Week 5 COVID - 19
Veterinary Hospital
Survey Results
Thank you to all the essential Veterinary Employees!

- We received over 300 survey responses on this Week 5 COVID-19 veterinary hospital survey. (215 Hospitals in the Northeast region and ~100 hospitals in other regions across the U.S.)
- This is the second survey we completed to provide a broad overview of how the COVID-19 pandemic is impacting the clinical, operations and financial performance in the animal health industry.
- We trended they data from Week 2 (3/27/20) and Week 5 (4/13/20) for hospital respondents in the Northeast area. (Massachusetts to Northern Virginia) This data can be viewed in slides 3-16.
- Our Week 5 survey included other regions as well. Giving comparative insights on how this pandemic is affecting our industry in the other regions as well. This data can be view in slides 16-31.
- If you would like to be part of future surveys, please click here (enter “Survey” in the message box).
What impact is COVID-19 having on your daily appointment schedule?

![Bar chart showing impact of COVID-19 on daily appointment schedule]
What are the main drivers for the reduction in appointments?
What impact is COVID-19 having on your staffing levels?

![Bar chart showing the percentage of reduction in staffing levels across different categories for Week 2 and Week 5. The categories are No reduction, <20% reduction, 20-40% reduction, 40-60% reduction, >60% reduction, and >80% reduction. The chart indicates a significant increase in the percentage of organizations experiencing reductions in staffing levels, particularly in the <20% reduction category.](chart.png)
What are the main drivers for reduction in staff? (Choose all that apply)

- Staff member needs to care for sick family member
- Staff member needs to care for child at home
- Staff member sick (COVID-19)
- Staff member sick (Not-COVID-19)
- Staff member unwilling to work
- Furlough of employees
- Termination of employees

What are the main drivers for reduction in staff?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Week 2</th>
<th>Week 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff member needs to care for sick family member</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff member needs to care for child at home</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff member sick (COVID-19)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff member sick (Not-COVID-19)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff member unwilling to work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Furlough of employees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Termination of employees</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
What operational changes are you making to manage COVID-19 transmission risk? (Choose all that apply)

- Staggering appointments
- Curb-side drop offs
- No clients in hospital (including waiting room)
- No clients in hospital (allowed in waiting room)
- Only seeing emergency and sick appointments
- Virtual Check-out and billing (Phone/Video calls, etc.)
- Splitting and scheduling hospital staff in different teams

Week 2
Week 5
What changes are you making to hospital operating hours?

What changes are you making to hospital operating hours?

- No change
- Shortening hours 0-2 hours/day
- Shortening hours 2-4 hours/day
- Shortening hours 4+ hours/day
- Closing certain days of the week

Week 2 vs Week 5
Are you using any new tools to manage pets that cannot come into the office? (check all that apply)

- Facetime (or other phone-based video conference)
- Telemedicine technology
- Texts with client
- Email
- Social media tips and tricks

Week 2
Week 5
How would you rank the stress level of your clinical team?
How are you keeping your staff mentally healthy during this time?

HOW ARE YOU KEEPING YOUR STAFF MENTALLY HEALTHY DURING THIS TIME?

- Food/Reward for staff: 40%
- Sharing feel-good texts/emails/memes: 37%
- Weekly meetings: 13%
- Daily meetings: 10%
What impact is COVID-19 having on the revenue of your hospital?

![Bar chart showing impact on revenue over time.](chart.png)
Have you or will you be applying for a loan/assistance with banks, local, state or federal agencies?

Week 2:
- Yes: 28%
- No: 65%

Week 5:
- Yes: 37%
- No: 62%
Future Outlook: How confident are you business will return to normal?

- Very confident, 44%
- Somewhat confident, 29%
- Not so confident, 6%
- Not at all confident, 1%
- Extremely confident, 19%
Crystal ball: When do you feel your business could return to normal or improve?

- April: 1%
- May: 8%
- June: 34%
- July: 29%
- August or later: 28%
What would be the main drivers for your hospitals revenue to return?

- Recapture wellness visits that were cancelled: 74%
- Recapture non-essential surgeries that were postponed: 69%
- Recapture dental visits that were postponed: 60%
- Simply, going into busy season: 45%
- Increase in puppy appointments (Foster and Adoption...): 29%
- Recapture flea, tick and heart-worm sales: 20%
- Unsure, too early to tell: 12%
- The sky is falling, recession will hit and we will not...: 9%
- Other (please specify): 9%
Regional Comparative Data

• The Northeast region has been most impacted by the pandemic.
• The following data provides a comparative analysis of hospitals in the Northeast region to other regional areas.
What impact is COVID-19 having on your daily appointment schedule?

