



COVID-19 Pet Owner Survey | October 2020

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Overview of

approach

Research overview

Objective

To:

- Determine whether pet owners experienced any veterinary medicine shortages and/or inability to receive veterinary care during the pandemic
- Measure pet owner experiences with new care technologies/practices (such as telemedicine) implemented in response to the pandemic
- Measure pet owner concerns about COVID-19 in companion animals

Methodology

~15 minute online survey

Audience

N=3258 cat and/or dog owners across four markets:

Brazil: 1015

US: 1010

France: 625

UK: 608

50% to have had experience with telemedicine, 50% to have not had experience with telemedicine.

Timing

September 28th - October 9th, 2020

Key

themes

Key themes

- Across markets, a significant number of pet owners are altering their normal behaviour when making a decision on contacting their vet practice. The pandemic has disrupted life in a myriad of ways and this shows how concerns about safety and social distancing for human health may in turn have an effect on animal health.
- However, when pet owners do seek treatment they are satisfied with the care their pets are receiving from veterinary professionals. Positive relationships between vet and pet owner are able to be maintained despite a different system of care being in place.
- While vet practice closures have inevitably made it more difficult for pet owners to obtain medicines for their pets, owners have been turning to pet stores both on and offline to make sure they have everything they need. This is despite reservations about social distancing when visiting a practice, so other factors such as convenience may be at play here.
- Owners want virtual consults, and vets are willing to provide them. However, there seems to be a disconnect between owner and vet on the value of these, as many consultations (particularly in the UK) are being offered for free. This may be driven by perceptions of efficacy of the sessions by pet owners.

Overall

trends

at market level

Brazil

Summary: Brazil (1)

Brazilian pet owners are most likely to have avoided contacting their vet practice during the pandemic due to safety concerns

- One in six (16%) Brazilian pet owners have **avoided** contacting their veterinary practice **altogether** during the pandemic, which is significantly higher compared to owners residing in other markets
 - The key reason behind this, cited by almost 4 in 10 (38%) is that they did not want to risk being around people outside of their social bubble
- Moreover, a significantly higher proportion of Brazilian owners (37%) said that they have felt worried about visiting their veterinary practice during the pandemic due to social distancing/safety reasons **despite 45%** indicating that their veterinary practice has adopted social distancing measures

In Brazil, safety concerns regarding COVID-19 extend from owners to their pets

- In addition to being concerned about their own safety during the pandemic, Brazilian pet owners are also **most likely** to be concerned about their **pet** becoming ill with COVID-19 with **6 in 10** (60%) indicating that they are concerned, to some extent, about this (with 23% being **very** concerned)
- They are **most engaged** with researching information about COVID-19 in pets, with a significantly higher proportion (49%) using Google and news media (42%) as their primary sources of information
- Brazilian pet owners are also most likely to have spoken with their vet about the risk of COVID-19 in pets (31%) compared to owners residing in other markets

Summary:

Brazil (2)

3 in 10 Brazilian owners obtained pet products/medicine from somewhere other than their vet practice but, despite safety concerns, over half shopped for these in-store

- Brazilian pet owners (30%), in particular, are most likely to have obtained pet products/medicines from somewhere **other** than their vet practice
- In terms of items bought from somewhere **other than** their vet practice; They are significantly more likely to have bought **specialist pet food** (47%) and **skin and coat care products** (24%) compared to owners residing in other markets
- Despite being particularly concerned about being around people outside of their social bubble, over half (53%) of Brazilian pet owners (who have purchased an item from somewhere other than their veterinary practice) have purchased pet medicine/health products **in-store** at a pet store during the pandemic, which is significantly higher compared to other markets
- Over two fifths (42%) of Brazilian owners shopped **online** at pet stores for these products during the pandemic

Brazilian pet owners are most likely to have had a digital/remote consultation during the pandemic, and are also most engaged with continuing to receive digital/remote consultations moving forward

- Brazilian pet owners are significantly more likely to have had a digital/remote consultation during the pandemic (84%) compared to owners residing in other markets: France: 34%, UK 26%, US, 24%, and therefore, vet practices in Brazil are most likely to have offered digital/remote consultations during the pandemic; with 6 in 10 (60%) Brazilian owners indicating that their practice currently offers these, compared to just 21% prior to the pandemic
- Of those who have had a digital/remote consultation, 97% were satisfied, to some extent, with the overall consultation with over 4 in 10 (41%) indicating that they were **extremely** satisfied
- A significantly higher proportion (38%) of Brazilian pet owners indicate that they would consider whether a veterinary practice offers digital/remote consultations before registering their pet
- Out of all pet owners across the four markets, Brazilian pet owners are most likely to agree (to some extent) that:
 - It's important that their dog (84%) or cat (71%) is registered with a vet practice that offers digital/remote consultations
 - They would be more likely to contact their vet practice if they knew they offered digital/remote consultations (79%)
 - Digital/remote consultations are more convenient than face-to-face visits (68%)

France

Summary: France (1)

Pharmacy culture is most prominent in France; as they are the only market where local pharmacy is the most cited place for purchasing pet medicines during the pandemic

- Almost a quarter (24%) of French pet owners have obtained products that they would **normally** get from their vet practice, **elsewhere** during the pandemic. Of these, around a quarter purchased parasite treatments (26%) or specialist pet food (24%) from somewhere other than their vet practice
- France is the only country where a local pharmacy is the most cited place for purchasing pet medicines/products (other than a vet practice) during the pandemic (25%)

French veterinary practices are less likely to have adopted social distancing and wearing PPE; but are most likely to have made disinfectants available for customers to use in the practice

- In terms of safety measures undertaken by veterinary practices, only 28% of French owners say that their veterinary practice staff have been wearing PPE (compared to 33% of Brazilian owners, 42% of American owners and 46% of UK owners)
- However, disinfectants that are available for customers to use appear to be more common in France (37%)

There is an appetite for digital/remote consultations in France, despite only 34% of French owners having had this type of consultation

- Just over a third (34%) of French pet owners have received a digital/remote consultation during the pandemic; yet French veterinary practices are the least likely (across all four markets) to offer digital/remote consultations (35%)
- There is a good appetite for digital/remote consultations in France, with 43% of owners indicating that they would like their practice to offer these types of consultations and just over 1 in 5 (21%) indicate that they would consider whether a veterinary practice offers digital/remote consultations before registering their pet
- Moreover, 56% agreed, to some extent, that they **would** be more likely to contact their vet practice if they offered digital/remote consultations

Summary: France (2)

Satisfaction levels with digital/remote consultations are high

- Of the 34% of French pet owners who did receive a virtual consultation during the pandemic, almost 9 in 10 (89%) were satisfied, to some extent, with the overall consultations they received; with almost a third (31%) indicating that they were extremely satisfied
- French pet owners (54%) were most likely to have had an in-person veterinary visit following a digital/remote consultations and were also most likely to have paid the same amount for the digital/remote consultation (53%) as they would have for a face-to-face consultation

Half of French pet owners are concerned, to some extent, about their pet falling ill with COVID-19 but over half have not heard reports of dogs/cats catching COVID-19

- 1 in 2 (50%) French pet owners indicate that they are concerned, to some extent, about their pet falling ill with COVID-19 despite 54% indicating that they haven't heard any reports of dogs/cats catching COVID-19, either in France or another country
- Despite their concerns, a third (33%) of French pet owners are not researching or receiving information about the risk of COVID-19 in pets; of those who are, just over a fifth (21%) are using Google and news media to search for this information

UK

Summary: UK (1)

Despite stringent safety measures adopted by UK vet practices, UK owners are most likely to have delayed contacting their vet practice during the pandemic

- Although 73% of UK pet owners have either contacted their vet practice as normal (45%) or have not needed to contact their vet practice (28%) during the pandemic, they are most likely to have **delayed** contacting their vet practice during the pandemic (23%) compared to owners residing in other markets
- The key reason for this is that they considered visiting their vet practice a non-essential task that they were delaying/avoiding (41%)
- Almost half of UK owners (48%) say that their veterinary practice has adopted social distancing measures and a significantly higher proportion (along with the US: 42%) say that vet practice staff have been wearing PPE (46%) compared to only 33% in Brazil and 28% in France
- Pet owners residing in the UK have also been most likely to avoid contact with veterinary staff when collecting medication (32%) compared to 15% of American owners, 14% of Brazilian owners and 11% of French owners

Although over a third (36%) of UK pet owners have purchased pet medicines in-store at pet stores, purchasing online at pet stores (27%) and Amazon (25%) also remain popular choices

- Just over 1 in 5 UK pet owners (21%) have bought medicines/treatments (particularly **parasite treatment**: 29%) that they would normally get from their vet practice, elsewhere
- Pet stores, both in-store (36%) and online (27%), remain popular choices for purchasing these items during the pandemic; with a quarter (25%) also indicating that they have purchased online at Amazon

Summary: UK (2)

Although almost 6 in 10 UK owners are willing to pay for digital/remote consultations, they are most likely to have had these consultations for free during the pandemic

- Just over a quarter (26%) of UK pet owners have had a digital/remote consultation during the pandemic
- Almost half (48%) of UK owners also say that their vet practice currently offers digital/remote consultations; which is a significant rise from before the pandemic (16%)
- 57% of UK owners are willing to pay for digital/remote consultations, but (amongst those who had a digital/remote consultation) they are the most likely to have received this for free (23%)
- Almost 9 in 10 (89%) UK owners were satisfied, to some extent, with the digital/remote consultations they received while 37% said that having a digital/remote consultation meant that they didn't have to wait as long to speak to a vet, and 1 in 5 (20%) said that it was less hassle than an in person veterinary visit
- 57% of UK pet owners agree, to some extent, that they would be more likely to contact their vet practice if they knew that they could have a digital/remote consultation with their vet and that they would find it more convenient to have a digital/remote consultation rather than a face-to-face visit
- For under half of UK pet owners (47%), the digital/remote consultation did not result in an in-person veterinary visit

UK pet owners are the least concerned about their pet falling ill with COVID-19

- 41% of UK pet owners are concerned, to some extent, about their pet falling ill with COVID-19, but they are the least likely to feel **very** concerned about this (10%) compared with owners in other markets
- UK pet owners lack of concern is reflected by the fact that 41% have not been researching/receiving information about the risk of COVID-19 in pets

US

Summary: US (1)

The risk of being around people outside of their social bubble, and perceiving veterinary visits as a non-essential task serve as the two biggest barriers to American pet owners contacting their vet practice during the pandemic

- Virtually half (49%) of American pet owners have contacted the vet practice as normal during the pandemic, but just over 1 in 5 (21%) have delayed or avoided contacting their vet practice
- The key reason for delaying/avoiding contact with the vet practice is (like Brazilian owners) not wanting to risk being around other outside for their social bubble (39%) and (like UK owners) perceiving veterinary visits as a non-essential task that they were delaying/avoiding
 - This is interesting because, like UK owners, a high proportion of American owners also cite social distancing (47%) and veterinary staff wearing PPE (42%) as the top two safety measures undertaken by their vet practice during the COVID-19 pandemic
- American cat owners (17%), in particular, were concerned that the process would be too stressful for their cat

American pet owners are the only owners across all four markets to favour online shopping for pet products over going in-store

- Just under a fifth (19%) of American owners bought medicines/treatments (particularly parasite treatment: 19%), which they would have normally bought from their vet practice, elsewhere during the pandemic
- The US is the only country where Amazon (33%) and **online** pet stores (34%) were used to buy these items **over** physical stores for product purchase. This suggests more of a reluctance to shop in physical stores perhaps due to long distances from said stores
- Encouragingly, almost three quarters (72%) of American owners indicate that the COVID-19 pandemic has **not** a) made it harder for them to get hold of medicines for their dog/cat nor b) forced them to give their dog/cat different medicine from what they're used to

Summary: US (2)

American pet owners are the least likely to have had a digital/remote consultation during the pandemic; but there is an appetite to receive these types of consultations

- Although 43% of American owners say that their vet practice currently offers digital/remote consultations, they are the least likely to have had a digital consultation with a vet (22%) compared to owners across other markets. This might be due to the fact that quite a large proportion (47%) do not know whether their vet practice offers digital/remote consultations
- Despite being the least likely to have had a digital/remote consultation during the pandemic, almost half (47%) of American owners say that they would like their vet practice to offer these types of consultations and just over 1 in 5 (22%) say that they would consider whether a vet practice offers digital/remote consultations before registering their pet
- Moreover, 55% of American pet owners agree, to some extent, that if they knew that they could have a digital/remote consultation with their vet, then they would be more likely to contact their vet practice; with 1 in 7 (14%) strongly agreeing with this sentiment.
- Almost 6 in 10 (59%) say that they would find a digital/remote consultation more convenient than an in-person visit

A high proportion of American owners indicate that they are unconcerned, to some extent, about their pet falling ill with COVID-19

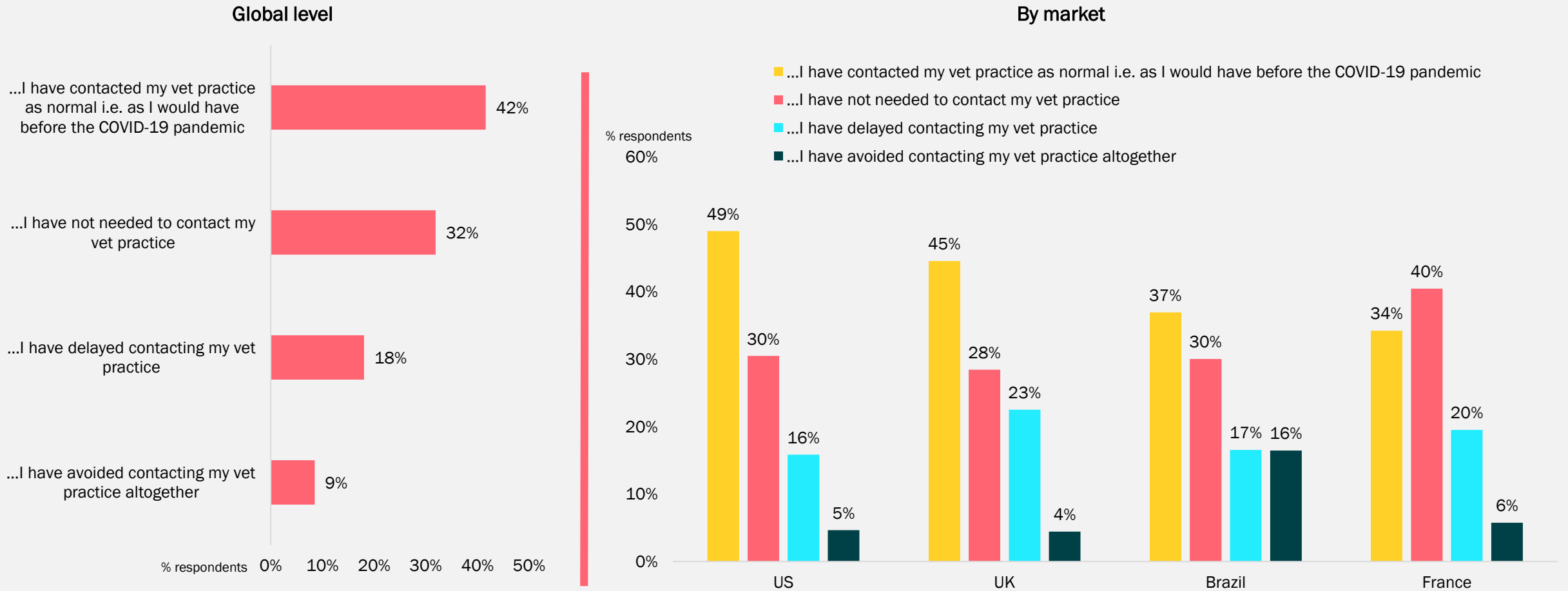
- Although 54% of American owners have **not** heard reports of dogs/cats falling ill with COVID-19 either in the US, or another country, they are still the most likely to have heard reports of **dogs** falling ill with COVID-19 in their **own** country (US) compared with owners residing in other markets
- Almost 6 in 10 (58%) say that they are not particularly, or not at all, concerned about their pet becoming ill with COVID-19 and this is reflected by the fact that 36% of American owners have not been researching/receiving information about the risk of COVID-19 in pets

Detailed

findings

Contacting the vet practice

Across all four markets, almost three fifths (58%) of respondents have NOT contacted their vet practice as normal during the pandemic

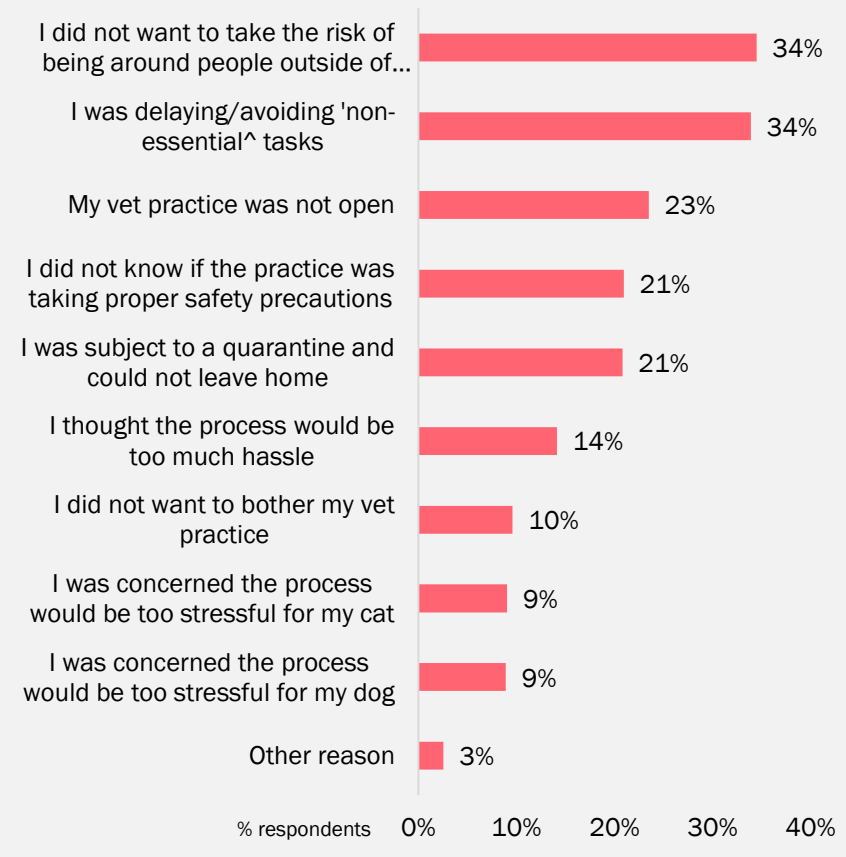


Base: n=3258 US=1010, UK=608 Brazil=1015 France=625 (all respondents)

