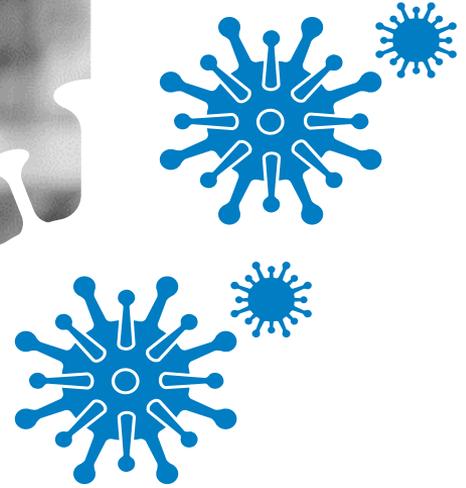


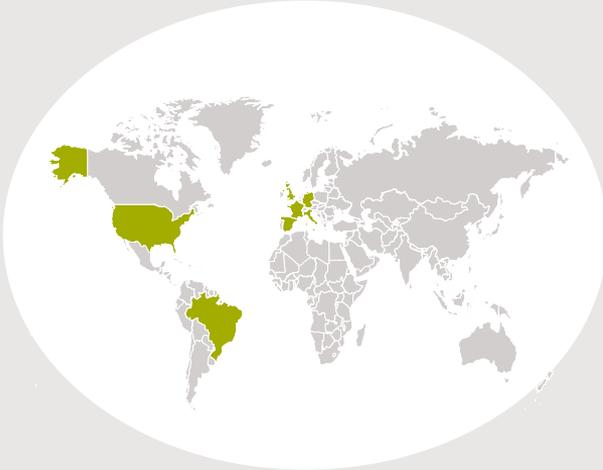


**COVID-19**  
**Companion Animal Vet Sentiment Survey**



# METHODOLOGY

## COUNTRY SCOPE



### Americas:

- USA
- Brazil

### Europe:

- France
- Germany
- Italy
- Spain
- United Kingdom



Sample size:

France	Germany	Italy	Spain	UK	USA	Brazil
101	100	102	101	101	100	72

51%



49%



All respondents to be **companion animal veterinarians**

Average number of full time  
vets per practice **4** vets

The project has been conducted in partnership with SERMO

All respondents participated on a voluntary basis and were not incentivised



Fieldwork completed between 16<sup>th</sup> and 17<sup>th</sup> April 2020 and 20<sup>th</sup> April in Brazil

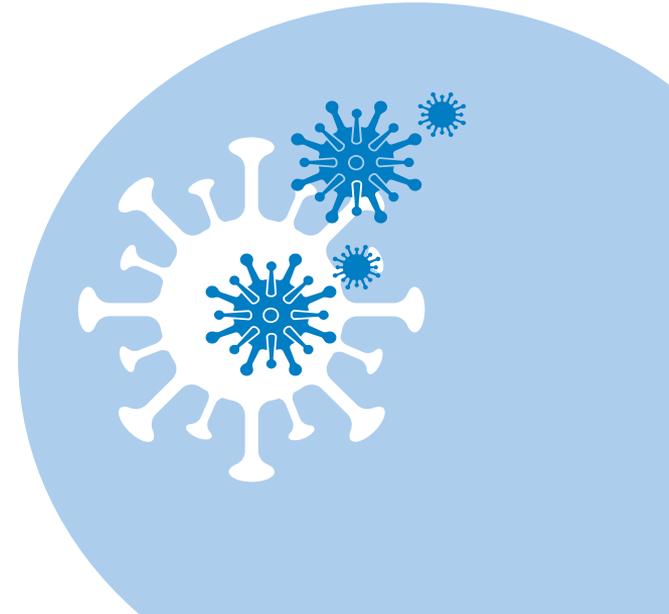
## EXECUTIVE SUMMARY [1-2]

- ❑ In the overall opinion of vets surveyed the **impact of Covid-19** on the functioning of veterinary practices **was greater in the last month than it will be in the next month**. Most clinics have responded to the pandemic by **allowing a restricted number of consultations/ restricted opening hours** (16-69%) as well as **accepting scheduled visits only** (32-89%).
- ❑ Practices in **France** and the **UK** felt the **most negative impact of Covid-19** in terms of **staff being reduced or furloughed** (65-89%), with the **number of affected staff higher in France** (ca. 61%) **than in the UK** (ca. 42%). Vets in these countries have been and will be also **dealing with emergency cases more than in other countries** surveyed (53-67%). On the other hand, the **pandemic has made significant changes to the operations of UK practices** which have switched to **telemed / consultation by telephone** (87-90%) and **offer home delivery of medications** (55-57%).
- ❑ **The majority of vet practices in Germany operate as per normal** (73-77%), followed by US (68-60%) and Brazil (47-56%).
- ❑ The pandemic's **most negative perceived impact** on the vet's professional activity is in the **number of visits/ consultations** (47-97%) and **OTC sales** (30-84%).

