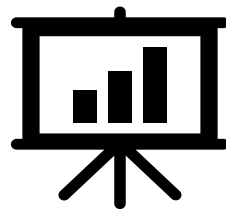




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Week 5 COVID - 19 Veterinary Hospital Survey Results

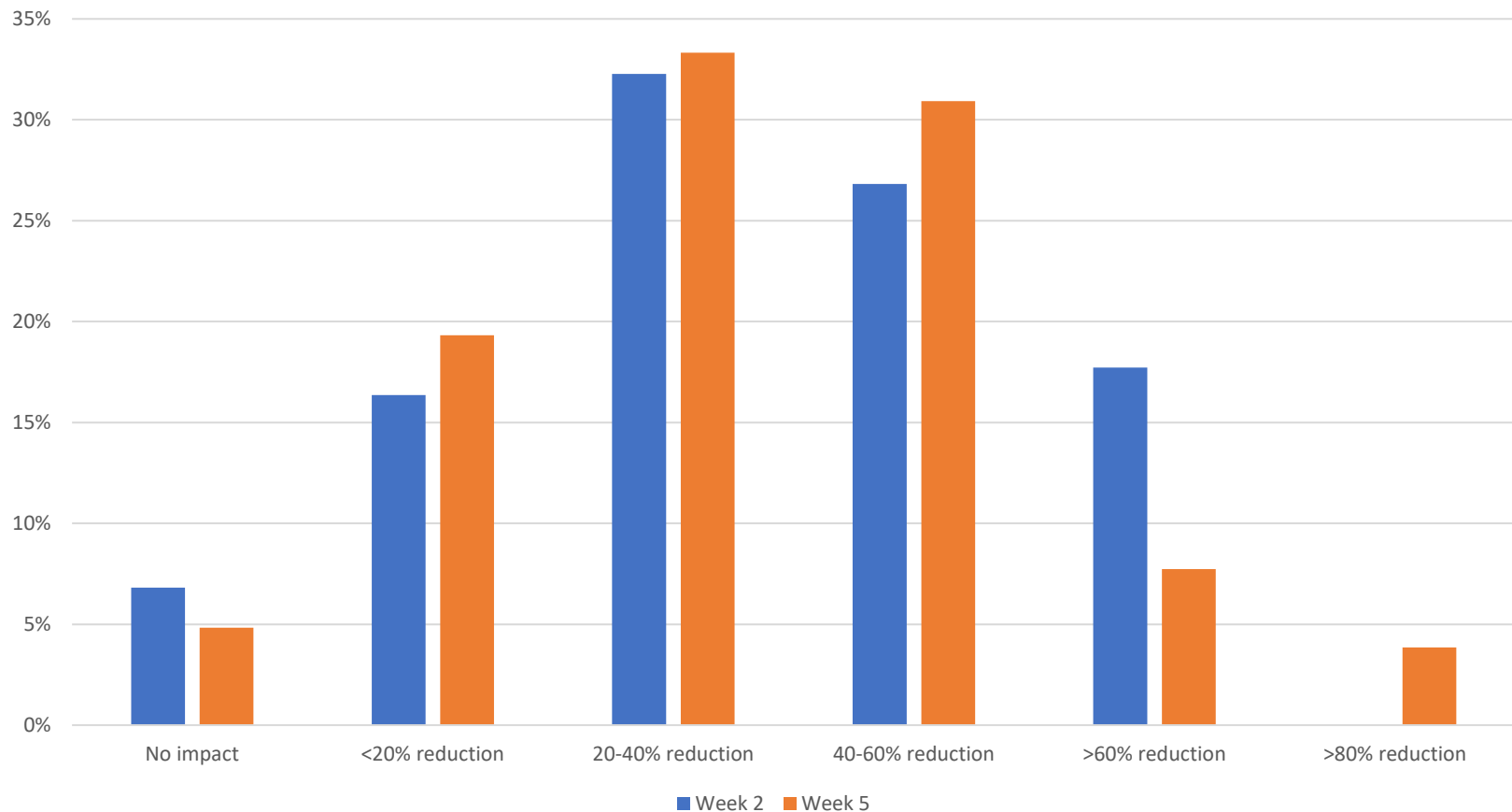


Thank you to all the essential Veterinary Employees!

- We received over 300 survey responses on this Week 5 COVID-19 veterinary hospital survey. (215 Hospitals in the Northeast region and ~100 hospitals in other regions across the U.S.)
- This is the second survey we completed to provide a broad overview of how the COVID-19 pandemic is impacting the clinical, operations and financial performance in the animal health industry
- We trended their data from Week 2 (3/27/20) and Week 5 (4/13/20) for hospital respondents in the Northeast area. (Massachusetts to Northern Virginia) This data can be viewed in slides 3-16
- Our Week 5 survey included other regions as well. Giving comparative insights on how this pandemic is affecting our industry in the other regions as well. This data can be viewed in slides 16-31.
- If you would like to be part of future surveys, please [click here](#) (enter "Survey" in the message box)

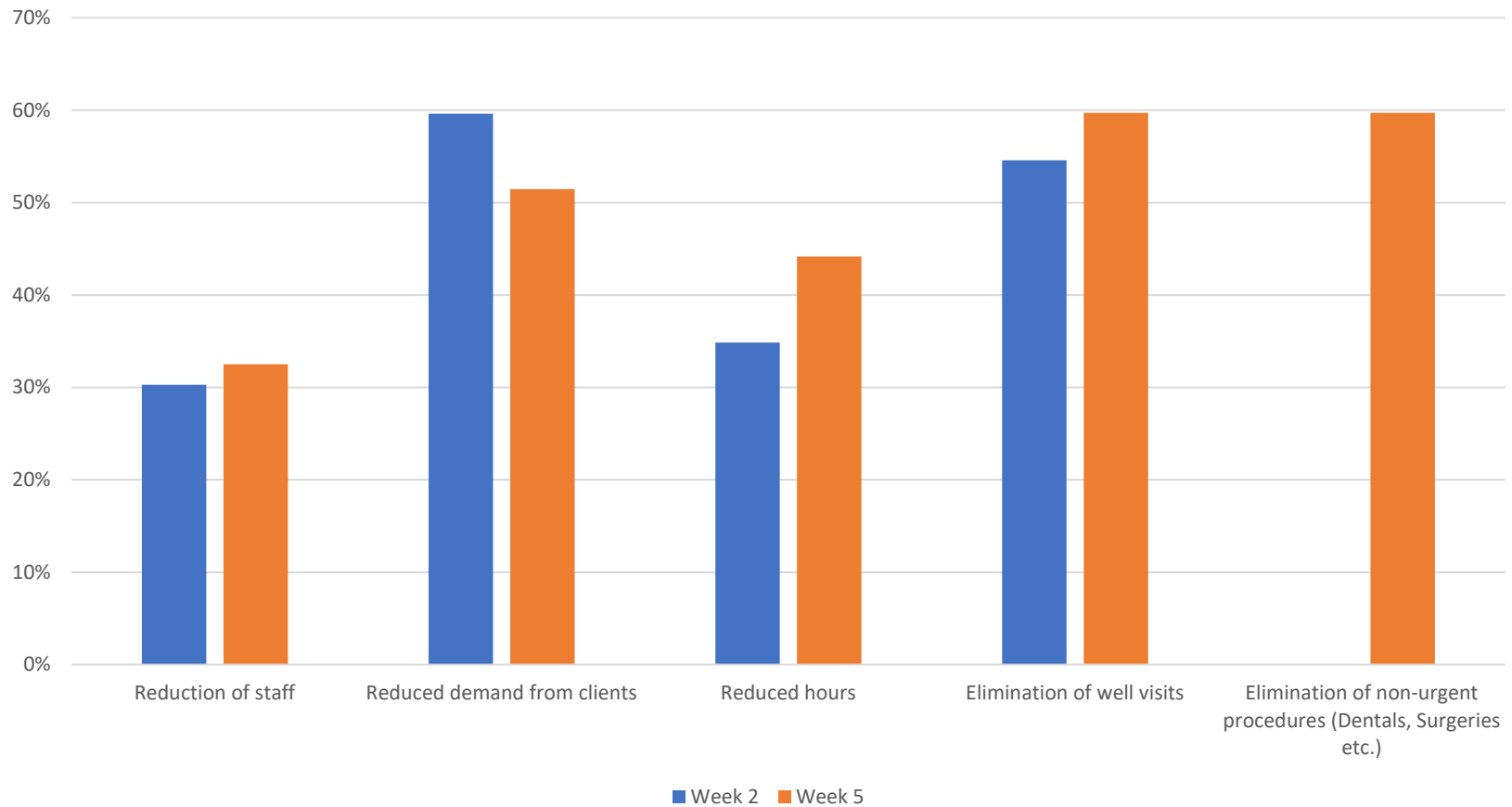
What impact is COVID-19 having on your daily appointment schedule?

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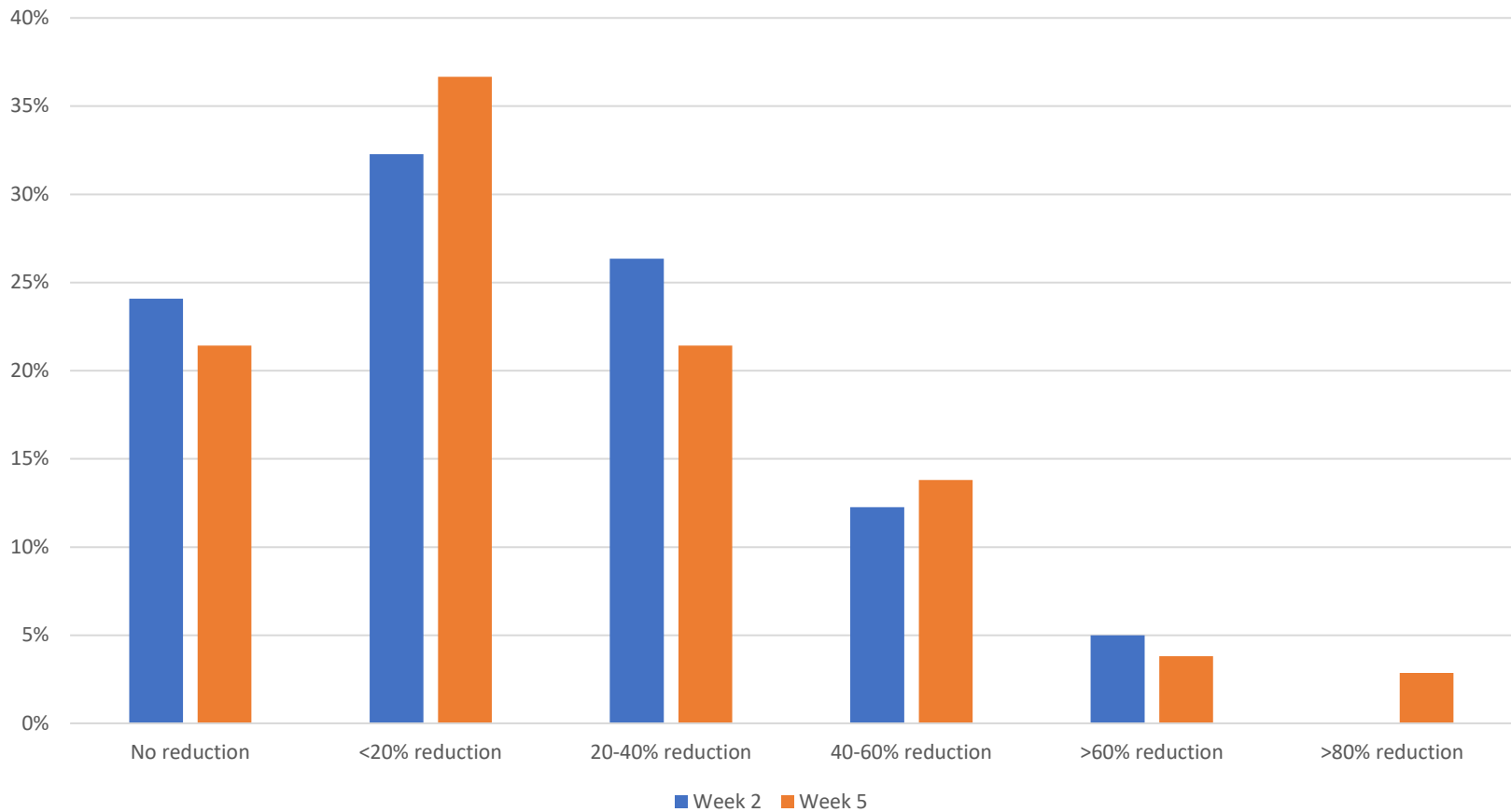
What are the main drivers for the reduction in appointments?

