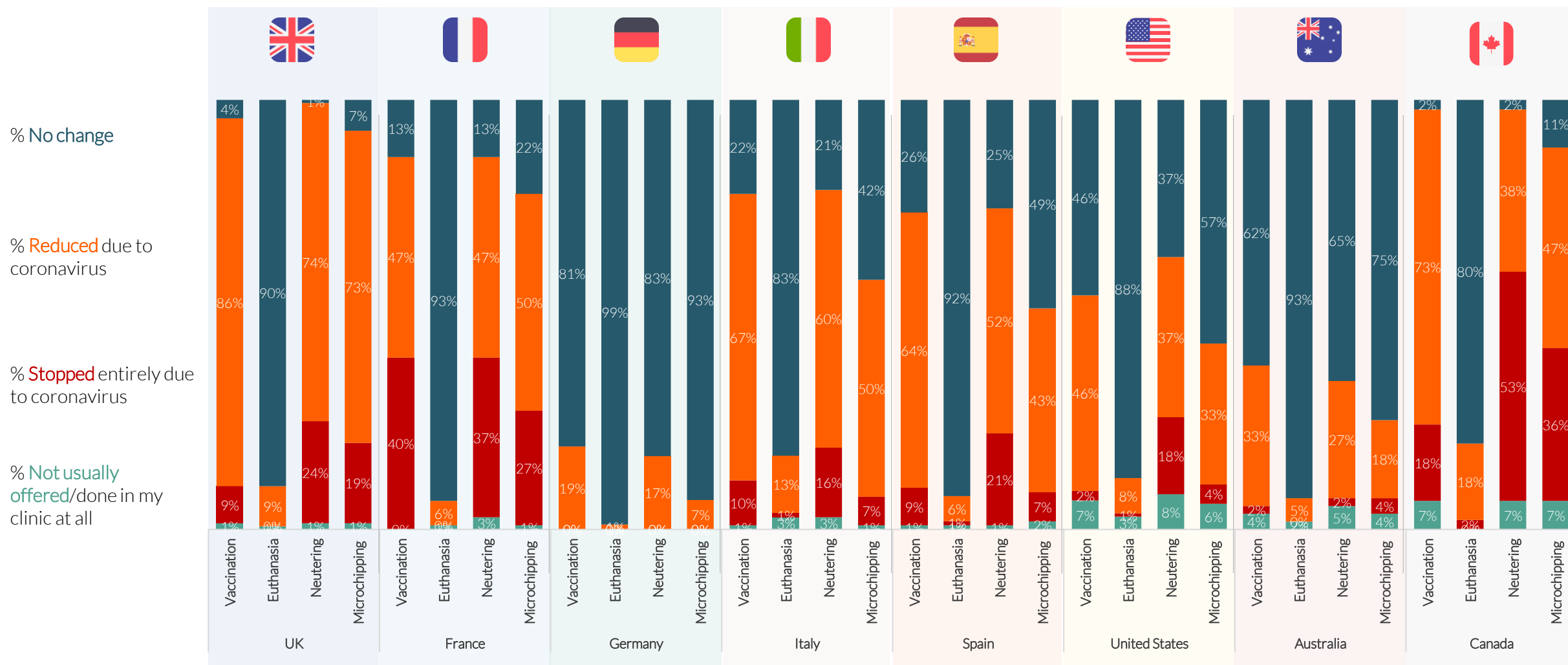
NB – question changed between first and second wave, so data may not be directly comparable*



*Wave 1: Q3. How, if at all, has the COVID-19 outbreak impacted your veterinary practice on the following? Stock deliveries
Wave 2, 3, 4: 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

CHANGE IN SERVICES PROVIDED

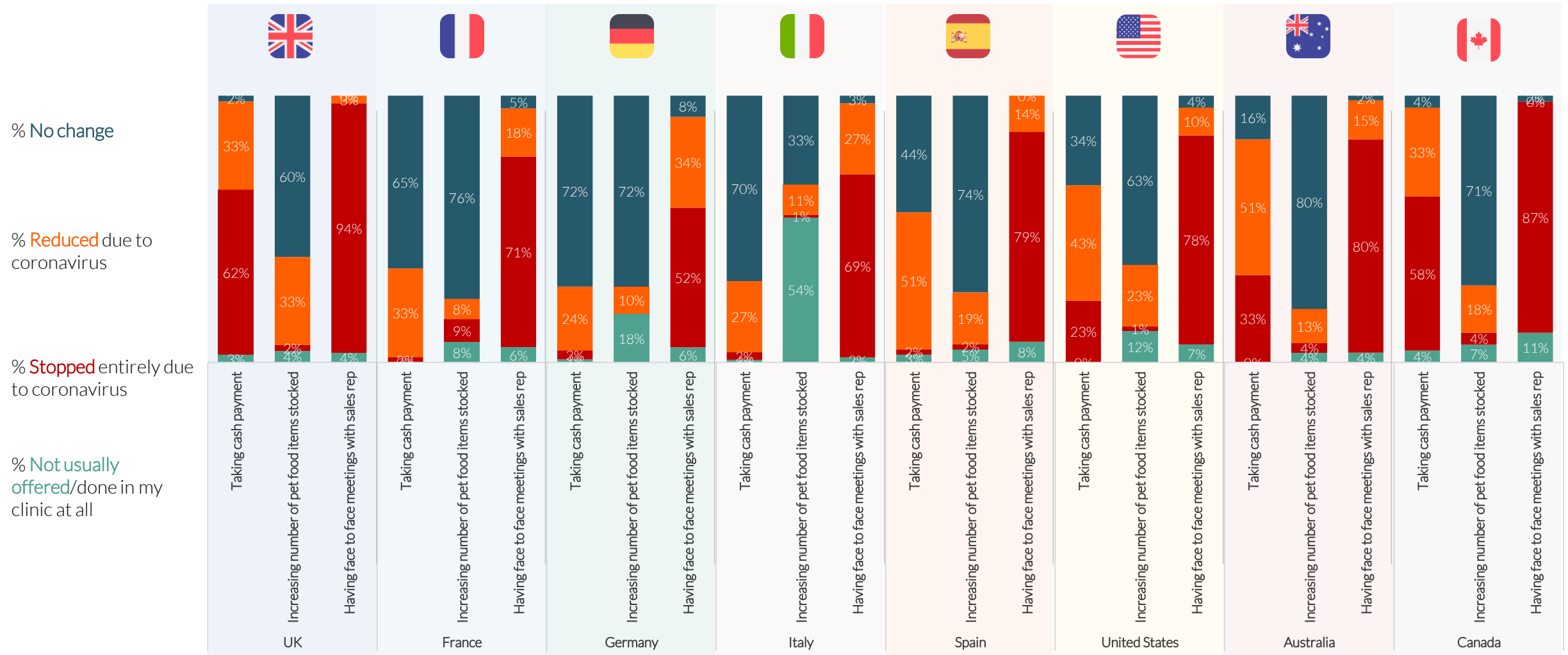
While Germany hasn't seen much impact on vaccination, euthanasia, neutering and microchipping, the story is different in the other countries where these activities have been badly hit due to the coronavirus (except Euthanasia)



Q14. For each of the clinic activities below, please pick the option that best fits