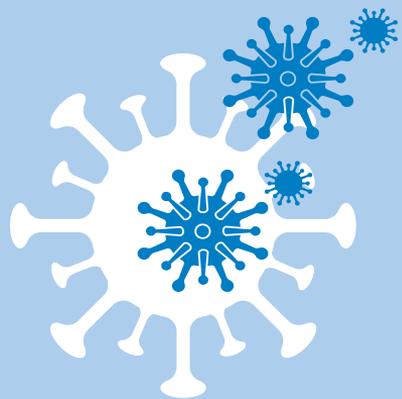
Interestingly, vets perceive some **positive impact** of Covid-19, namely in **relationship with customers** (15-49%) and **team spirit within the practice** (13-55%).

In general, **vets in Germany see the least of negative and the most of positive impacts** of the pandemic among all the countries.

Since the start of the Covid-19 crisis the most difficult to deal with issue for the majority of vets was **reduced turnover / profit** (except Germany, 55-83%) and **government regulations** (42-65%). **Managing family life and professional activity at the same time** was a big challenge for vets in Italy, Spain, USA and Brazil (47-58%).



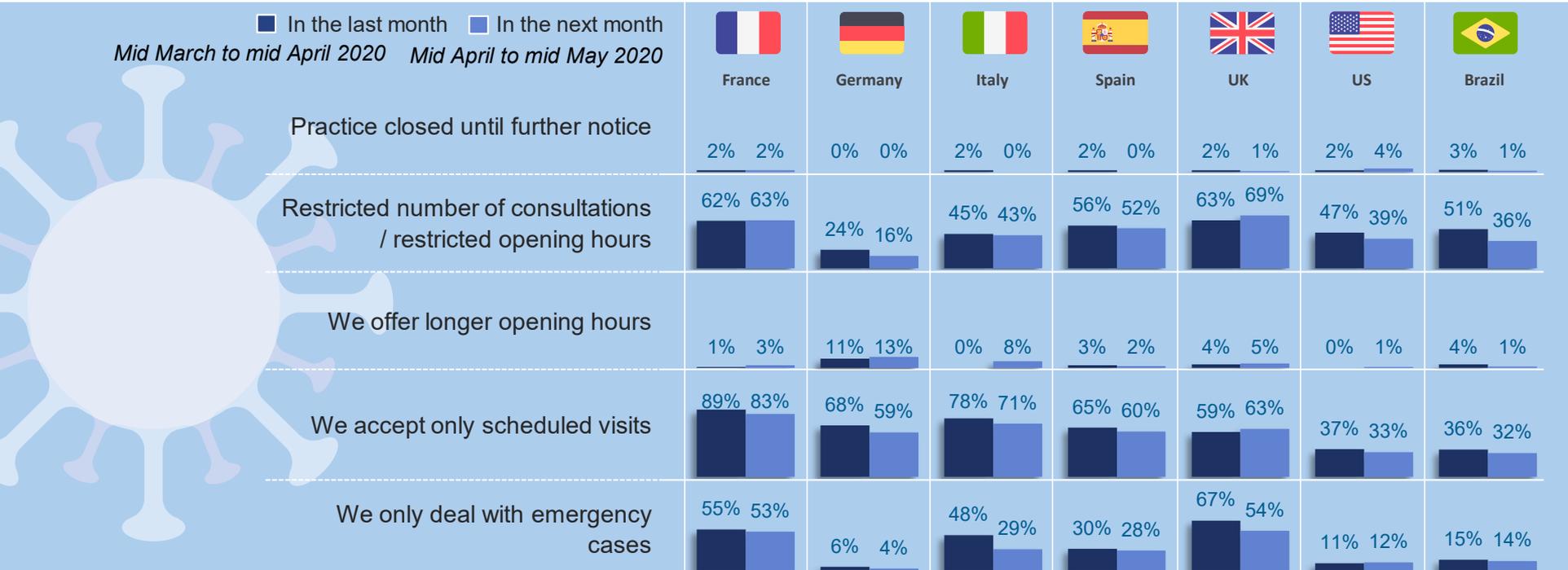
## EXECUTIVE SUMMARY [2-2]