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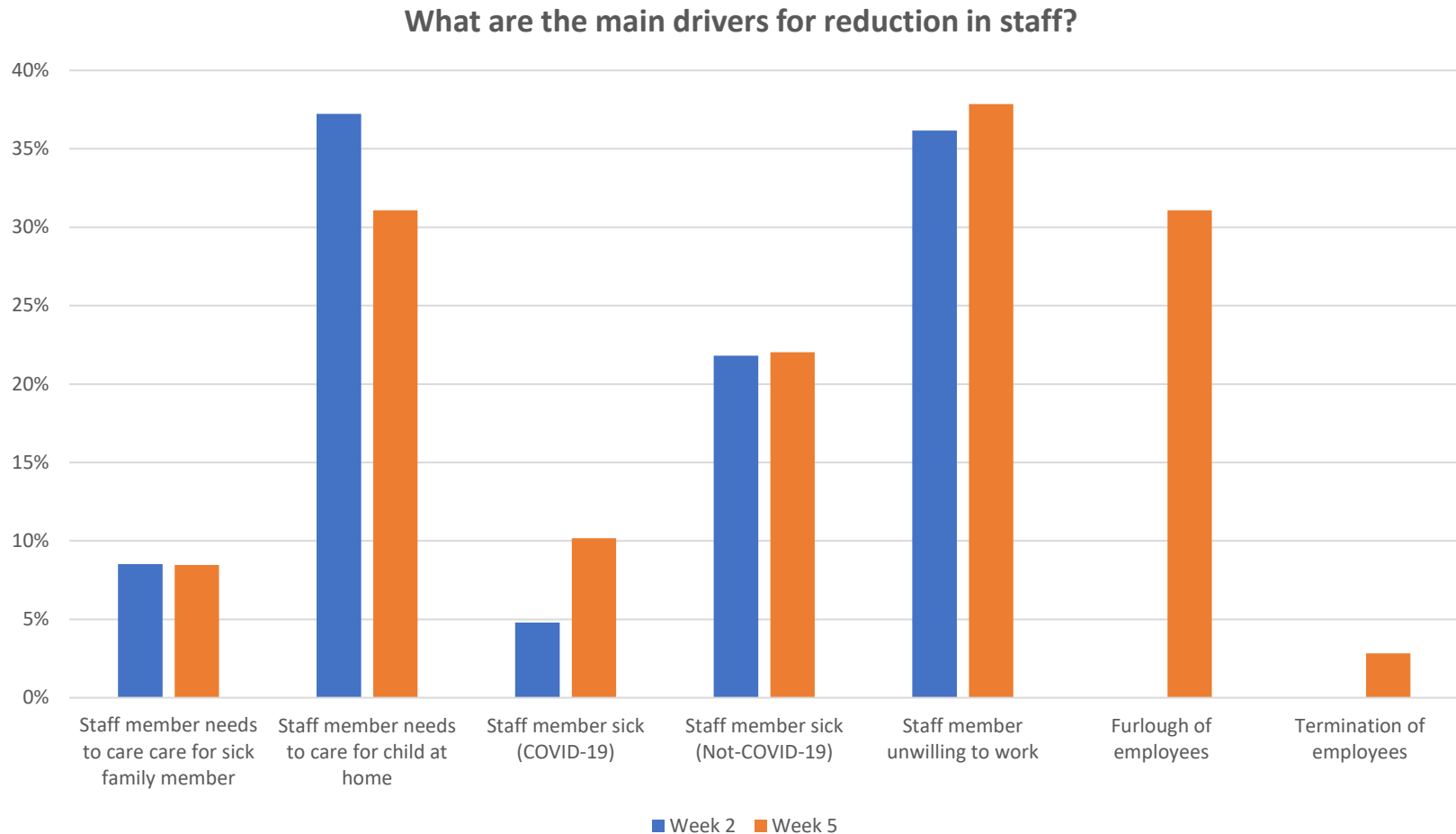


What impact is COVID-19 having on your staffing levels?

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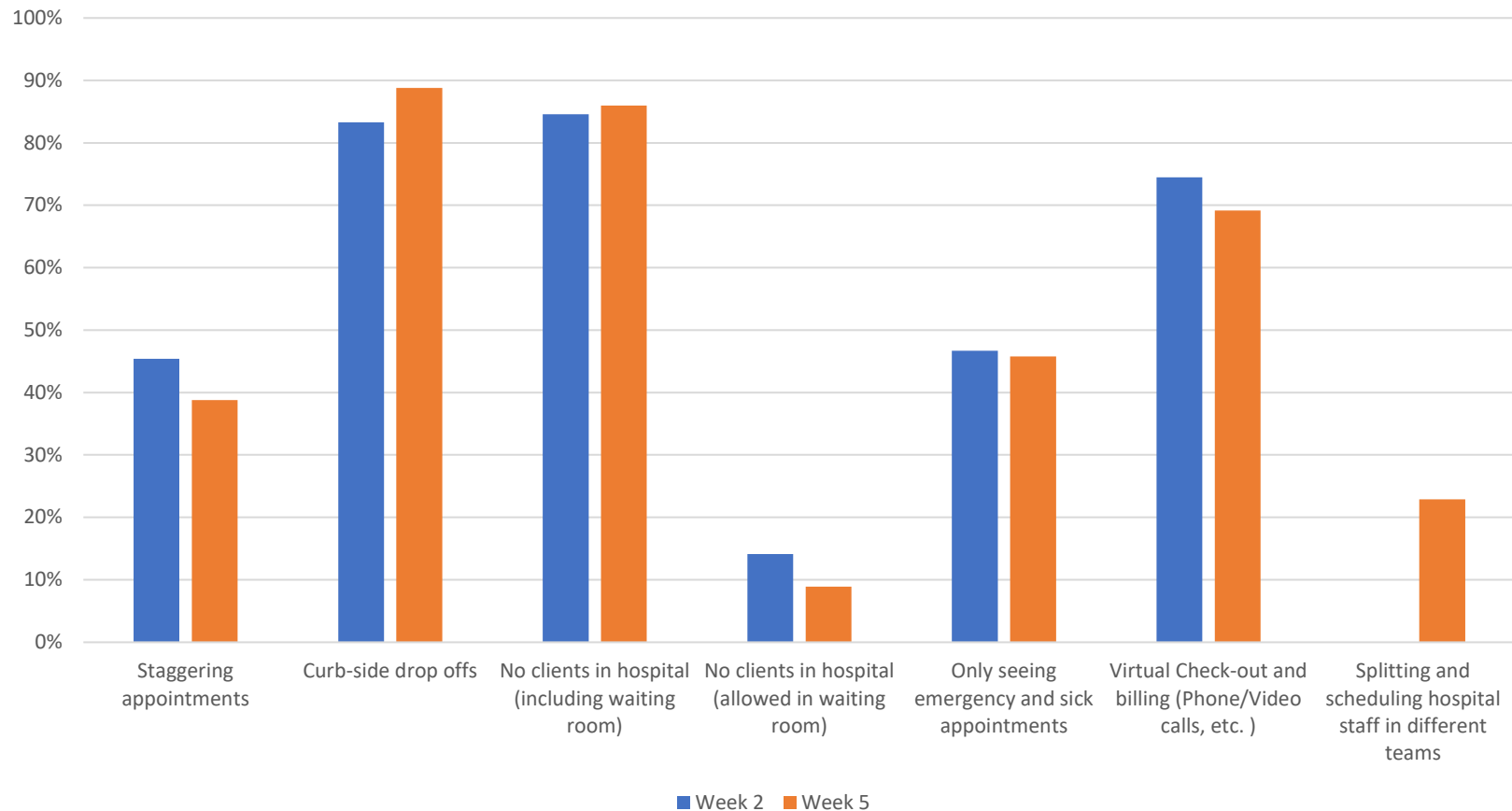


What are the main drivers for reduction in staff? (Choose all that apply)



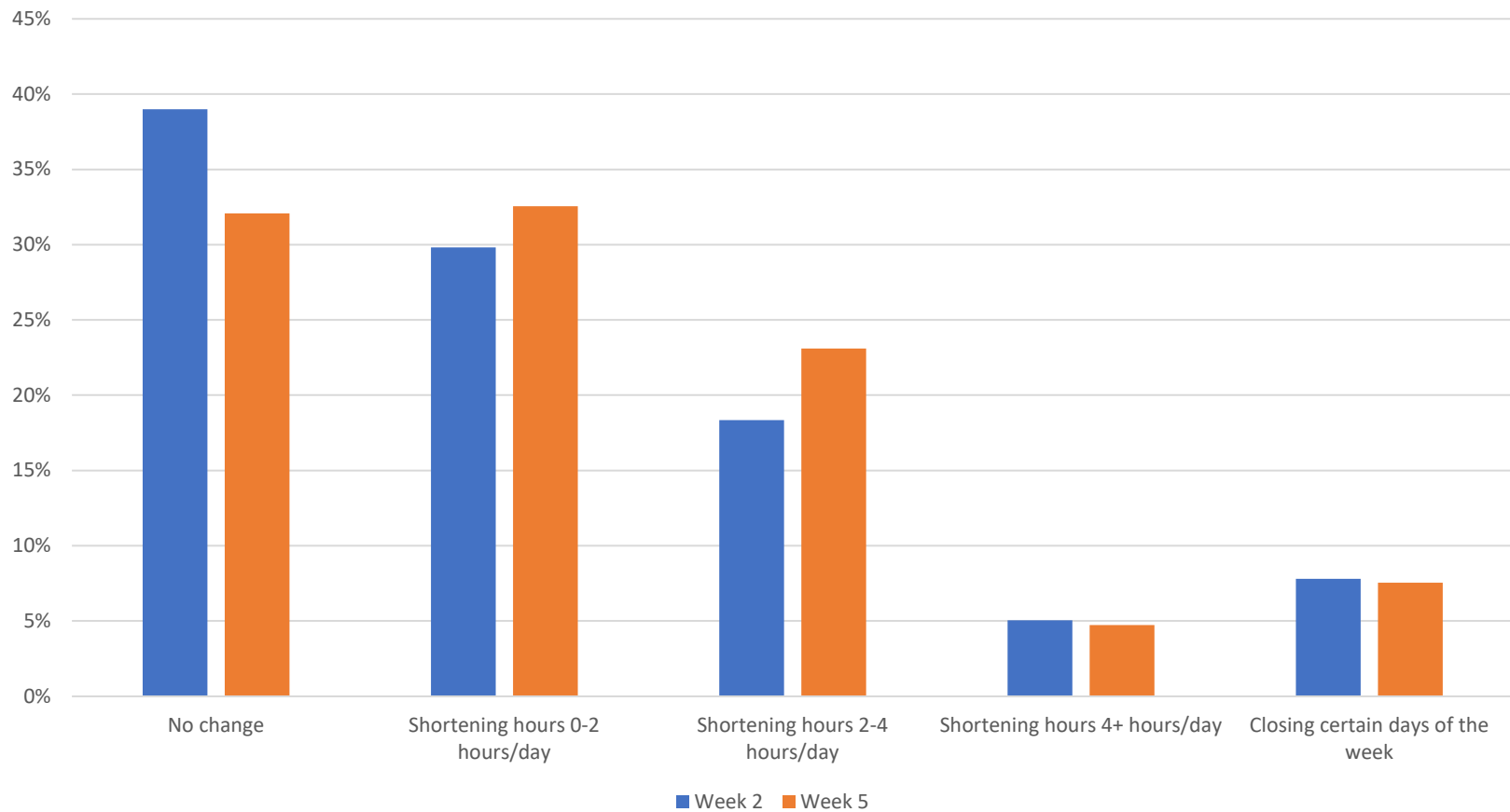
What operational changes are you making to manage COVID-19 transmission risk? (Choose all that apply)

What operational changes are you making to manage COVID-19 transmission risk?

