

Results of the National COVID-19 Survey – June 22 to July 3, 2020



"Your success is our business"



A national survey of veterinarians was completed to measure the steps veterinary hospitals have taken in the interest of public health, and the impact on their businesses during the pandemic. CVMA and OVMA conducted the survey in partnership with:

- Associated Veterinary Purchasing Co. Ltd.
- Merck Animal Health
- Purina Pro Plan Veterinary Diets
- Royal Bank of Canada
- Veterinary Purchasing
- Western Drug Distribution Center Limited

The survey received a total of 1,126 responses collected between June 22 and July 3, 2020, providing great insight into how veterinarians are dealing with the changing world they face.

**Please note that Prince Edward Island and Newfoundland and Labrador are excluded from some tables due to insufficient completed surveys from these provinces.*

Province

Survey respondents were asked “In which province are you and/or your practice located?”

Ontario had the highest number of responses, with 544, while Alberta generated 185 responses, and British Columbia 171.

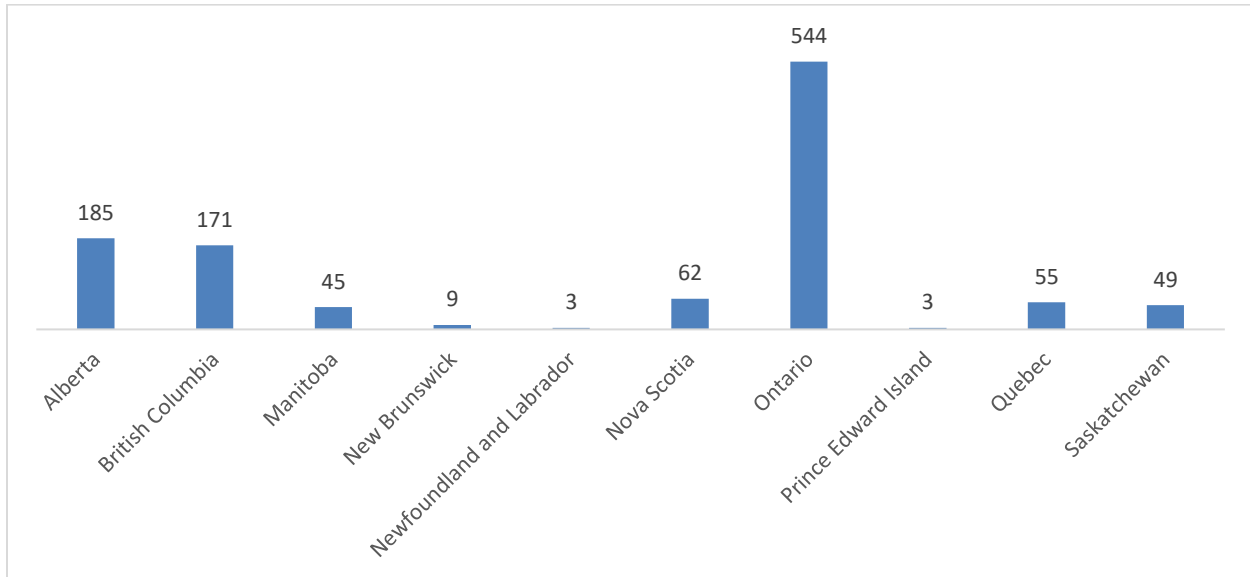


Figure 1. In which province are you and/or your practice located?

Type of Practice

Survey respondents were asked “What type of hospital do you work in/medicine do you practice?”

Across nearly all provinces, small animal veterinarians were the bulk of the respondents. The one exception was Saskatchewan, where mixed animal veterinarians comprised the majority of respondents.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Exclusively Small Animal	71%	61%	66%	56%	78%	76%	80%	72%	33%
Mixed Animal	14%	22%	9%	34%	11%	14%	7%	16%	51%
Equine Only	1%	0%	2%	0%	0%	2%	1%	0%	0%
Bovine Only	0%	2%	0%	2%	0%	0%	0%	0%	0%
Exclusively Large Animal	2%	1%	2%	0%	0%	2%	2%	0%	2%
Feline Only	2%	2%	3%	2%	0%	2%	1%	0%	0%
Small Animal Mobile	1%	1%	2%	4%	0%	0%	1%	2%	0%
Emergency	1%	2%	1%	0%	0%	4%	1%	0%	2%
Specialty/Referral	3%	5%	8%	0%	11%	0%	2%	4%	4%
Other	5%	4%	7%	2%	0%	0%	5%	6%	8%

Table 1. What type of hospital do you work in/medicine do you practice?