CHANGE IN SERVICES PROVIDED

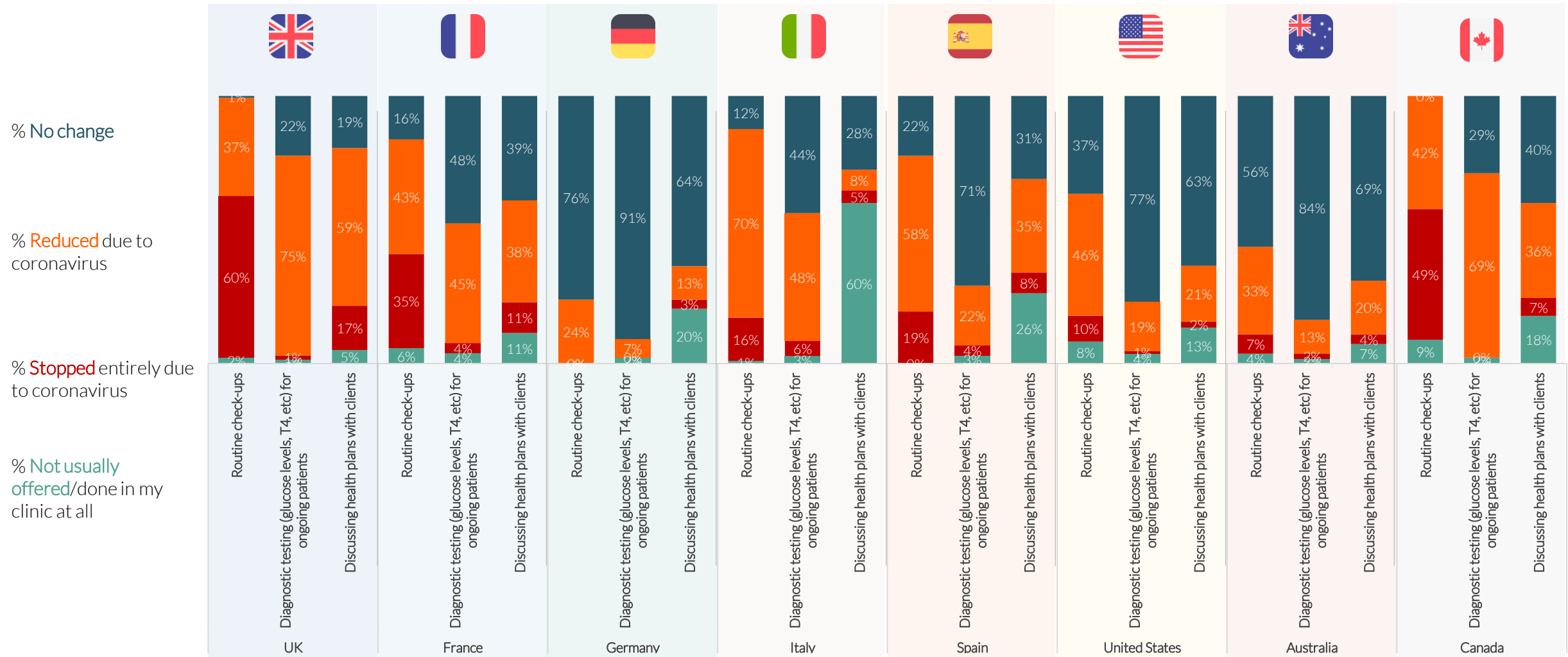
Face to face meetings with sales rep have obviously taken a big hit due to the outbreak, as well as taking cash payment in most countries.



Q14. For each of the clinic activities below, please pick the option that best fits

CHANGE IN SERVICES PROVIDED

Routine check-ups and diagnostic testing have reduced or stopped in most countries, esp. in the UK, France, Italy and Canada. However, it seems list these activities haven't seen such a big impact in Germany and Australia



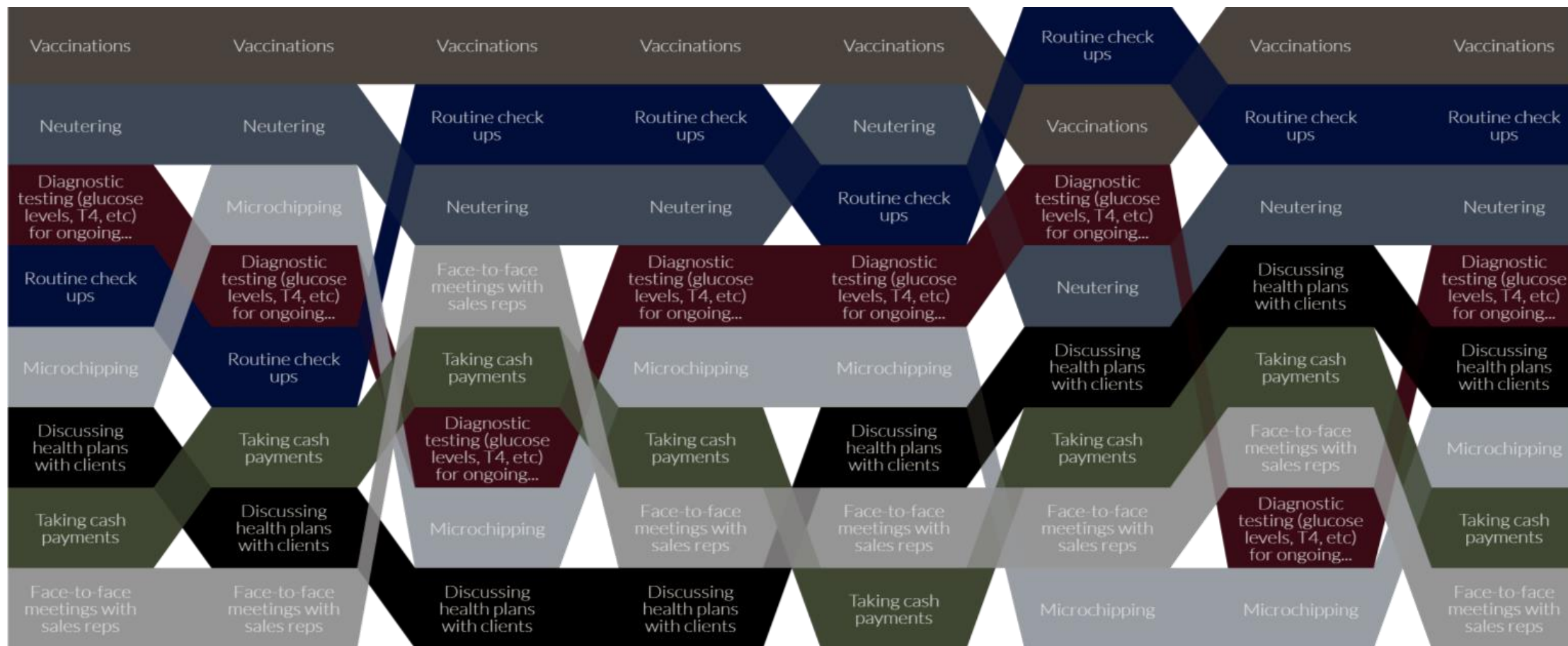
Q14. For each of the clinic activities below, please pick the option that best fits