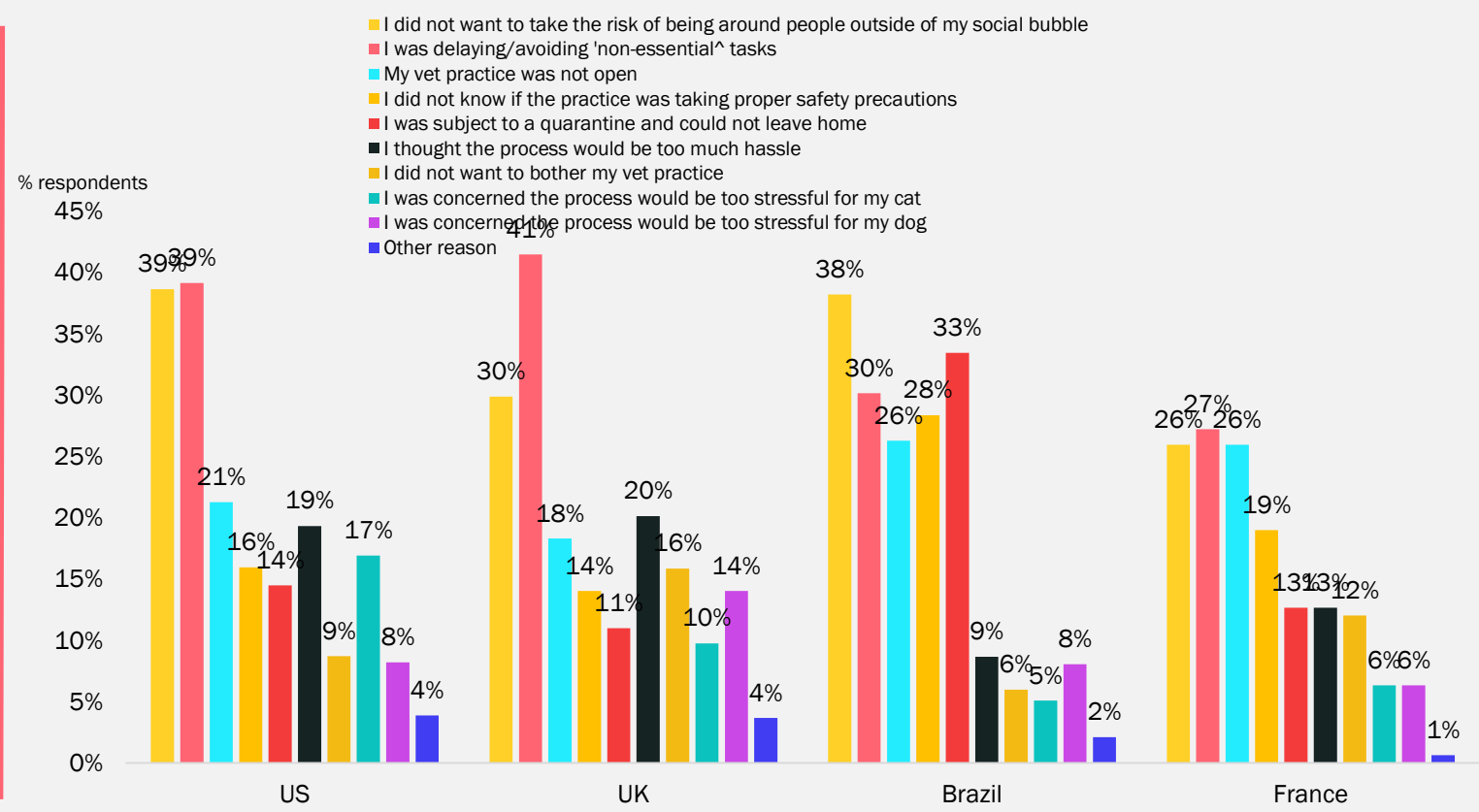
Q1. Which one of the following best describes your circumstances/behaviour regarding your interaction (if any) with a vet practice during the COVID-19 pandemic? During the COVID-19 pandemic (Select one answer only)

Not wanting to risk being around people outside of social bubble and avoiding/delaying 'non-essential' tasks were the two most common reasons for delaying or avoiding contact with the vet practice

Global level



By market



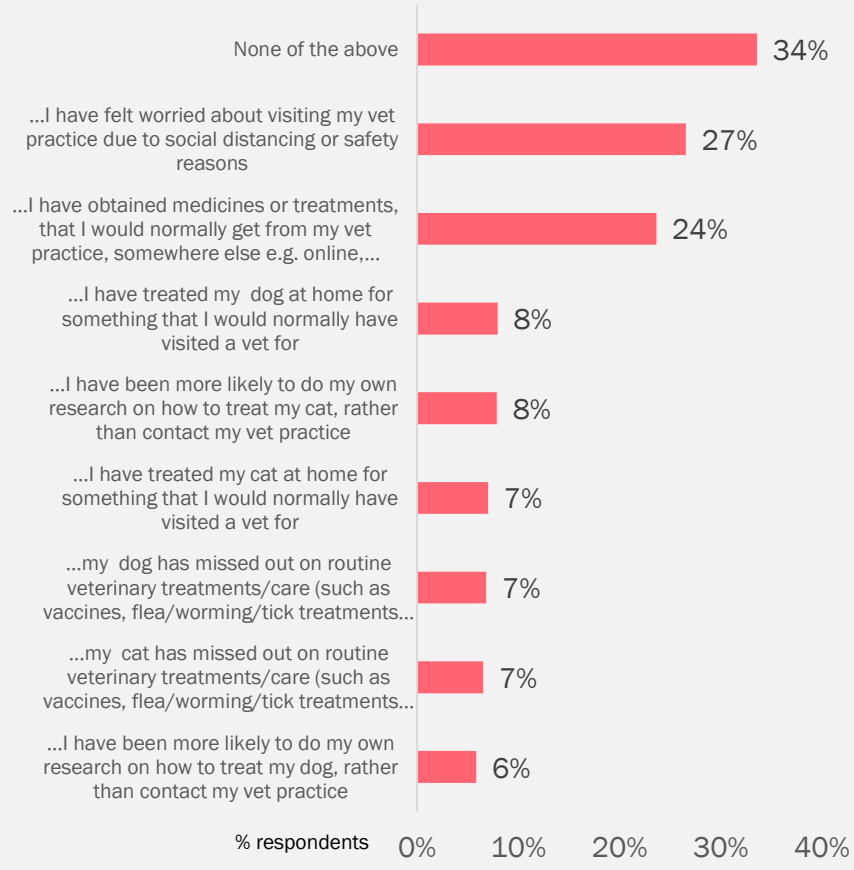
Base: n=3258 US=207, UK=164 Brazil=335 France=158 (those who delayed/avoided contacting your vet practice during the COVID-19 pandemic)

Q2. Why have you delayed/avoided contacting your vet practice during the COVID-19 pandemic? (Select all that apply)

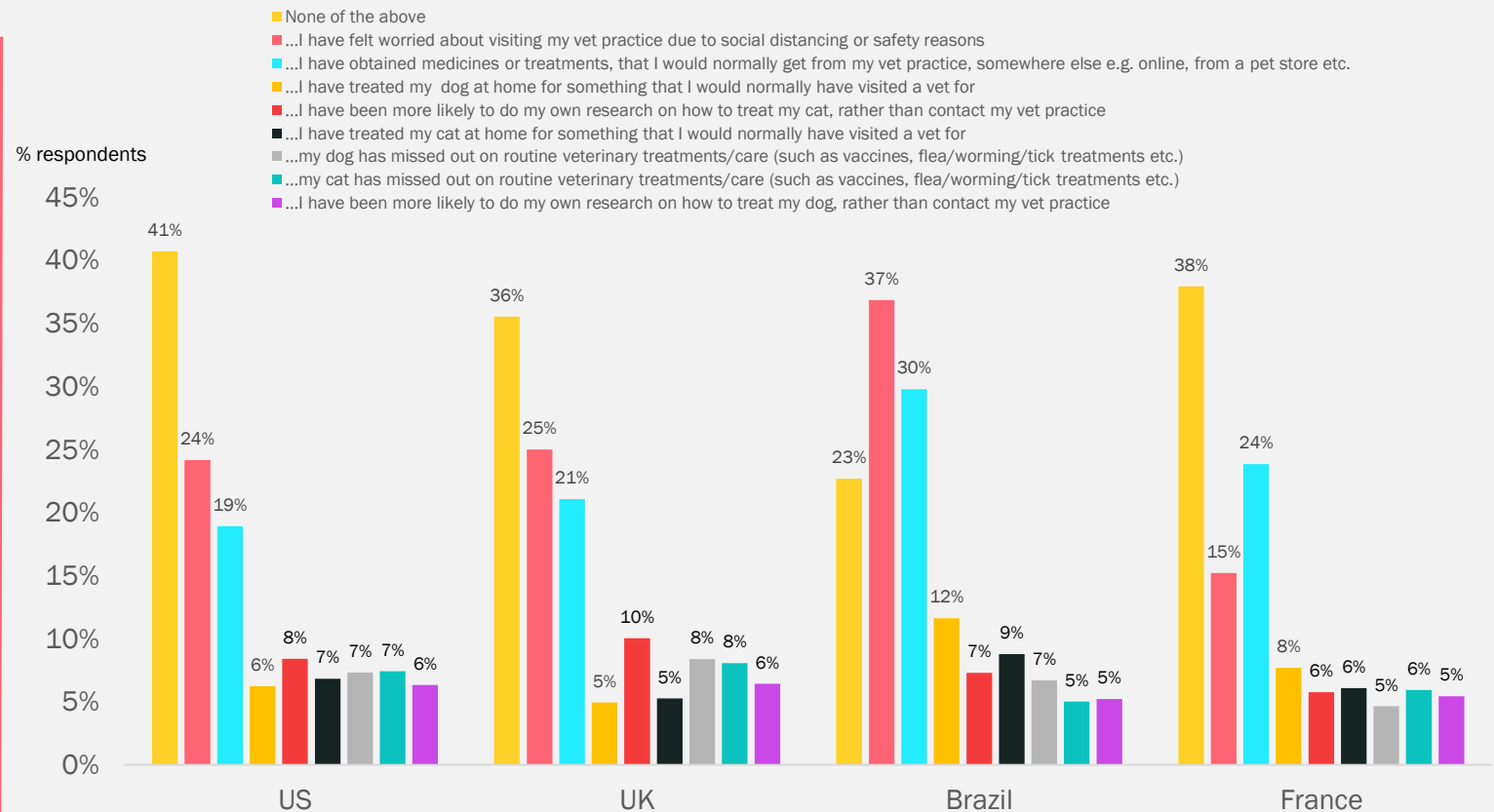
Obtaining medicine

Almost a quarter of respondents have obtained medicines or treatments, that they would normally get from their vet practice, somewhere else

Global level



By market

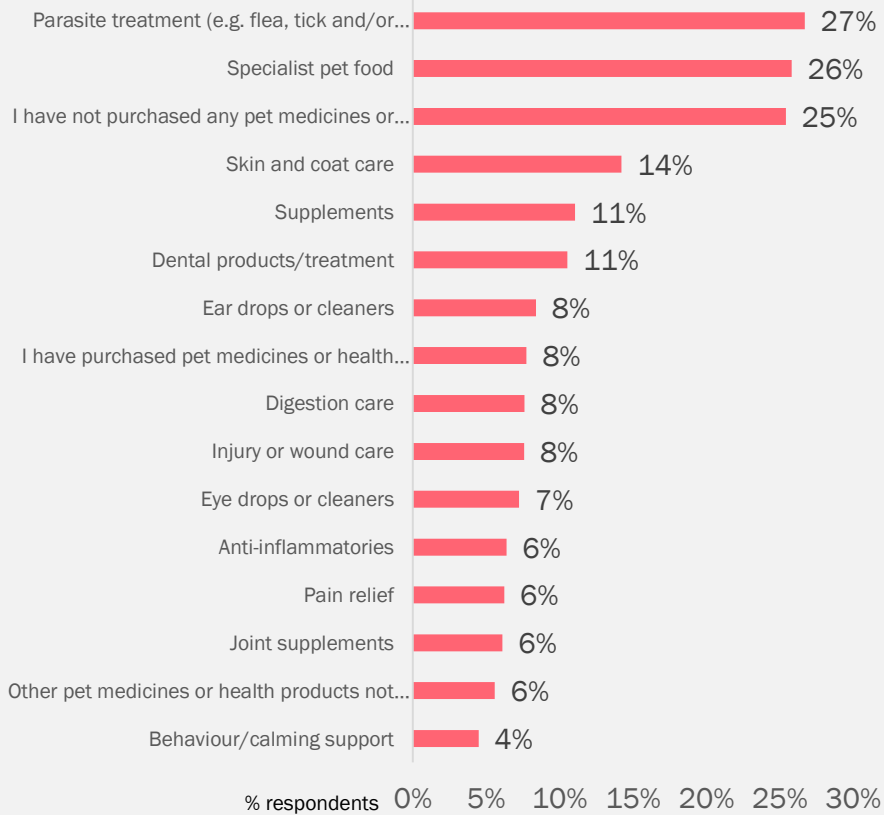


Base: n=3258 US=1010, UK=608 Brazil=1015 France=625 (all respondents)

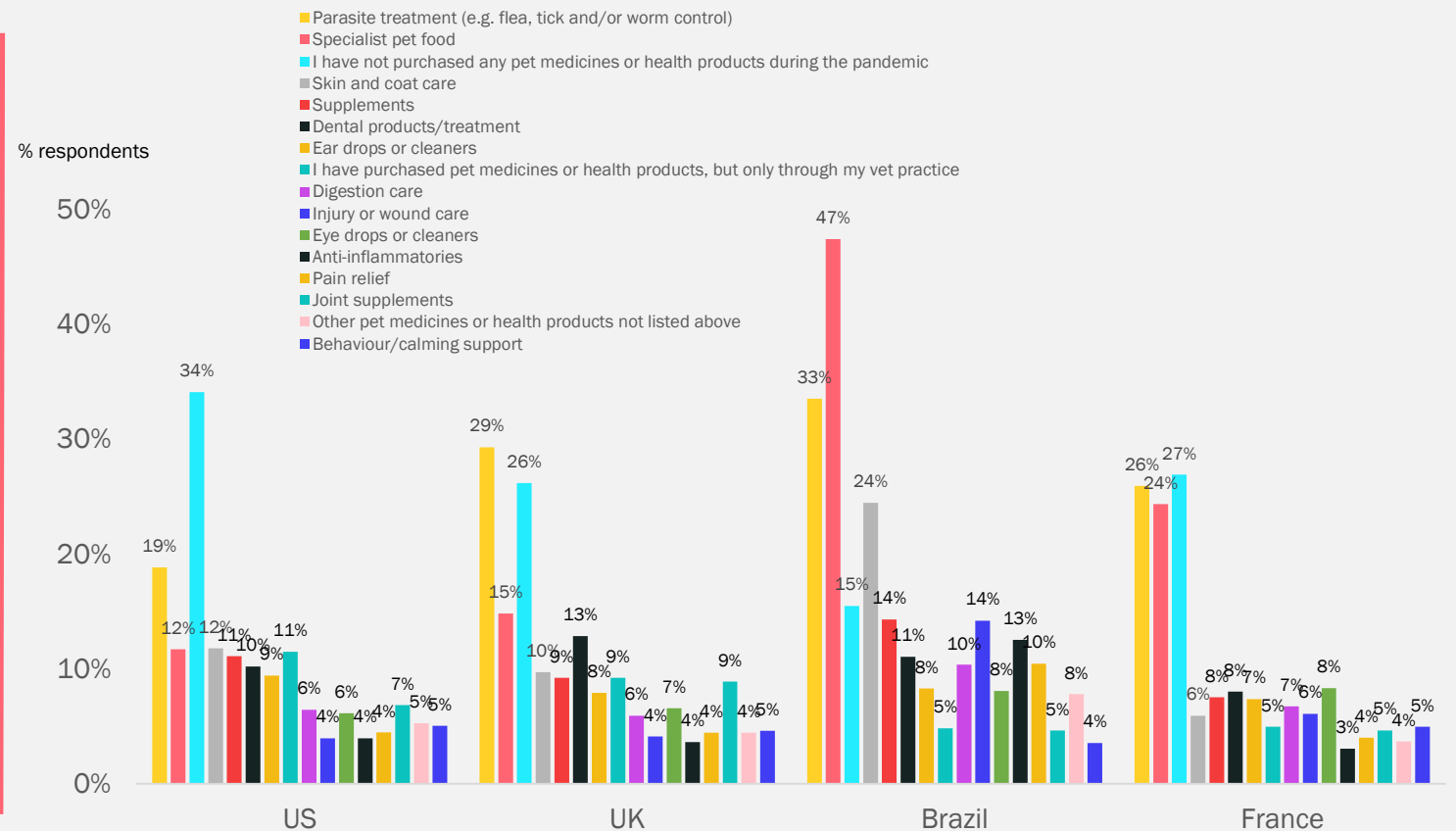
Q3. Which, if any, of the following statements apply to you? (Select all that apply During the COVID-19 pandemic...)

During the COVID-19 pandemic, over a quarter of owners have purchased parasite treatment and specialist pet food from somewhere other than their vet practice

Global level



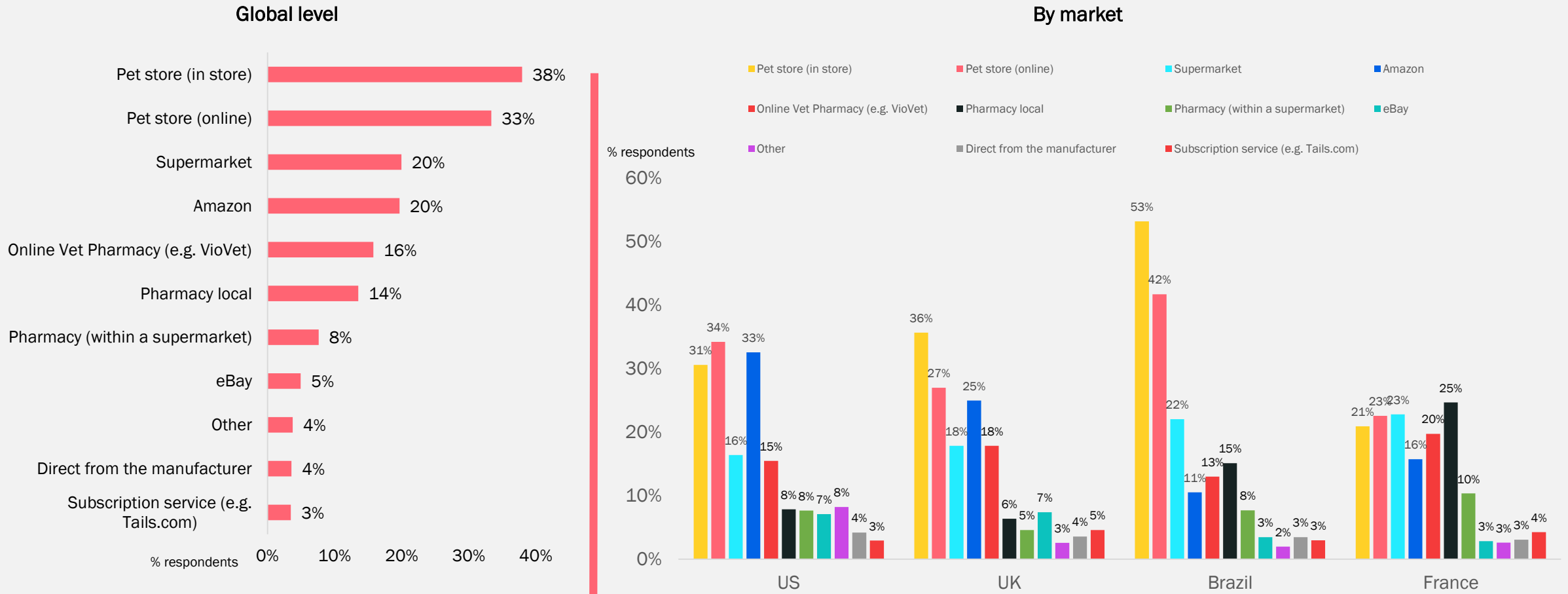
By market



Base: n=2178 US=550 UK=393 Brazil=809 France=426 (those who have purchased from somewhere other than their vet)

Q4. During the COVID-19 pandemic, which, if any, of the following have you purchased from somewhere other than your vet practice? (Select all that apply)

Of those who purchased an item from somewhere other than their vet practice, almost 4 in 10 purchased at a pet store (in store) while a third purchased online at a pet store

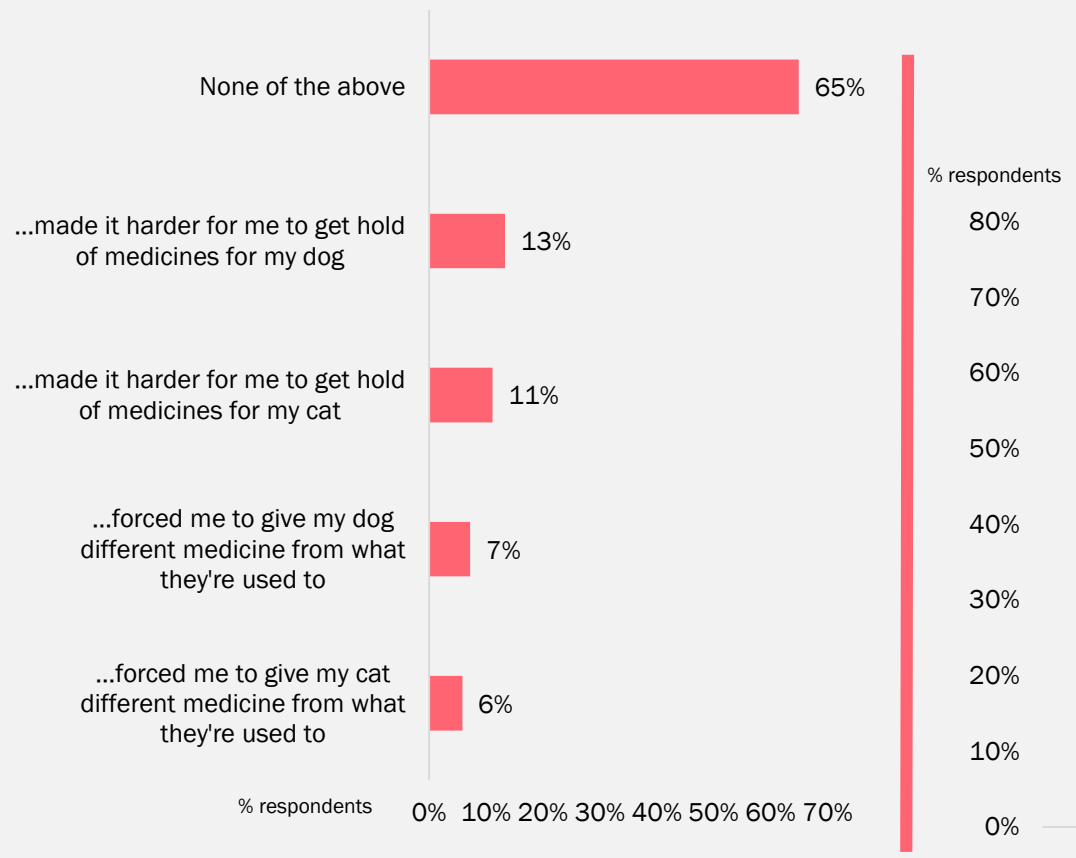


Base: n=2178 US=550 UK=393 Brazil=809 France=426 (those who have purchased from somewhere other than their vet)