- Depending on the country, vets are currently experiencing supply / shortage problems with specific categories of products.  
**Shortage of vaccines** is experienced mostly by **vets in Germany** (reported by **42% of vets** surveyed in this country), while **in the UK**, vets have **the largest issue with the availability of antibiotics** (reported by **44% of vets** surveyed in this country).  
**Shortage of parasiticides** is **the main issue in Italy** (35% of mentions), whereas most surveyed **French vets (68%)** are facing a **shortage of pet food**.
- **Most of the surveyed vets (54%) expect supply / shortage problems to continue in the coming months.** Shortage of **vaccines** is expected mostly by vets **in Brazil (58%** of mentions in this country) and **Germany (48%** of mentions). Whereas half of vets surveyed **in the UK and US** expect a shortage of **antibiotics**. Mainly vets in France (56%) believe they will face a shortage of pet food
- Across all of the countries, **ensuring the availability of veterinary products / avoid shortage is the most welcomed help from the animal health industry.** Also **developing a communication campaign for pet owners or farmers** (good practices, hygiene and safety measures with pets and farm animals) would be valued by approx. 50% of vets **in Spain, UK and Brazil.** Almost half of vets surveyed **in the UK (48%)** would appreciate **sales reps' support via phone / online.**
- Across all the countries, **vets are moderately satisfied with help provided by animal health manufacturers so far.** They expect the manufacturers to maintain sufficient stock and offer more financial support.
- Information that is **very positive** for the market research and AH industry is the fact that the **vast majority of vets in all countries** (between **89-99%** of vets depending on the country) declare a **high willingness to participate in market research during COVID-19.** Some of these vets admit that they have more time now to participate in surveys.

# Impact of Covid-19 on the functioning of veterinary practices [1-2]

% of responses



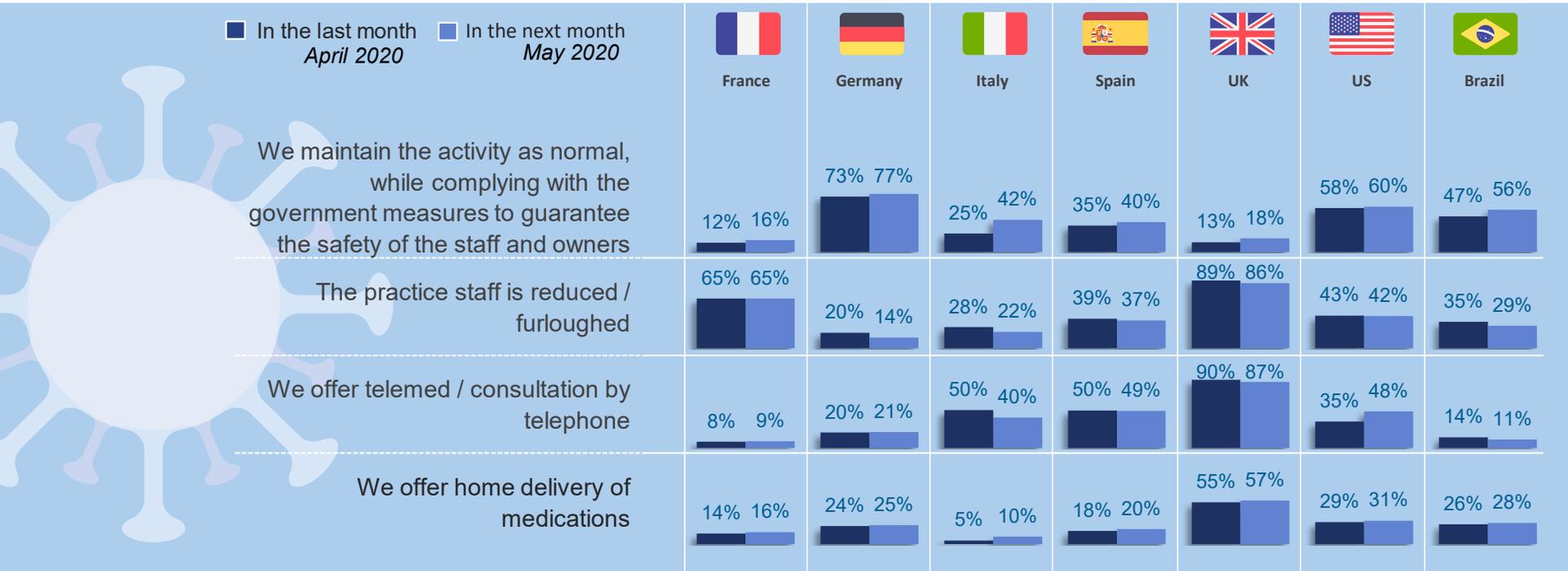
Q1a. Which of the below propositions apply to the situation of your practice in the last month?