SUMMARY: PRIORITY TO GET BACK TO NORMAL



**Most
important
to get back
to normal**

**Least
important
to get back
to normal**



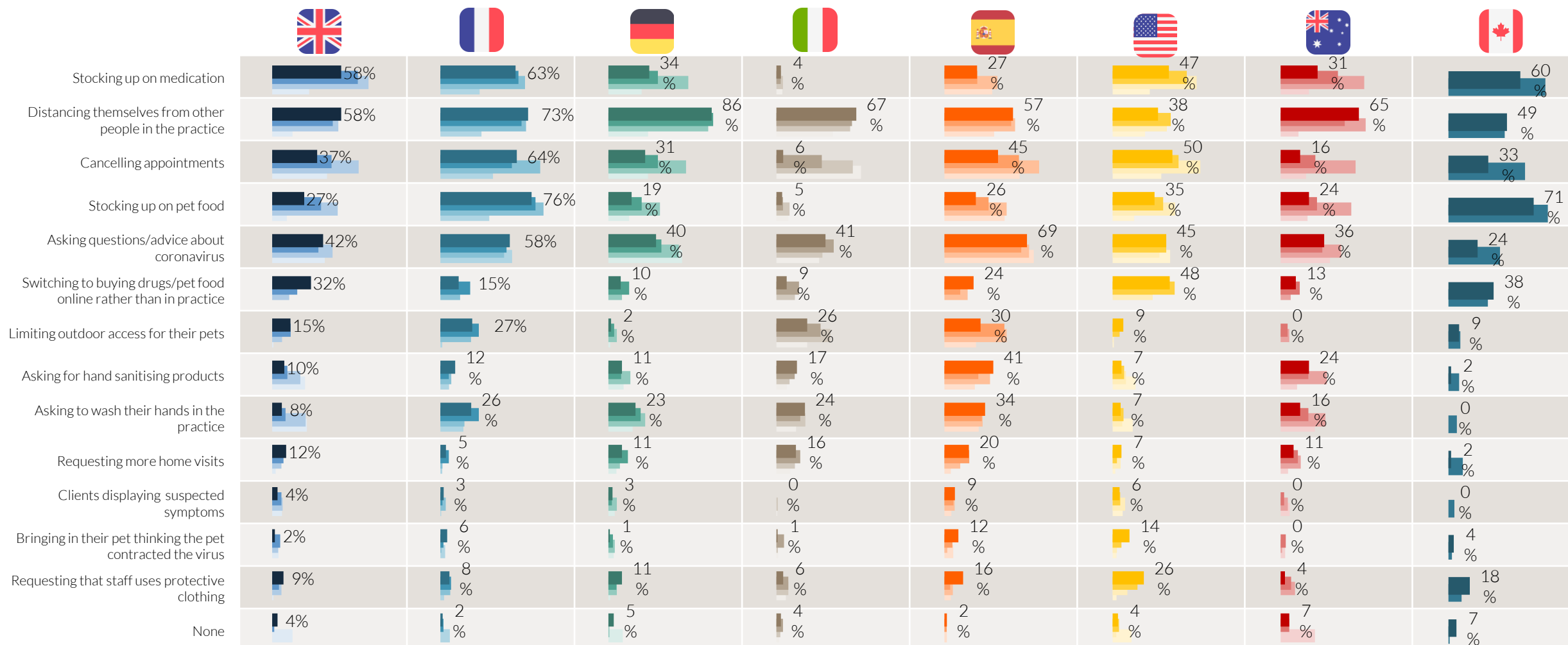
NEWQ14a. Of the activities that have changed or stopped in your clinic, which are the most important for you to get back to "normal"? Please drag and drop into priority order where 1 is 'Most important' to get back to normal and last is the least important.

4.5

Client responses and behaviours

CLIENT RESPONSE TO COVID-19

Clients are still being cautious but less 'panicky'. While they don't seem to be stocking up (medication and pet food) as much as they did, they still distance themselves from others in the practice and ask questions about the coronavirus.



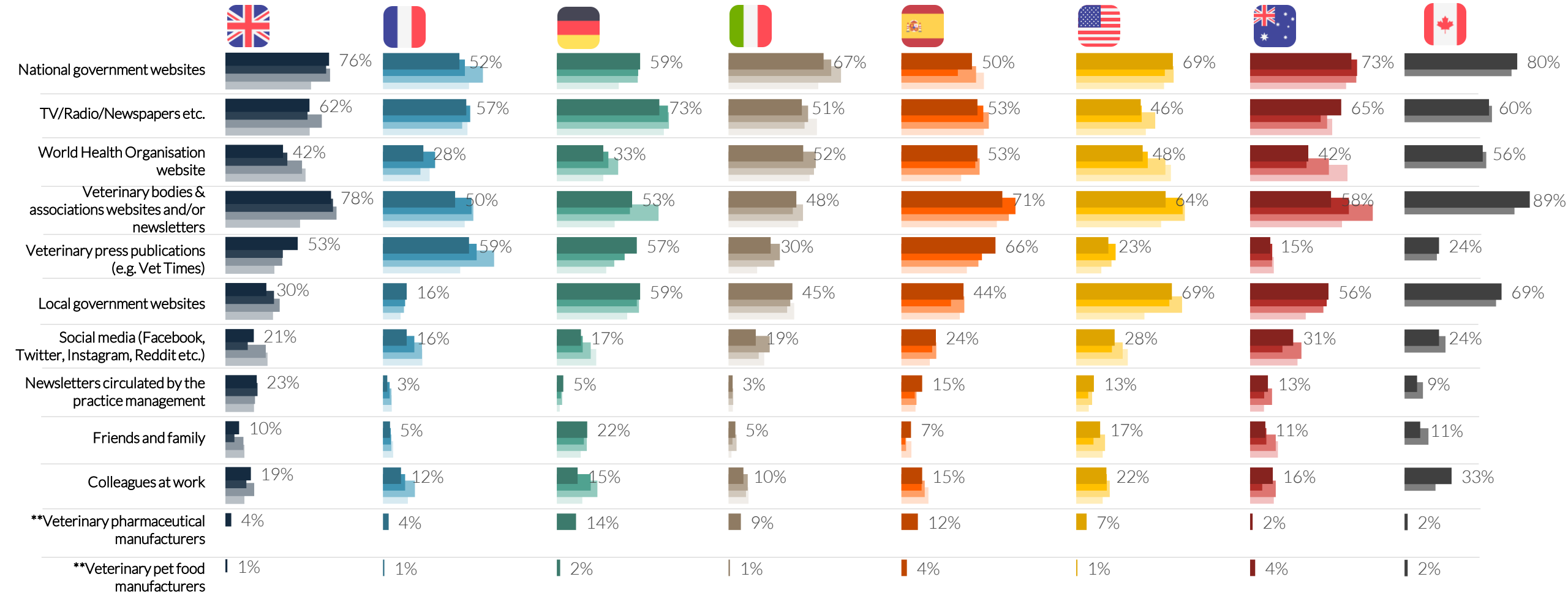
4.6

Accessing information and support



SOURCES USED BY veterinarians FOR UPDATES ON OUTBREAK

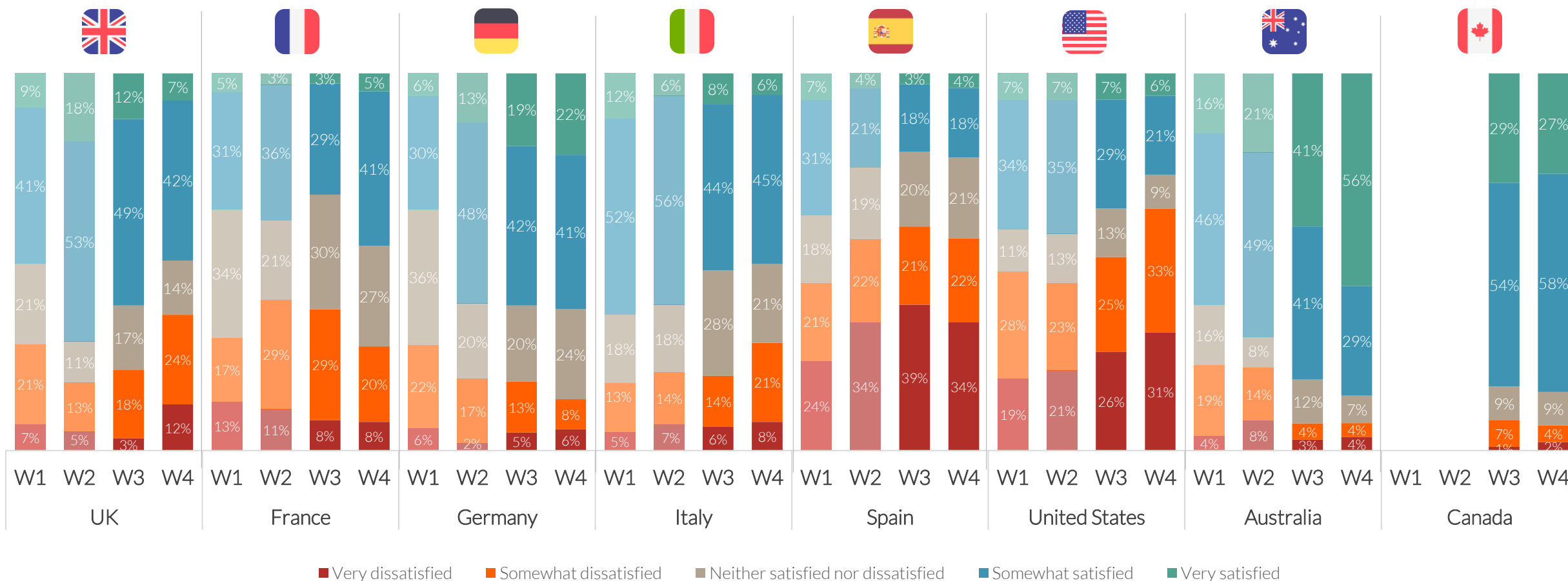
No dramatic change since last wave, although UK and Spain using veterinary press slightly more. Interest in info from veterinary bodies falling in US, Australia and marginally in Spain, but increasing in Canada. Marginal interest in information from veterinary pharmaceutical or pet food manufacturers.