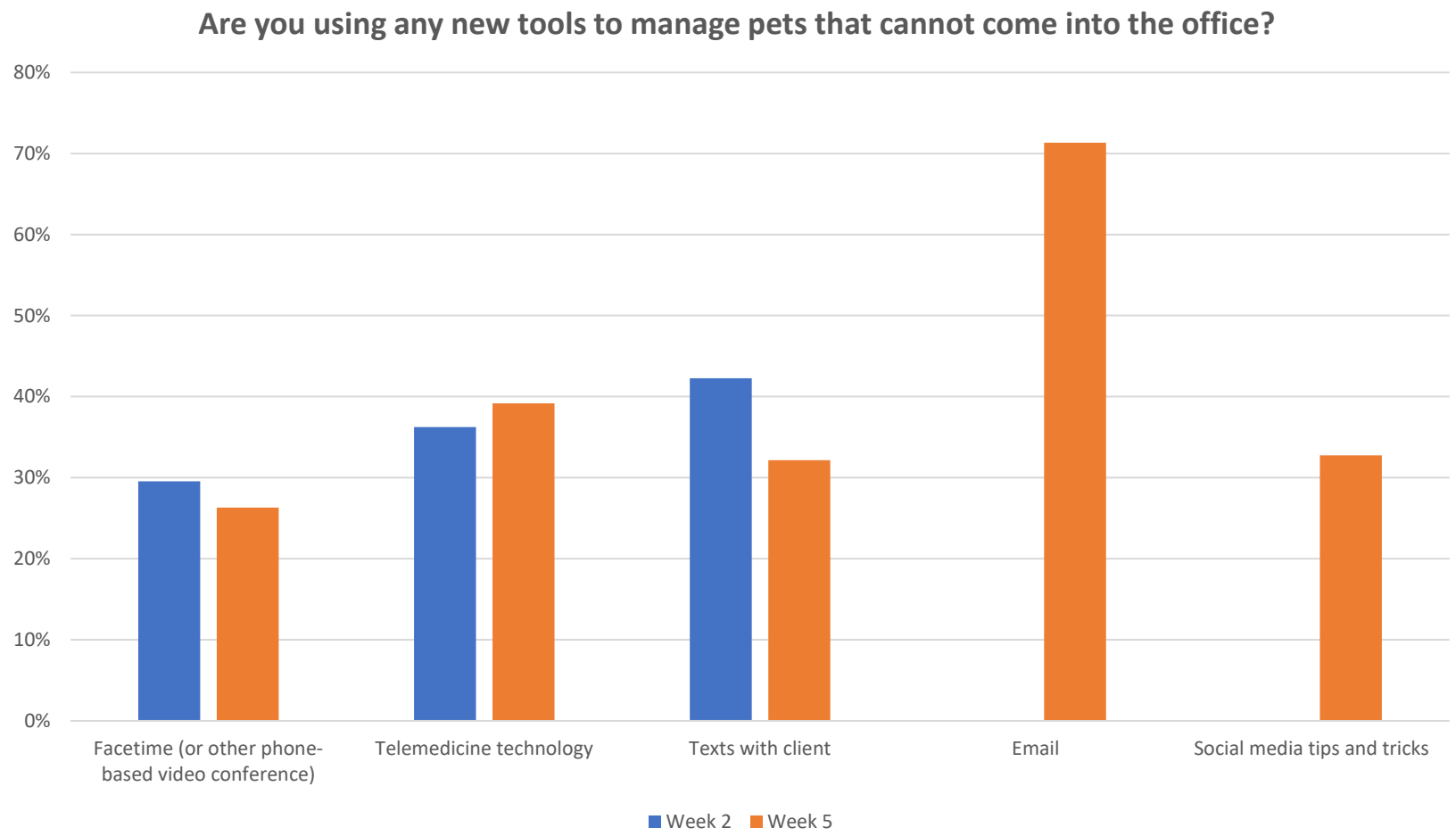


What changes are you making to hospital operating hours?

What changes are you making to hospital operating hours?

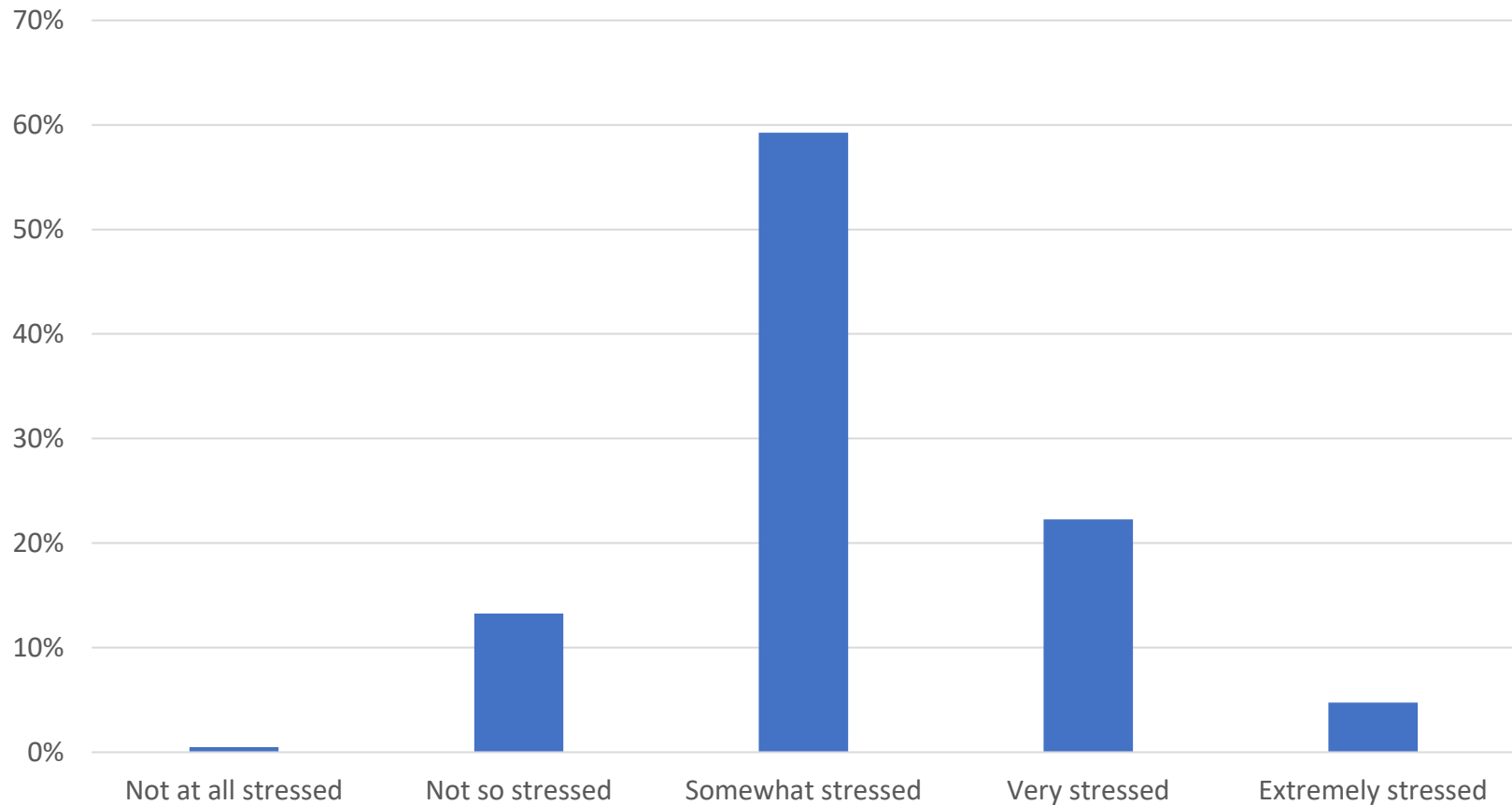


Are you using any new tools to manage pets that cannot come into the office? (check all that apply)



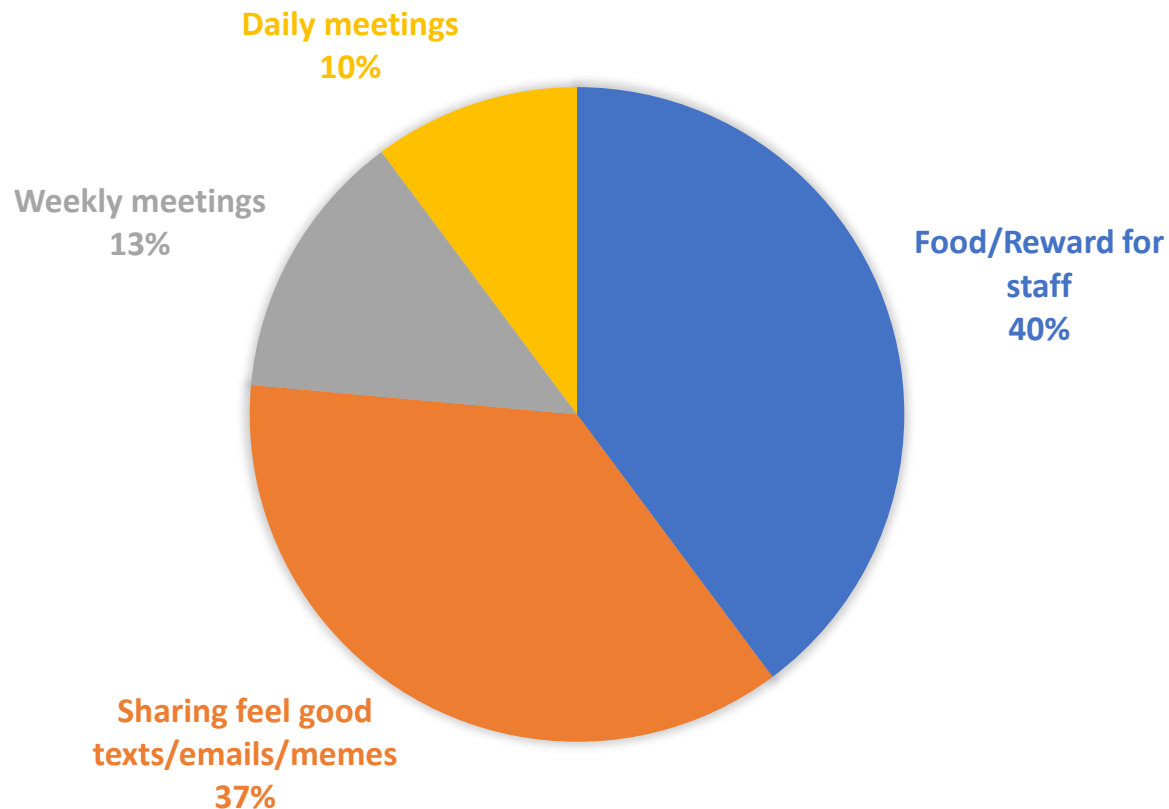
How would you rank the stress level of your clinical team?