Q1b. And which propositions do you think would apply to the coming month?

Base: France n=101, Germany n=100; Italy n=102; Spain n=101; UK n=101, USA n=100; Brazil n=72

# Impact of Covid-19 on the functioning of veterinary practices [2-2]

% of responses



Q1a. Which of the below propositions apply to the situation of your practice in the last month?

Q1b. And which propositions do you think would apply to the coming month?

# % of practice's staff not working/ furloughed in the last month/ in the next month



	France	Germany	Italy	Spain	UK	US	Brazil
<b>Mean % of practice's staff not working/ furloughed</b>							
In the last month	61%	30%	36%	36%	42%	28%	39%
In the next month	60%	32%	18%	38%	41%	27%	35%

Q1c In the last month what % of your staff was not working / furloughed?

Base: France n=66, Germany n=20; Italy n=28; Spain n=39; UK n=90, USA n=43; Brazil n=25

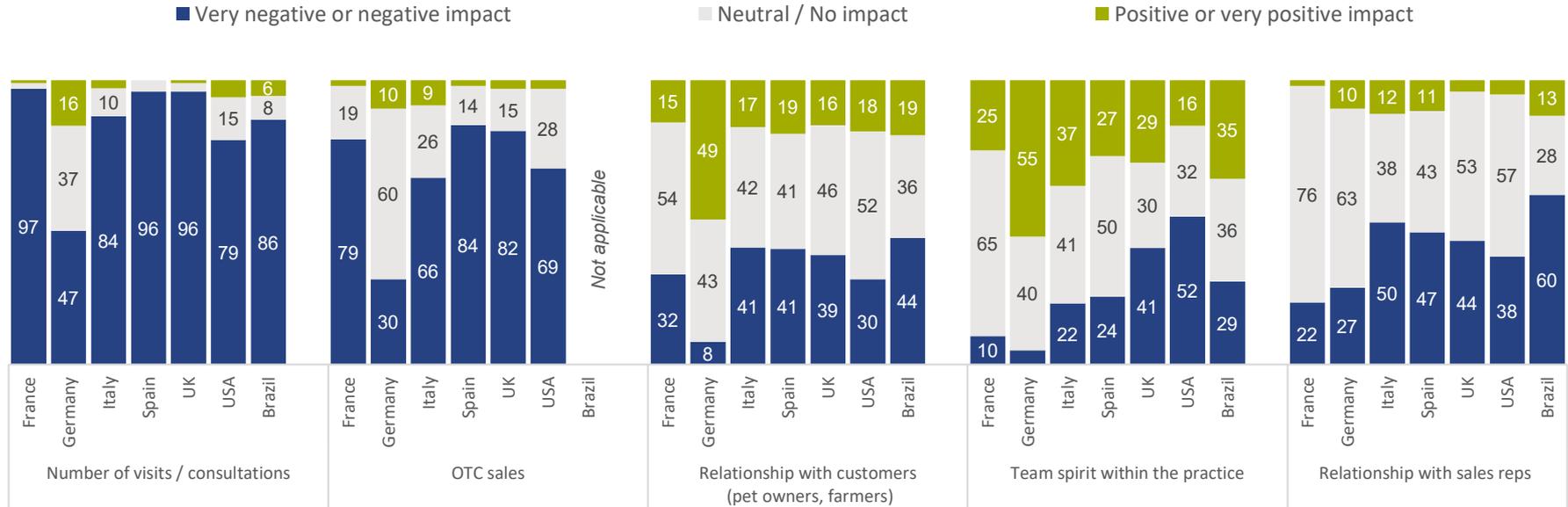
And in the next month what % of your staff is not working /furloughed?