Measures Taken During Pandemic

Survey respondents were asked “Over the course of the pandemic, which measures did you and/or your hospital implement at any point?”

Nearly all veterinarians undertook increased cleaning, limited entry to their hospital, utilized contactless payment methods, and curbside animal drop-off. Many others took steps such as postponing appointments and surgeries, providing curbside pick-up of dietary and pharmaceutical products, or limiting their practice to emergency or urgent care only.

It should be noted that, when limited to mixed, large, and mobile veterinarians, the percentage of those minimizing contact and using the lowest risk client for restraint during farm/mobile calls was significantly higher; these figures are artificially decreased in the table below due to the high number of small animal veterinarians who responded to the survey.

Some of the common “other” responses specified included individual risk assessments for allowing appointments, permitting only small numbers of clients to enter the hospital, and eliminating any paper documents (e.g. receipts, signed consent forms, etc.).

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Emergency Care Only	61%	27%	40%	36%	56%	81%	79%	65%	34%
Postponing Immature Animal Exams/Vaccines	20%	11%	12%	14%	11%	54%	21%	41%	15%
Postponing Mature Animal Exams/Vaccines	79%	59%	73%	78%	78%	91%	87%	73%	61%
Postponing Elective Surgeries	81%	56%	76%	64%	100%	93%	91%	69%	56%
Curbside Animal Drop-off	87%	88%	84%	86%	67%	89%	91%	55%	78%
Utilizing Telemedicine	70%	56%	55%	56%	67%	76%	81%	55%	61%
Curbside Pickup of Diets/Pharmaceuticals	90%	85%	89%	86%	100%	93%	95%	51%	83%
Home Delivery of Diets/Pharmaceuticals	32%	20%	31%	25%	11%	33%	38%	20%	20%
Limiting Client Entry to Hospital	90%	88%	88%	92%	89%	91%	92%	67%	85%
Increasing Cleaning/Disinfecting	95%	96%	98%	89%	100%	94%	96%	76%	90%
Contactless payments	89%	84%	92%	83%	100%	91%	93%	67%	76%
Screening Clients for Illness/Travel	77%	72%	81%	72%	89%	69%	80%	51%	83%
Asking Clients to Wear Masks	60%	59%	51%	67%	67%	67%	64%	55%	39%
Use of PPE by Veterinary Team	84%	79%	84%	75%	67%	85%	88%	71%	61%
Minimizing Contact During Farm/Mobile Calls	17%	22%	20%	25%	11%	20%	12%	16%	41%
Utilizing Lowest Risk Client on Farm/Mobile Calls	10%	14%	10%	8%	11%	15%	8%	6%	15%
None of the Above	1%	0%	0%	3%	0%	2%	0%	2%	0%
Other	6%	10%	6%	6%	22%	7%	4%	6%	10%

Table 2. Over the course of the pandemic, which measures did you and/or your hospital implement at any point?

Measures Continuing to be Implemented

Survey respondents were asked “Which measures are you and/or your hospital continuing to implement?”

While some measures have fallen dramatically in prevalence, such as practicing only emergency/urgent care, others continue to be implemented by the vast majority of veterinary hospitals. Ninety-one per cent of respondents indicated that they were continuing to practice increased cleaning/disinfecting, with 78 per cent still requiring curbside drop-off of animals.

Once again, when limited to mixed, large, and mobile veterinarians, the percentage minimizing contact and using the lowest risk client for restraint during farm/mobile calls was significantly higher.