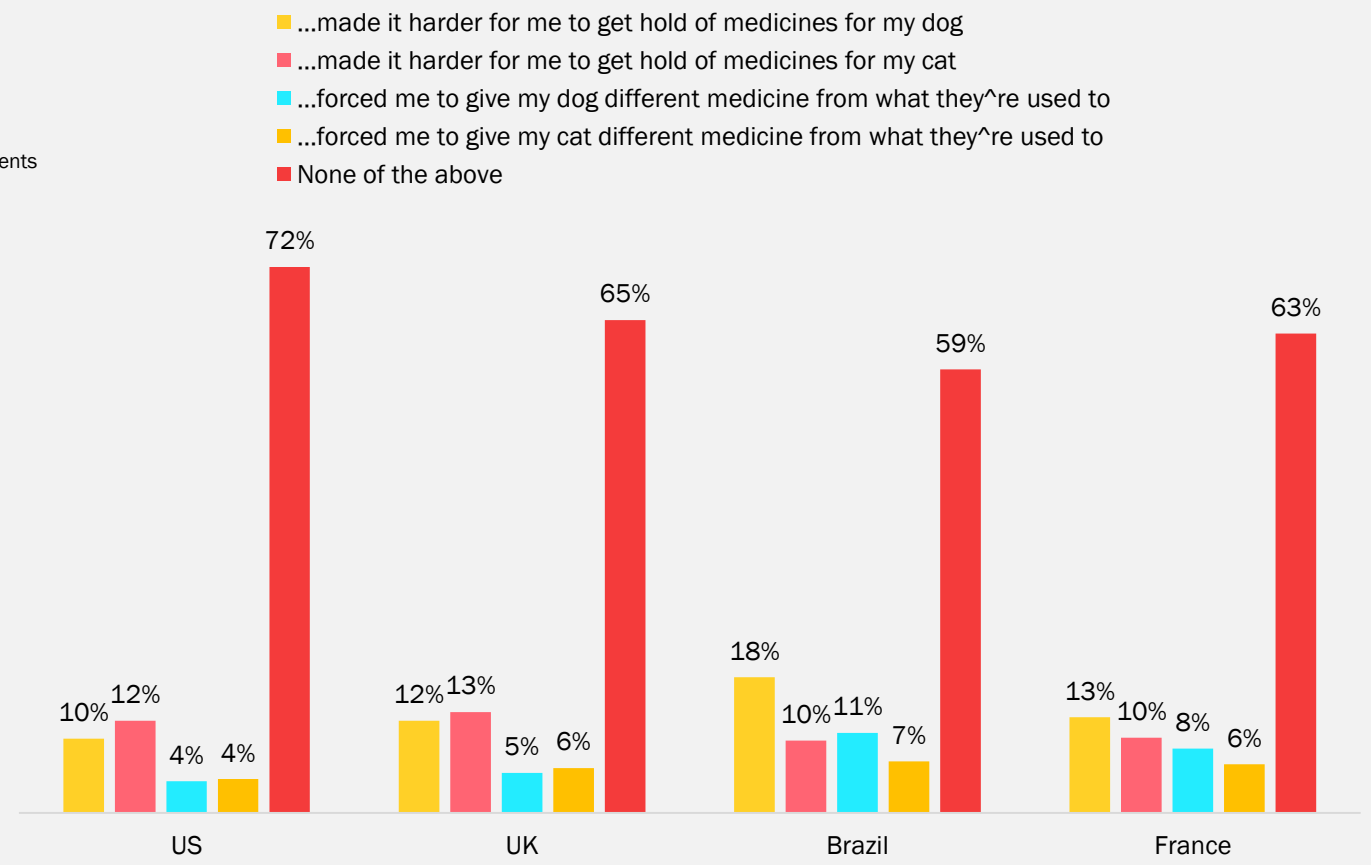
Q5. Where did you purchase the items selected at the previous question? (Select all that apply)

Over a third (35%) said the pandemic had made it harder to get hold of medicines for their pet, or that they were forced to give their pet different medicine from what they're used to

Global level



By market

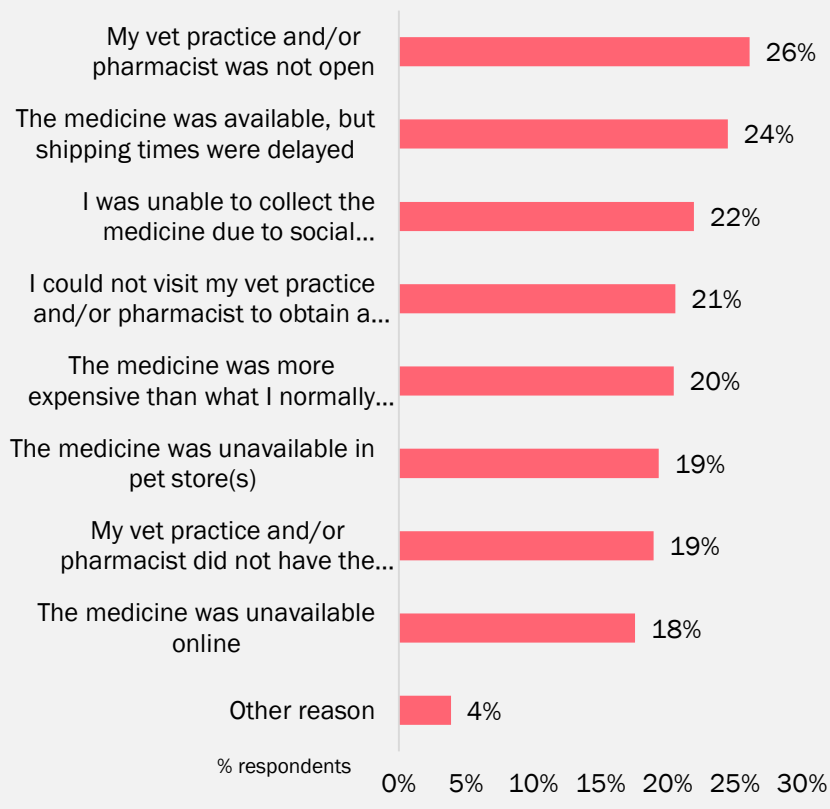


Base: n=3258 US=1010, UK=608 Brazil=1015 France=625 (all respondents)

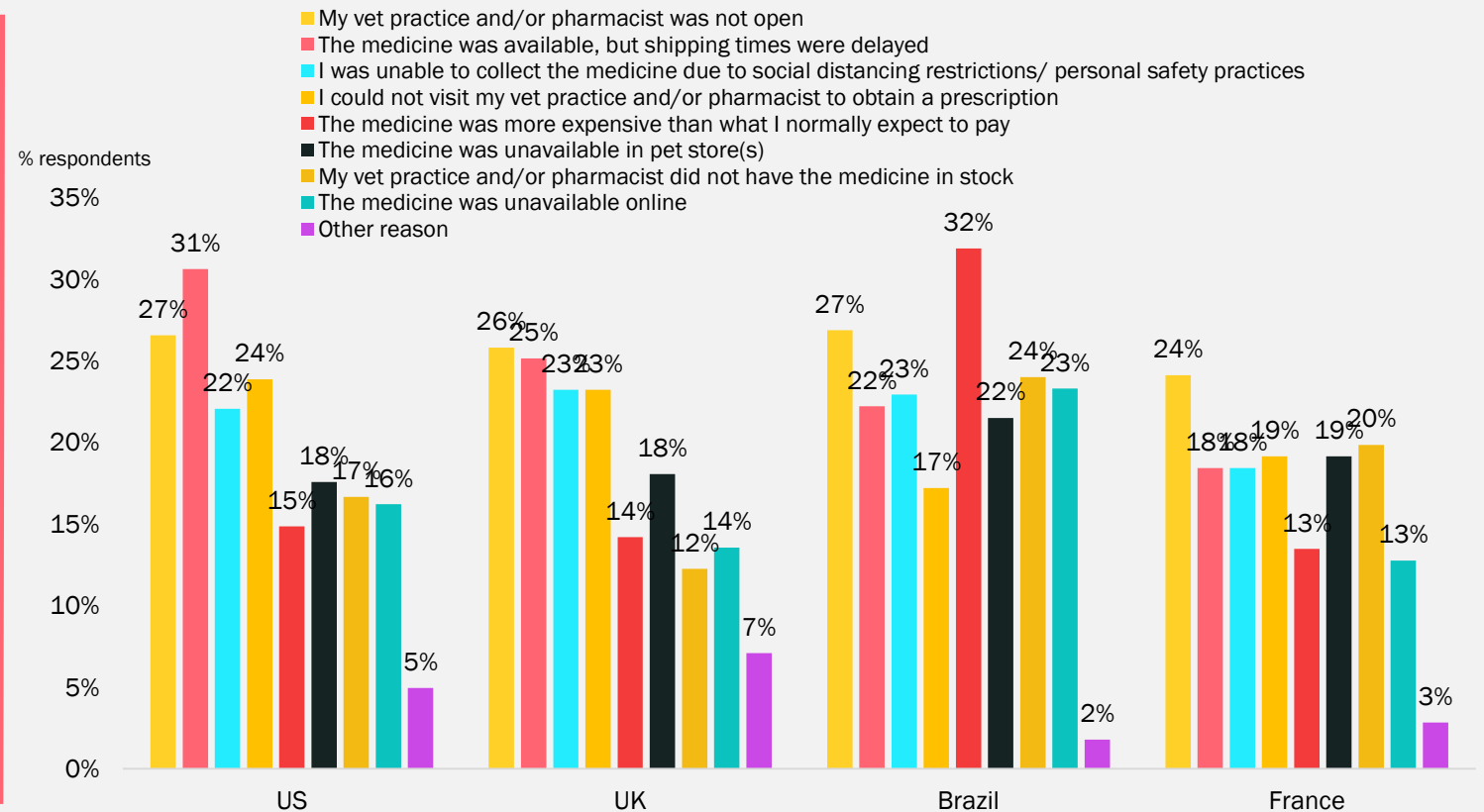
Q6. Which, if any, of the following statements apply to you? (Select all that apply) The COVID-19 pandemic has...

Of those who said it was harder for them to get hold of certain medicines, over a quarter (26%) said this was because their vet practice and/or pharmacist was not open

Global level



By market



Base: n=797 US=222 UK=155 Brazil=279 France=141 (all who have found it difficult to get certain medication)

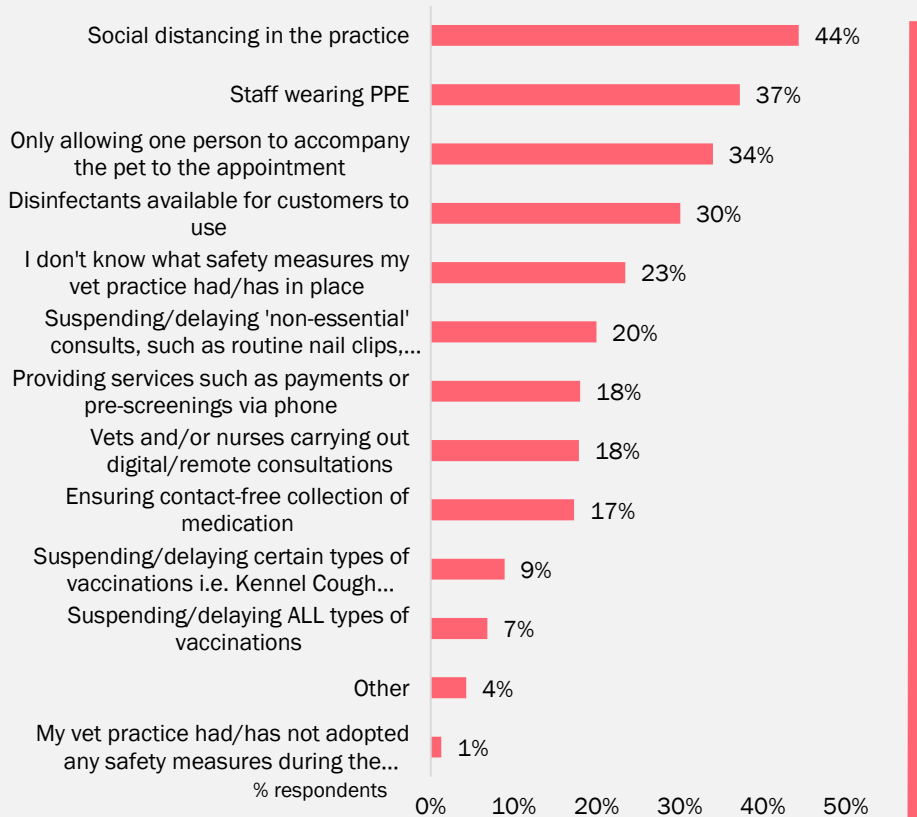
Q7. Why have you found it difficult to get hold of certain medicines during the COVID-19 pandemic? (Select all that apply)



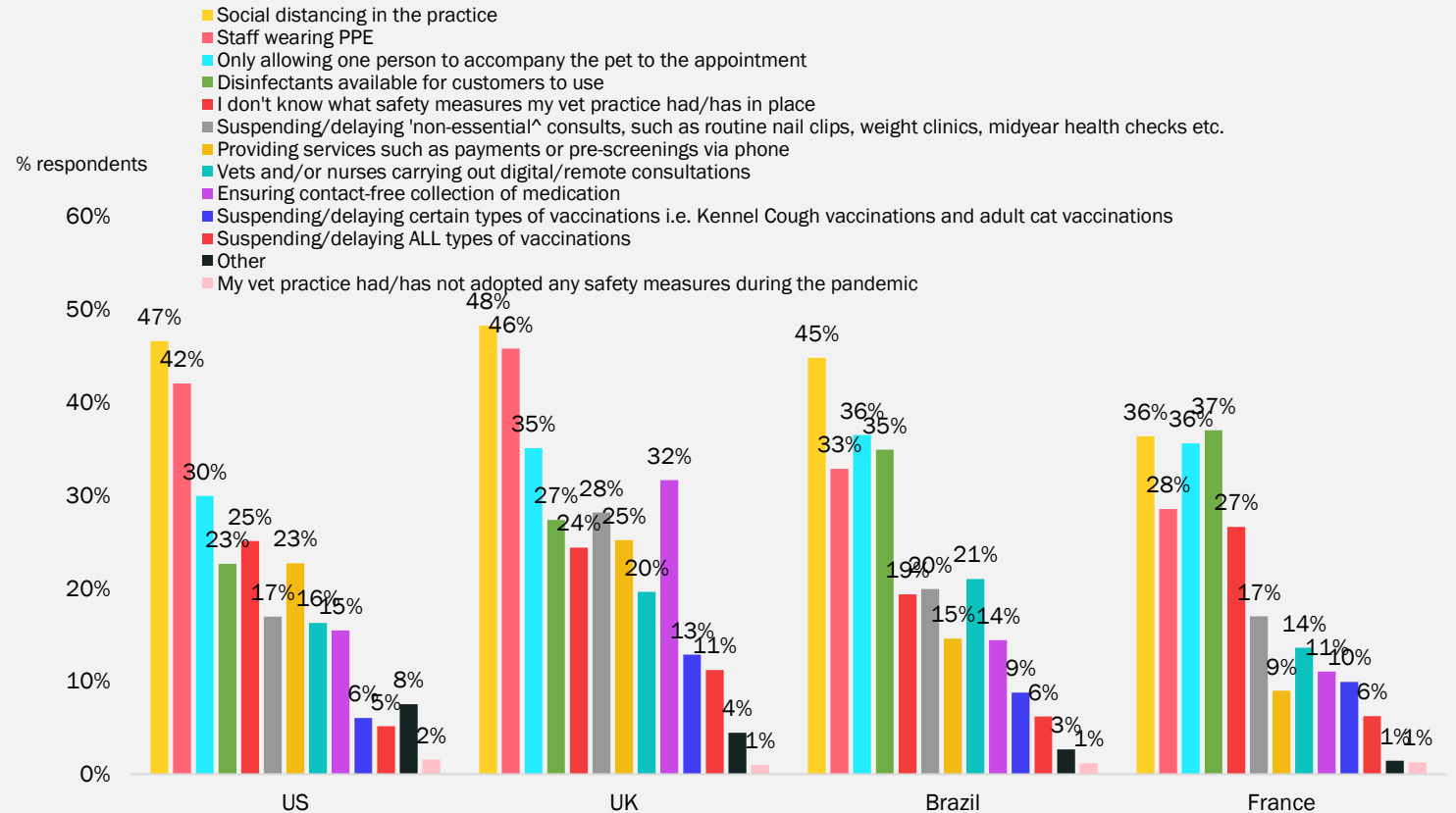
Safety measures

Social distancing is the main safety measure undertaken by vet practices across all four markets

Global level



By market



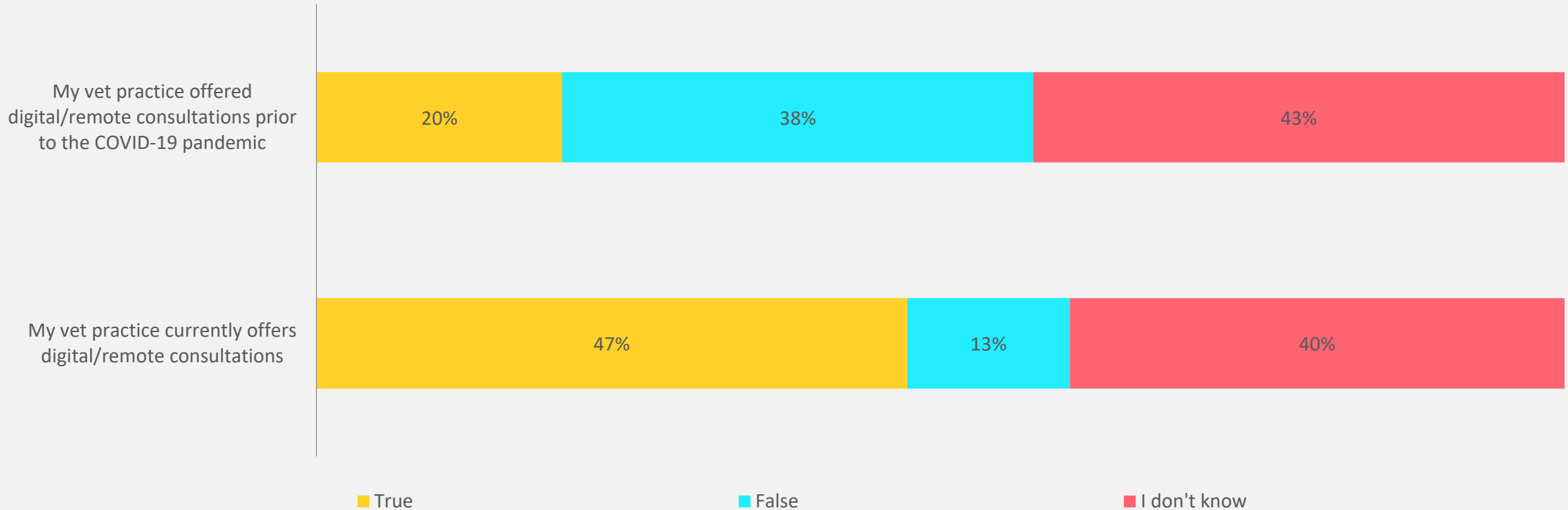
Base: n=3258 US=1010 UK=608 Brazil=1015 France=625 (all respondents)

