

Pet Owner Survey

Overview

Between September 28 and October 9, 2020, a survey of 3,258 pet owners was commissioned by the global animal health association, HealthforAnimals, and global healthcare communications consultancy Pegasus, an Ashfield company, part of UDG Healthcare PLC. The survey was conducted by Censuswide, a global survey provider. Participants from four countries took part, including Brazil (1,015), the US (1,010) France (625), and the UK (608). The pet owners were divided evenly (50:50) between dog and cat owners.

Global headline findings

The Covid-19 pandemic disrupted health care for pets.

- More than a quarter of pet owners (27%) delayed or avoided contacting their veterinary practice since the start of the Covid-19 pandemic.
- More than 1 in 10 pets (13%) missed essential, routine treatments like vaccines, and flea, tick or worm treatments.
- Pet owners cited concerns around exposure beyond social bubbles and non-essential activities for avoiding veterinary practices.

76% of pet owners were able to list at least one safety measure adopted by their veterinary practice during the COVID-19 pandemic.

- Social distancing, PPE and only allowing one person to accompany pets to appointments, were among the most common precautions.
- Only 1% of pet owners said their veterinary clinic had not adopted new safety measures in response to Covid-19.

Telemedicine tools were widely adopted and pet owners were satisfied with results

- Almost half (47%) of pet owners stated their veterinarian offered digital/remote consultations, up from 20 per cent prior to the pandemic.
- 75% of pet owners who has a consultation with their veterinarian using remote or digital tools were satisfied or extremely satisfied with the overall consultation.
- Almost two-thirds (60%) of all pet owners said they are willing to pay for veterinary advice/consultation through these services and 26% said they would consider whether a practice offered digital/remote consultations when registering with a new veterinarian.

Most pet owners had no problem accessing animal medicines

- 65% of pet owners said the pandemic did not make it harder to access medicines nor did they need to provide a different medicine than their pet is used to.
- For pet owners who had difficulty, the top issues were veterinary practice and/or pharmacist was not open, shipping times were delayed, or owner was unable to collect the medicine due to social distancing restrictions/personal safety practices.
- Less than 5% of pet owners reported that their veterinary practice and/or pharmacist did not have their pet's medicine in stock.

Complete findings

Veterinary care experience

Pet owners reported the following interactions with veterinary practices during the pandemic:

- 42% contacted their veterinary practice as normal
- 32% did not need to contact their veterinary practice during the pandemic
- 18% delayed contacting a veterinarian
- 9% avoided contacting a veterinarian altogether

Pet owners gave the following reasons for delaying/avoiding contacting a veterinary practice during the pandemic:

- 34% did not want to be exposed to people outside of their social bubble
- 34% were delaying “non-essential” tasks
- 23% said their veterinary practice was not open
- 21% were unsure about safety precautions at veterinary practices
- 21% were subject to quarantine and could not leave home
- 14% believed it would be “too much hassle”
- 10% did not want to bother their veterinarian
- 9% believed it would be too stressful for their dog/cat

During the pandemic, pet owners:

- Felt worried about visiting the veterinarian due to social distancing/safety reasons (27%)
- Obtained medicines or treatments they would normally get from their veterinary practice somewhere else such as online, in a pet store, etc. (24%)
- Treated their pet at home for something they normally would have visited their veterinarian for (15%)
- Allowed their dogs and cats to miss routine treatments (13%)

Access to Medicines

Pet owners said the pandemic has affected their access to medicines in the following way:

- 24% said the pandemic made it harder to get hold of medicines for their pet
- 13% said the pandemic forced them to give their pet a different medicine from what they’re used to.
- 65% said the pandemic did not make it more difficult to access medicines nor did it require them to provide a different medicine than usual.

Pet owners who said the pandemic 'made it harder to get hold of medicines' reported the following reasons:

- Vet practice and/or pharmacist was not open (26% / 6.3% of all respondents)
- Medicine was available but shipping times were delayed (24% / 6% of all respondents)
- Owner was unable to collect the medicine due to social distancing restrictions / personal safety practices (22% / 5.4% of all respondents)
- Owner could not visit veterinary practice to obtain a prescription (21% / 5% of all respondents)
- Medicine was more expensive than normal (20% / 5% of all respondents)
- Medicine was unavailable in pet store (19% / 4.7% of all respondents)
- Veterinary practice and/or pharmacist did not have the medicine in stock (19% / 4.6% of all respondents)
- Medicine was unavailable online (18% / 4.3% of all respondents)

According to pet owners, veterinarians implemented Covid-19 response measures including:

- Implementing social distancing (44%)
- Staff wearing PPE (37%)
- Allowing only one person to accompany a pet (34%)
- Making disinfectants available for customers to use (30%)
- Suspending/delaying non-essential consultations (20%)

Telemedicine

Pet owners reported the following availability of digital/remote consultations:

- 47% said digital/remote consultations are currently available
- 20% said digital/remote consultations were available before the pandemic

Of the pet owners who had a digital/remote consultation with a veterinarian:

- 77% were satisfied or extremely satisfied with the advice given
- 75% were satisfied or extremely satisfied with the convenience
- 75% were satisfied or extremely satisfied with the consultation overall
- 49% said the digital/remote consultation led to an in-person visit
- 58% said they paid the same or more compared to face-to-face visit

Overall, pet owners stated the following about digital/remote consultations:

- 50% would like their veterinary practice to offer digital/remote consultations
- 60% are willing to pay for veterinary advice/consultation through these services

- 26% said they would consider whether a practice offered digital/remote consultations when registering with a new veterinarian.

Covid-19 and pets

The level of fear of pets falling ill with Covid-19 among pet owners:

- 54% of pet owners had not heard reports of dogs or cats falling ill with Covid-19
- 32% of pet owners were concerned or very concerned about their dog or cat falling ill with Covid-19

The most common information sources about risk of Covid-19 in pets for Pet owners is:

- Google (31%)
- News Media (29%)
- 'Talking to their Veterinarian' (23%)

National Trends

Survey results were generally similar across all four markets with a few exceptions.

The Brazilian market is more enthusiastic about telemedicine

- 60% of Brazilian pet owners said their veterinarian had adopted digital / remote consultation tools compared to 47% across all four markets.
- 86% of Brazilian pet owners who received a digital or remote consultation were satisfied or very satisfied, compared to 74% across all four markets.
- 65% of Brazilian pet owners would like their veterinarian to offer digital/remote consultations compared to 50% across all four markets.
- 38% of Brazilian pet owners said availability of digital/remote consultations would be a top factor when registering with a veterinarian compared to 26% across all four markets.

Brazilian pet owners were more concerned about Covid-19 risks

- 42% of Brazilian pet owners were 'concerned' or 'very concerned' about their pet potentially contracting Covid-19 compared to 32% across all four markets
- Brazilian pet owners were more "worried about visiting their veterinary practice due to social distancing/safety requirements" (37% vs 27%), which is likely why 33% of Brazilian pet owners delaying or avoiding veterinary visits, compared to 24% across all markets.

Telemedicine is less widely available in French market

- 35% of French pet owners said their veterinary practice currently offers digital/remote consultations, compared to 47% across all markets
- 43% of French pet owners would like their veterinary practice to offer digital/remote consultations, compared to 50% across all four markets.