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

ADVICE SATISFACTION FROM NATIONAL GOVERNMENT

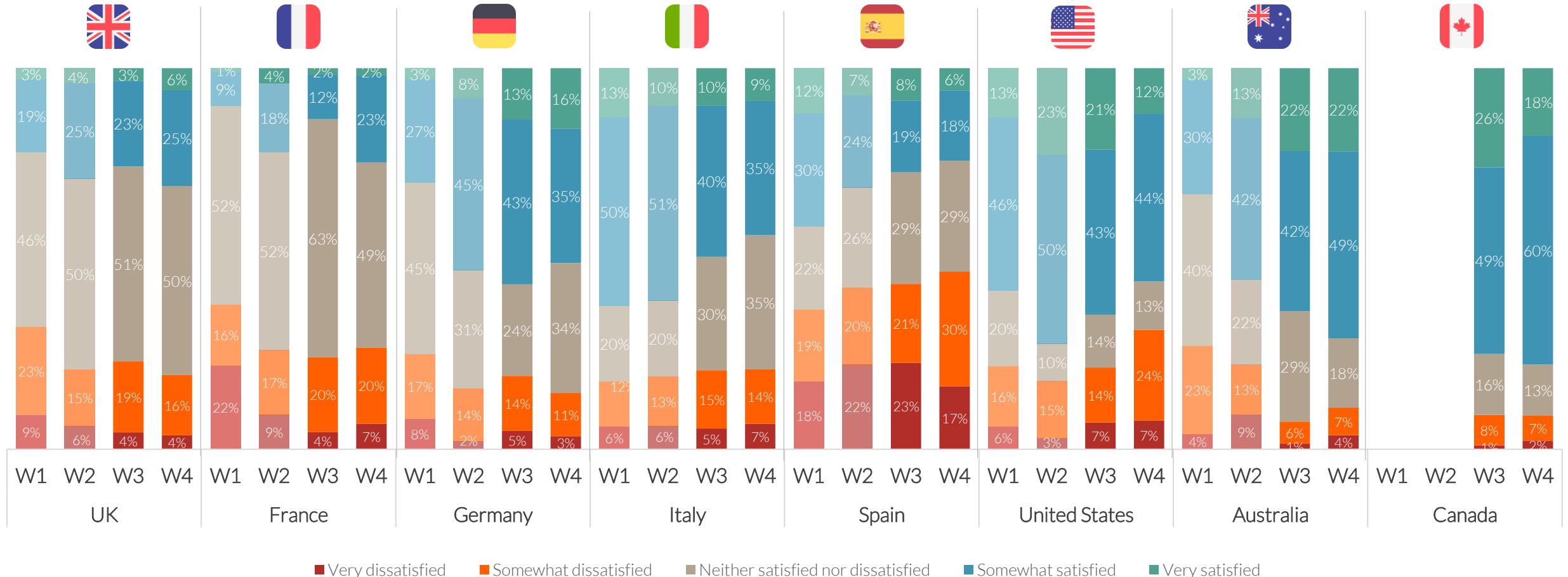
Satisfaction with advice from the national government has dropped markedly in the UK and the US with a slight decrease in Italy. The only increase in satisfaction noted in France and Australia, while it remains the same in Germany, Spain and Canada. Both Canada and Australia take the lead with around 3 quarters of satisfied veterinarians.



ADVICE SATISFACTION FROM LOCAL GOVERNMENT

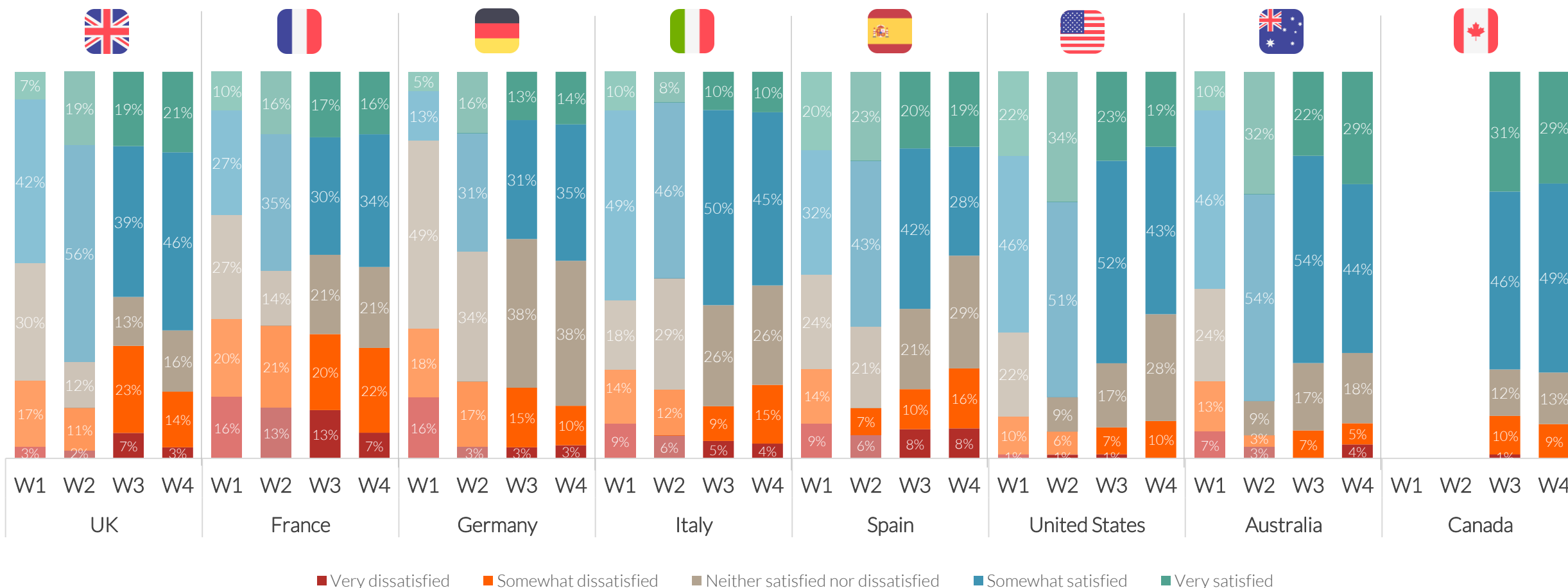
The trend for satisfaction in local government guidance mirrors satisfaction in national government. There has been no major change since Wave 3 in most countries, with the exception of the US where the satisfaction dropped noticeably. Satisfaction in Canada and Australia is again high. There is a marked contrast between satisfaction with national and local government in the US, and to some extent in Spain, with higher dissatisfaction with the former.