Q8. Which, if any, of the following safety measures has (or did) your vet practice adopted during the COVID-19 pandemic? (Select all that apply)

Digital consultationations and telemedicine

Across all four markets, there has been a rise in vet practices offering digital/remote consultations (a rise from 20% - 47%)

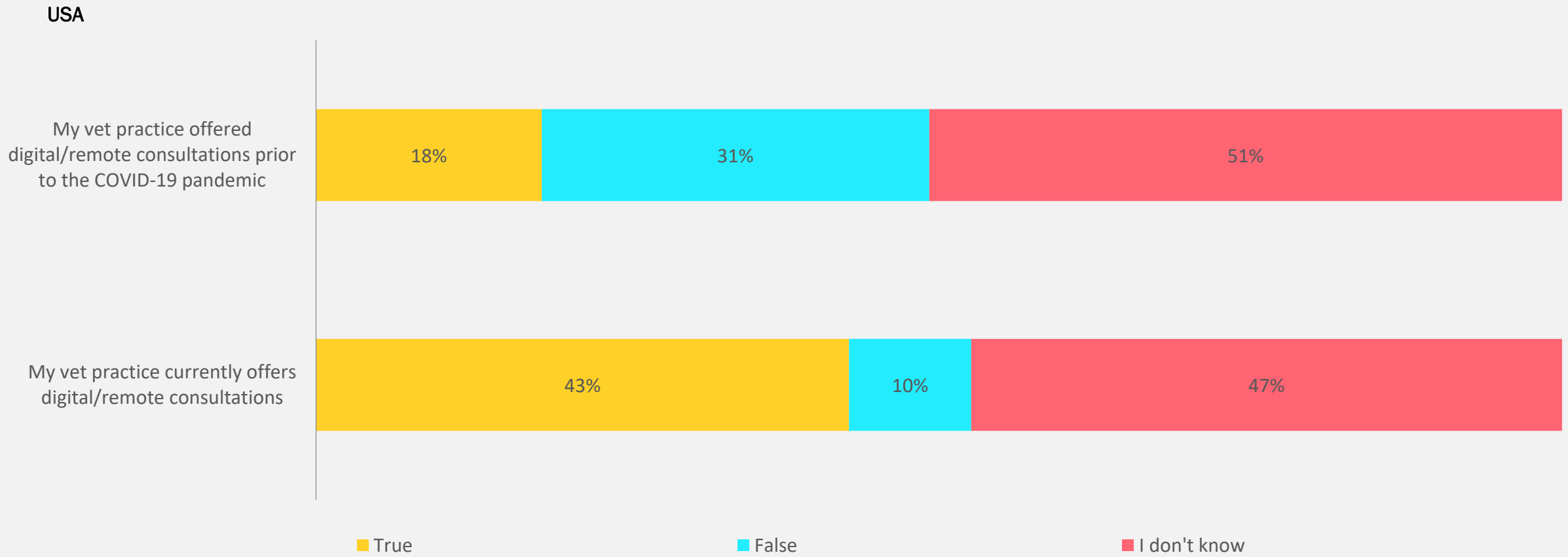
Global level



Base: n=3258 (all respondents)

Q9. Please indicate whether the following statements are true or false. (Select one answer per row)

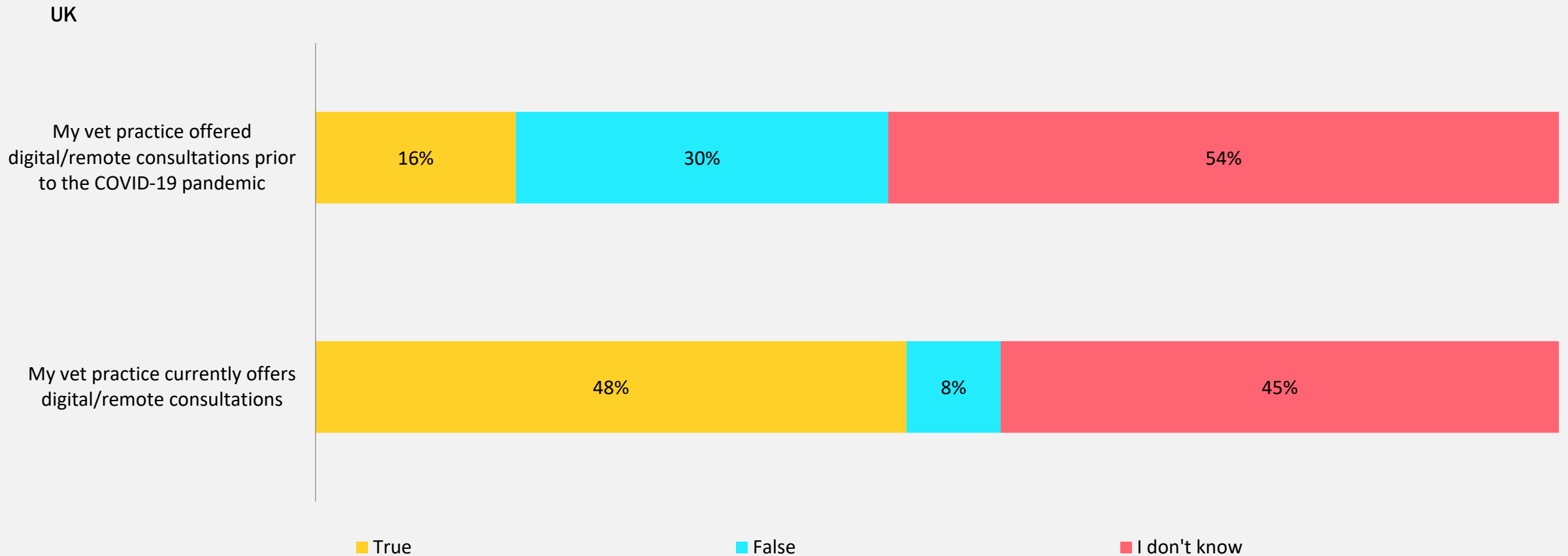
In the US; over four fifths (43%) said their vet practice currently offers digital/remote consultations



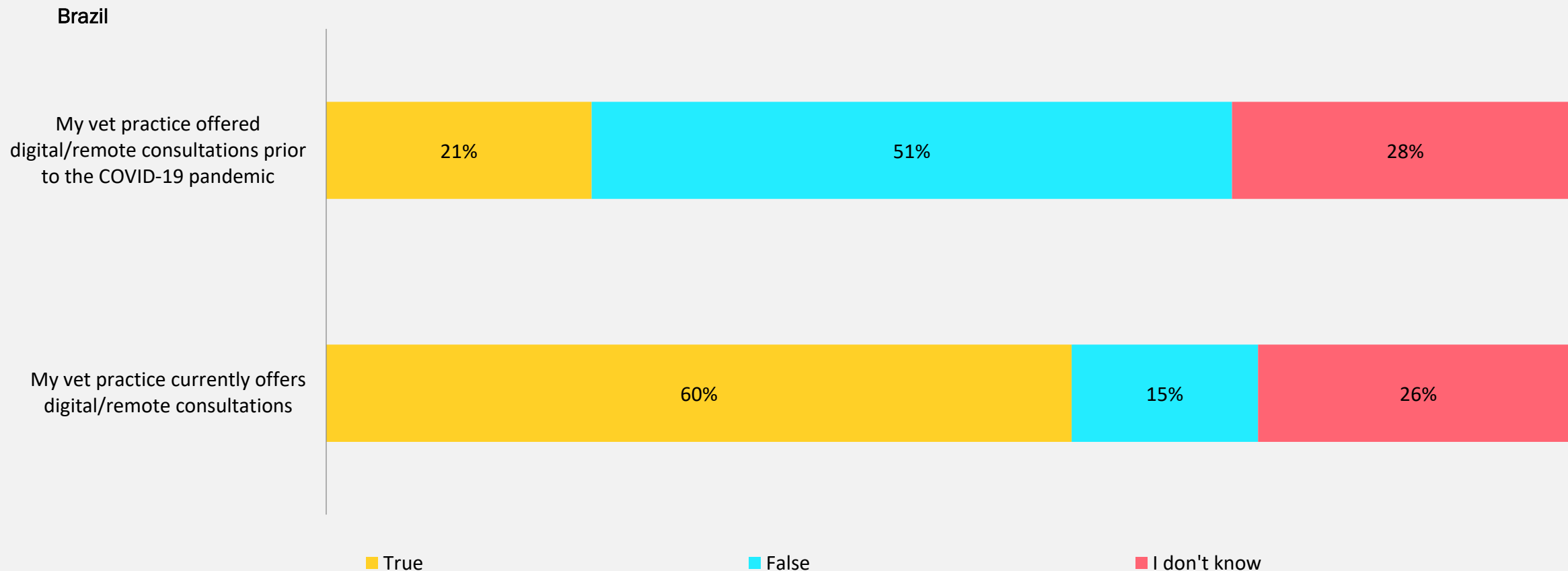
Base: US=1010 (all respondents)

Q9. Please indicate whether the following statements are true or false. (Select one answer per row)

In the UK; almost half (48%) said their vet practice currently offers digital/remote consultations



Brazilian vet practices are most likely to offer virtual consultations; with 6 in 10 owners indicating that their practice currently offers these, compared to just 21% prior to the pandemic

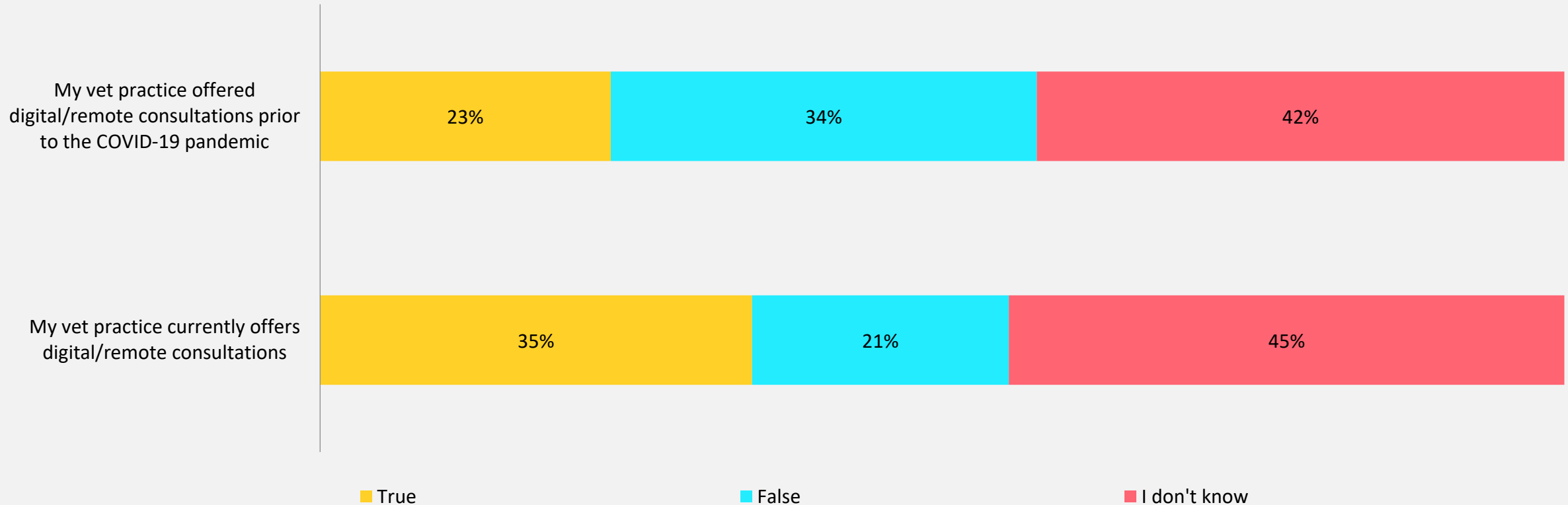


Base: Brazil=1015 (all respondents)

Q9. Please indicate whether the following statements are true or false. (Select one answer per row)

French vet practices are the least likely to offer virtual consultations during the pandemic; with just over a third of owners indicating that their practice offers these

France

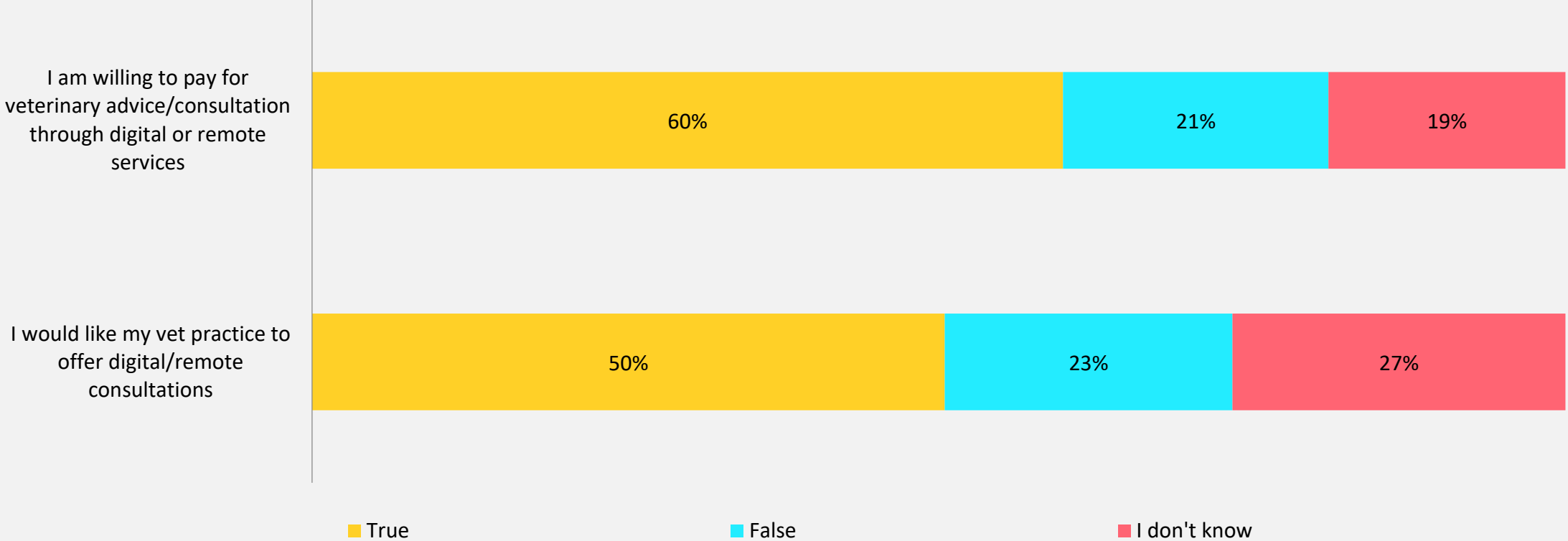


Base: France=625 (all respondents)

Q9. Please indicate whether the following statements are true or false. (Select one answer per row)

Across four markets, three fifths (60%) of respondents are willing to pay for veterinary advice/consultations through digital or remote services

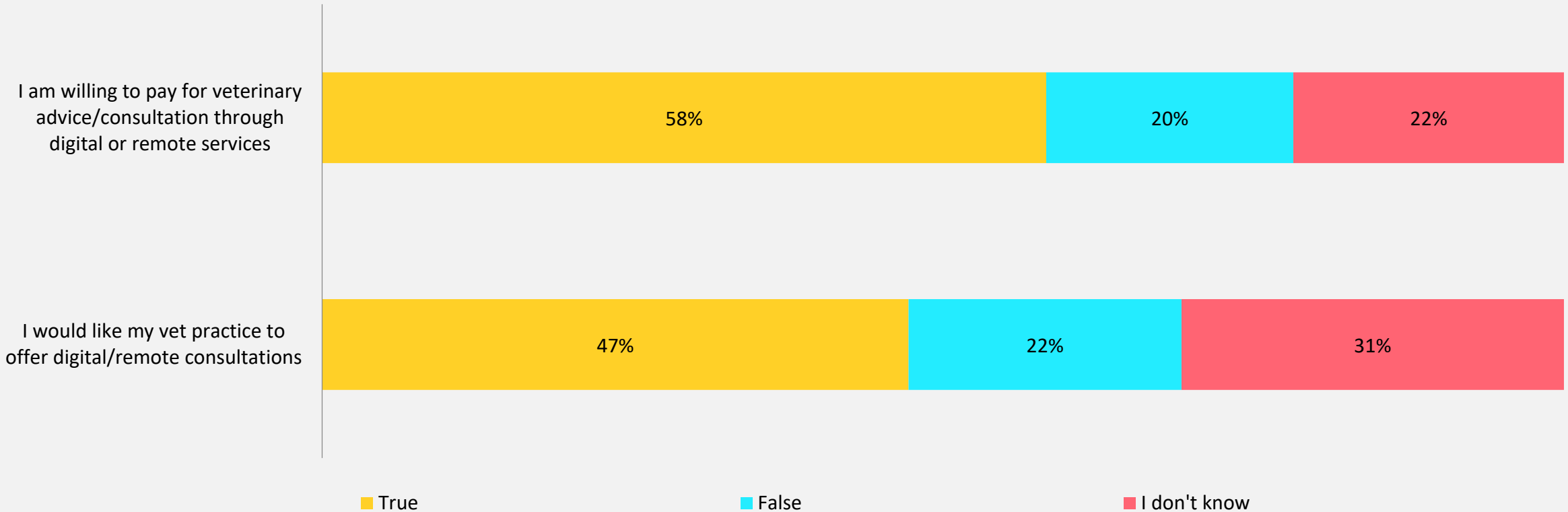
Global level:



Base: n=3258 US=1010 (all respondents) n=1716 (all who do not have digital /remote consultations)
Q10. Please indicate whether the following statement(s) are true or false. (Select one answer per row)

In the US, almost three fifths (58%) of respondents are willing to pay for veterinary advice/consultations through digital or remote services

USA:

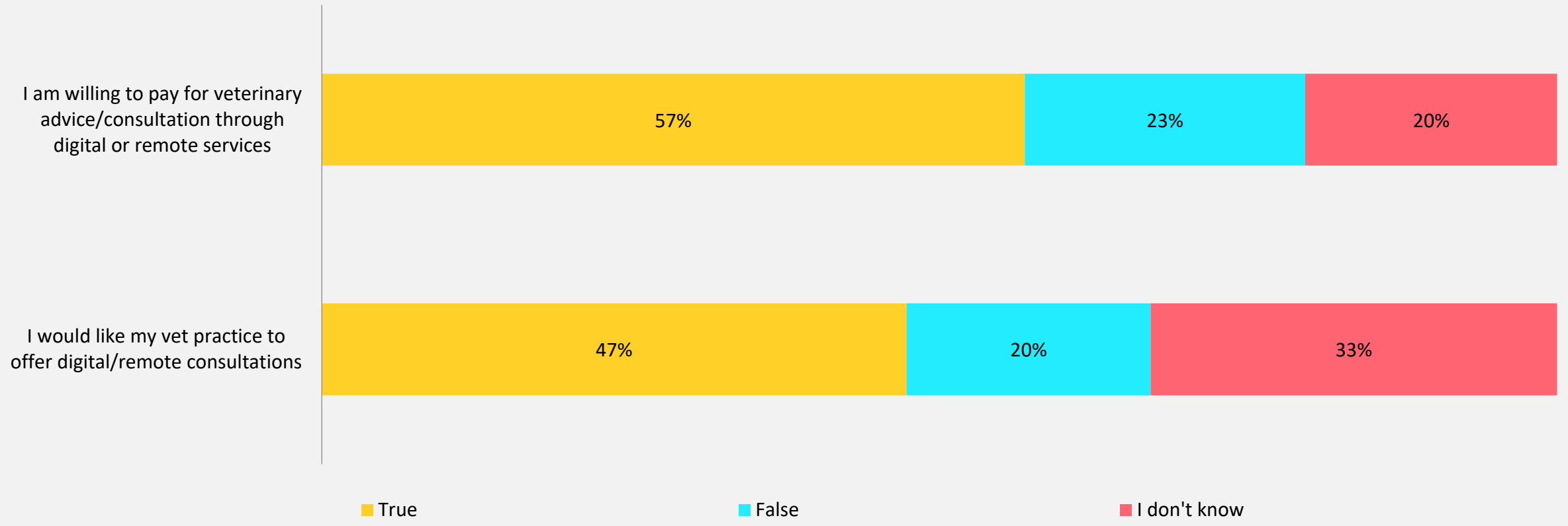


Base: US=1010 (all respondents) US=578 (all who do not have digital /remote consultations)