How would you rank the stress level of your clinical team?



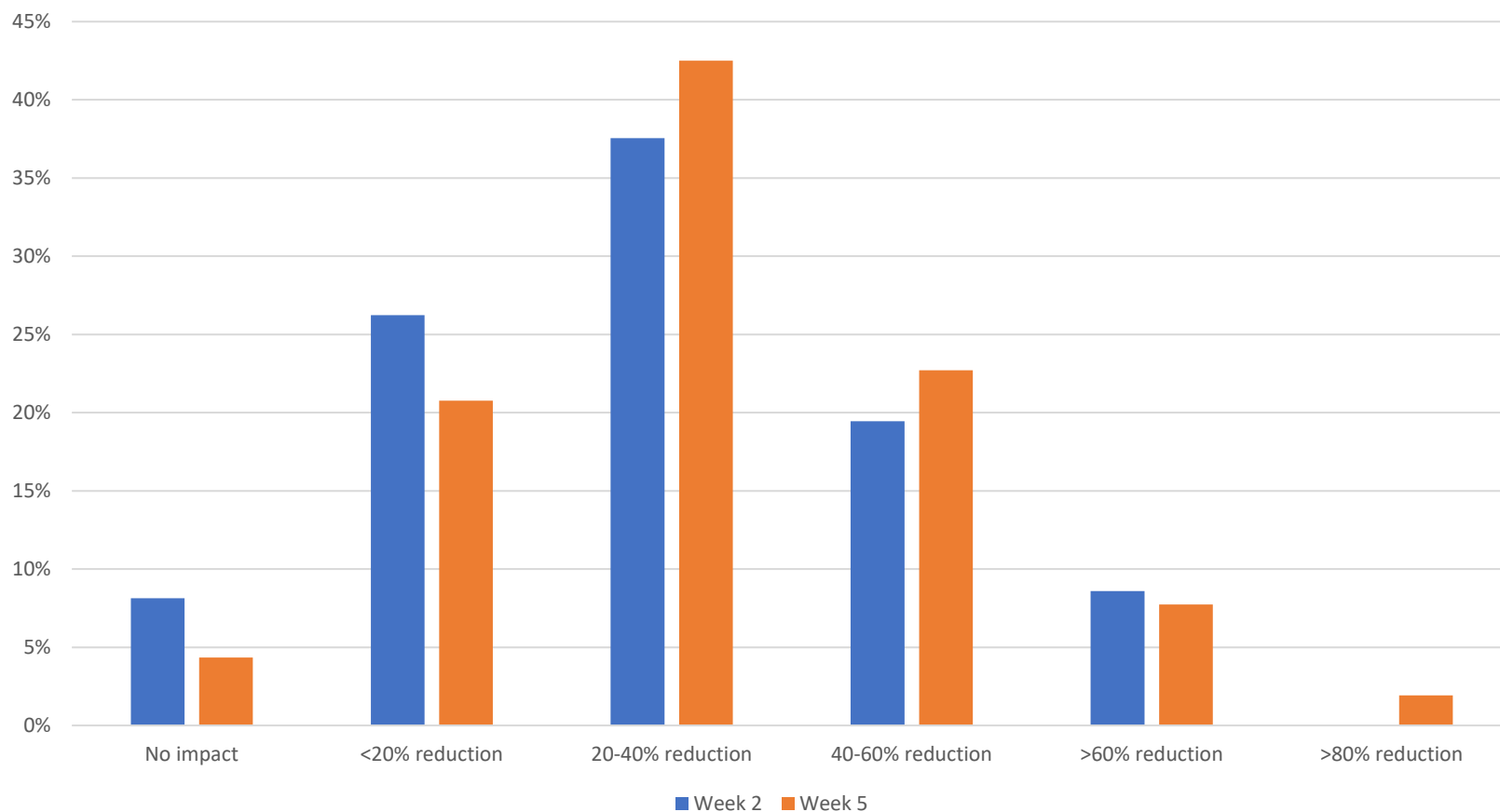
How are you keeping your staff mentally healthy during this time?

HOW ARE YOU KEEPING YOUR STAFF MENTALLY HEALTHY DURING THIS TIME?



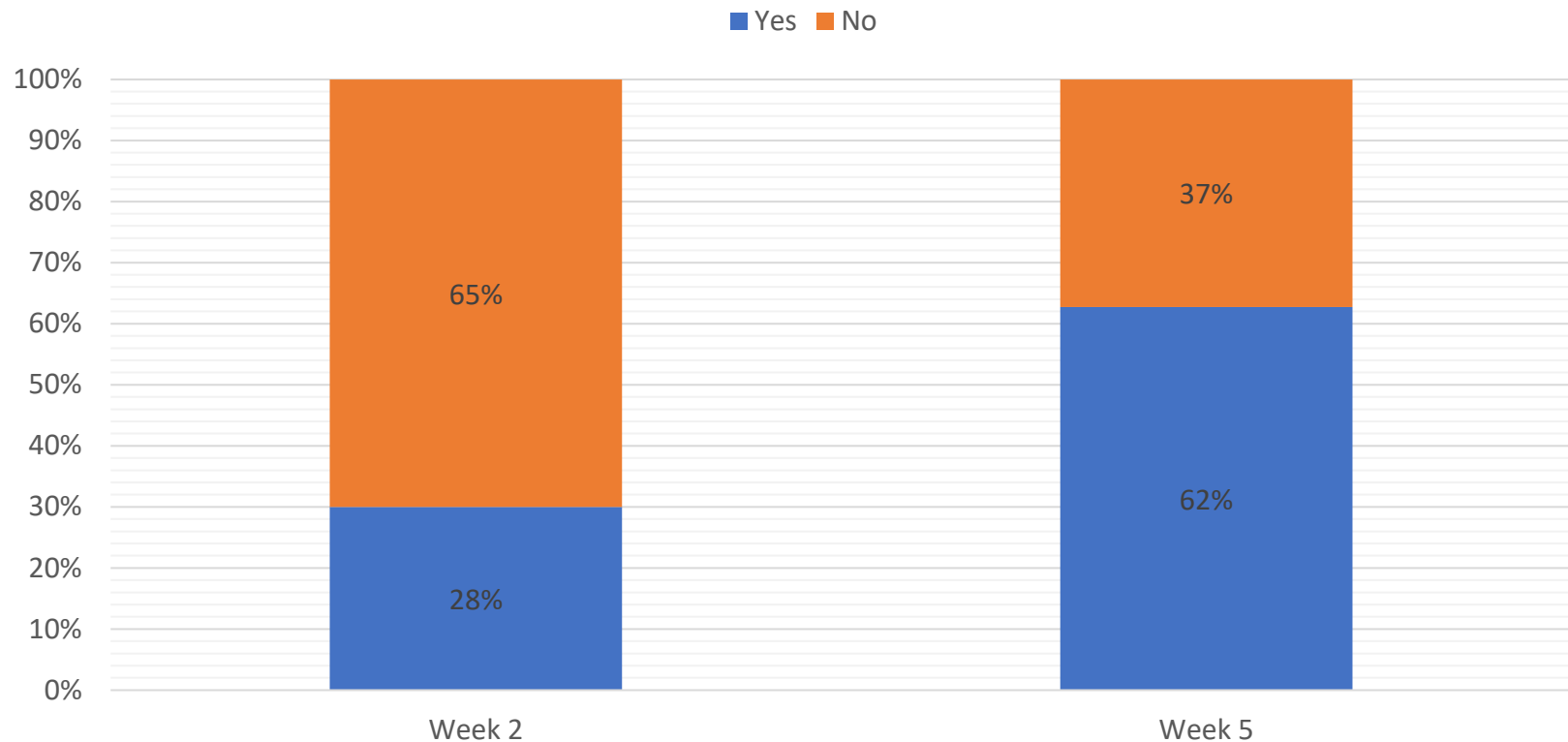
What impact is COVID-19 having on the revenue of your hospital?

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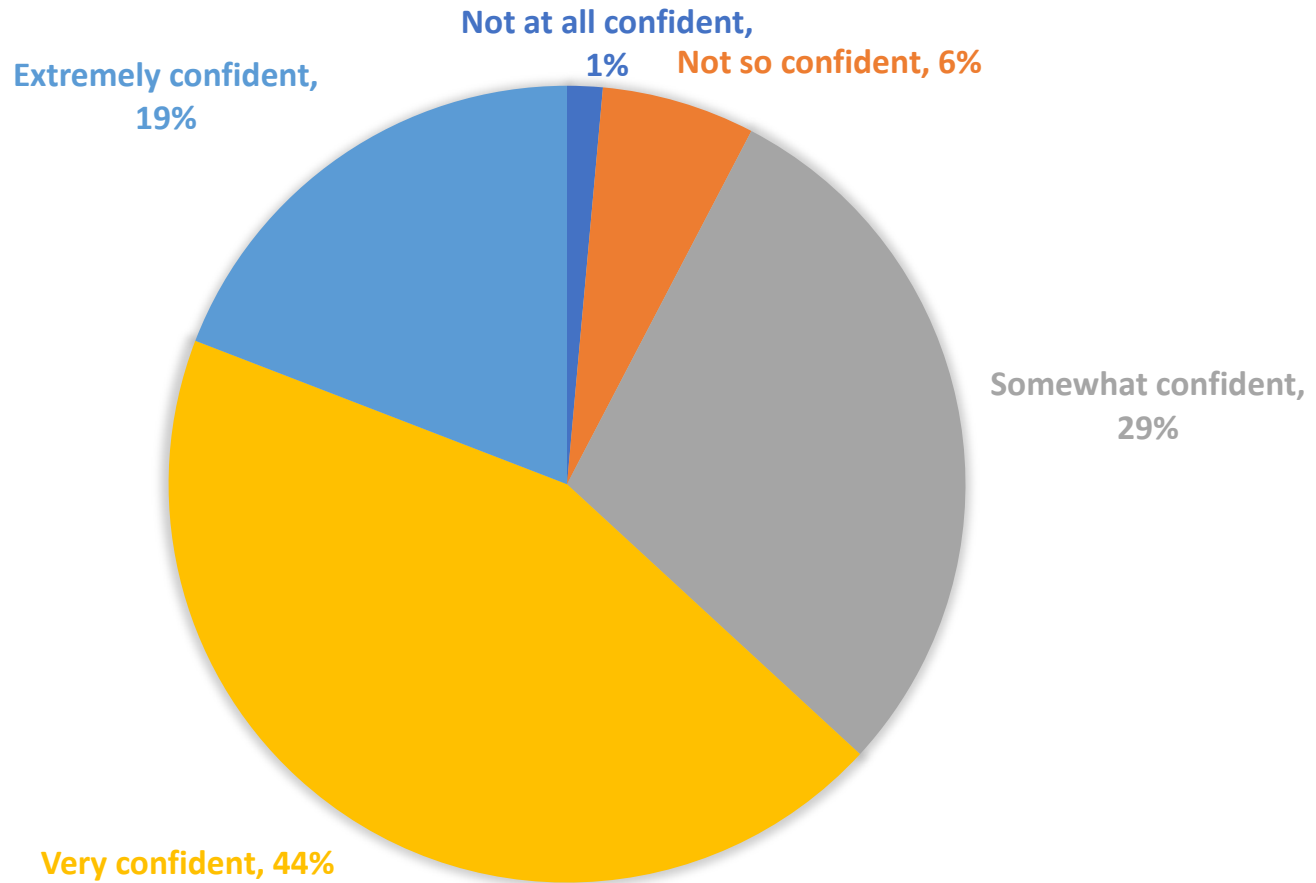


Have you or will you be applying for a loan/assistance with banks, local, state or federal agencies?

