COVID-19 VETERINARY SURVEY RESULTS

RESPONDING TO COVID-19
80% of practices continue to limit client contact

Operational strategies

- Clients asked to wait in vehicles during treatment: 75% (April) - 84% (July)
- Contactless payment processing: 66% (April) - 59% (July)
- Patient history by phone or virtual only: 55% (April) - 59% (July)
- Client visits by appointment only: 55% (April) - 59% (July)
- Drive-thru pickup and drop-off: 55% (April) - 59% (July)
- Telemedicine/Telehealth/Virtual visits: 55% (April) - 59% (July)
- Emergency cases only: 4% (April) - 18% (July)
- Staggered/Dedicated hours for senior citizens: 1% (April)
- All of these options: 4% (April) - 9% (July)

Precautionary measures

- Asked clients to maintain safe distances: 72% (April) - 68% (July)
- Asked staff with symptoms to go home: 66% (April) - 59% (July)
- Canceled appointments: 65% (April) - 59% (July)
- Asked staff to sanitize PPE for reuse: 65% (April) - 59% (July)
- Advised clients on Covid-19: 55% (April) - 61% (July)
- Asked clients displaying symptoms to leave: 55% (April) - 61% (July)
- Asked clients to wash hands: 41% (April) - 35% (July)
- Asked staff members to telecommute: 13% (April) - 35% (July)

Avg cash shortfall for April: $17K
Avg cash shortfall for June: $14K

IMPACT OF COVID-19 ON PRACTICES

Client visits pre-covid - Apr '20

- 0% - 10%: 15% (April) - 25% (July)
- 10% - 20%: 10% (April) - 15% (July)
- 20% - 30%: 5% (April) - 10% (July)
- 30% - 40%: 0% (April) - 5% (July)
- 40% - 50%: 0% (April) - 5% (July)
- 50% - 60%: 0% (April) - 5% (July)
- 60% - 70%: 0% (April) - 5% (July)
- 70% - 80%: 0% (April) - 5% (July)
- 80% - 90%: 0% (April) - 5% (July)
- 90% - 100%: 0% (April) - 5% (July)

Client visits June '19 - June '20

- 0% - 10%: 25% (April) - 20% (July)
- 10% - 20%: 20% (April) - 15% (July)
- 20% - 30%: 15% (April) - 10% (July)
- 30% - 40%: 10% (April) - 5% (July)
- 40% - 50%: 5% (April) - 5% (July)
- 50% - 60%: 0% (April) - 5% (July)
- 60% - 70%: 0% (April) - 5% (July)
- 70% - 80%: 0% (April) - 5% (July)
- 80% - 90%: 0% (April) - 5% (July)
- 90% - 100%: 0% (April) - 5% (July)

Client change %

Respondents

- 0% - 10%: 80% (April) - 66% (July)
- 10% - 20%: 68% (April) - 55% (July)
- 20% - 30%: 60% (April) - 50% (July)
- 30% - 40%: 41% (April) - 33% (July)
- 40% - 50%: 31% (April) - 25% (July)
- 50% - 60%: 25% (April) - 19% (July)
- 60% - 70%: 19% (April) - 13% (July)
- 70% - 80%: 13% (April) - 9% (July)
- 80% - 90%: 9% (April) - 5% (July)
- 90% - 100%: 5% (April) - 2% (July)

STRATEGIES FOR COVID-19

Cash shortfall strategies

- SBA loan: 55% (April) - 65% (July)
- Forgo your own salary: 59% (April) - 65% (July)
- Use business cash reserves: 59% (April) - 65% (July)
- Rely on business line of credit: 55% (April) - 65% (July)
- Use personal assets for cash infusion: 55% (April) - 65% (July)
- Tax credit advances: 35% (April) - 41% (July)
- Take out a personal loan: 35% (April) - 41% (July)
- All these options: 20% (April) - 25% (July)
- None: 10% (April) - 5% (July)