Q10. Please indicate whether the following statement(s) are true or false. (Select one answer per row)

Almost half (47%) of UK owners would like their vet practice to offer digital/remote consultations yet almost a quarter are not prepared to pay for them

UK:

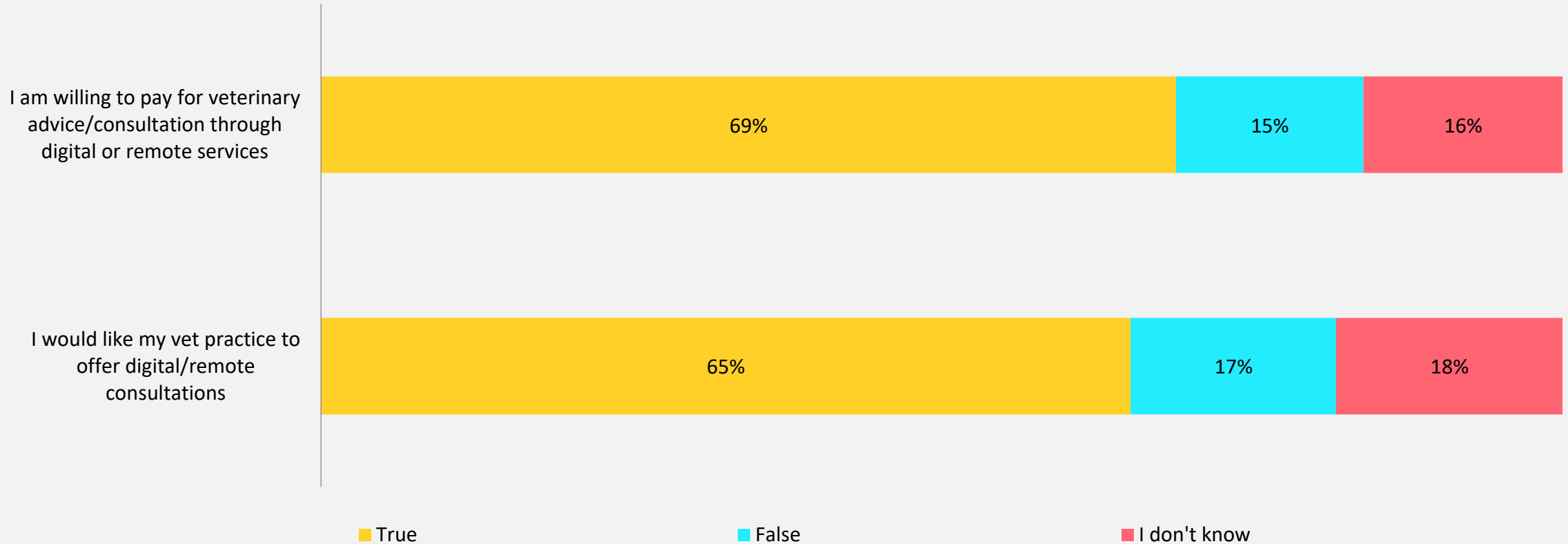


Base: UK=608 (all respondents) UK=319 (all who do not have digital /remote consultations)

Q10. Please indicate whether the following statement(s) are true or false. (Select one answer per row)

In Brazil, almost seven in ten (69%) respondents are willing to pay for veterinary advice/consultations through digital or remote services, while 65% would value this service

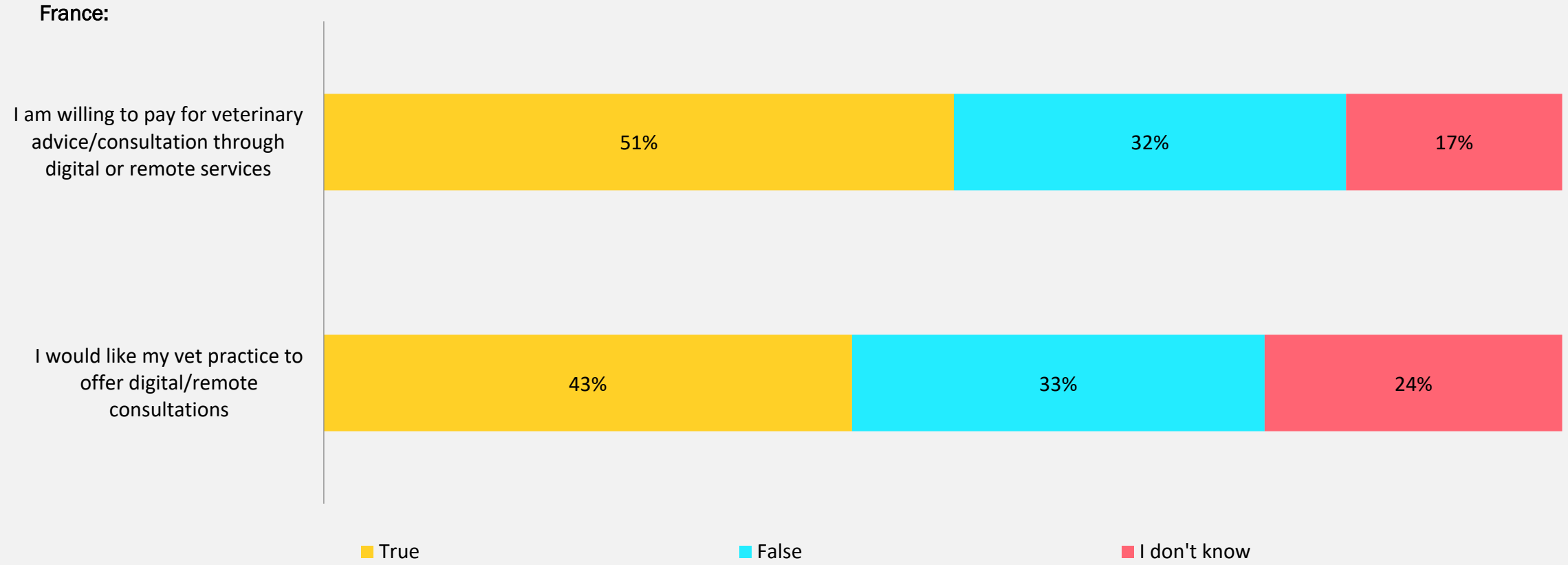
Brazil:



Base: Brazil=1015 (all respondents) Brazil=411 (all who do not have digital /remote consultations)

Q10. Please indicate whether the following statement(s) are true or false. (Select one answer per row)

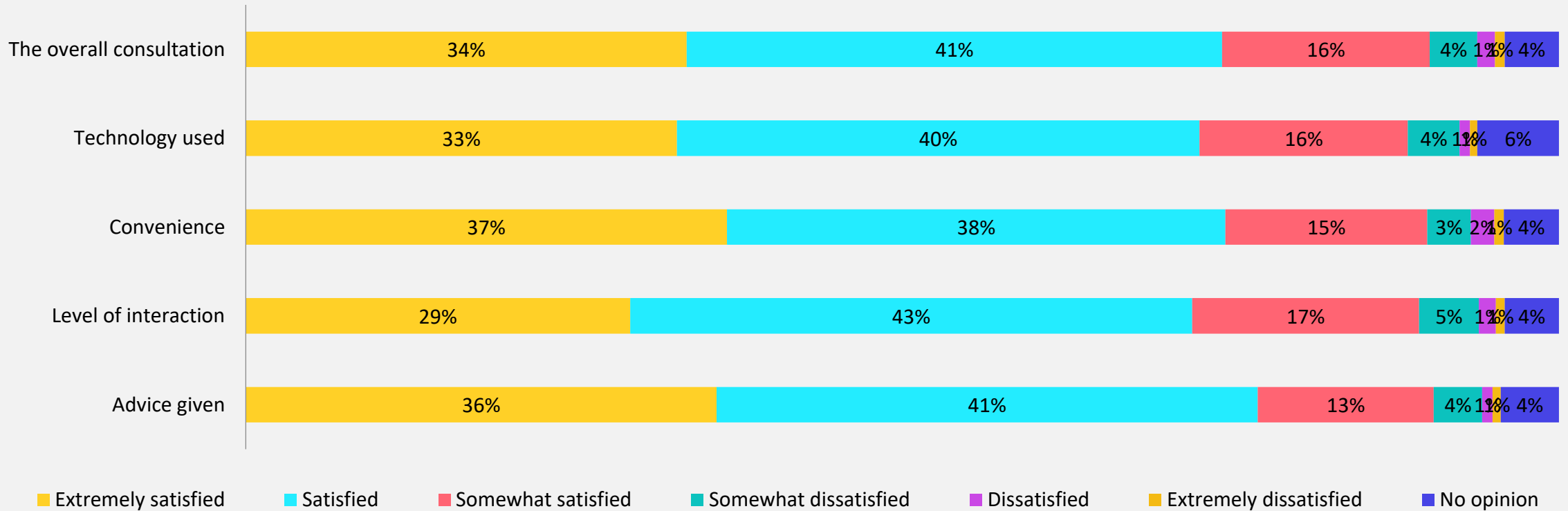
French pet owners are the *least* willing to pay for digital/remote consultations at 32%; yet over 4 in 10 (43%) would like their practice to offer these



Base: France=625 (all respondents) France=408 (all who do not have digital /remote consultations)
Q10. Please indicate whether the following statement(s) are true or false. (Select one answer per row)

Across all four markets, three quarters (75%) of owners are extremely satisfied or satisfied with the overall digital/remote consultations that they had with their vet

Global level:

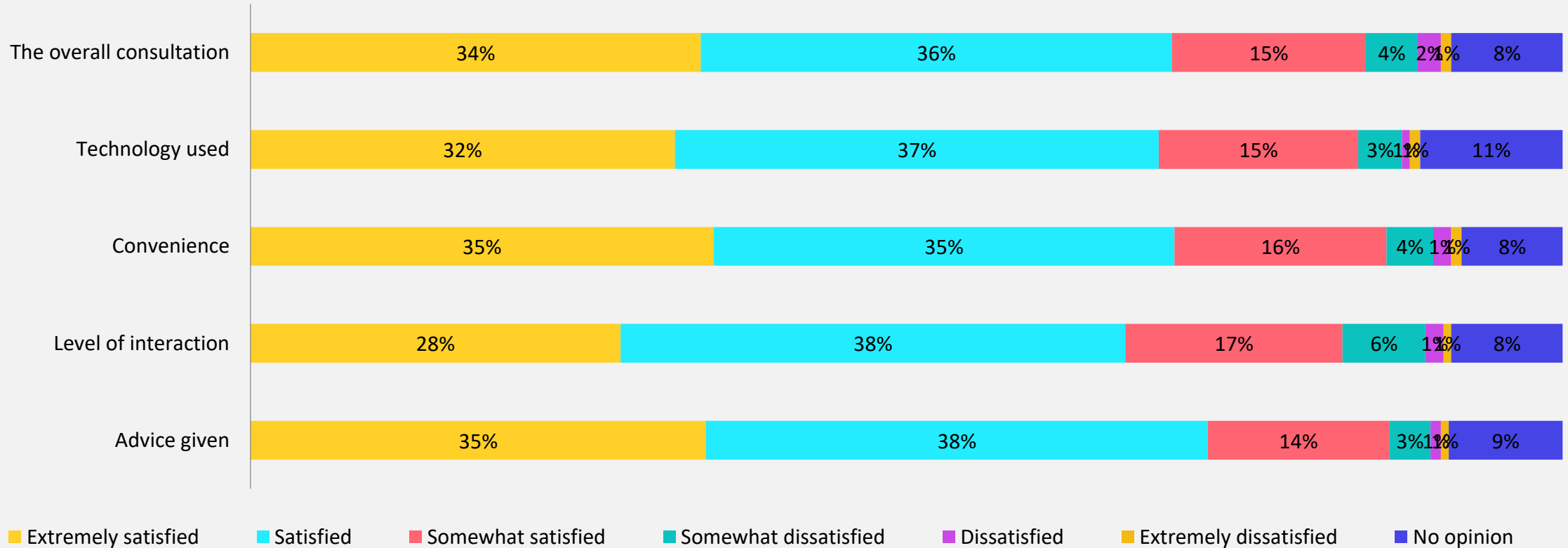


Base: n=1626 (all who've had a digital/remote consultations)

Q11. Please rate your level of satisfaction or dissatisfaction with each of the following aspects of the digital/remote consultations that you had with your vet. If you have had more than one digital/remote consultations, please think of the most recent. (Select one answer per row)

In the US, just over a third of respondents are extremely satisfied with the overall digital/remote consultations

USA:

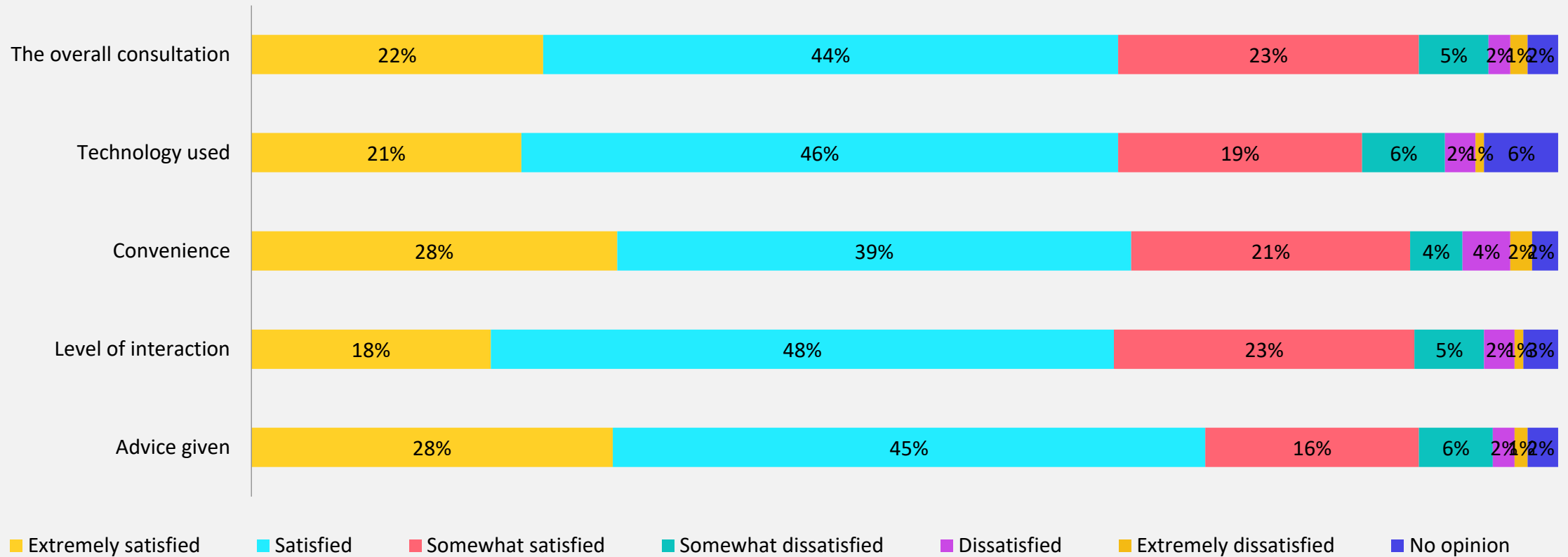


Base: US=507 (all who've had a digital/remote consultations)

Q11. Please rate your level of satisfaction or dissatisfaction with each of the following aspects of the digital/remote consultations that you had with your vet. If you have had more than one digital/remote consultations, please think of the most recent. (Select one answer per row)

In the UK, over a quarter (28%) of respondents are extremely satisfied with the advice given from the digital/remote consultation with their vet

UK:

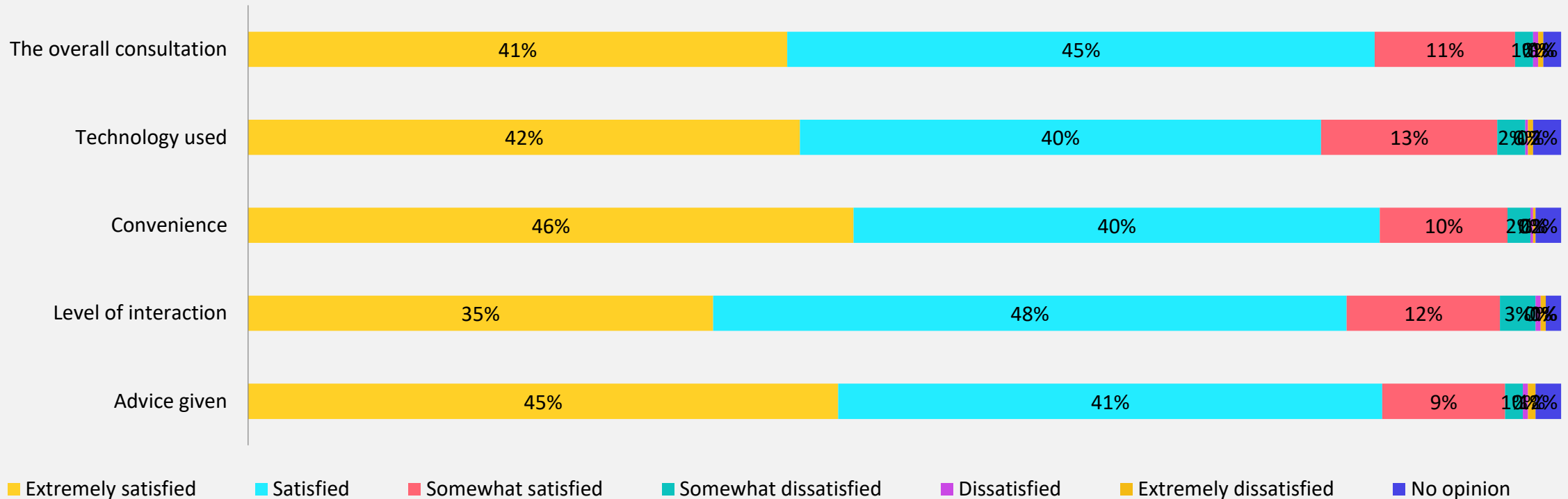


Base UK=300 (all who've had a digital/remote consultation)

Q11. Please rate your level of satisfaction or dissatisfaction with each of the following aspects of the digital/remote consultations that you had with your vet. If you have had more than one digital/remote consultations, please think of the most recent. (Select one answer per row)

Brazilian owners were particularly satisfied with the convenience element of digital consultations; as well as the advice they were given during the consultation

Brazil:

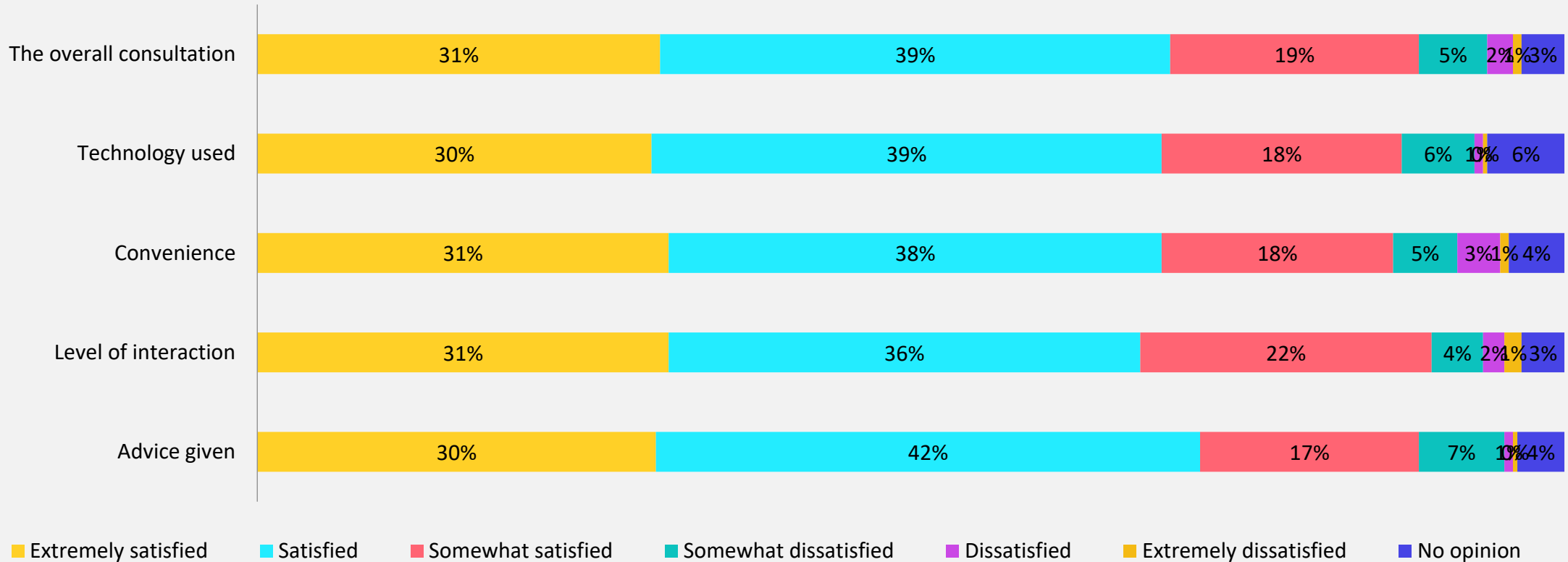


Base: Brazil=514 (all who've had a digital/remote consultation)