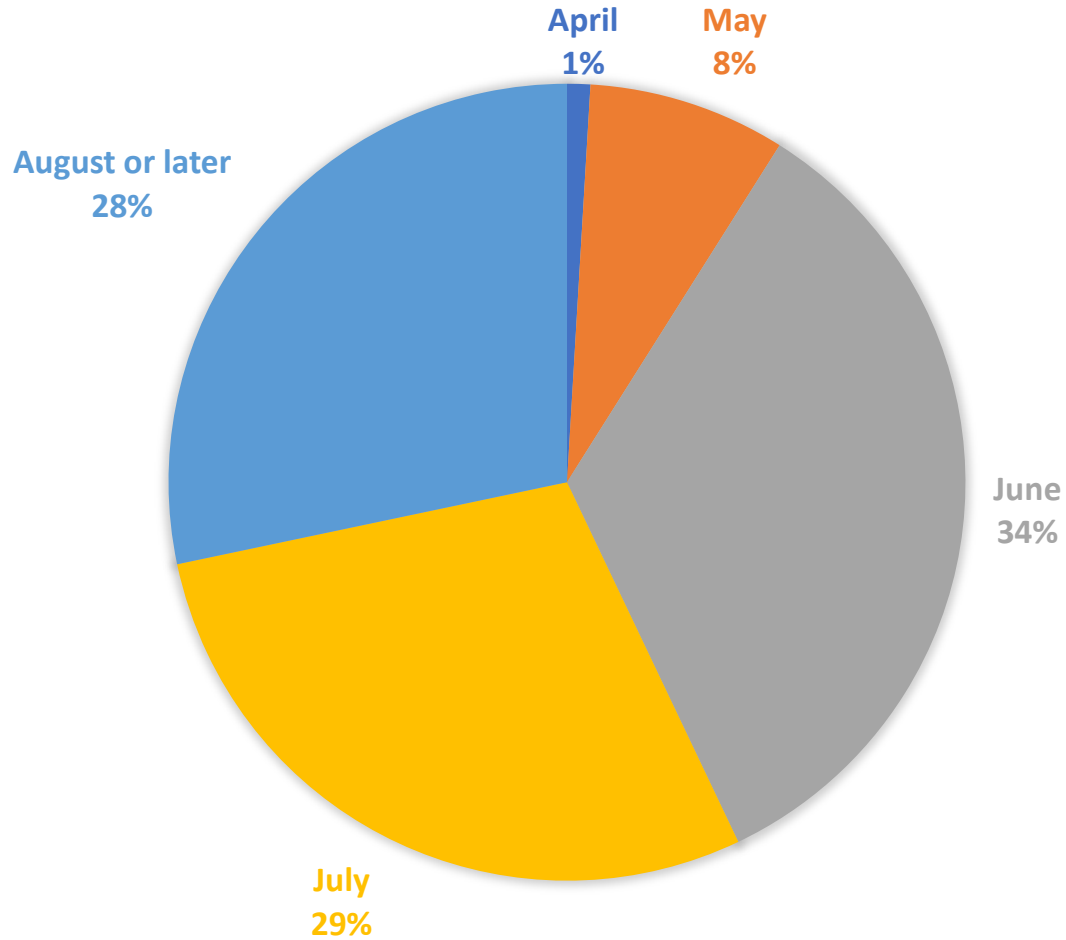
Have you or will you be applying for a loan/assistance with banks, local, state or federal agencies?



Future Outlook: How confident are you business will return to normal?

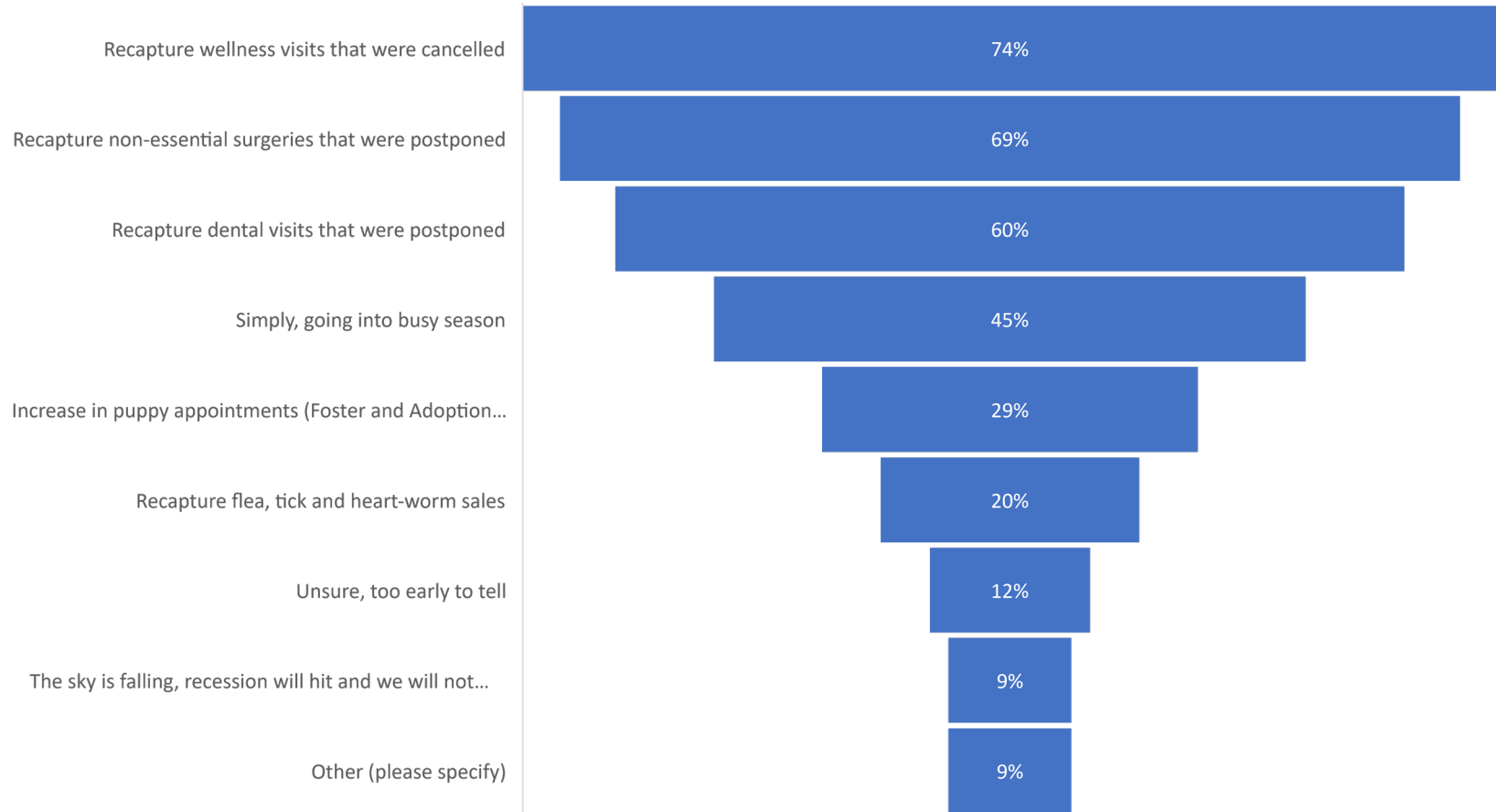


Crystal ball: When do you feel your business could return to normal or improve?



What would be the main drivers for your hospitals revenue to return?

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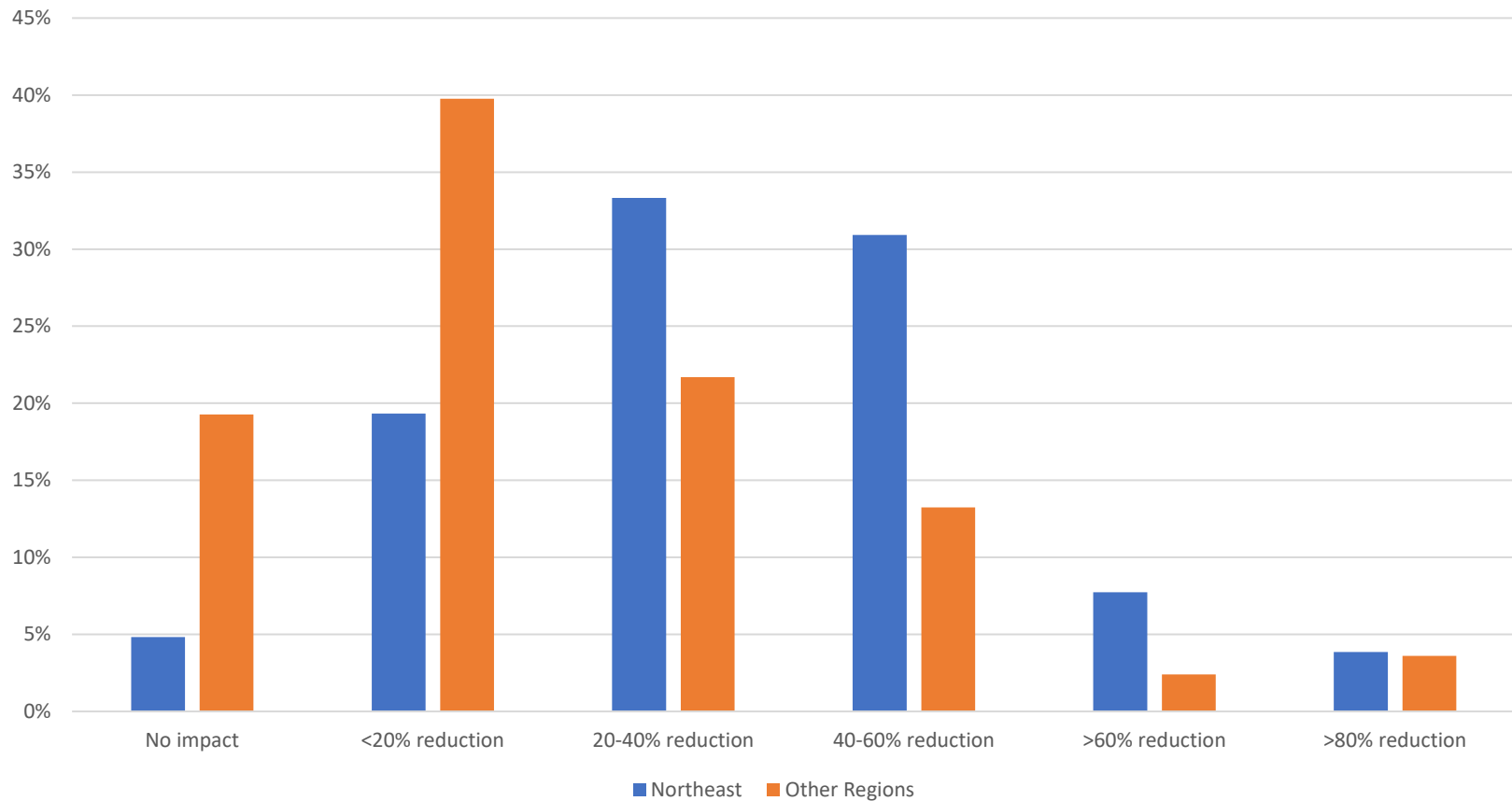


Regional Comparative Data

- The Northeast region has been most impacted by the pandemic.
- The following data provides a comparative analysis of hospitals in the Northeast region to other regional areas