Base: France n=66, Germany n=14; Italy n=22; Spain n=37; UK n=87, USA n=42; Brazil n=21

Base: [Practices where the staff is reduced / furloughed](#)

# Impact of Covid-19 on vets' professional activity

% of responses



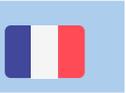
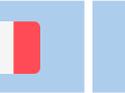
Q2. We understand that the situation may vary from day to day, but how do you assess the impact of the Covid-19 crisis on your professional activity as of today, on the following aspects?

Base: France n=101, Germany n=100; Italy n=102; Spain n=101; UK n=101, USA n=100; Brazil n=72

## Most difficult to deal with since the start of the Covid-19 crisis

% of responses

Top 3 issues per country highlighted in blue

							
	France	Germany	Italy	Spain	UK	USA	Brazil
Supply problems / shortage of some products	34%	62%	42%	47%	32%	57%	33%
Staff reduction	44%	6%	26%	30%	63%	39%	44%
Dealing with the concerns/queries of pet owners related to Covid-19 and their pets	40%	47%	39%	33%	46%	24%	42%
Dealing with the government regulations (confinement, safety measures...)	58%	42%	64%	57%	52%	45%	65%
Dealing with emergency cases / severe cases	22%	13%	28%	15%	33%	25%	13%
Dispensing products or delivering / treatments to the customers (pet owners, farmers)	23%	6%	10%	13%	25%	17%	4%
Dealing with family life and professional activity at the same time	26%	31%	47%	58%	48%	53%	53%
Dealing with reduced turnover / profit	73%	39%	80%	79%	65%	55%	83%

Q3. As a veterinarian, what do you find most difficult to deal with since the start of the Covid-19 crisis?

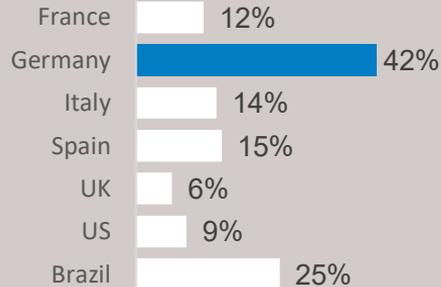
Base: France n=101, Germany n=100; Italy n=102; Spain n=101; UK n=101, USA n=100; Brazil n=72

# Currently experienced shortage of different product categories

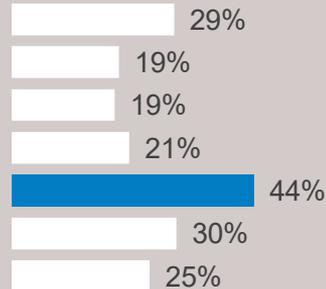
% of responses



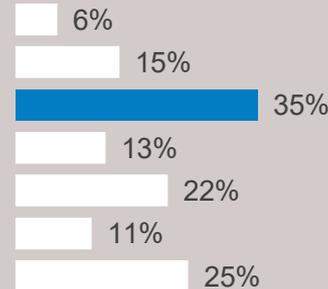
Shortage of vaccines



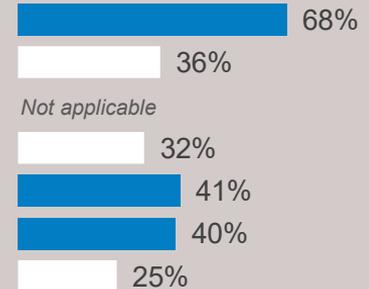
Shortage of antibiotics



Shortage of parasiticides



Shortage of pet food



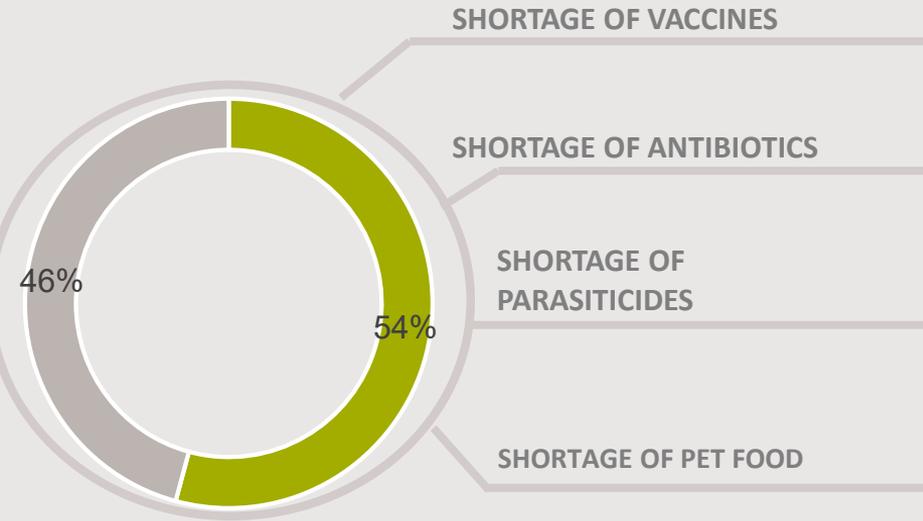
Q4. For which product categories do you currently experience supply / shortage problems?