Q11. Please rate your level of satisfaction or dissatisfaction with each of the following aspects of the digital/remote consultations that you had with your vet. If you have had more than one digital/remote consultations, please think of the most recent. (Select one answer per row)

In France, three in ten (30%) respondents are extremely satisfied with the advice given from the digital/remote consultation

France:



Base: France=305 (all who've had a digital/remote consultations)

Q11. Please rate your level of satisfaction or dissatisfaction with each of the following aspects of the digital/remote consultations that you had with your vet. If you have had more than one digital/remote consultations, please think of the most recent. (Select one answer per row)

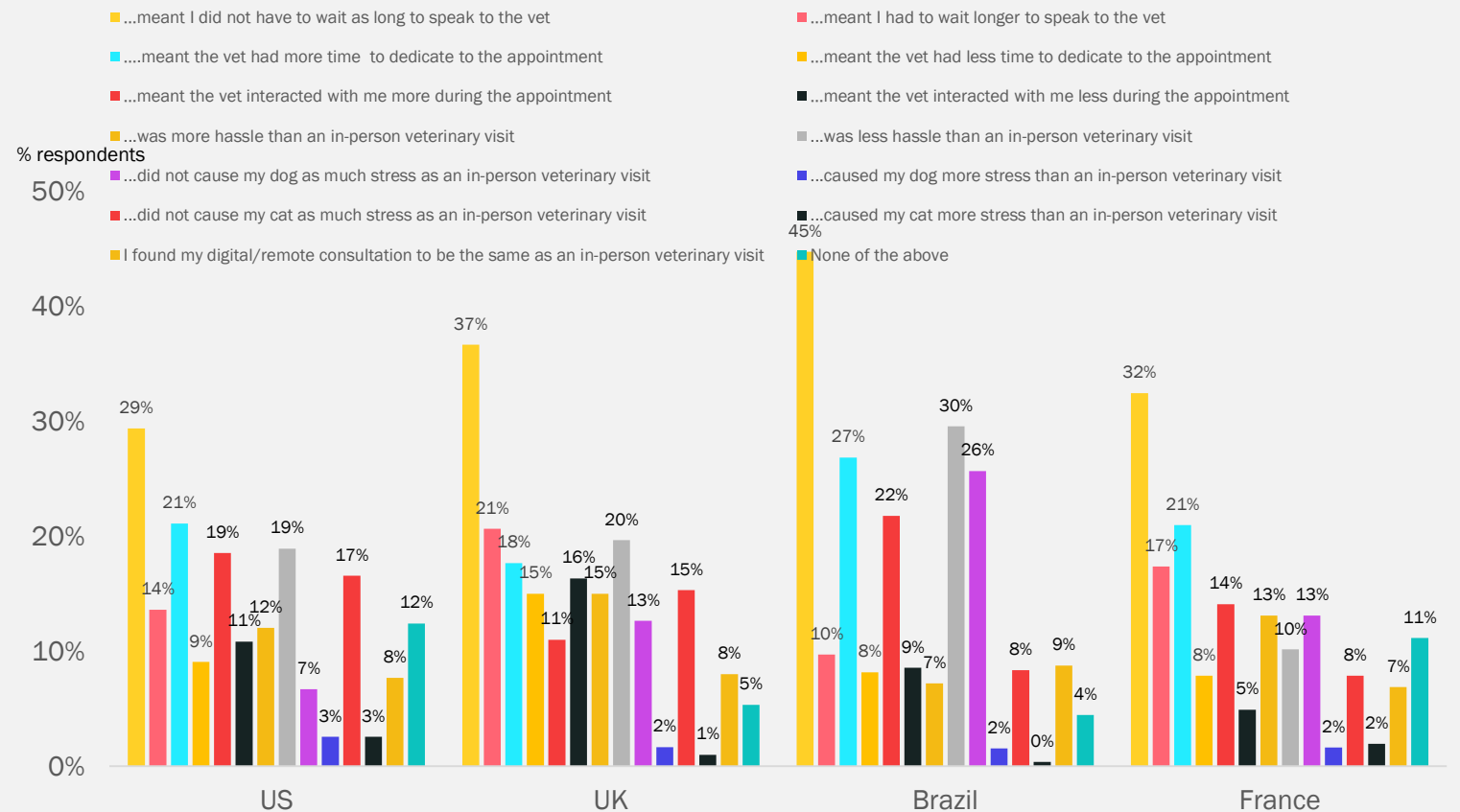
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Over a third (36%) of respondents agreed they did not have to wait as long to speak to the vet, compared to a regular 'in-person' vet visit

Global level



By market

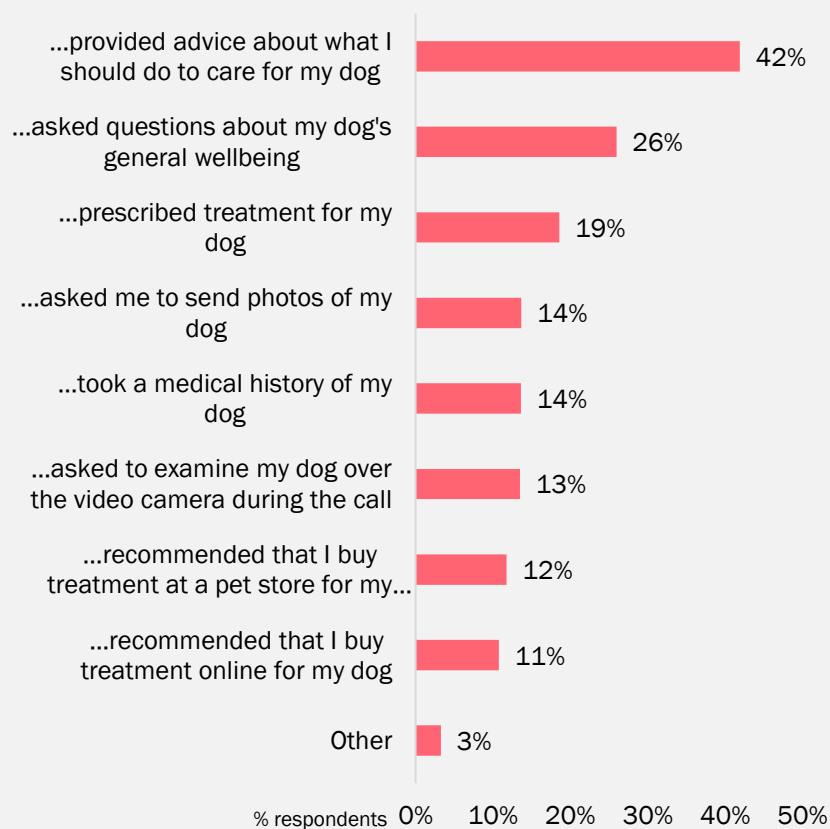


Base: n=1626 US=507 UK=300 Brazil=514 France=305 (all who've had a digital/remote consultations)

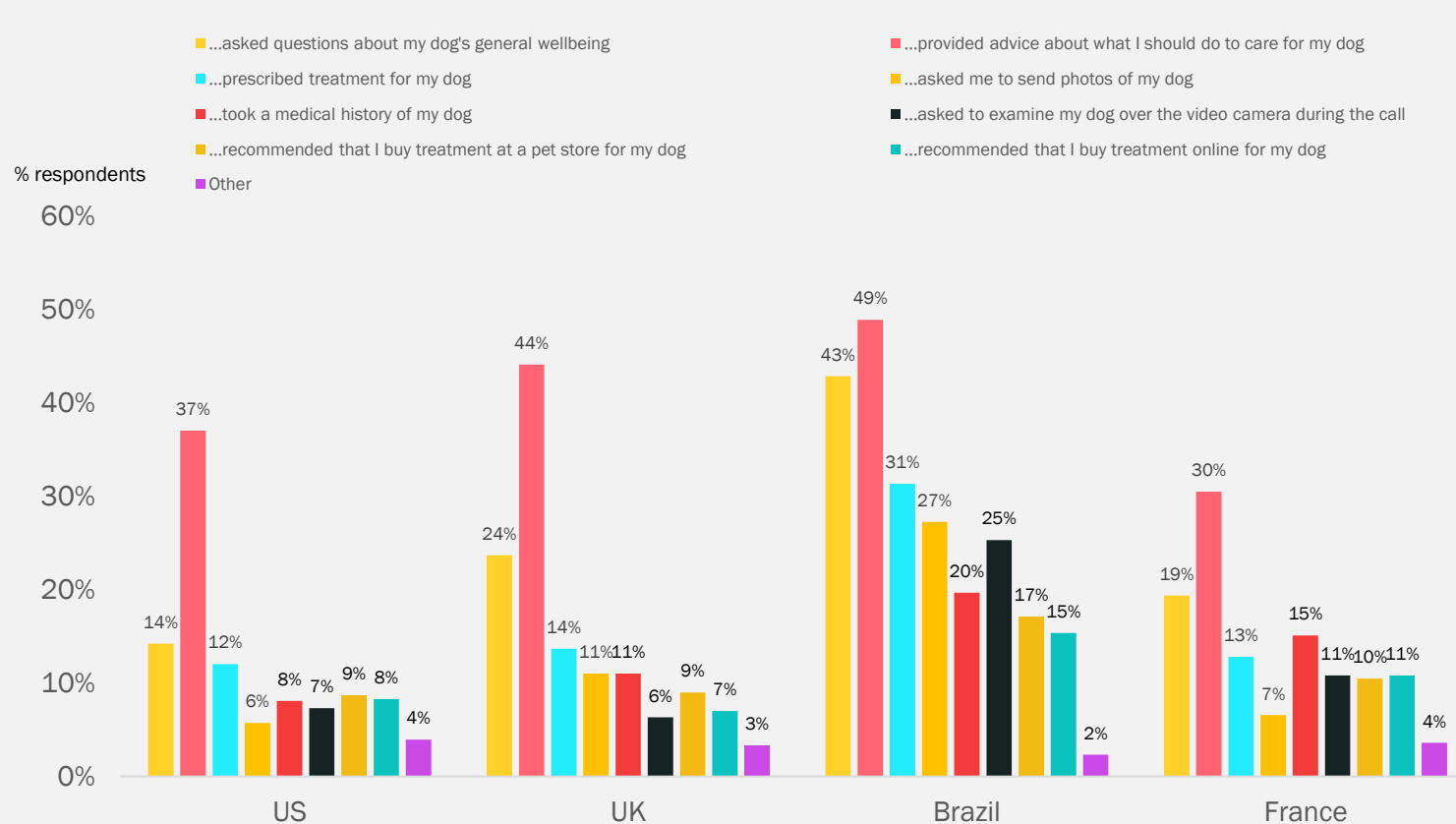
Q12. How did your digital/remote consultation compare to a 'regular' in-person veterinary visit? (Select all that apply) The digital/remote consultation...

Over a quarter (26%) of respondents were asked about their dog's general wellbeing

Global level



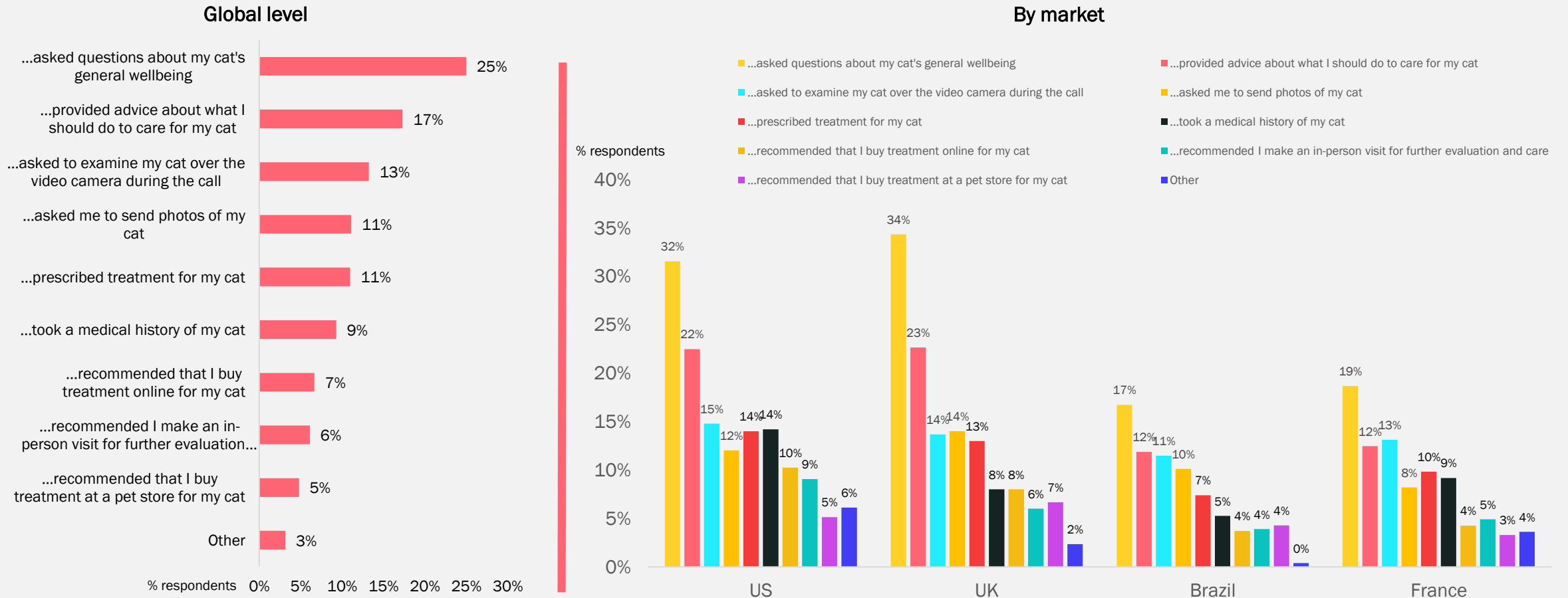
By market



Base: n=1626 US=507 UK=300 Brazil=514 France=305 (all who've had a digital/remote consultations) (dog owners) - see notes section for details on base sizes

Q13. What type of care was provided via the digital/remote consultation that you had with your vet? (Select all that apply) The vet...

A quarter (25%) of respondents were asked about their cat's general wellbeing

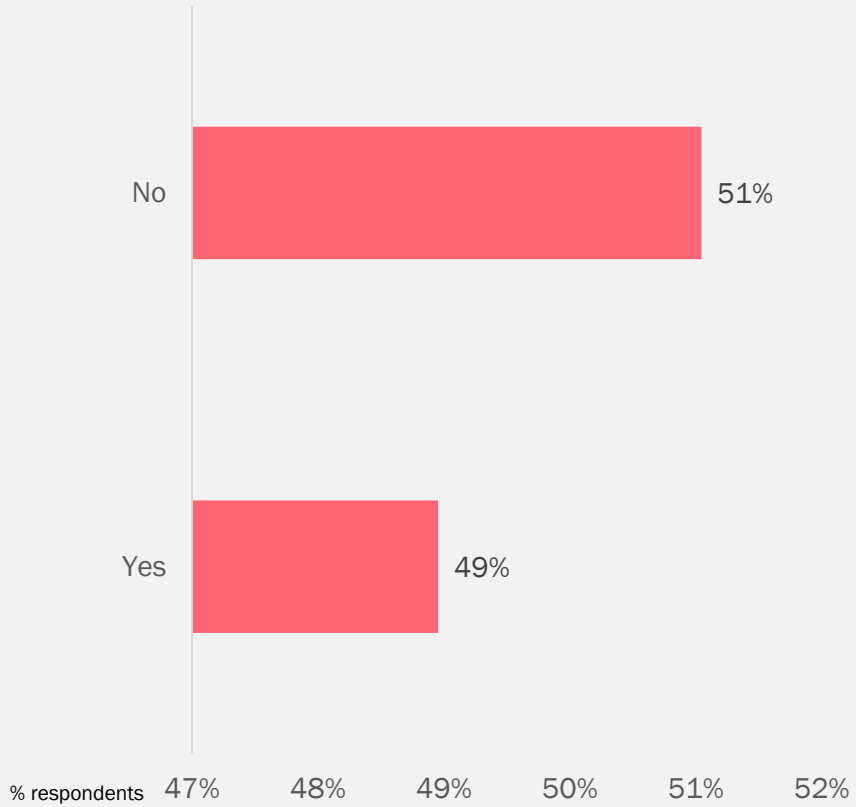


Base: n=1626 US=507 UK=300 Brazil=514 France=305 (all who've had a digital/remote consultations) (cat owners) – see notes section for details on base sizes

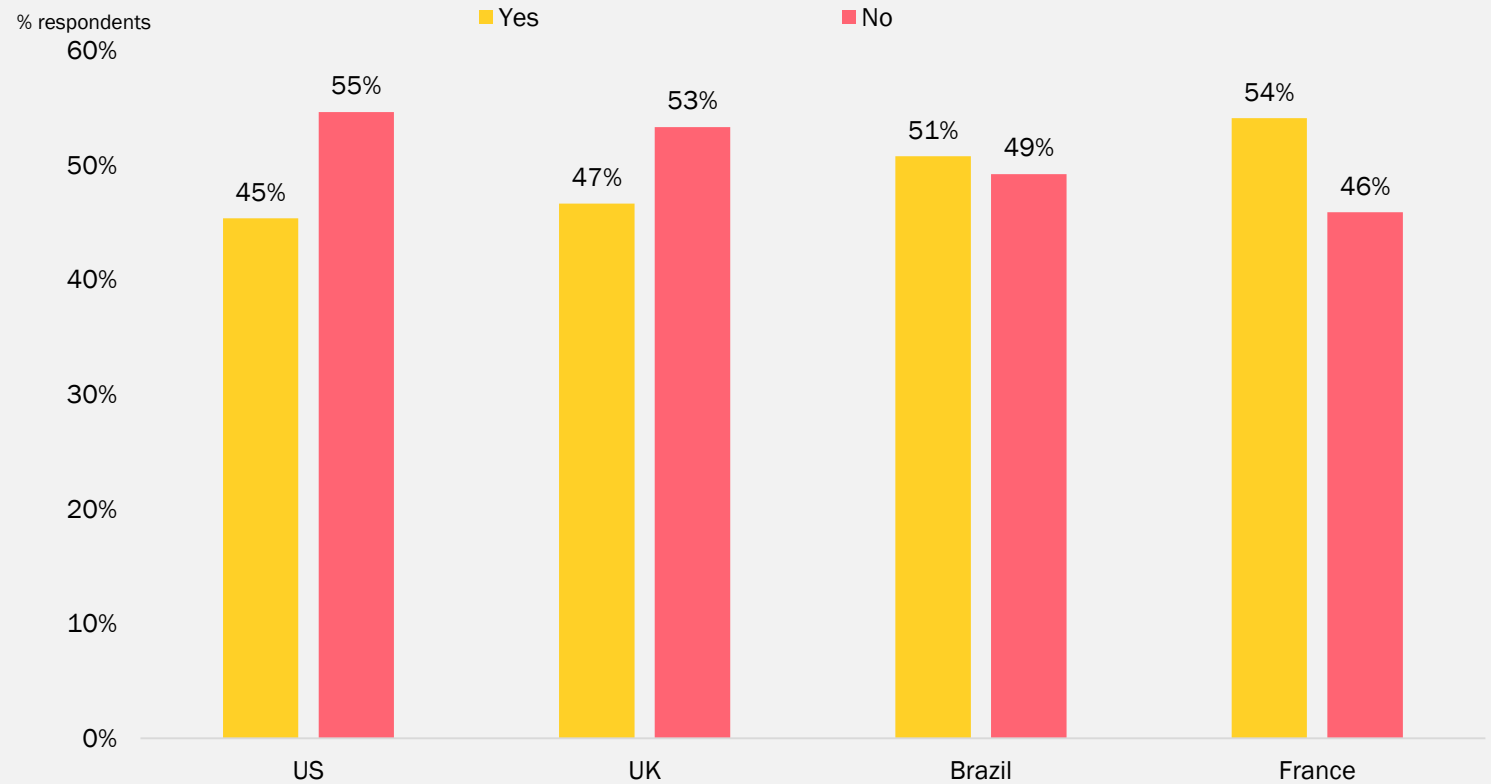
Q13. What type of care was provided via the digital/remote consultation that you had with your vet? (Select all that apply) The vet...