Some of the common “other” responses specified included providing masks for clients who do not bring one, having longer appointment times to facilitate distancing and cleaning, and utilizing plastic shields to separate clients and veterinary team.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Emergency Care Only	2%	3%	4%	0%	0%	0%	1%	2%	0%
Postponing Immature Animal Exams/Vaccines	1%	1%	2%	0%	0%	2%	0%	0%	0%
Postponing Mature Animal Exams/Vaccines	4%	6%	8%	0%	0%	0%	2%	10%	2%
Postponing Elective Surgeries	3%	4%	4%	3%	0%	0%	3%	4%	0%
Curbside Animal Drop-off	78%	77%	77%	69%	33%	74%	87%	31%	61%
Utilizing Telemedicine	53%	49%	44%	39%	33%	59%	60%	39%	39%
Curbside Pickup of Diets/Pharmaceuticals	83%	80%	77%	78%	78%	89%	92%	27%	68%
Home Delivery of Diets/Pharmaceuticals	27%	17%	25%	19%	11%	19%	35%	22%	17%
Limiting Client Entry to Hospital	87%	85%	85%	81%	67%	96%	88%	71%	83%
Increasing Cleaning/Disinfecting	91%	92%	95%	83%	100%	89%	91%	76%	83%
Contactless payments	82%	76%	80%	78%	89%	87%	86%	61%	66%
Screening Clients for Illness/Travel	65%	61%	73%	58%	56%	67%	66%	47%	66%
Asking Clients to Wear Masks	61%	64%	55%	67%	67%	76%	62%	57%	34%
Use of PPE by Veterinary Team	80%	74%	82%	69%	67%	78%	85%	71%	54%
Minimizing Contact During Farm/Mobile Calls	13%	17%	15%	17%	11%	17%	10%	12%	22%
Utilizing Lowest Risk Client on Farm/Mobile Calls	8%	11%	9%	6%	11%	13%	5%	8%	10%
None of the Above	1%	1%	0%	3%	0%	2%	1%	2%	2%
Other	4%	5%	7%	6%	22%	2%	3%	2%	12%

Table 3. Which measures are you and/or your hospital continuing to implement?

Client Entry to Hospital

Survey respondents were asked “When are you and/or your hospital planning to allow clients to enter the building on a wider scale?”

Across Canada, 11 per cent of respondents indicated that they are currently allowing clients to enter the building. The most common responses indicated, at 31 per cent each, were to allow clients once Public Health or other experts recommended it, and that respondents did not know when they would re-allow clients in the building.

Some of the common “other” responses specified included once regional case rates declined or the region entered the next phase of re-opening, and once there is a vaccine for COVID-19.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Currently Allowing Entry	11%	15%	10%	19%	67%	22%	6%	23%	15%
In 1-2 Weeks	6%	4%	4%	11%	0%	19%	4%	10%	24%
In 2-4 Weeks	5%	8%	4%	6%	11%	7%	4%	0%	5%
In 4-8 Weeks	4%	7%	4%	3%	0%	2%	4%	0%	0%
When Public Health/Other Experts Recommend	31%	26%	32%	19%	11%	20%	35%	44%	15%
Never Limited Entry	1%	1%	2%	0%	0%	2%	0%	0%	5%
Don't Know	31%	28%	29%	31%	11%	20%	36%	13%	22%
Not Applicable	3%	4%	4%	3%	0%	2%	3%	5%	0%
Other	8%	7%	11%	8%	0%	6%	8%	5%	15%

Table 4. When are you and/or your hospital planning to allow clients to enter the building on a wider scale?

Telemedicine

Survey respondents were asked “If you and/or your hospital have implemented telemedicine, what do you charge for a telemedicine examination? If you do not charge for this service, please enter \$0.”

Across Canada, 74% of those who indicated offering telemedicine were charging for this service. The national average charge was \$46.35, while the median was \$50.00. These figures exclude those respondents who indicated that they were not charging for telemedicine (\$0 answers not included in calculated mean or median).

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Percentage Charging	74%	52%	72%	67%	86%	84%	80%	88%	52%
Mean (excluding \$0)	\$46.35	\$69.55	\$66.83	\$64.71	\$61.28	\$55.53	\$61.60	\$55.86	\$63.07
Median (excluding \$0)	\$50.00	\$75.00	\$72.00	\$63.25	\$65.00	\$55.00	\$60.00	\$60.00	\$70.00

Table 5. If you and/or your hospital have implemented telemedicine, what do you charge for a telemedicine examination?