Wave 1
+
Wave 2
+
Wave 3
+
Wave 4



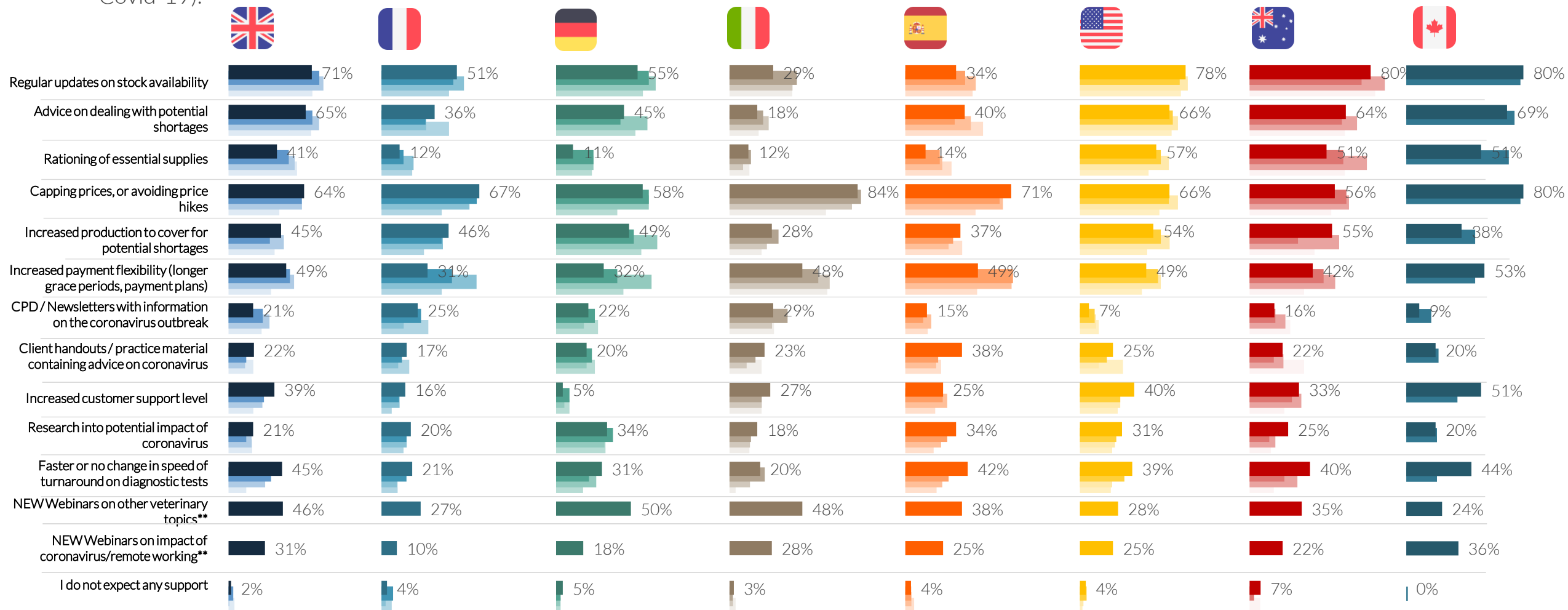
ADVICE SATISFACTION FROM NATIONAL VETERINARY ASSOCIATIONS

The levels of satisfaction with the national veterinary associations' advice rather steady since Wave 3 with a slight increase in the UK. Drop in satisfaction levels in the US and Spain. Again, Australia and Canada the most satisfied.



EXPECTED SUPPORT FROM MANUFACTURERS & SERVICE PROVIDERS

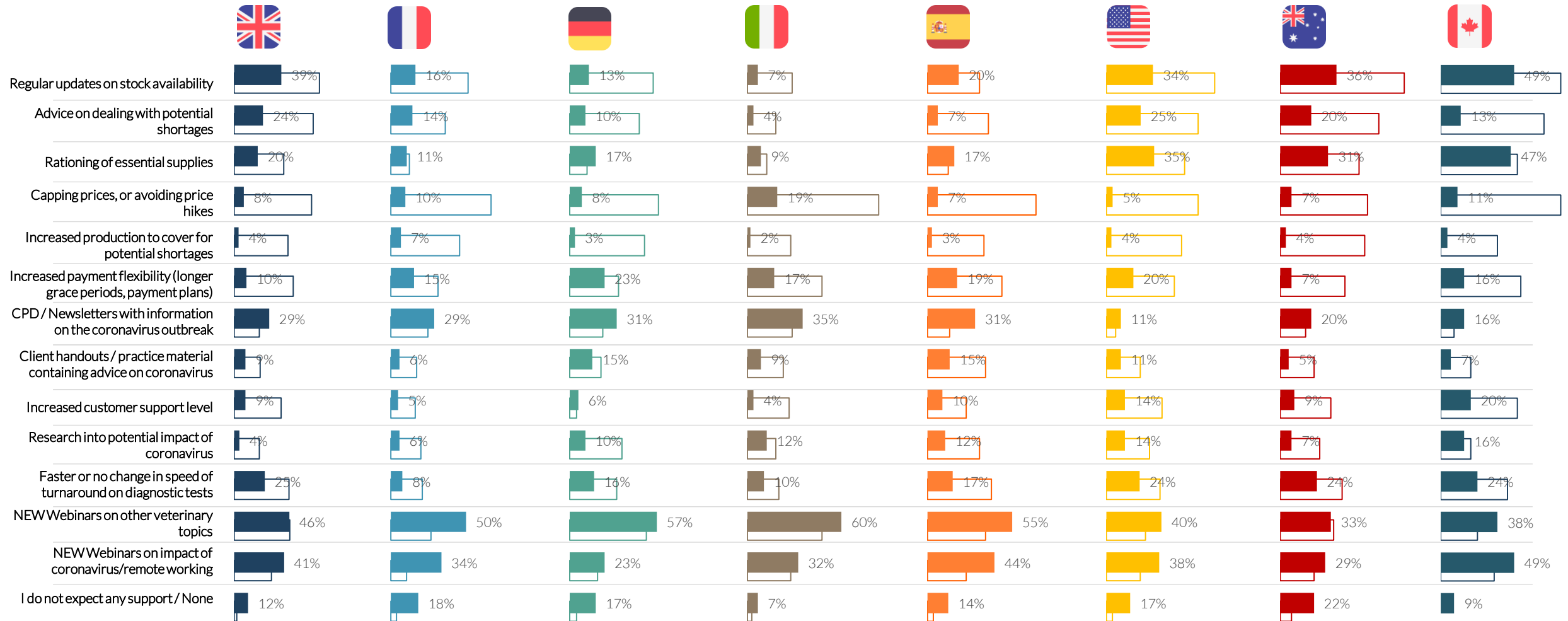
While most expectations remained stable since the previous wave, there is a decrease in rationing expectations. However, veterinarians are expecting an increase in customer support and turnaround of diagnostic tests. They are also keen on webinars on veterinary topics (inc. on Covid-19).



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

SUPPORT RECEIVED VS. SUPPORT EXPECTED

There is a **gap** between what the veterinarians are expecting and what they are receiving, esp. around price capping and production increase to cover for potential shortage. However, they seem to be receiving acceptable webinar support and CPD.



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

Q11b: And which of these support types have you received, from any manufacturers and service providers?

52

Dark colour bar – Support received
No colour bar – Support expected

**NEW in Wave 4

PARTICULARLY HELPFUL SUPPORT / ADVICE



We asked respondents to tell us in their own words about any **piece of advice or support that stood out** or has been particularly helpful.