For just under half (49%), the digital/remote consultation led to an in-person veterinary visit

Global level



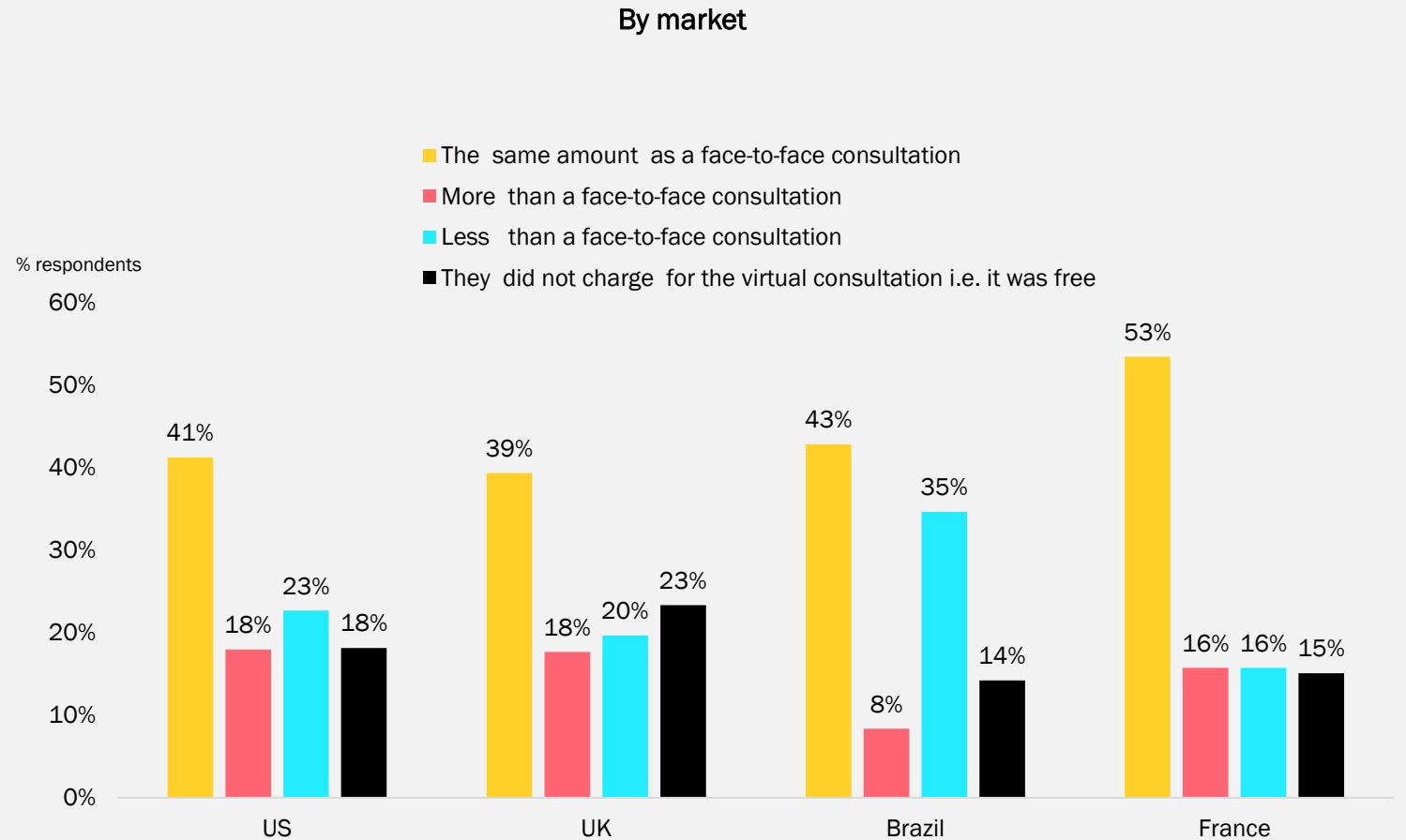
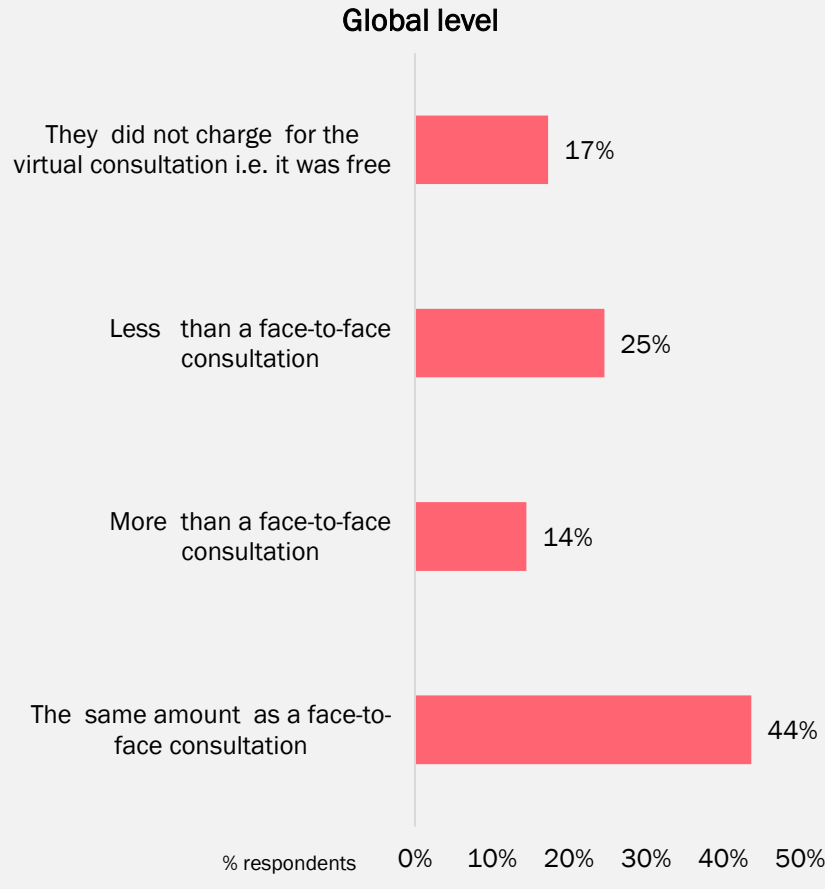
By market



Base: n=1626 US=507 UK=300 Brazil=514 France=305 (all who've had a digital/remote consultations)

Q14. Did the digital/remote consultation that you had with your vet lead to an in-person veterinary visit? (Select one answer only)

Over two fifths (44%) of owners paid the same amount for a digital consultation as they would for a face-to-face consultation; while 1 in 7 (14%) actually paid more for their digital consultation

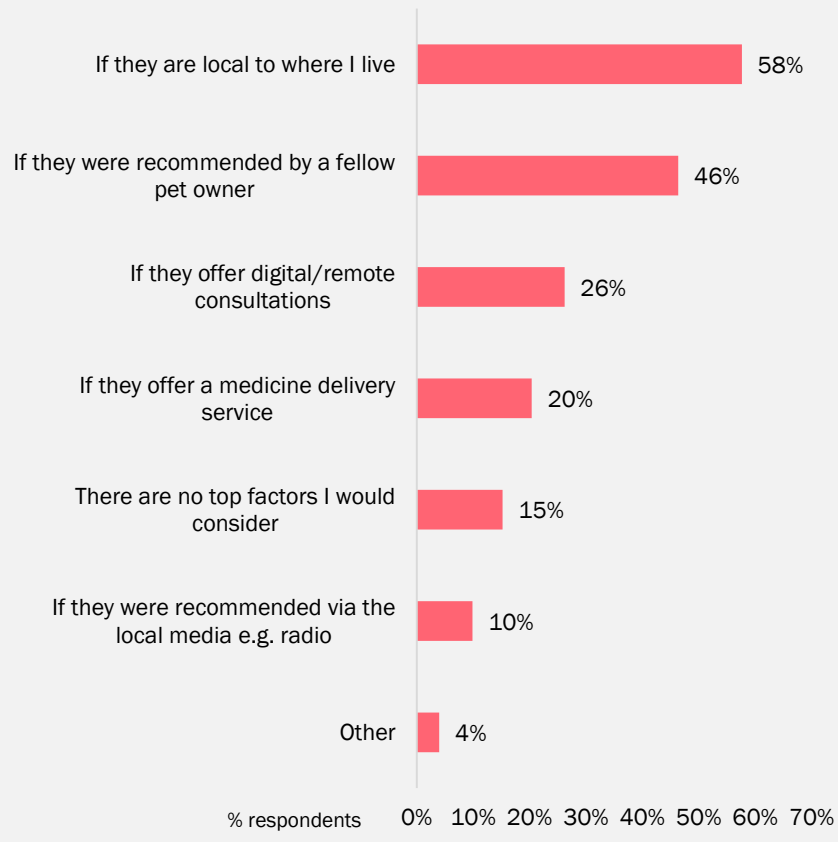


Base: n=1626 US=507 UK=300 Brazil=514 France=305 (all who've had a digital/remote consultation)

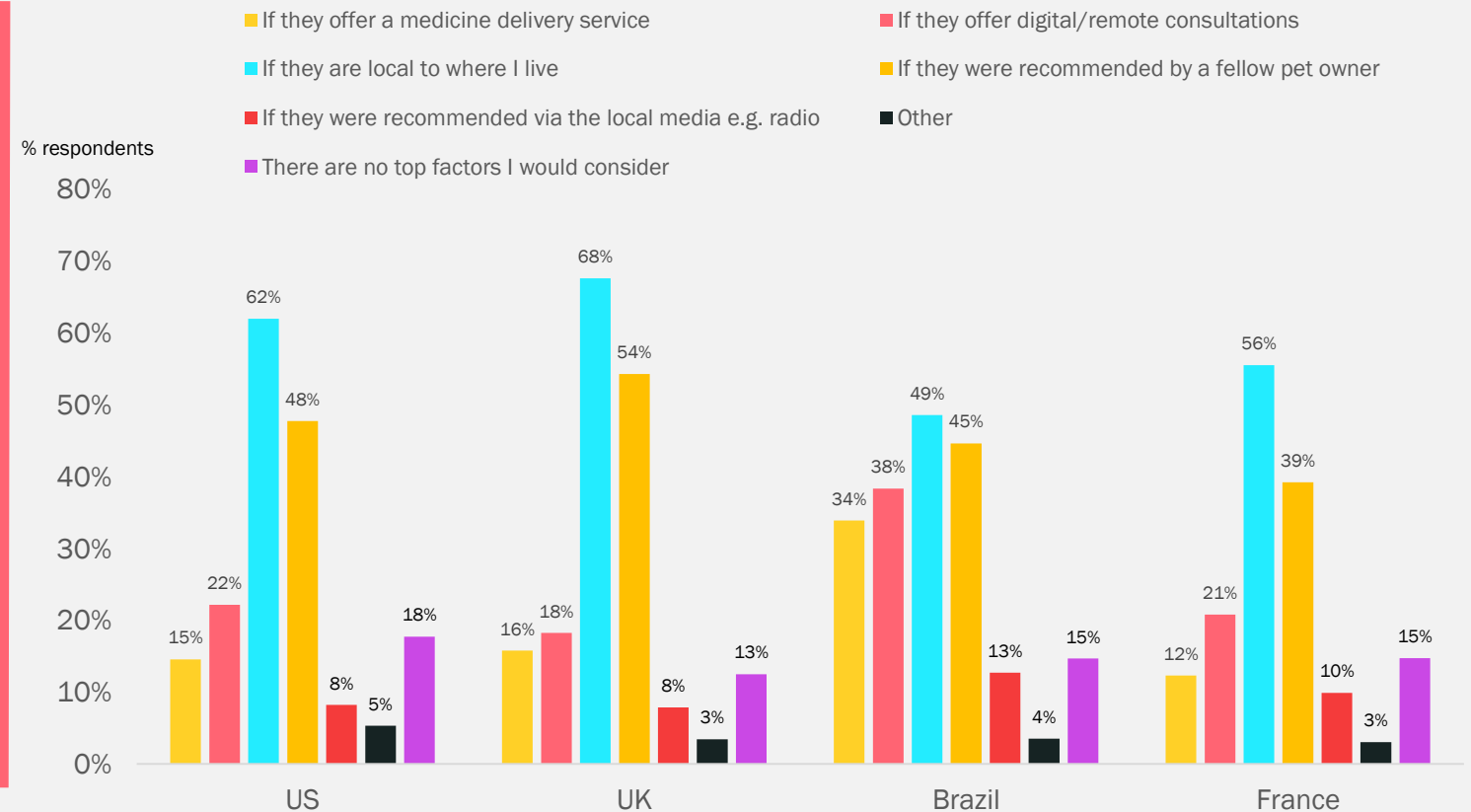
Q15. How much, if anything, did your vet charge for the digital/remote consultation? (Select one answer only)

Almost 6 in 10 (58%) consider a new vet practice being local to where they live a top factor

Global level



By market

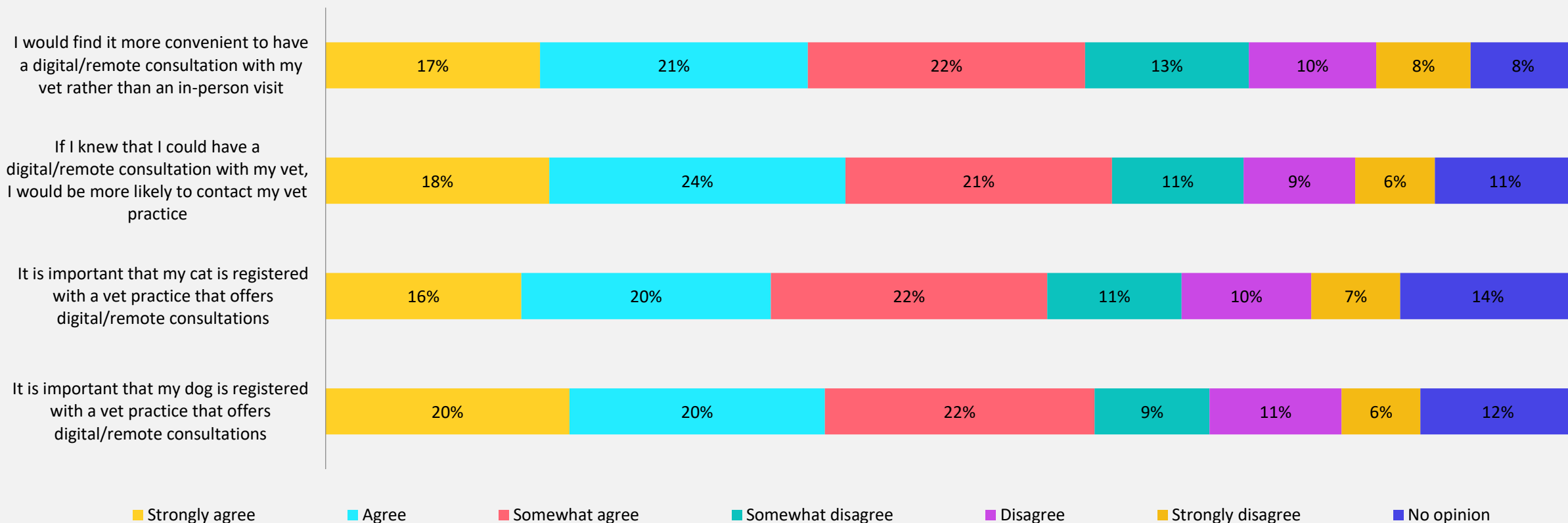


Base: n=3258 US=1010 UK=608 Brazil=1015 France=625 (all respondents)

Q16. What are the top factors, if any, that you would consider when thinking about registering your dog/cat with a new vet practice? (Tick up to three)

Across four markets, almost a fifth (18%) strongly agree that if they knew that they could have a digital/remote consultation with their vet, they would be more likely to contact their vet practice

Global level

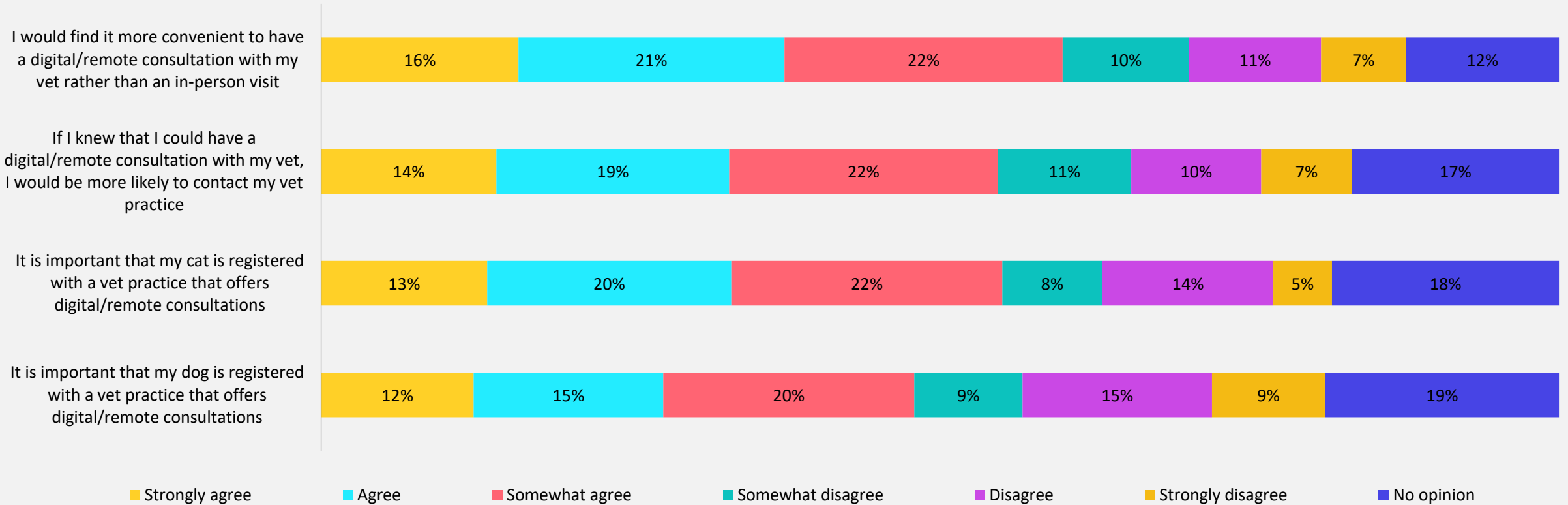


Base: n=3258 (all respondents) n=1630 (all dog owners) n=1628 (all cat owners)

Q17. Please indicate the extent to which you agree or disagree with the following statements. (Select one answer per row)

In the US, 1 in 7 (14%) strongly agree that if they knew that they could have a digital/remote consultation with their vet, they would be more likely to contact their vet practice