Euthanasia Appointment Measures

Survey respondents were asked “How are you and/or your hospital conducting euthanasia appointments?”

The majority of respondents across Canada indicated that they were requiring personal protective equipment (PPE) for staff and clients (77 per cent), limiting the number of clients permitted to attend euthanasia appointments (71 per cent), and screening clients for any signs of illness or travel history before allowing them to attend (62 per cent).

Some of the common “other” responses specified included conducting euthanasia appointments outdoors, sedating the animal away from the client and then having them present only for the final moments of the appointment, and that euthanasia appointments were not applicable to the respondent’s type of practice.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Limiting Number of Clients Present	71%	78%	59%	61%	44%	78%	75%	59%	56%
Require PPE for Staff and/or Clients	77%	79%	72%	75%	67%	80%	80%	61%	59%
Screening Clients for Illness/Travel	62%	56%	61%	72%	44%	67%	64%	47%	56%
Using IV Extension Sets	44%	46%	45%	22%	22%	50%	48%	20%	27%
Not permitting Clients to Attend	8%	4%	9%	3%	0%	13%	8%	10%	12%
No Changes Made	4%	4%	3%	17%	22%	4%	3%	2%	20%
No Euthanasia Appointments During Pandemic	2%	2%	3%	0%	0%	0%	2%	2%	0%
Other	12%	11%	19%	6%	11%	13%	10%	14%	24%

Table 6. How are you and/or your hospital conducting euthanasia appointments?

Hours of Operation Alterations

Survey respondents were asked “Have you and/or your hospital altered your hours of operation?”

The largest group of respondents, at 44 per cent nationally, indicated that they had reduced their hours. An additional 40 per cent had not altered their hours of operation.

Some of the common “other” responses specified included alterations to opening and closing times without an overall change in total hours, reducing appointment hours to allow for telemedicine appointments, and that hours had initially been reduced but are now back to a normal schedule.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Fully Closed/Ceased Operations	0%	0%	1%	0%	0%	0%	0%	0%	0%
Reduced Hours	44%	36%	43%	47%	33%	70%	44%	59%	20%
Extended Hours	5%	9%	4%	8%	0%	6%	4%	5%	2%
Have Not Changed Hours	40%	46%	37%	31%	56%	19%	39%	36%	68%
Other	11%	8%	15%	14%	11%	6%	13%	0%	10%

Table 7. Have you and/or your hospital altered your hours of operation?

Staffing Alterations

Survey respondents were asked “Have you and/or your hospital altered staffing?”

While at first, there were concerns around business slowdowns and potential layoffs or terminations, the introduction of government programs, such as the Canada Emergency Wage Subsidy helped to quell these worries.

Across Canada, only 14 per cent of respondents indicated that they had laid off staff over the course of the pandemic. Rather, the primary issue that arose was highlighted by the 46 per cent of respondents who indicated that they had lost staff, due to self-isolation, illness, and particularly child-care responsibilities. With schools and daycares closed, camps cancelled, and people supposed to be isolating from others as much as possible, many veterinary staff were left with few alternatives, but to remain out of work so they could supervise their children.

The most common “other” response specified was that additional staff had been hired, to allow for great distancing from clients on farm calls, or to assist with the increased time requirements of many of the measures they had implemented to deal with the pandemic.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
No - All Staff Healthy/Working as Normal	36%	39%	30%	47%	44%	19%	36%	31%	41%
Lost Staff to Self-Isolation/Illness/Child-care Responsibilities, etc.	46%	36%	53%	33%	11%	43%	50%	38%	44%
Laid Off Staff Due to Business Slowdown	14%	17%	13%	11%	11%	46%	10%	26%	0%
Reduced Staff Hours Due to Business Slowdown	19%	18%	18%	14%	33%	44%	16%	36%	10%
Split Staff into Separate Teams	21%	22%	11%	25%	22%	52%	19%	33%	22%
Staff Working from Home/Remotely	15%	14%	15%	11%	0%	11%	16%	13%	24%
Other	12%	13%	20%	11%	22%	11%	10%	13%	12%

Table 8. Have you and/or your hospital altered staffing?