Week 5 - Northeast vs. Other Regions

- **No impact**
  - Northeast: 5%
  - Other Regions: 30%

- **<20% reduction**
  - Northeast: 25%
  - Other Regions: 40%

- **20-40% reduction**
  - Northeast: 35%
  - Other Regions: 15%

- **40-60% reduction**
  - Northeast: 10%
  - Other Regions: 5%

- **>60% reduction**
  - Northeast: 5%
  - Other Regions: 5%

- **>80% reduction**
  - Northeast: 5%
  - Other Regions: 5%
What impact is COVID-19 having on your daily appointment schedule?

Week 5 - Northeast vs. Other Regions

- Reduction of staff
- Reduced demand from clients
- Reduced hours
- Elimination of well visits
- Elimination of non-urgent procedures (Dentals, Surgeries etc.)

Northeast vs. Other Regions
What impact is COVID-19 having on your staffing levels?

Week 5 - Northeast vs. Other Regions

- No reduction
- <20% reduction
- 20-40% reduction
- 40-60% reduction
- >60% reduction
- >80% reduction

Northeast vs. Other Regions: [Diagrams showing percentage distribution]
What are the main drivers for reduction in staff? (Choose all that apply)

Week 5 - Northeast vs. Other Regions

- Staff member needs to care for sick family member
- Staff member needs to care for child at home
- Staff member sick (COVID-19)
- Staff member sick (Not-COVID-19)
- Staff member unwilling to work
- Furlough of employees
- Termination of employees

Northeast vs Other Regions
What operational changes are you making to manage COVID-19 transmission risk? (Choose all that apply)

Week 5 - Northeast vs. Other Regions

- Staggering appointments
- Curb-side drop offs
- No clients in hospital (including waiting room)
- No clients in hospital (allowed in waiting room)
- Only seeing emergency and sick appointments
- Virtual Check-out and billing (Phone/Video calls, etc.)
- Splitting and scheduling hospital staff in different teams

Northeast vs. Other Regions: Northeast chart shows higher percentages for most categories compared to Other Regions.
What changes are you making to hospital operating hours?

Week 5 - Northeast vs. Other Regions

- No change
- Shortening hours 0-2 hours/day
- Shortening hours 2-4 hours/day
- Shortening hours 4+ hours/day
- Closing certain days of the week

Northeast vs. Other Regions
Are you using any new tools to manage pets that cannot come into the office? (check all that apply)

Week 5 - Northeast vs. Other Regions

- Facetime (or other phone-based video conference)
- Telemedicine technology
- Texts with client
- Email
- Social media tips and tricks

Northeast: 20%, 40%, 60%, 80%
Other Regions: 0%, 10%, 20%, 30%
How would you rank the stress level of your clinical team?

Week 5 - Northeast vs. Other Regions

- Not at all stressed
- Not so stressed
- Somewhat stressed
- Very stressed
- Extremely stressed
How are you keeping your staff mentally healthy during this time?

Week 5 - Northeast vs. Other Regions

- Food/Reward for staff
- Sharing feel good texts/emails/memes
- Weekly meetings
- Daily meetings

Northeast vs. Other Regions: [Bar chart showing differences in staff engagement strategies.]
What impact is COVID-19 having on the revenue of your hospital?

Week 5 - Northeast vs. Other Regions

- No impact
- <20% reduction
- 20-40% reduction
- 40-60% reduction
- >60% reduction
- >80% reduction

Northeast vs. Other Regions

- Northeast
- Other Regions
Have you or will you be applying for a loan/assistance with banks, local, state or federal agencies?

Northeast Other Regions

Have you or will you be applying for a loan/assistance with banks, local, state or federal agencies?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>62%</td>
<td>37%</td>
</tr>
<tr>
<td>Other Regions</td>
<td>34%</td>
<td>62%</td>
</tr>
</tbody>
</table>
Future Outlook: How confident are you business will return to normal?

Week 5 - Northeast vs. Other Regions

- Not at all confident
- Not so confident
- Somewhat confident
- Very confident
- Extremely confident

Not at all confident: 0%
Not so confident: 5%
Somewhat confident: 10%
Very confident: 45%
Extremely confident: 40%

Northeast vs. Other Regions:
- Northeast: Blue
- Other Regions: Orange
Crystal ball: When do you feel your business could return to normal or improve?

Week 5 - Northeast vs. Other Regions

- April: 0% Northeast, 0% Other Regions
- May: 5% Northeast, 15% Other Regions
- June: 35% Northeast, 35% Other Regions
- July: 25% Northeast, 25% Other Regions
- August or later: 20% Northeast, 20% Other Regions
What would be the main drivers for your hospitals revenue to return?

- Recapture wellness visits that were cancelled
- Recapture non-essential surgeries that were postponed
- Recapture dental visits that were postponed
- Simply, going into busy season
- Increase in puppy appointments (Foster and Adoptions on the rise during quarantine)
- Recapture flea, tick and heartworm sales
- Unsure, too early to tell
- The sky is falling, recession will hit and we will not return to normal for at least 12 months.
- Other (please specify)

**Week 5 - Northeast vs. Other Regions**