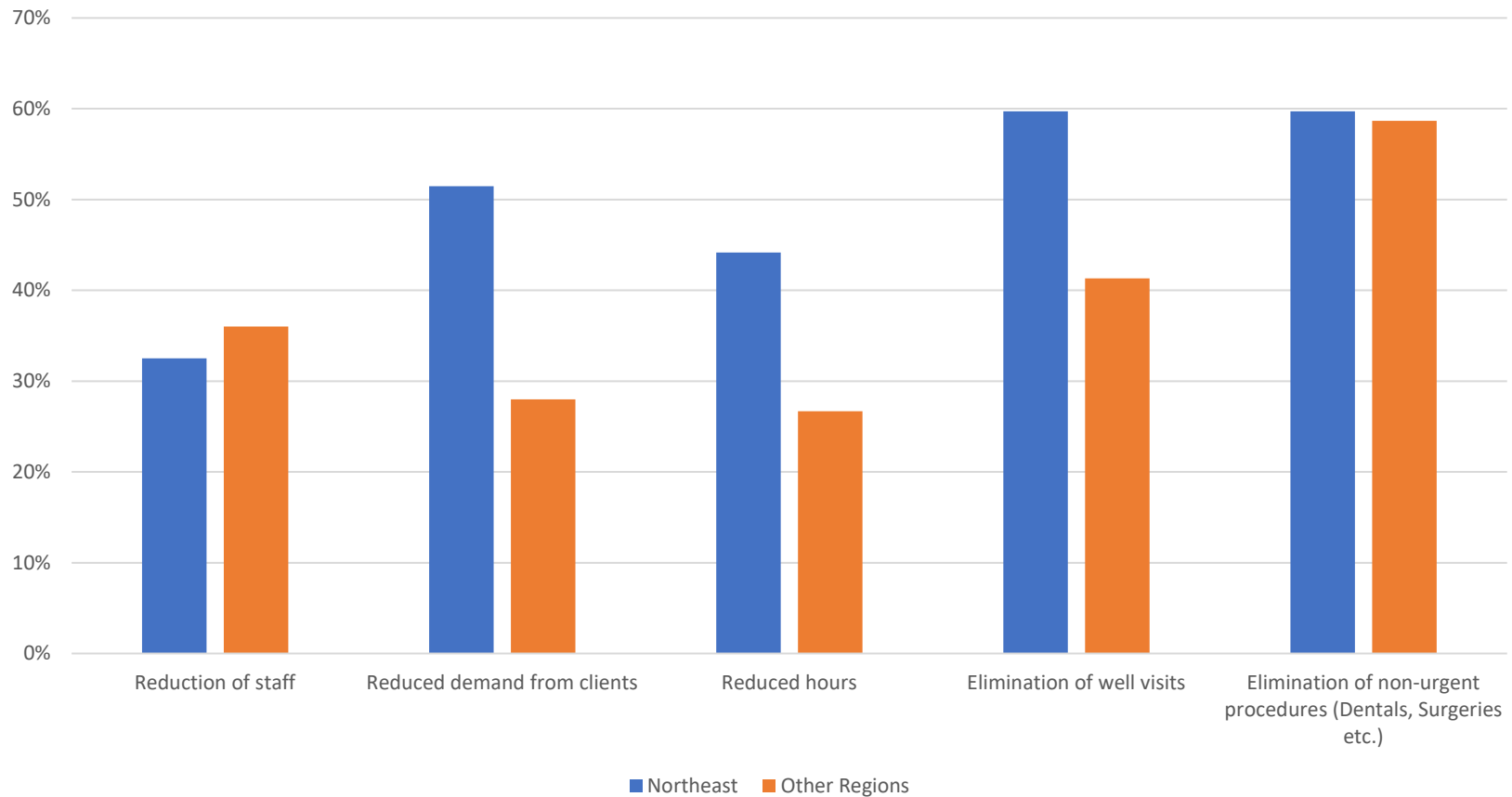
What impact is COVID-19 having on your daily appointment schedule?

Week 5 - Northeast vs. Other Regions



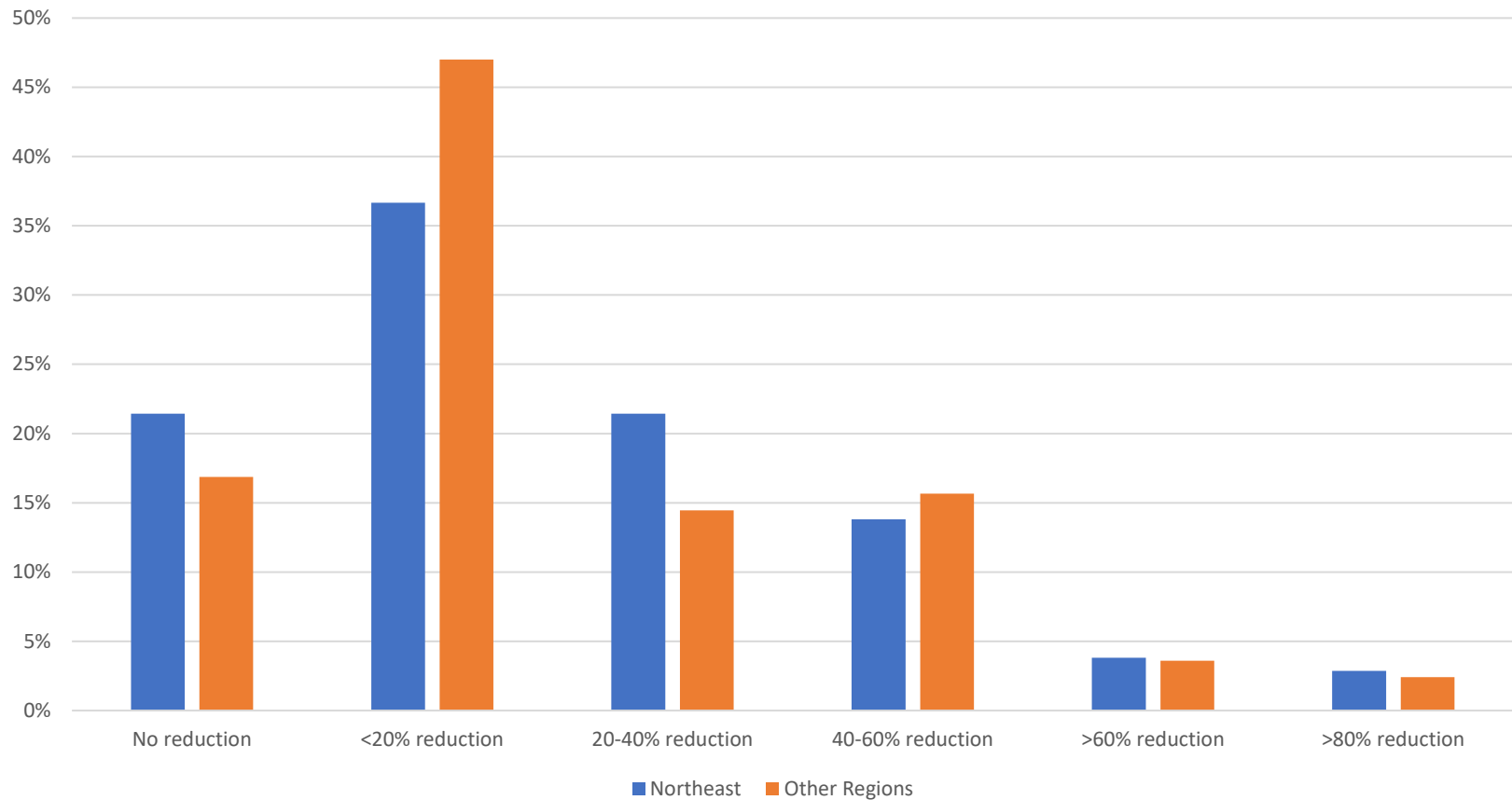
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Week 5 - Northeast vs. Other Regions



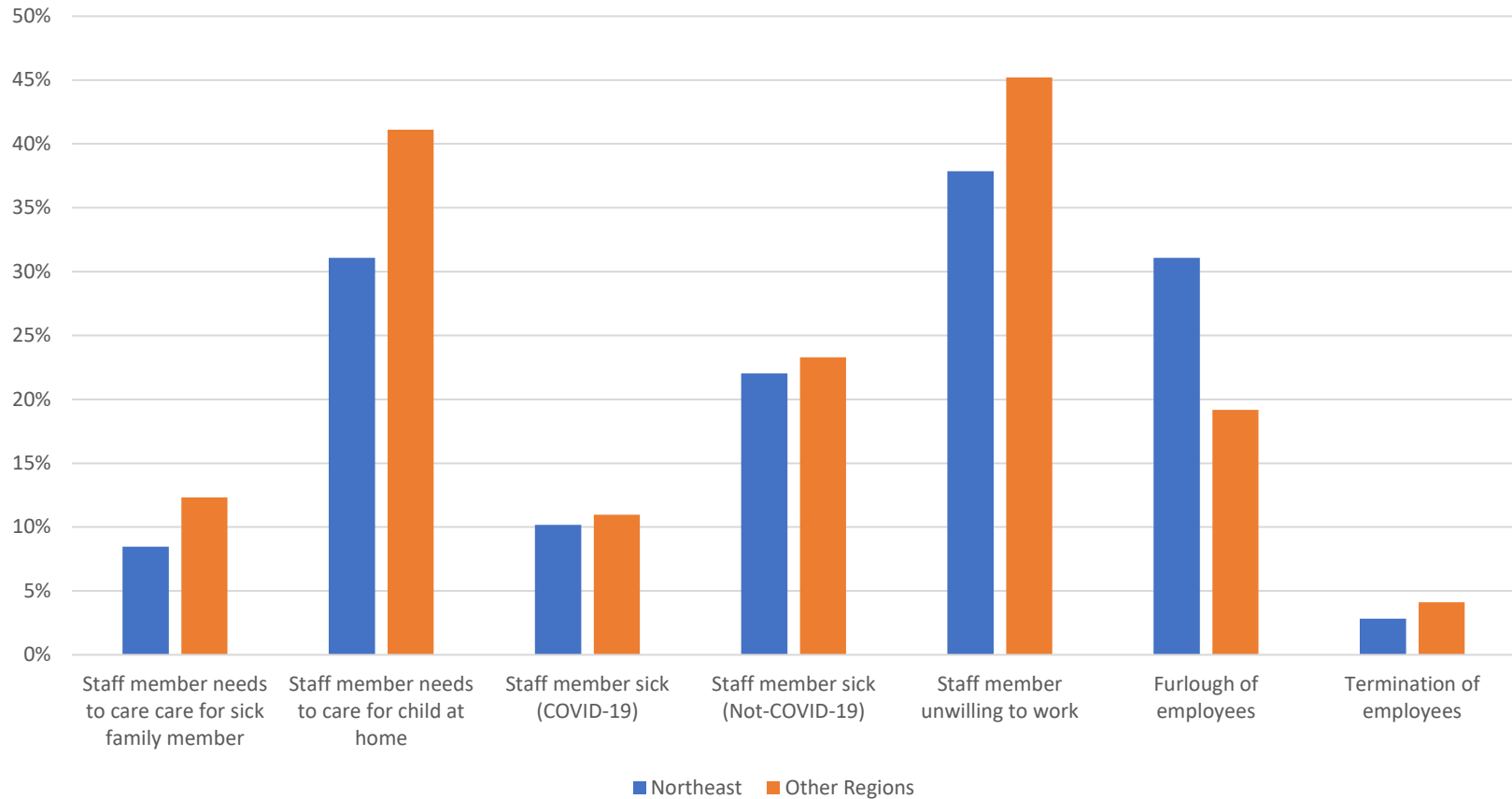
What impact is COVID-19 having on your staffing levels?