USA

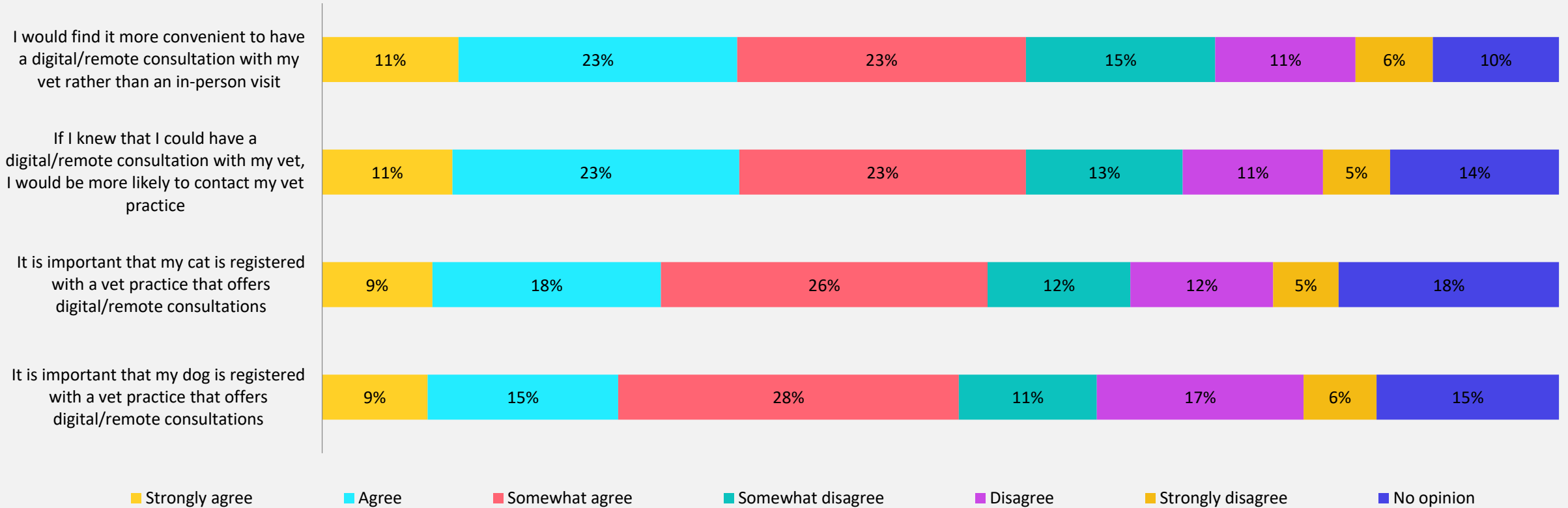


Base: US=1010 (all respondents) US=503 (all dog owners) US=507 (all cat owners)

Q17. Please indicate the extent to which you agree or disagree with the following statements. (Select one answer per row)

In the UK, Over 1 in 10 (11%) strongly agree that if they knew that they could have a digital/remote consultation with their vet, they would be more likely to contact their vet practice

UK

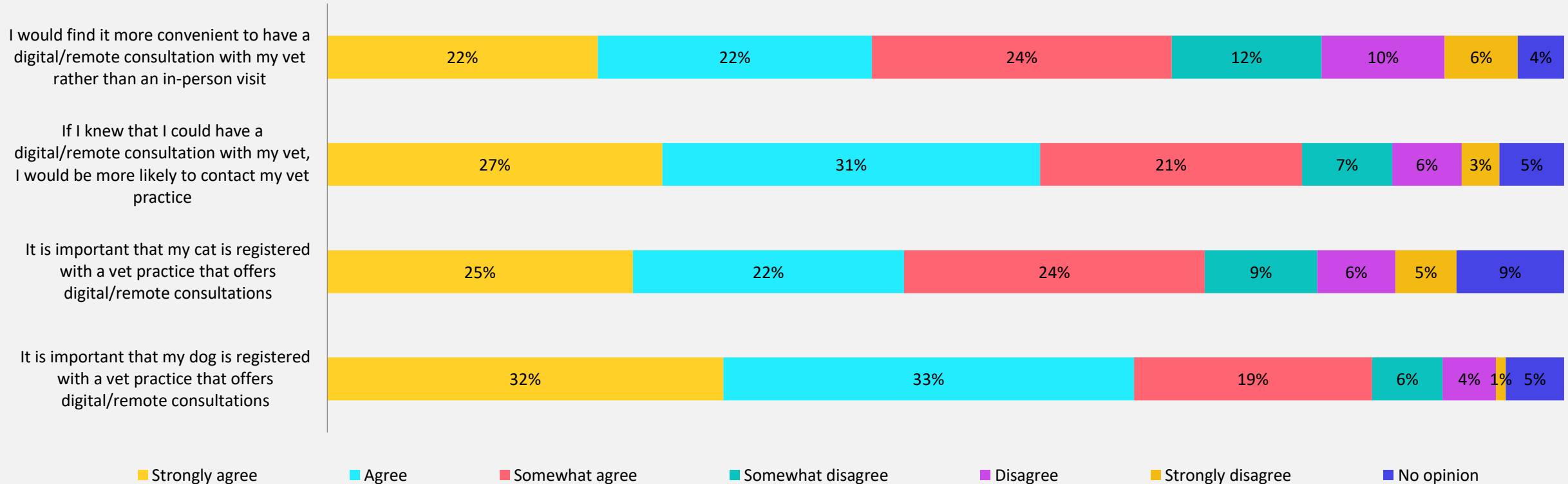


Base: UK=608 (all respondents) UK=305 (all dog owners) UK=303 (all cat owners)

Q17. Please indicate the extent to which you agree or disagree with the following statements. (Select one answer per row)

In Brazil, over a quarter (27%) strongly agree that if they knew that they could have a digital/remote consultation with their vet, they would be more likely to contact their vet practice

Brazil

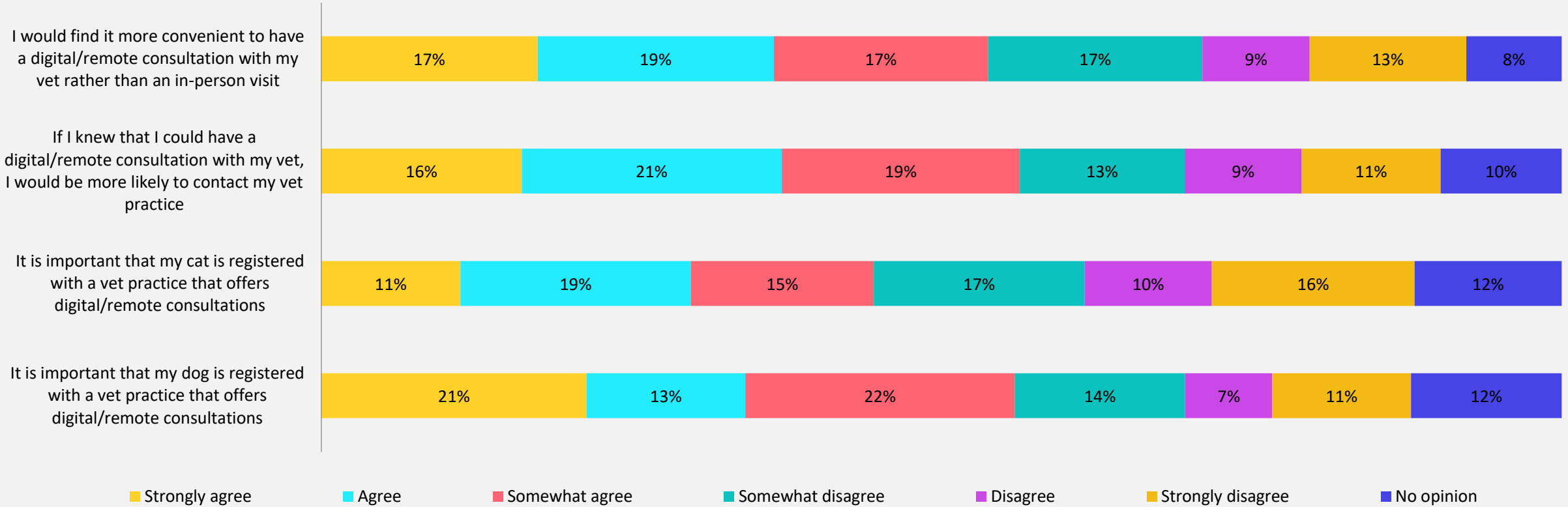


Base: Brazil=1015 (all respondents) Brazil=509 (all dog owners) Brazil=506 (all cat owners)

Q17. Please indicate the extent to which you agree or disagree with the following statements. (Select one answer per row)

In France, 1 in 6 (16%) strongly agree that if they knew that they could have a digital/remote consultation with their vet, they would be more likely to contact their vet practice

France

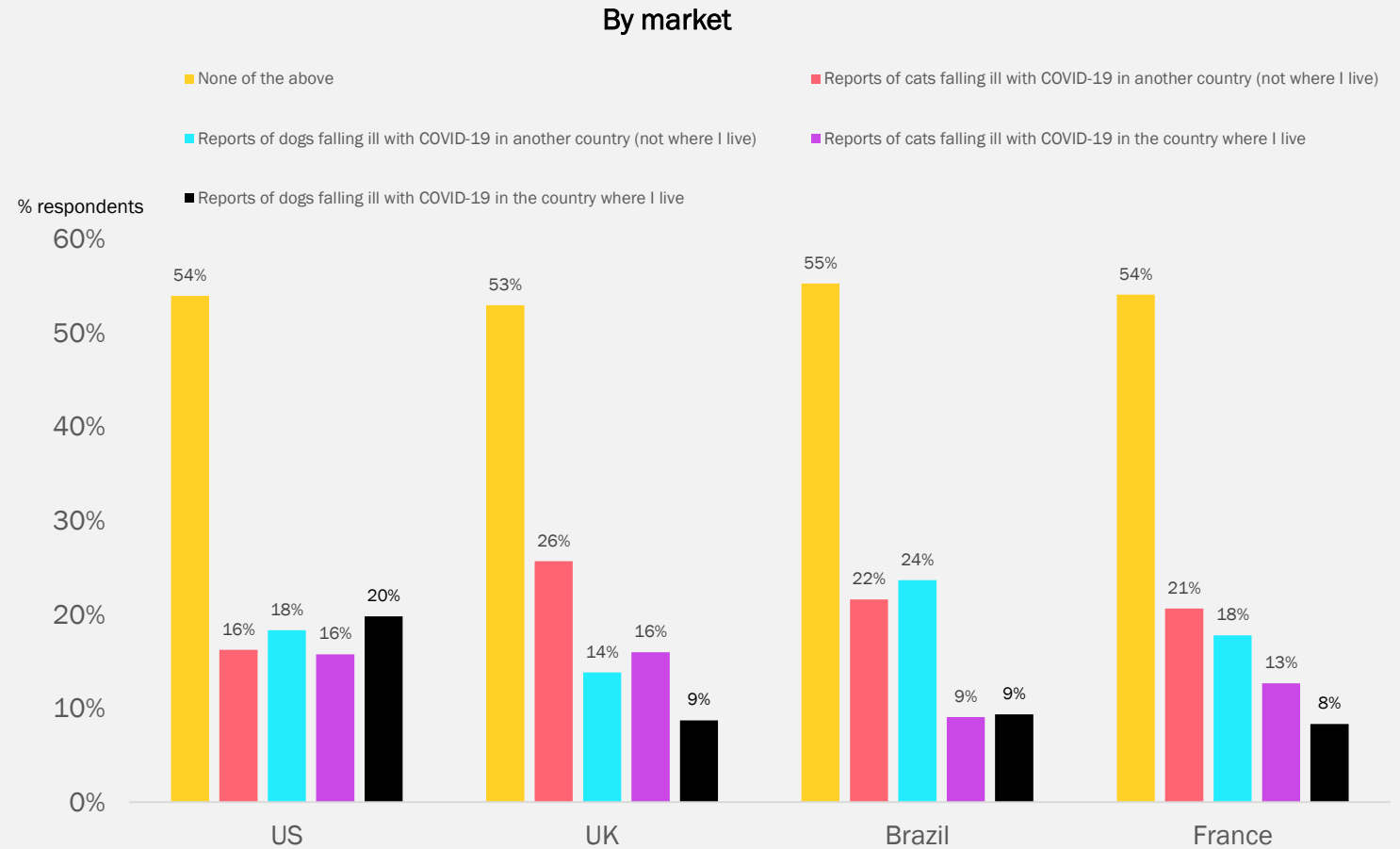
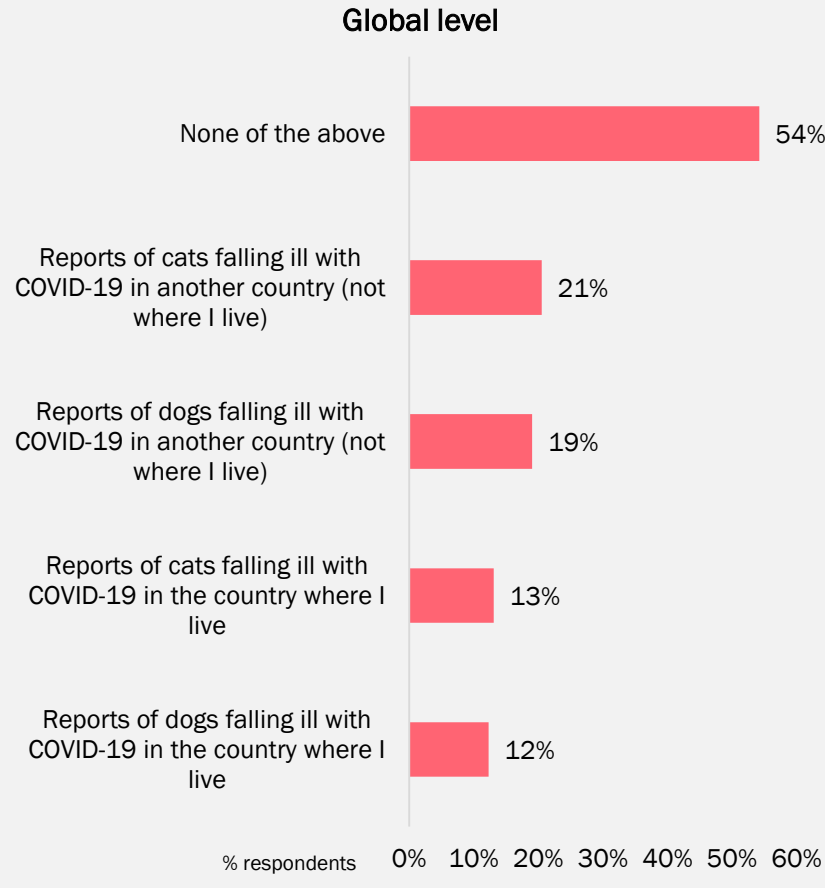


Base: France=625 (all respondents) France=313 (all dog owners) France=312 (all cat owners)

Q17. Please indicate the extent to which you agree or disagree with the following statements. (Select one answer per row)

COVID-19 in pets

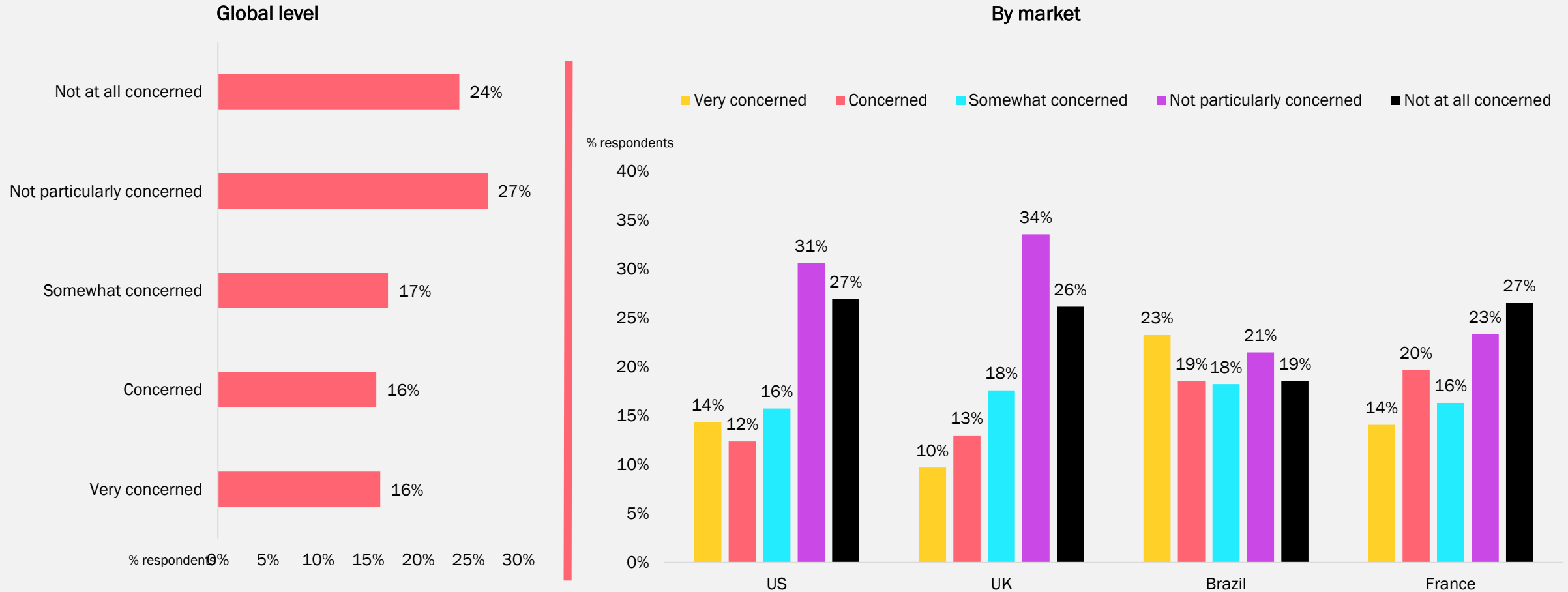
46% of respondents have heard reports of either cats or dog falling ill with COVID, either at home or abroad



Base: n=3258 US=1010 UK=608 Brazil=1015 France=625 (all respondents)

Q18. Which, if any, of the following have you heard of? (Select all that apply)

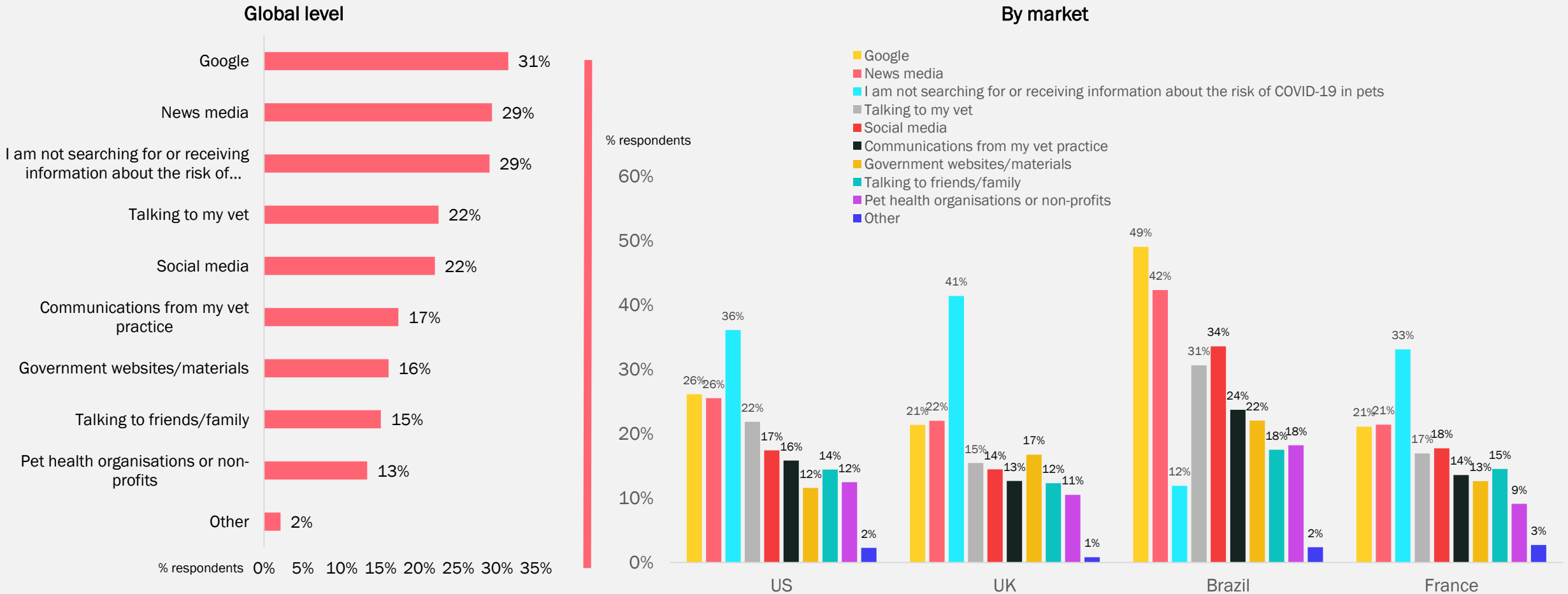
Almost a third (32%) of respondents are either 'Concerned' or 'Very concerned' about their dog/ cat falling ill with COVID-19



Base: n=3258 US=1010 UK=608 Brazil=1015 France=625 (all respondents)

Q19. How concerned, if at all, are you about your dog / cat falling ill with COVID-19? (Select one answer only)

Google is the top source for searching for or receiving information about the risk of COVID-19 in pets, with almost a third (31%) using it



Base: n=3258 US=1010 UK=608 Brazil=1015 France=625 (all respondents)

Q20. How, if at all, are you searching for or receiving information about the risk of COVID-19 in pets? (Select all that apply)

*Thank
you!*

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