Most relied on source of information

- American Veterinary Medical Association: 100% (April) - 100% (July)
- State veterinary medical association: 100% (April) - 100% (July)
- State public health/government officials: 100% (April) - 100% (July)
- Federal public health officials: 100% (April) - 100% (July)
- Local public health/government officials: 100% (April) - 100% (July)
- News media: 75% (April) - 58% (July)
- Peer to peer network/other colleagues: 25% (April) - 42% (July)
- Social media: 20% (April) - 35% (July)
- Friends/family: 15% (April) - 25% (July)
- Land grant universities: 10% (April) - 15% (July)
- Extension agents: 5% (April) - 10% (July)
- Other veterinary industry association: 0% (April) - 5% (July)

For more information visit: avma.org/Coronavirus
**CLIENT TRAFFIC AND WAIT TIME**

### Average client traffic

<table>
<thead>
<tr>
<th>Month</th>
<th>May 2019</th>
<th>May 2020</th>
<th>June 2019</th>
<th>June 2020</th>
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</thead>
<tbody>
<tr>
<td>Avg clients per month</td>
<td>1,100</td>
<td>1,000</td>
<td>1,100</td>
<td>1,000</td>
</tr>
</tbody>
</table>

### Average new client traffic

<table>
<thead>
<tr>
<th>Month</th>
<th>May 2019</th>
<th>May 2020</th>
<th>June 2019</th>
<th>June 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg clients per month</td>
<td>80</td>
<td>60</td>
<td>80</td>
<td>60</td>
</tr>
</tbody>
</table>

### Avg wait time (minutes) May

<table>
<thead>
<tr>
<th>Month</th>
<th>May 2019</th>
<th>May 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg wait time (minutes)</td>
<td>11</td>
<td>18</td>
</tr>
</tbody>
</table>

### Avg wait time (minutes) June

<table>
<thead>
<tr>
<th>Month</th>
<th>June 2019</th>
<th>June 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg wait time (minutes)</td>
<td>11</td>
<td>20</td>
</tr>
</tbody>
</table>

### Change to overall business activity 2020 vs 2019

<table>
<thead>
<tr>
<th>Percentage Change</th>
<th>Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>-75%</td>
<td>1%</td>
</tr>
<tr>
<td>-50%</td>
<td>1%</td>
</tr>
<tr>
<td>-25%</td>
<td>19%</td>
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<tr>
<td>0%</td>
<td>28%</td>
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<tr>
<td>25%</td>
<td>47%</td>
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<tr>
<td>50%</td>
<td>2%</td>
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<tr>
<td>75%</td>
<td>0%</td>
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<tr>
<td>100%</td>
<td>1%</td>
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</tbody>
</table>

### Change to number of clients 2020 vs 2019

<table>
<thead>
<tr>
<th>Percentage Change</th>
<th>Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>-75%</td>
<td>1%</td>
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<tr>
<td>-50%</td>
<td>1%</td>
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<tr>
<td>-25%</td>
<td>19%</td>
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<tr>
<td>0%</td>
<td>28%</td>
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<td>25%</td>
<td>48%</td>
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<tr>
<td>50%</td>
<td>2%</td>
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<tr>
<td>75%</td>
<td>0%</td>
</tr>
<tr>
<td>100%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Avg cash shortfall May 2020: $17K
Avg cash shortfall June 2020: $14K

Cash shortfall for May 2020:
- Less than $5,000: 19.0%
- $5,000 - $9,999: 22.2%
- $10,000 - $24,999: 38.1%
- $25,000 - $49,999: 15.9%
- $50,000 or more: 4.8%

Cash shortfall for June 2020:
- Less than $5,000: 20.0%
- $5,000 - $9,999: 21.5%
- $10,000 - $24,999: 38.5%
- $25,000 - $49,999: 15.4%
- $50,000 or more: 4.6%

Change to revenue: 2020 vs 2019
- Average spending per $100

Average spending per $100:

June 2019:
- Wages and salary: 17.86
- Rent: 2.99
- Utilities: 2.67
- Equipment: 13.59
- Marketing: 1.04
- Repairs: 1.86
- Other: 5.86