Week 5 - Northeast vs. Other Regions



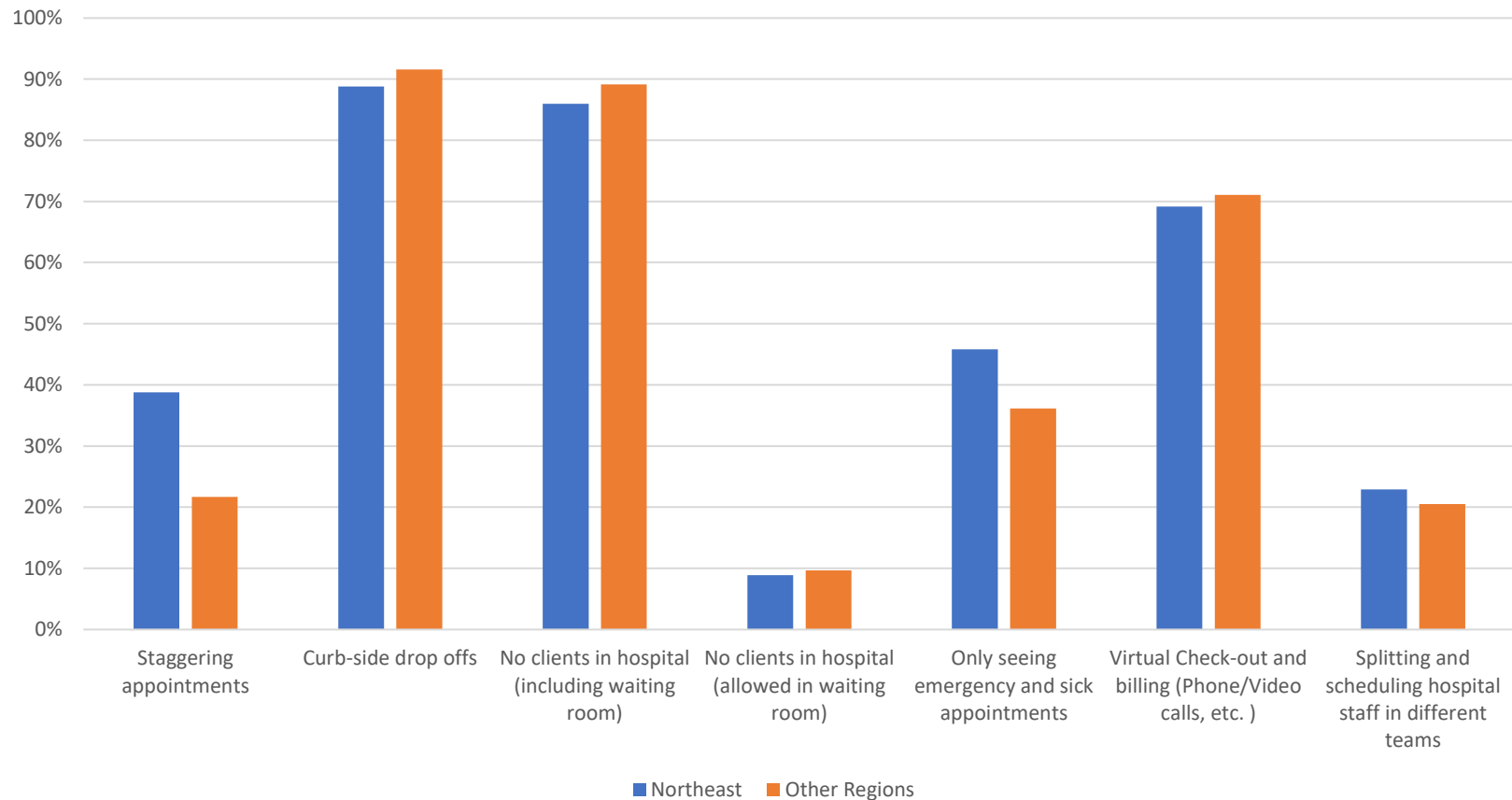
What are the main drivers for reduction in staff? (Choose all that apply)

Week 5 - Northeast vs. Other Regions



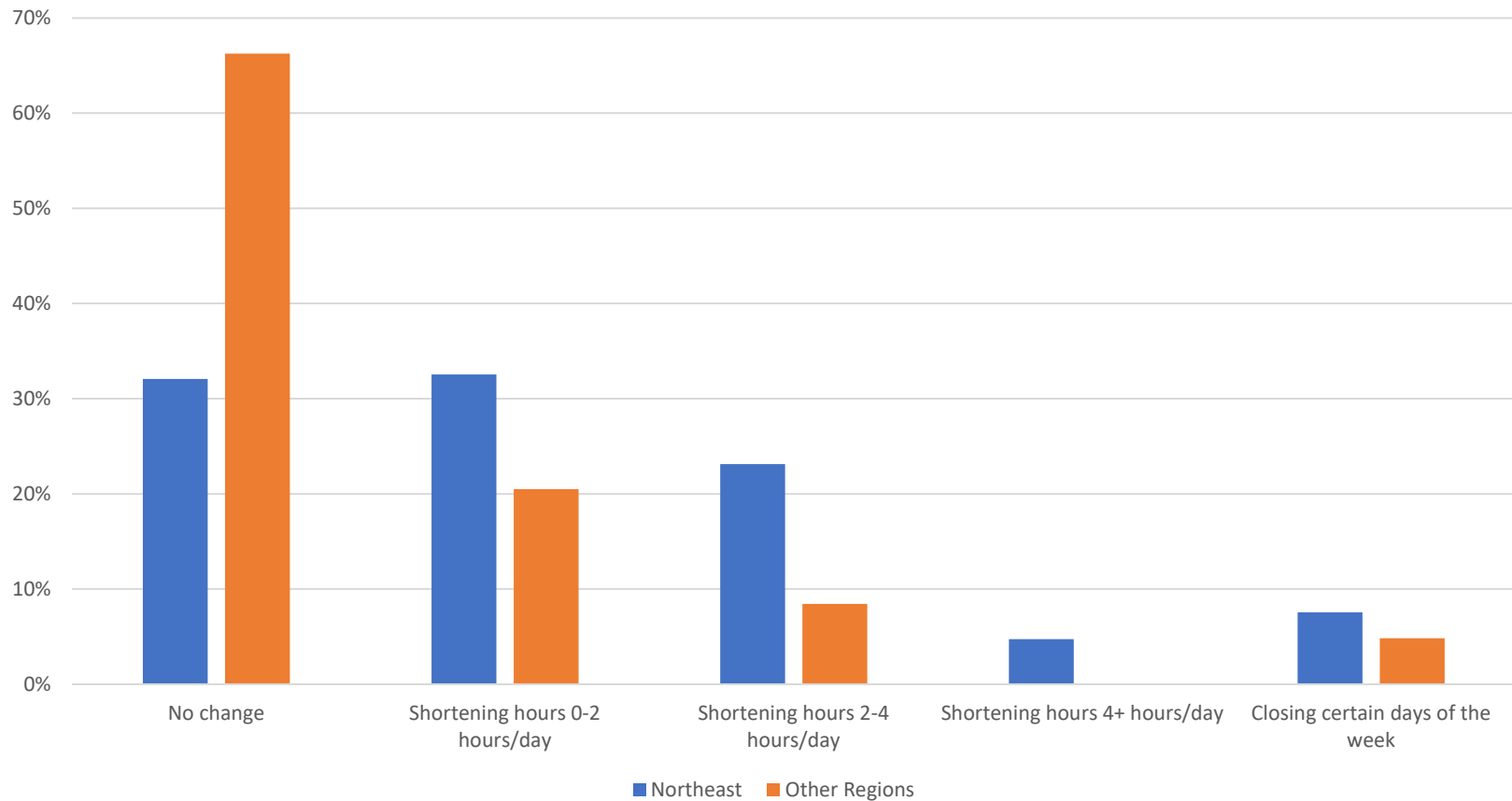
What operational changes are you making to manage COVID-19 transmission risk? (Choose all that apply)

Week 5 - Northeast vs. Other Regions



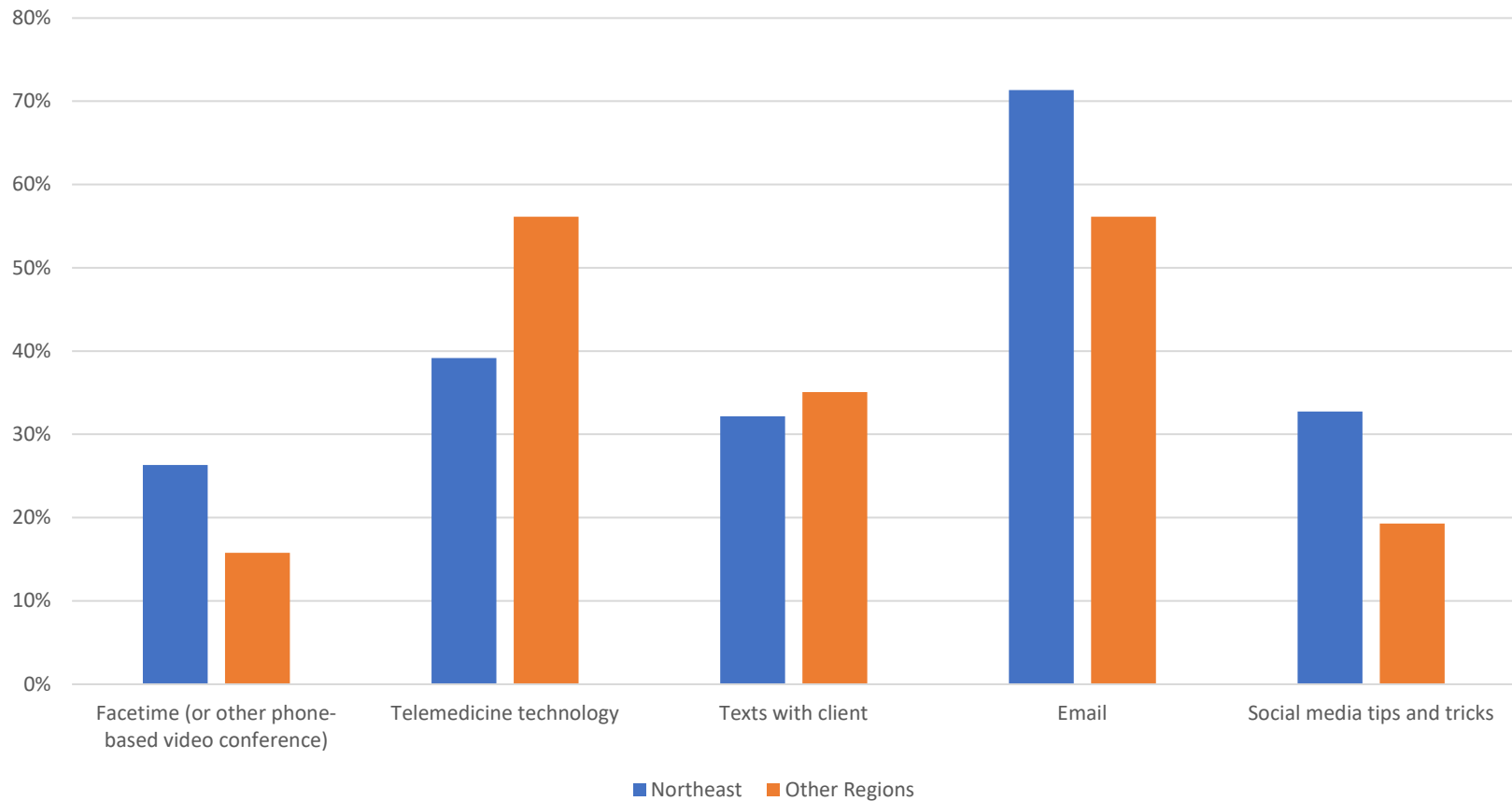
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Week 5 - Northeast vs. Other Regions