Various types of support were mentioned – from government guidelines and aid programmes, veterinary bodies and manufacturer support, in-practice team support, to advice and support from colleagues, friends and family.


All gestures, big and small, were appreciated, including (but not limited to):


- having **PPE and sanitising products** sent to the clinics
- **words of encouragement** and **gratitude** from the clients
- **information exchange** between colleagues from different practices
- **guidance** on how to manage and support the practice and team members
- **advice** from accountants
- a plethora of **information resources**, whether closely related to the veterinary activities or to personal or mental health and wellbeing


Even though a high degree of overlap exists, we grouped the comments into **three overarching categories** – vet practice-related, overall information and wellbeing. Here are a few snippets.


VET PRACTICE: SUPPORT / ADVICE FOUND PARTICULARLY HELPFUL


"RCVS allowing prescription of drugs remotely may allow staff to come off furlough and do telemedicine." 


"BVA vaccination and neutering advice. Before this outbreak I would have turned to the BSAVA ahead of the BVA for practical support and advice but the BVA have really come to the fore in striking a reasonable common sense approach to advising veterinary practices with very clear protocols. Thank you BVA!" 

"The way your employer handles this pandemic will say a great deal about their management ability." 


"Offer from drug company to post meds to client directly." 


"VetPlus sent us a lot of hand sanitizer just when we were running out. It was brilliant." 


"Advice on how to manage curbside service." 


"Reps saying they are there for us and taking the time to talk." 


"Dr. Weese guide to reopening vet practice." 

"Discussing protocols with other practices." 


"Vetoryl and Zycortyl webinars on managing conditions with fewer clinic visits." 


"Delayed billing has been delayed further and Merck provided support in terms of staff sampling, webinar, promo to purchase discounted product." 

"Telemedicine is here to stay, find a way to incorporate it into daily practice." 


"Weekly BVA webinar has been the cornerstone of guiding how to manage the practice during this difficult time." 


"The health of the team is the most important." 

"I work for a corporate clinic and their communication and guidance has been great." 

"Curbside service has been the best recommendation." 


"Support offered via other practice owners' facebook groups." 


"Things WILL get better and thank you for being open – hearing this from clients is reassuring." 


"Discussion of alternatives to use in the face of shortages of drugs/products." 


NEWQ11c: Now please think about all the support or advice you have received in regards to the coronavirus outbreak during the past few weeks. This could be support or advice from any person, company or organization. Is there any piece of advice or support you have received that has been particularly helpful? Please describe below.


VET PRACTICE: SUPPORT / ADVICE FOUND PARTICULARLY HELPFUL


"Information material for customers especially regarding behavior and incorrect information." 


"The MSD company has sent masks, gloves and goggles. The only company that had a really useful and important thought." 


"Do not credit customers to maintain adequate cash flow." 


"Possibilities of telemedicine." 


"Conference on economic management of the company in connection with the epidemic." 


"Spreading and postponement of certain seasonal orders, payment of advance discounts." 


"Help with revaccination protocols after 2 months without vaccine (Boehringer). Help with anti virus hygiene procedures in the clinic (SNVEL)." 


"SNVEL website and newsletter with timely update of all government provisions (partial unemployment, various aids, obligations towards customers, staff, etc.)." 


"I have received totally free protective screens from a non-profit group. That has been the only protection I have had in quite a few days until I have got more masks." 


"Webinars and advice on how to act regarding cleaning and managing the entrance of clients in the clinic, respecting the sanitary measures imposed by the government." 


"CEVE's support has been from the first minute and at the national level to help us in our daily work, from a legal, scientific, professional and business point of view." 

"Discounts on food or drugs to compensate for the drop in income." 

"Covid AK test for humans possible in my preferred laboratory (Laboklin)." 

"In line with the separate team building, we also formed two separate, non-meeting teams to avoid closing the practice due to illness or quarantine." 


"Laboklin tested its employees on COVID19 AK and published the results. Helpful and interesting." 


"The company WDT has kept and was able to supply disinfectants in small rationed quantities. Eickemeyer has tried and delivered protective masks." 


NEWQ11c: Now please think about all the support or advice you have received in regards to the coronavirus outbreak during the past few weeks. This could be support or advice from any person, company or organization. Is there any piece of advice or support you have received that has been particularly helpful? Please describe below.


* Answers translated from French, Spanish, Italian and German using Google Translate.


OVERALL INFO: SUPPORT / ADVICE FOUND PARTICULARLY HELPFUL


"Information from the government about the likely course the restrictions are going to take is helpful to plan ahead." 


"AVA guidance for in clinic management." 


"The best advice has been coming from Federal & State Government . The AVA has mainly been advising on their lobbying of the Government regarding designating Veterinary practices as essential services so that we can continue providing services." 


"Information from the Friedrich-Loeffler-Institut on the corona situation in the animal sector and risks for animal owners." 


"It was late and seemed more extreme than most were putting forward, but the provincial body was finally there to give us a baseline to make decisions on." 


"An authoritative study published in Pubmed concerning the sensitivity of Coronavirus to common sanitizing agents. It made it clear." 


"Advice on the correct use of personal protective equipment." 


"Our state veterinary associate has brochures to give to clients available." 


"Thoughts on effects at social, community level and the need for large-scale sample surveys of the population for the true spread or presence of COVID-19." 


"Webinars on managing particular diseases during Covid restrictions e.g. Addison's and Cushing's cases." 


To imagine the virus is like paint so when you get it on your hands and you touch your face, phone ,etc ..afterwards you get virus everywhere. WASH HANDS and DON'T TOUCH YOUR FACE. 

"VCA has regular updates on how to best protect our staff during this time." 

"From the national government, from the Veterinary Council and the Veterinary College." 

"The page www.winepi.net has the best information that I have been able to obtain about the evolution of the coronavirus in Spain and the surrounding countries and helps me predict what may happen in the coming weeks." 

"Our government has lifted the urgent care only restrictions- this is support, but it was a great hindrance, so not that it's gone, things will improve." 

"Veterinary group on facebook giving information about the covid." 

"SNVEL's advice for crisis management." 

NEWQ11c: Now please think about all the support or advice you have received in regards to the coronavirus outbreak during the past few weeks. This could be support or advice from any person, company or organization. Is there any piece of advice or support you have received that has been particularly helpful? Please describe below.

* Answers translated from French, Spanish, Italian and German using Google Translate.

WELLBEING: SUPPORT / ADVICE FOUND PARTICULARLY HELPFUL

"Focus on something good each day."



"We have some mental health crises occurring in our clinic staff at the moment likely at least partially triggered by covid/social isolation. Support for these people has been the most highly appreciated at the moment."



"It is very unlikely that practicing veterinary medicine will return to what it was like pre-COVID-19. Be creative, adaptable and don't forget to take care of yourself."



"My landlord has helped us with rent."



"That it's out of my individual control and so try not to stress!"



"Our internal staff/leadership has been most important for our success over the last few weeks; their prompt response to the changing situation and legislation, and us pulling together as a team. Very little else has impacted the way we work. Our teams offer personal and professional support to each other."



"Support from colleagues meaning I work from home as much as possible as I am asthmatic."



"Support from many of our customers who remained understanding and respectful."



"A friend's advice to get emergency government help, which worked."



"Do not worry and do not panic!"



"Just take it one day and a time and try to be as safe as possible."



"I think the best recommendation they have made is not to be afraid, to be responsible and to act with your head."



"Dr Bonnie Henry's daily updates are excellent, she reminds us to stay safe, stay calm and this is not forever, it is just for now."