Base: France n=34, Germany n=62; Italy n=43; Spain n=47; UK n=32, USA n=57; Brazil n=24

# Expected shortage of different product categories in the coming month

% of responses

- Yes, I do expect supply / shortage problems
- No, I don't expect supply / shortage problems

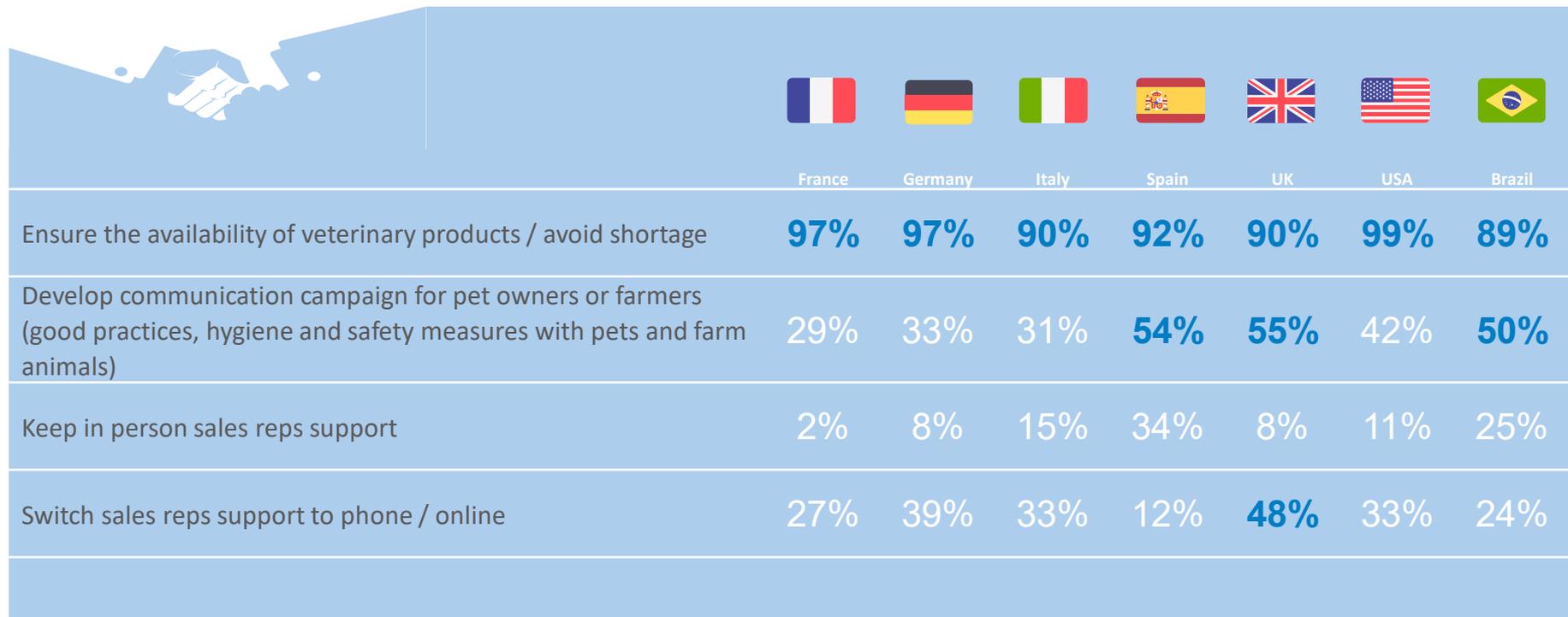


	 France	 Germany	 Italy	 Spain	 UK	 USA	 Brazil
SHORTAGE OF VACCINES	26%	<b>48%</b>	22%	15%	14%	19%	<b>58%</b>
SHORTAGE OF ANTIBIOTICS	44%	42%	11%	23%	<b>51%</b>	<b>49%</b>	32%
SHORTAGE OF PARASITICIDES	23%	20%	<b>24%</b>	9%	19%	19%	18%
SHORTAGE OF PET FOOD	<b>56%</b>	28%	0%	<b>32%</b>	26%	33%	26%

Q5. For the coming month, do you expect supply / shortage problems on certain categories?

