

## Pet Owner Survey *France findings*

### 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.

### Primary French Findings

#### **The Covid-19 pandemic disrupted health care for French pets.**

- More than a quarter of pet owners (26%) delayed or avoided contacting their veterinary practice since the start of the Covid-19 pandemic.
- More than 1 in 10 pets (11%) missed essential, routine treatments like vaccines, and flea, tick or worm treatments.
- Pet owners cited delaying non-essential activities and concerns around exposure beyond social bubbles as primary reasons for avoiding veterinary practices.

#### **73% of French pet owners were able to list at least one safety measure adopted by their veterinary practice during the COVID-19 pandemic.**

- Disinfectants available for customers to use, social distancing 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 use increased and French pet owners were satisfied with results**

- Just over 1/3<sup>rd</sup> (35%) of pet owners stated their veterinarian offered digital/remote consultations, up from 23 per cent prior to the pandemic.
- 70% of pet owners who has a consultation with their veterinarian using remote or digital tools were satisfied or extremely satisfied with the overall consultation.
- 51% of all pet owners said they are willing to pay for veterinary advice/consultation through these services and 20% said they would consider whether a practice offered digital/remote consultations when registering with a new veterinarian.

#### **Most French pet owners had no problem accessing animal medicines**

- 63% 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 issue was their veterinary practice and/or pharmacist was not open.
- Less than 5% said their veterinary practice and/or pharmacist did not have their medicine in stock; Only 2.9% said their medicine was not available online.

## Complete findings

### Veterinary care experience

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

- 34% contacted their veterinary practice as normal
- 40% did not need to contact their veterinary practice during the pandemic
- 20% delayed contacting a veterinarian
- 6% avoided contacting a veterinarian altogether

*Pet owners who delayed/avoided contacting a veterinary practice (26%) during the pandemic gave the following reasons:*

- 27% were delaying/avoiding “non-essential” tasks
- 26% did not want to be exposed to people outside of their social bubble
- 26% said their veterinary practice was not open
- 19% were unsure about safety precautions at veterinary practices
- 13% believed it would be too stressful for their dog/cat
- 13% believed it would be “too much hassle”
- 13% were subject to quarantine and could not leave home
- 12% did not want to bother their veterinarian

*During the pandemic, pet owners:*

- Felt worried about visiting the veterinarian due to social distancing/safety reasons (15%)
- Treated their pet at home for something they normally would visit their veterinarian for (14%)
- Allowed their dogs and cats to miss routine treatments such as vaccines (11%)

### Access to Medicines

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

- 23% said the pandemic made it harder to get hold of medicines for their pet
- 15% said the pandemic forced them to give their pet a different medicine than normal
- 63% 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 (24% / 5.4% of all respondents)
- Veterinary practice and/or pharmacist did not have the medicine in stock (20% / 4.5% of all respondents)
- Owner could not visit veterinary practice to obtain a prescription (19% / 4.3% of all respondents)
- Medicine was available but shipping times were delayed (18% / 4.2% of all respondents)
- Owner was unable to collect the medicine due to social distancing restrictions / personal safety practices (18% / 4.2% of all respondents)
- Medicine was more expensive than normal (13% / 3% of all respondents)

- Medicine was unavailable in pet store (19% / 4.3% of all respondents)
- Medicine was unavailable online (13% / 2.9% of all respondents)

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

- Making disinfectants available for customers to use (37%)
- Implementing social distancing (36%)
- Allowing only one person to accompany a pet (36%)
- Staff wearing PPE (29%)
- Suspending/delaying 'non-essential' consults (17%)

### **Telemedicine**

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

- 35% said digital/remote consultations are currently available
- 23% said digital/remote consultations were available before the pandemic

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

- 72% were satisfied or extremely satisfied with the advice given
- 69% were satisfied or extremely satisfied with the convenience
- 70% were satisfied or extremely satisfied with the consultation overall
- 54% said the digital/remote consultation led to an in-person visit
- 69% said they paid the same or more compared to face-to-face visit

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

- 43% would like their veterinary practice to offer digital/remote consultations
- 51% are willing to pay for veterinary advice/consultation through these services
- 20% 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
- 34% 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 (21%)
- News Media (21%)