NEWQ11c: Now please think about all the support or advice you have received in regards to the coronavirus outbreak during the past few weeks. This could be support or advice from any person, company or organization. Is there any piece of advice or support you have received that has been particularly helpful? Please describe below.

*Answers translated from French, Spanish, Italian and German using Google Translate.

4.7

**In veterinarians' own
words**

HIGH AND LOW POINTS - ADDITIONAL COMMENTS

A huge **'THANK YOU'** to all Members of veterinarianspanel who so kindly, thoroughly and openly shared their thoughts and experiences in our survey.

We pulled some verbatims together to provide **context for a more in-depth understanding** of the impact on both the personal and professional levels.

As the protective measures keep a tight grip on the way the veterinary practices function, a certain degree of **frustration** and **concern** still permeates veterinarian's stories. High levels of **stress** and even **burnout** continue to be mentioned throughout most countries.


Many still endure **uncertainty**, **lack of support** and **financial hardship** among other issues related to the reality shift brought upon by the pandemic. However, some more **positive-sounding** and appreciative comments begin to shine through, especially in Australia.





STRESS, CONCERN AND FRUSTRATION PERSIST (1)


"I've been running the practice 6 days a week with one nurse and one manager and rest of staff furloughed. It has been exhausting (...). There are no funds for locums to relieve me as a vet etc. and the practice has had to get loans and grant from the government and **redundancies** may occur.

Personally, as a 50+ year old male solo vet I am **frightened to death** of catching the virus (...). My wife (...) and I are practicing social distancing in our house and I have not had my children visit yet since lockdown, which is taking its toll (understatement). We know of several friends who have died of covid.

The practice was about to take on a new full time vet in April, to grow and to increase turnover before possible sale in next 5 years, but that has completely gone out of the window and is another stress that has been added. Despite long days and no let up with a skeleton staff, I am **not sleeping** at all and my moods are very low and am **suffering anxiety/panic attacks** more and more of late." 


"It's been hard to communicate as effectively with clients and we've received **abuse** for not allowing clients in the room with their pet" 


"I would like to see more access and availability for **PPE**. There is **none available** from the veterinary purchasing company. Any PPE has been purchased independently." 


"I feel that some disabled veterinarians who have to shield have been **discriminated** against and furloughed because it is cheaper than offering them the ability to work from home. There has also been very **poor communication** between corporates and these individuals about job security in the future." 


"It has saddened me to see how much this **crisis has polarised the profession** and how bitter arguments about many aspects of it have become. I dearly hope we can come together again as a profession and divisions this has opened up are not lasting." 

"I am dreading going back to work after furlough, and only about 10% of this dread is due to Coronavirus. It has crystallised that **I want to leave the profession.**" 


"The very worst part of all this is doing euthanasias without having the owner/family present. It is so **very sad and seems cruel.**" 


"We have been fully booked and now facing an 8 week backlog. We have curbside service which is more labour intensive. So we are generating similar income to previous but having higher staffing costs and therefore **less profitable.**" 


"My work almost completely disappeared I do not qualify for any state support above £90 per week. I have been **extremely frustrated** that I am having to compete with veterinarians who have 80% of their wages paid by the state yet continue to pick up shifts when they should stay at home. My hourly wage has halved due to these people and there is now no work. This has had an extreme impact on my mental health. **I want to leave this profession even more so than usual.**" 


"Staff are beginning to **burn out**. Client calls and consults increasing. patients in worse conditions on arrival. Takes considerably longer to do anything." 


STRESS, CONCERN AND FRUSTRATION PERSIST (2)


"Currently 2 days on, 2 days off with another team we are separated from, which is difficult as **we miss our friends!** Our roles have completely changed, having initially to cover ALL roles in the clinic, and as veterinarians **we weren't even aware of half of them** or how to go about doing them!" 

"**Adversely affected team bonding** as management picked which staff furloughed, no rotation of furloughed staff and no logic to who furloughed, often longest serving and most experienced, competent staff, so feels **unfair**. Giving priority to some members of staff over others. **Concerned** this will have long impact if we get back to work." 


"We are **really struggling** to cope with the increasing work load with so few of us present in the practice. We **need more staff** to come off furlough but the Regional Director is not in agreement. The staff are working under a **great deal of stress doing long hours** and under difficult conditions." 


"Overall it has been **stressful**. Many patients are doing great with curbside service. Others are not. **Communication is difficult**, on phone to talk to every client. Not everyone wants to pay for telemedicine if they have just paid for an exam. Not everyone has email, to send estimates and communications. Everyone **just wants to get back to normal**." 


"Owners are waiting to bring in patients that really need to be seen sooner and have had several emergencies because owners let their pet having significant symptoms (vomiting, diarrhea, lethargy) for at least 1 week or longer before coming in to be seen making their recovery **very difficult**." 

"The pandemic is hitting our veterinary technicians hardest. They're on the "front lines" getting patients from cars and having contact with the public multiple times a day. Their **stress is palpable**. We're doing what we can to recognize that." 


"Some **clients** have been great.....sent us lunch, thanked us for helping them. Others are a pain.....demanding nail trims, exaggerating how sick dog is just to come in for nail trims etc, complaining about emergency fee."


Also, our boss has not been very helpful or appreciative. He took himself off schedule because he is afraid of COVID 19, and yet the rest of us are **working extra hard** with not even a simple thank you. His complaints about costs are **killing morale** at a time when we really need to be a team. **We may have staff quit** over this." 


"We are having a **hard time** getting supplies like paper towels and iso alcohol for surgeries." 


"The receptionists are also **exhausted** from answering the phones and running medications/food out to clients. As the quarantine continues, people in general are getting more **easily agitated**. We have had several clients lash out at all of us. We are ready to go back to a more normal routine but also want to keep our staff safe." 


STRESS, CONCERN AND FRUSTRATION PERSIST (3)


"Customers do little to protect themselves and rely too much on our professionalism for barrier measures, and **many people do not care** at all." 


"We expected an outbreak of the demand for vaccines or sterilization, at least requests but this is currently not the case... The **hairstressers are more important** than us ???" 


"A lot of thinking about the strategy to adopt - **psychologically stressful and tiring**. Try to protect yourself and your loved ones as much as possible." 


"We divided our team in half so that we could still be operational in the event of a quarantine. Intra-team **communication is difficult**. There is some **stress** from it.." 

"The owners of the clinic consider employees but only from the duty point of view. We have no rights. (...) Much **bitterness** after years and years of work and complete availability." 


"The Italians heal themselves by rolling up their sleeves despite everything. Above all, despite the incompetence of our ministers. **veterinarians are depressed**." 


"Most clients are nice, understanding and grateful, but some are absolutely ruthless, which **takes a lot of energy** and strength." 


"First it went down then it stabilized and now it increases compensating the drop. With the economic problems that will come, it **will be worse**." 

"The current situation is OK but there is a **tremendous concern** for the uncertainty that will be there in a few months." 

"Overall, dealing with pet owners has become **more strenuous and difficult**. Daily discussions about required measures and non-compliance with them (mouth protection, distance, only one person with the animal) cost an **infinite amount of nerves** and strength."

"The circumstances force us to invest money in protection material for workers which imposes an extra expense, in masks, disinfectants, robes ... I find it **outrageous** that these products have taxes." 


You always have to be careful that the measures are observed to protect our employees. **Insufficient** to no delivery of protective clothing, mouth protection, disinfectants to veterinary practices." 


"We have **lowered the income** and number of consultations but we must spend **more time** managing purchases, cleaning, disinfecting, answering telephone consultations, etc." 

QComments: Is there anything else you would like to add on the impact of coronavirus outbreak on your veterinary practice? Please tell us some stories about any particular high or low points.


*Answers translated from French, Spanish, Italian and German using Google Translate.