June 2020:
- Wages and salary: 36.85
- Rent: 7.19
- Utilities: 7.56
- Equipment: 27.40
- Marketing: 2.83
- Repairs: 5.13
- Other: 10.08
CLIENT CONTACT

Operational strategies

- Clients asked to wait in vehicles during treatment: 73% in April, 84% in July
- Contactless payment processing: 59% in April, 66% in July
- Patient history by phone or virtual only: 59% in April, 54% in July
- Client visits by appointment only: 54% in April, 56% in July
- Drive-thru pickup and drop-off: 32% in April, 55% in July
- Telemedicine/Telehealth/Virtual visits: 32% in April, 58% in July
- Emergency cases only: 20% in April, 32% in July
- Staggered/Dedicated hours for senior citizens: 5% in April, 4% in July
- Home visits: 8% in April, 38% in July
- All of these options: 1% in April, 9% in July
- None: 2% in April, 9% in July

Precautionary measures

- Asked clients to maintain safe distances: 72% in April, 74% in July
- Asked staff with symptoms to go home: 68% in April, 60% in July
- Canceled appointments: 68% in April, 60% in July
- Asked staff to sanitize PPE for reuse: 57% in April, 57% in July
- Other policies on personal hygiene: 55% in April, 61% in July
- Advised clients on Covid-19: 53% in April, 52% in July
- Asked staff to limit use of PPE: 41% in April, 52% in July
- Asked clients displaying symptoms to leave: 31% in April, 57% in July
- Asked clients to wash hands: 28% in April, 35% in July
- Asked staff members to telecommute: 13% in April, 13% in July
- None: 2% in April, 9% in July

Instituting measures to limit client contact

Respondents

- Yes, we did initially, but we are in the process of returning to normal: 84% in April, 81% in July
- Yes, we did initially, but have returned to prior practice: 68% in April, 66% in July
- Yes, we did and we continue to: 59% in April, 75% in July
- No: 55% in April, 58% in July

Social distancing protocols

- Respondents
  - Yes, we did initially, but we are in the process of returning to normal: 72% in April, 74% in July
  - Yes, we did initially, but have returned to prior practice: 68% in April, 60% in July
  - Yes, we did and we continue to: 57% in April, 58% in July
  - No: 53% in April, 61% in July

Precautionary measures

- Respondents
  - Yes, we did initially, but we are in the process of returning to normal: 72% in April, 74% in July
  - Yes, we did initially, but have returned to prior practice: 68% in April, 60% in July
  - Yes, we did and we continue to: 57% in April, 58% in July
  - No: 53% in April, 61% in July

Instituting measures to limit client contact

Respondents

- Yes, we did initially, but we are in the process of returning to normal: 84% in April, 80% in July
- Yes, we did initially, but have returned to prior practice: 66% in April, 66% in July
- Yes, we did and we continue to: 59% in April, 75% in July
- No: 55% in April, 58% in July
**INFORMATION AND CONCERNS (JULY AND AUGUST)**

**Most relied on source of information**

- American Veterinary Medical Association: 71%
- State veterinary medical association: 68%
- State public health/government officials: 65%
- Federal public health officials: 38%
- Local public health/government officials: 41%
- News media: 34%
- Peer to peer network/other colleagues: 35%
- Social media: 8%
- Friends/family: 11%
- Land grant universities: 2%
- Extension agents: 2%
- Other veterinary industry association: 14%
- Other: 9%

**What can the AVMA do to help?**

- Regular updates: 49%
- Provide safe operating guidelines: 43%
- All of these items: 39%
- Webinars for continuing education: 38%
- How other veterinarians are doing: 32%
- Idea sharing forum: 26%
- Short-term loan information: 17%

**Employee concerns**

- Transmission from clients: 41%
- Transmission from other employees: 38%
- Animal to human transmission of COVID-19: 22%
- Human to animal transmission of COVID-19: 21%