# Help welcomed from the animal health industry

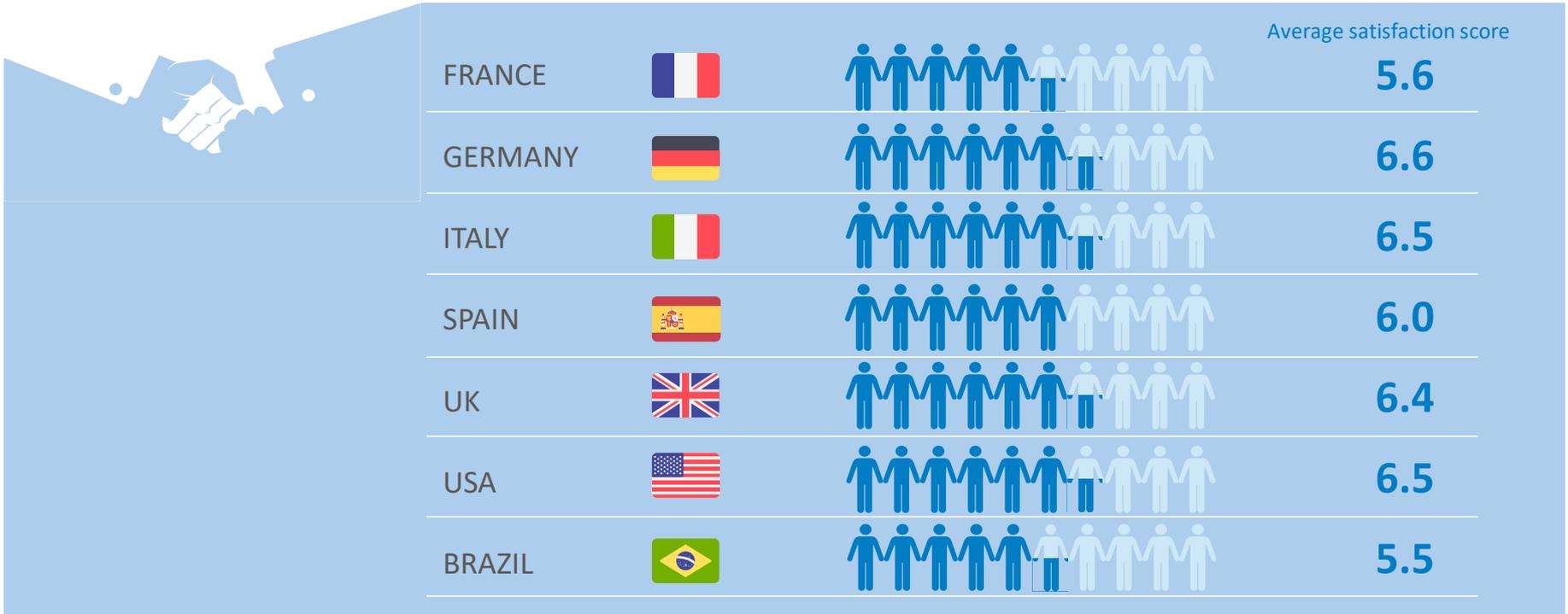
% of responses



Q6. How can the animal health industry help you cope with this difficult situation?

Base: France n=101, Germany n=100; Italy n=102; Spain n=101; UK n=101, USA n=100; Brazil n=72

## Satisfaction with help provided by animal health manufacturers so far



Q7. How satisfied are you with the help provided by animal health manufacturers to this day?