Canada Emergency Wage Subsidy Qualification

Survey respondents who indicated that they were either practice owners or practice managers were asked “Have you qualified for the Canada Emergency Wage Subsidy (75% wage subsidy) at any point during the pandemic?”

The Canada Emergency Wage Subsidy (CEWS) covers up to 75% of an employee’s wage, to a maximum of \$847 per week (approximately \$44,000 per year, or 75% of the annual salary of an employee making approximately \$59,000 per year).

To qualify for this program, veterinarians had to show that their revenues had declined by at least 15% in March 2020 from either March 2019 or the average of January and February 2020, and by at least 30% in April, May, and June 2020 from the same month in 2019 or the average of January and February 2020.

Despite physical distancing, urgent-care only provisions, curbside drop-off, missing staff, and all the other difficulties faced, only one third of veterinarians across Canada ended up qualifying for CEWS throughout the pandemic.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Yes	33%	24%	26%	20%	50%	30%	41%	25%	17%
No	67%	76%	74%	80%	50%	70%	59%	75%	83%

Table 9. Have you qualified for the Canada Emergency Wage Subsidy (75% wage subsidy) at any point during the pandemic?

Payroll Situation

Survey respondents who indicated that they were either practice owners or practice managers were asked “Which best describes your payroll situation?”

With 45 per cent of respondents, many indicated that staff hours and pay had remained consistent throughout the pandemic. The next most widely selected response was that staff hours had been reduced, but that compensation remained consistent. Only five per cent had reduced staff hours and pay, and almost none had reduced compensation while keeping hours consistent.

Some of the common “other” responses specified included reducing staff hours while increasing pay, and having lost staff (as explained in table 8) but paying remaining staff the same or an increased wage.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Reduced Hours & Pay, EI Top Up	8%	11%	8%	10%	0%	19%	7%	16%	0%
Reduced Hours, Consistent Pay	27%	17%	28%	25%	25%	39%	28%	28%	22%
Reduced Hours & Pay	5%	7%	5%	5%	0%	4%	4%	4%	4%
Consistent Hours, Reduced Pay	0%	0%	0%	0%	0%	0%	0%	4%	0%
Consistent Hours & Pay	45%	46%	43%	55%	50%	23%	46%	32%	65%
Other	15%	19%	16%	5%	25%	15%	15%	16%	9%

Table 10. Which best describes your payroll situation?

May Revenue

Survey respondents were asked “How busy were you and/or your hospital in May?”

The largest group of respondents, at 40 per cent across Canada, indicated that their May 2020 revenue had decreased from May 2019 by 30% or less. Another 12 per cent had seen their revenues decline from May 2019 by a margin of more than 30%, while 16% had seen consistent business, and 20 per cent had seen an uptick in revenue from the same month last year.

The most common “other” response provided was that the respondent did not know what the revenue of their hospital was in May 2020 compared to May 2019.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Consistent with May 2019	16%	23%	17%	29%	0%	4%	13%	8%	35%
Increased from May 2019	20%	34%	22%	23%	33%	11%	14%	15%	30%
Decreased from May 2019 by 30% or Less	40%	22%	42%	31%	56%	55%	46%	59%	10%
Decreased from May 2019 by 30% or More	12%	5%	11%	6%	0%	11%	16%	10%	0%
Other	12%	16%	8%	11%	11%	19%	11%	8%	25%

Table 11. How busy were you and/or your hospital in May?

June Revenue

Survey respondents were asked “How do you anticipate your and/or your hospital's revenues will be for June?”

In a reversal of fortune from May 2020 revenues, most respondents shared a much more optimistic outcome to this inquiry. Thirty-six per cent indicated their June 2020 revenues would be increased from June 2019, while an additional 30 per cent felt it would be consistent from the previous year. While some of this is without a doubt demand for veterinary services that has been pushed back from the more sweeping lockdowns in March and April, it is nonetheless encouraging to see veterinary hospitals rebound so rapidly.