BUT ON A MORE POSITIVE NOTE... (1)


"We had our busiest ever month in March and just beat it in April. **Optimism has replaced anxiety**. More staff employed and renovations/ extensions commenced. Our stress has only come from being very busy and adapting to changes in the way we work by following social distancing guidelines. Hopefully we can continue to stay well and avoid a second wave. I feel slightly guilty in how well we are doing compared to our overseas veterinary brothers and sisters but realise things may change anytime if complacency sets in.." 


"To be honest I am **really enjoying** practice without face to face meetings with owners. Just dealing with pets and having them held properly by vet technicians without any of the underlying anxieties [emotional/monetary] of owners present in the room has been enlightening. I am finding that we are charging more appropriately [less subconscious discounting?] and that owners are now rarely questioning invoices. I **wish it could stay this way long term...**" 

"I am **very proud of my staff** and the referring veterinarians who support our hospital. Veterinary medicine is an essential service in Australia and veterinarians and support staff across our country have **risen to the challenges** brought to us by this pandemic in an **impressive and selfless** manner. I am proud to stand shoulder to shoulder with my colleagues who continue to treat and help animals while risking their own health to do so." 


"Our efficiency has dropped dramatically and our staff are tired. But generally **in really good spirits**. Everyone is chipping in and offering their opinions or advice to help the situation. Staff are wary of lifting restrictions too early but also aware that the current restrictions are negatively impacting turnover. Delicate **balance**. Most clients are **grateful** for our help and our ability to offer our services in a safe manner." 


"I feel that in Australia we have been **very lucky** compared to other parts of the world. Our daily routine has been disrupted. Our clients have been **understanding** and very **accommodating** and the staff have been very **adaptable**." 


"Clients have been **supportive and appreciative**. 2 clients dropped off face masks for us! Another dropped off chocolates to thank us for being open! Many clients appreciated the prompt reply to their emails." 


"We have **been lucky** in that only two veterinarians of 12 have had to be furloughed. Our **profits are only down 15%** as pick up emergency work from other local practices so ooh is **super busy!**" 


BUT ON A MORE POSITIVE NOTE... (2)


"Most clients have been very **supportive**, and quite a few see veterinarians as key workers, and **thanked** us for doing our job." 


"In some ways it had been beneficial as the time has allowed **reflection** on life. The clinic is **more relaxed** but I **miss clients** and the interaction and interaction with all my colleagues. I don't see the situation improving until we have a vaccine." 

"It's **not as bad as initially feared**. With the correct protocols in place disruption can be kept to a minimum." 


"My **employers are really doing the best they can** to keep the practice going. They are working tirelessly. I am **grateful** to them and to the government for having implemented the furlough scheme." 


"It has been **much less stressful** for all of the staff NOT allowing clients into the building." 


"I'm **proud of my team** for stepping up and doing their best!" 


"**Increased bonding** between staff members as we are now in a 'save our ship' mentality in terms of the clinic." 

"It was challenging to sit by and do nothing during our closure period, hoping that everything would be ok and praying we could catch up on the back log of patients, and that clients would be cooperative."

Now as we are starting to gradually increase service, most **clients are very cooperative** and we've been able to reschedule all the cancellations and start to accept some new appointments. It's **getting better slowly**." 

"What has changed is the ways we communicate with clients. We are **more thorough and efficient**." 

"I've had several **clients** reach out to tell me they **appreciated** that I am still helping their pets during a pandemic. That was **really nice to hear** and reminded me to focus on the good clients." 

"Working in this new way has been a **bonding experience for my employees**. We are working very hard together to care for our patients." 

BUT ON A MORE POSITIVE NOTE... (3)

"Punctuality and **increased courtesy and respect** of customers."



"As far as we are concerned, **the worst has passed.**"



"[The positive aspect has been:] **uniting staff** on a common front to overcome the situation."



"[We've experienced] **much less economic damage** than feared. Quite a favorable full recovery."



"I work in a very small 'family' practice and this confirms the choices: my clientele is **patient and kind.**"



"The **support** received by the majority of clients and colleagues, including my employees [has been positive]."



"It is more time-consuming to work with the safety precautions, but **overall the atmosphere in practice is cautiously positive**, although one employee has a burnout due to Corona."



"Teamwork and division in the changing weekly rhythm was stressful on the one hand, but a lot **more quality of life** in the free week, which will lead to a **change in future** working hours."



"**Customers** finally register **nicely** by phone! (Even collections for medication can be prepared) ... **less stress** .. less customer smell in my nose through mouth protection ...;))))))"



"We have carried out an important task of informing and reassuring citizens, of common sense and hope, and my clients have evolved in their way of seeing things. I think I have managed to **value my work and my profession**, I have worked more despite lower income and being closed for some time by quarantine.

MANY HAVE TAKEN PERSPECTIVE, LISTENED AND SEEN CERTAIN THINGS THAT THEY DIDN'T THINK ABOUT. I hope they do not forget and continue to value our professional role. The sector needs to value a number of things, like other sectors and in the end reality prevails that not everything is numbers, or that certain values have a cost. Not taking this into account in the end affects what is important - health, quality, responsibility, conscience, well-being, trust, etc.

Many of my **colleagues are excellent**, we all know that. I still **feel proud** of many of them and others have even moved me like Jose Luis Puchol, anesthetists etc, from laboratories, there are **very great people**."



QComments: Is there anything else you would like to add on the impact of coronavirus outbreak on your veterinary practice? Please tell us some stories about any particular high or low points.

*Answers translated from French, Spanish, Italian and German using GoogleTranslate.

05

QUESTIONS?

Contact details

WHO IS **CM** RESEARCH?

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

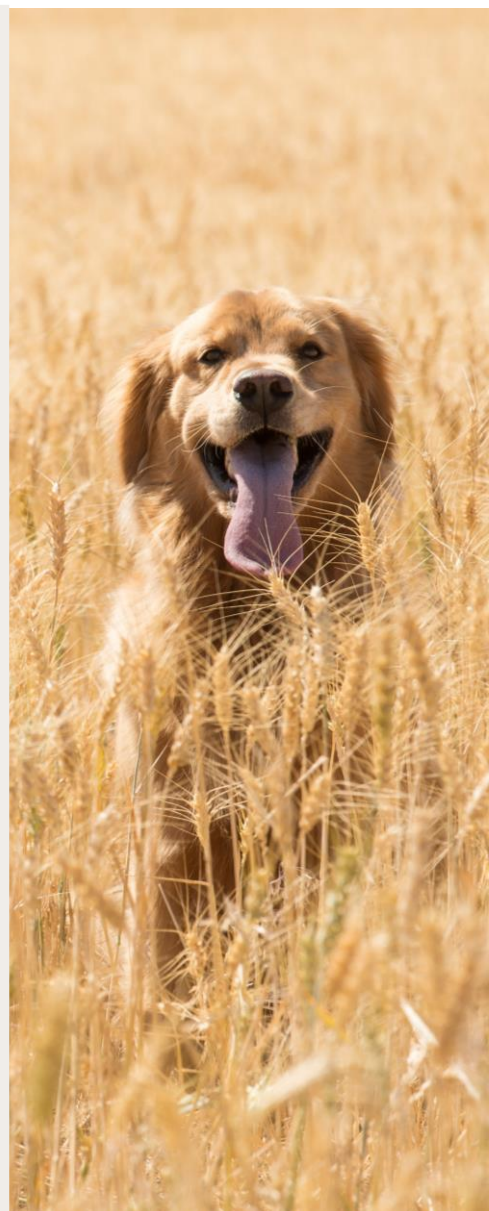
We run quantitative & qualitative, syndicated & sponsored, global & local projects for most of the top veterinary pharmaceutical companies and testing laboratories.

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

Our team brings together some of the market research industry's top research professionals and animal health & veterinary marketing experts.

No one knows veterinarians better than we do



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