Please give a score from 1 to 10, with 1 meaning “not at all satisfied” and 10 meaning “very satisfied”

Base: France n=101, Germany n=100; Italy n=102; Spain n=101; UK n=101, USA n=100; Brazil n=72

# What should the Animal Health industry do to better help practices cope with the situation due to the COVID-19 pandemic [open-ended question]

% of responses. Base: All respondents who scored less than 6 on satisfaction with help provided by animal health manufacturers so far



	 France	 Germany	 Italy	 Spain	 UK	 US	 Brazil
Better financial support (delayed billing- adjusting contract terms- discounts- promos- incentives)	36%	13%	34%	<b>50%</b>	10%	28%	<b>56%</b>
Maintain sufficient stock (keeping surplus of supplies/ ensure constant supplies/ increase production/ avoid bottlenecks)	<b>38%</b>	19%	<b>41%</b>	30%	<b>37%</b>	33%	9%
Improve communication with clinics (flexibility in on-site vs. phone visits from sales reps / proactive communication / inform on shortages)	5%	22%	14%	3%	13%	<b>28%</b>	<b>24%</b>
Increase public awareness (clarify guidelines of essential services allowed/ educate public on necessary treatments/ communication campaigns)	11%	3%	-	5%	<b>20%</b>	3%	<b>18%</b>
Improve communication with pet owners (how Covid-19 affects pets/ provide advice/ brochures)	4%	3%	-	<b>15%</b>	<b>17%</b>	8%	12%
Assistance with ordering and delivery/ faster delivery	7%	<b>13%</b>	<b>14%</b>	8%	-	3%	6%
Others (prioritise human health medicine/ offer alternatives/ promotion of certain drugs/provide tests for vets)	9%	6%	3%	8%	7%		6%
Supply Personal Protective Equipment/ Cleaning products/ Safer packaging	5%	<b>19%</b>	-	-	3%	8%	-

Q8a What should the animal health industry do to better help you cope with the situation?

Base: France n=55, Germany n=32; Italy n=29; Spain n=40; UK n=30, USA n=36; Brazil n=34

## Appreciated forms of Animal Health manufacturers' support that help vets to cope with the crisis [open-ended question]

% of responses. Base: All respondents who scored less than 6 on satisfaction with help provided by animal health manufacturers so far

	 France	 Germany	 Italy	 Spain	 UK	 US	 Brazil
Friendly phone support/ maintaining high morale/ positive attitude/ general support/ availability of consultancy	28%	19%	26%	23%	17%	6%	34%
Conduct of webinars/ online training	26%	13%	41%	16%	7%	3%	13%
Switch to assistance via phone/online communication	4%	15%	25%	11%	10%	9%	18%
Provision of extra material support (meals/PPE)	-	9%	15%	26%	4%	11%	24%
Better financial support (Rebates/ delayed billings/ bonuses/ special offers)	20%	9%	11%	20%	6%	5%	21%
Maintaining constant product availability	28%	-	-	-	25%	14%	-
Company patronage (visits/ reaching out/ ensuring a clinic is doing fine)	9%	9%	1%	2%	10%	27%	-
Easier/ continuous/ timely delivery and assistance with ordering	7%	10%	10%	8%	8%	3%	-
Company assurance of supplies/ updates on product availability	-	4%	1%	-	10%	25%	3%

Q8b What do you particularly appreciate in the support provided by AH manufacturers to help you cope with the crisis?  
Base: France n=46, Germany n=68; Italy n=73; Spain n=61; UK n=71, USA n=64; Brazil n=38

# Willingness to participate in market research during COVID-19

% of responses

- I'm happy to continue answering surveys as usual
- I am more willing to participate, because I have more time
- It will be more difficult for me to answer surveys during this period / I don't feel like it at this moment
- I don't know yet – I will decide based on each survey



Q9. In these days, how do you feel about answering market research projects that support research and development initiatives within animal health industry?

Base: France n=101, Germany n=100; Italy n=102; Spain n=101; UK n=101, USA n=100; Brazil n=72



## Client driven solutions



More than

**950**

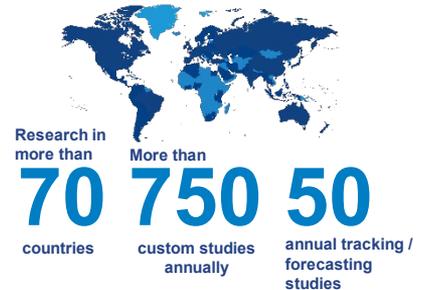
**talented professionals**

~950 market researchers, interviewers, data analysts, marketing scientists and data visualization specialists



**Creating winning strategies**

**No matter where you are**



**clearer vision smarter decision**

# Questions?

Please contact:

Stéphane Neyrat

Research Director, Custom Research

[stephane.neyrat@kynetec.com](mailto:stephane.neyrat@kynetec.com)

M: + 33 (0)6 37 75 73 14

[www.kynetec.com](http://www.kynetec.com)