Once again, the most common “other” response provided was that the respondent did not know what the revenue of their hospital was in June 2020 compared to June 2019.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Consistent with June 2019	30%	35%	34%	34%	11%	25%	27%	24%	44%
Increased from June 2019	36%	36%	31%	23%	56%	38%	37%	29%	38%
Decreased from June 2019 by 30% or Less	21%	13%	23%	32%	22%	26%	22%	37%	3%
Decreased from June 2019 by 30% or More	4%	3%	6%	0%	11%	0%	6%	0%	0%
Other	9%	13%	6%	11%	0%	11%	8%	10%	15%

Table 12. How do you anticipate your and/or your hospital's revenues will be for June?

Animal Behaviour

Survey respondents were asked “Have you and/or your hospital found animal behaviour to have been noticeably altered due to separation from the client during appointments/procedures?”

The most widely selected response, with 48 per cent, was that there was no noticeable difference in animal behaviour as a result of separating them from the client, to adhere with physical distancing requirements.

The next most commonly indicated answer was an “other” response, with the majority of these specifying that they found animals were better behaved, less aggressive, and easier to restrain and work with away from clients.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
More Aggressive	5%	9%	5%	0%	0%	9%	4%	5%	5%
More Difficult to Restrain	9%	10%	5%	0%	22%	13%	9%	18%	5%
More Fearful	23%	18%	19%	8%	11%	26%	26%	28%	25%
No Noticeable Difference	48%	54%	48%	47%	33%	43%	49%	33%	40%
Clients Have Remained with Animal	4%	4%	6%	6%	44%	6%	1%	8%	15%
Other	34%	30%	33%	44%	22%	43%	34%	45%	28%

Table 13. Have you and/or your hospital found animal behaviour to have been noticeably altered due to separation from the client during appointments/procedures?

Interest in Meeting with Industry Representatives In-Person

Survey respondents were asked “How interested are you in meeting with industry representatives (e.g. pharmaceutical sales representatives) in your hospital?”

Responses were provided on a scale from 1 to 5, with 1 equating to “Not at all interested” and 5 to “Very interested”.

Across Canada, the average score was 2.07, with a median of 2.00, falling slightly below a neutral level of interest (equal to 3.00).

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Mean	2.07	2.39	1.99	1.94	2.67	2.34	1.90	2.16	2.51
Median	2.00	3.00	1.50	1.50	3.00	2.00	1.00	2.00	3.00

Table 14. How interested are you in meeting with industry representatives (e.g. pharmaceutical sales representatives) in your hospital?

Interest in Meeting with Industry Representatives Virtually

Survey respondents were asked “How interested are you in meeting with industry representatives virtually (e.g. Zoom meeting)?”

Responses were provided on a scale from 1 to 5, with 1 equating to “Not at all interested” and 5 to “Very interested”.

Across Canada, the average score was 2.75, with a median of 3.00, landing on a neutral level of interest (equal to 3.00), and above the interest level of in-person meetings.

	Canada	AB	BC	MB	NB	NS	ON	QC	SK
Mean	2.75	2.95	2.90	2.45	3.11	2.63	2.62	3.08	2.87
Median	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00

Table 15. How interested are you in meeting with industry representatives virtually (e.g. Zoom meeting)?

Conclusions

Overall, the results of this survey paint a picture of a profession that took immediate and appropriate action in response to a public health emergency and has overcome significant disruption without suffering grievous damage to revenue and businesses. While COVID-19 is not yet entirely in the rear-view mirror, this should provide a great deal of confidence in the resilience of the Canadian veterinary profession.

Thank you again to Merck Animal Health, Associated Veterinary Purchasing Co. Ltd., Purina Pro Plan Veterinary Diets, Royal Bank of Canada, Veterinary Purchasing and Western Drug Distribution Center Limited, and all the veterinarians and veterinary staff who responded to the survey.

If you have any questions or concerns regarding the National COVID-19 Survey, please contact Dr. Chris Doherty at cdoherly@ovma.org.