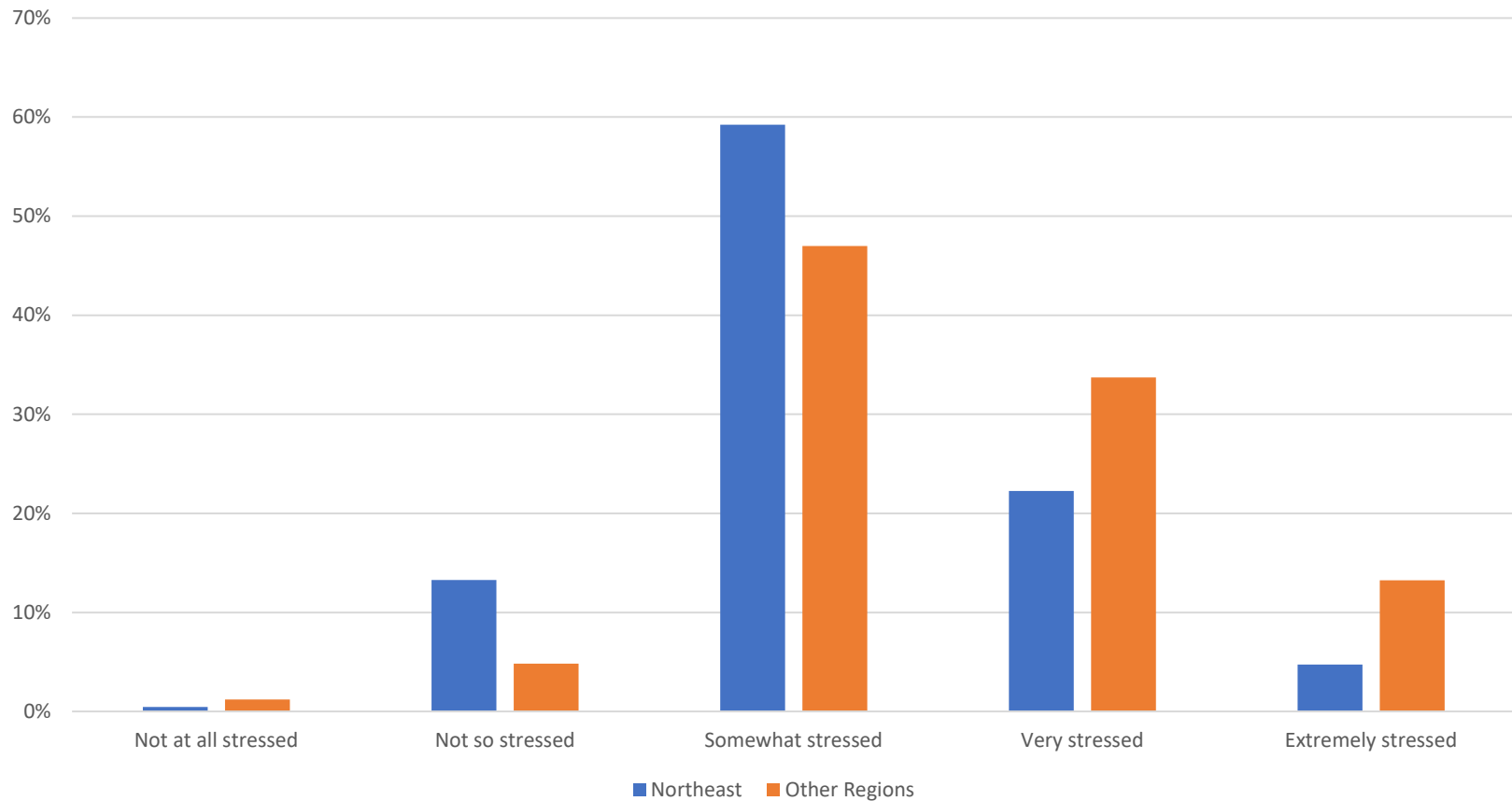
Are you using any new tools to manage pets that cannot come into the office? (check all that apply)

Week 5 - Northeast vs. Other Regions



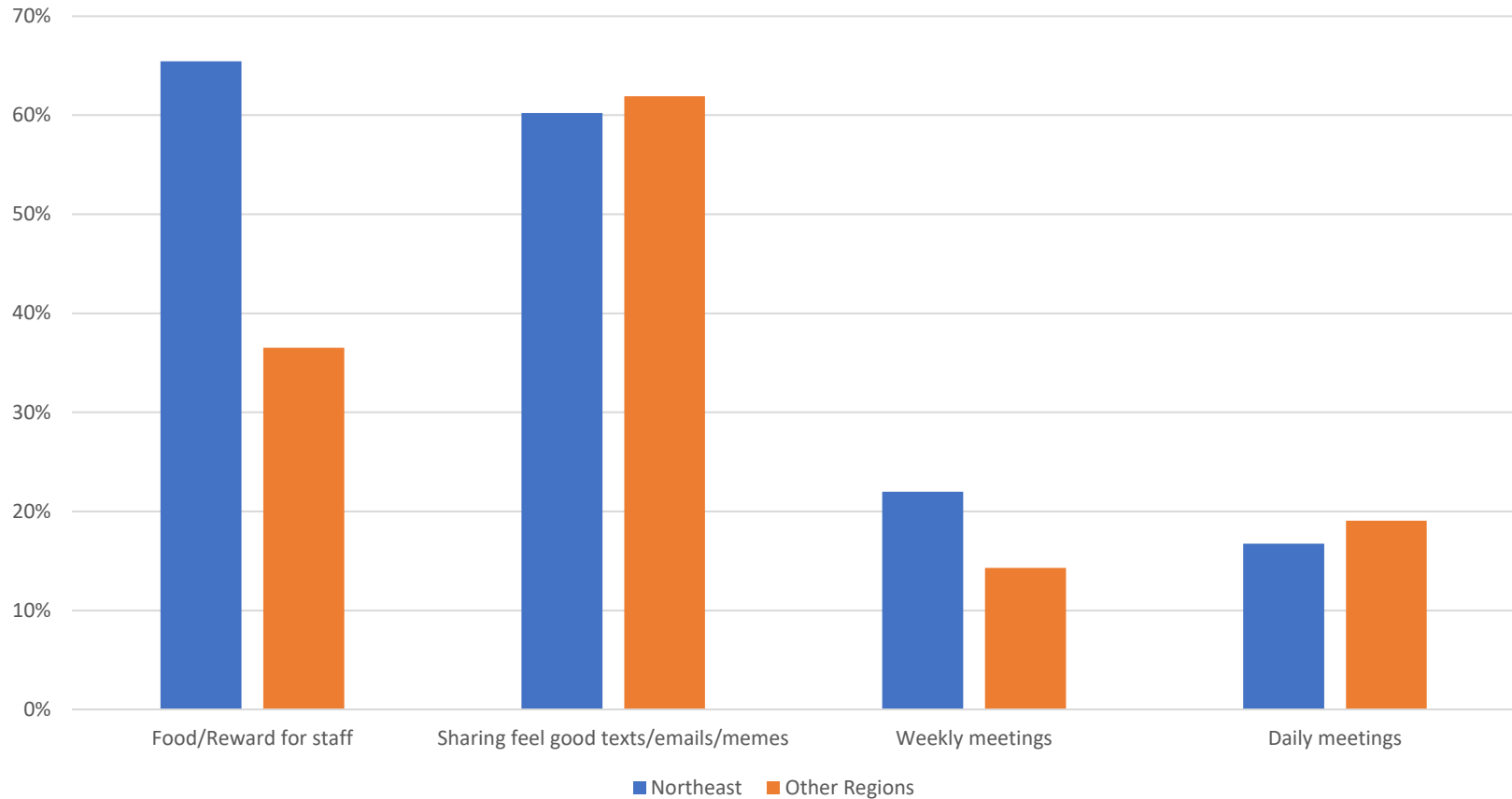
How would you rank the stress level of your clinical team?

Week 5 - Northeast vs. Other Regions



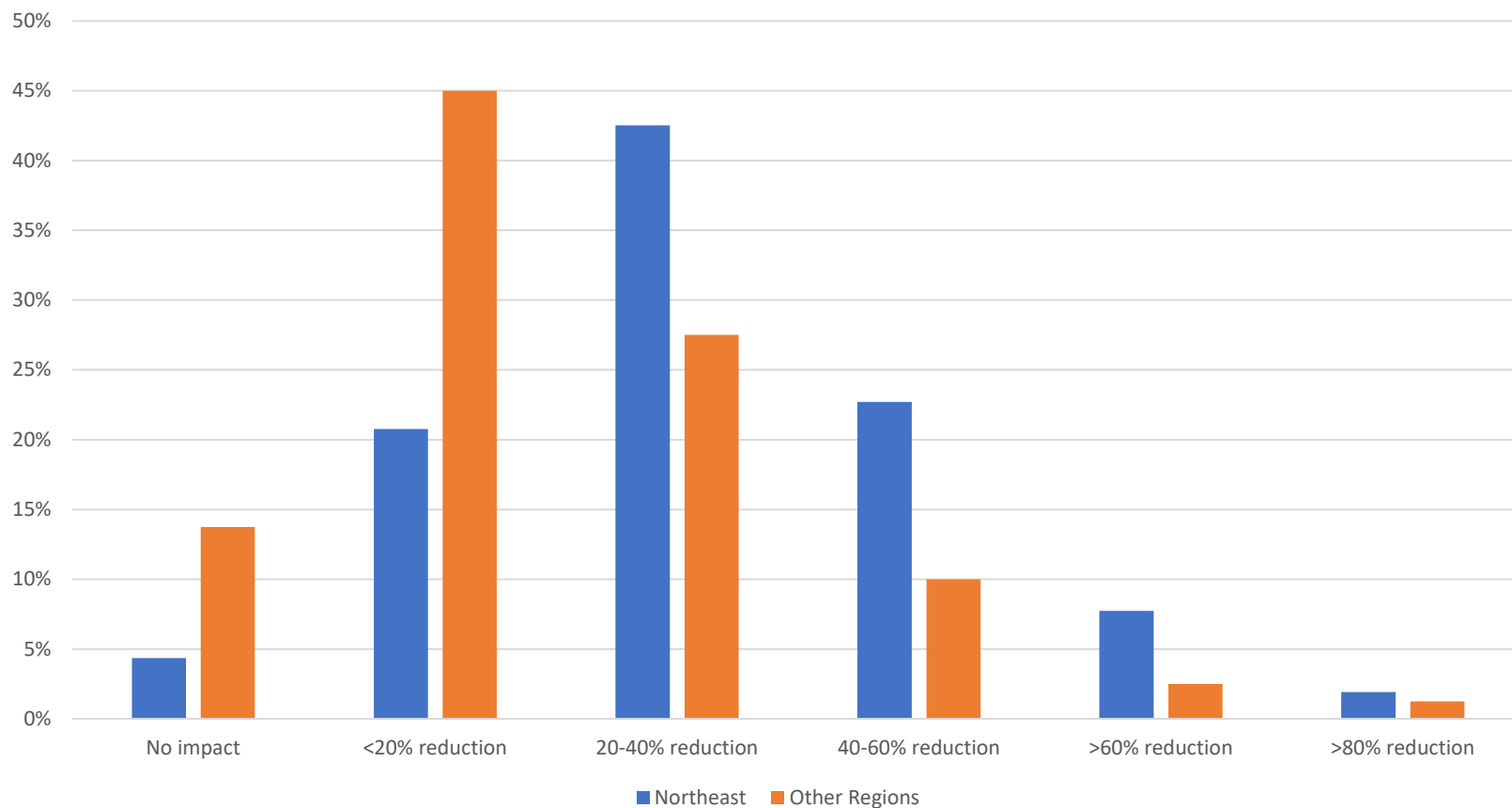
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Week 5 - Northeast vs. Other Regions



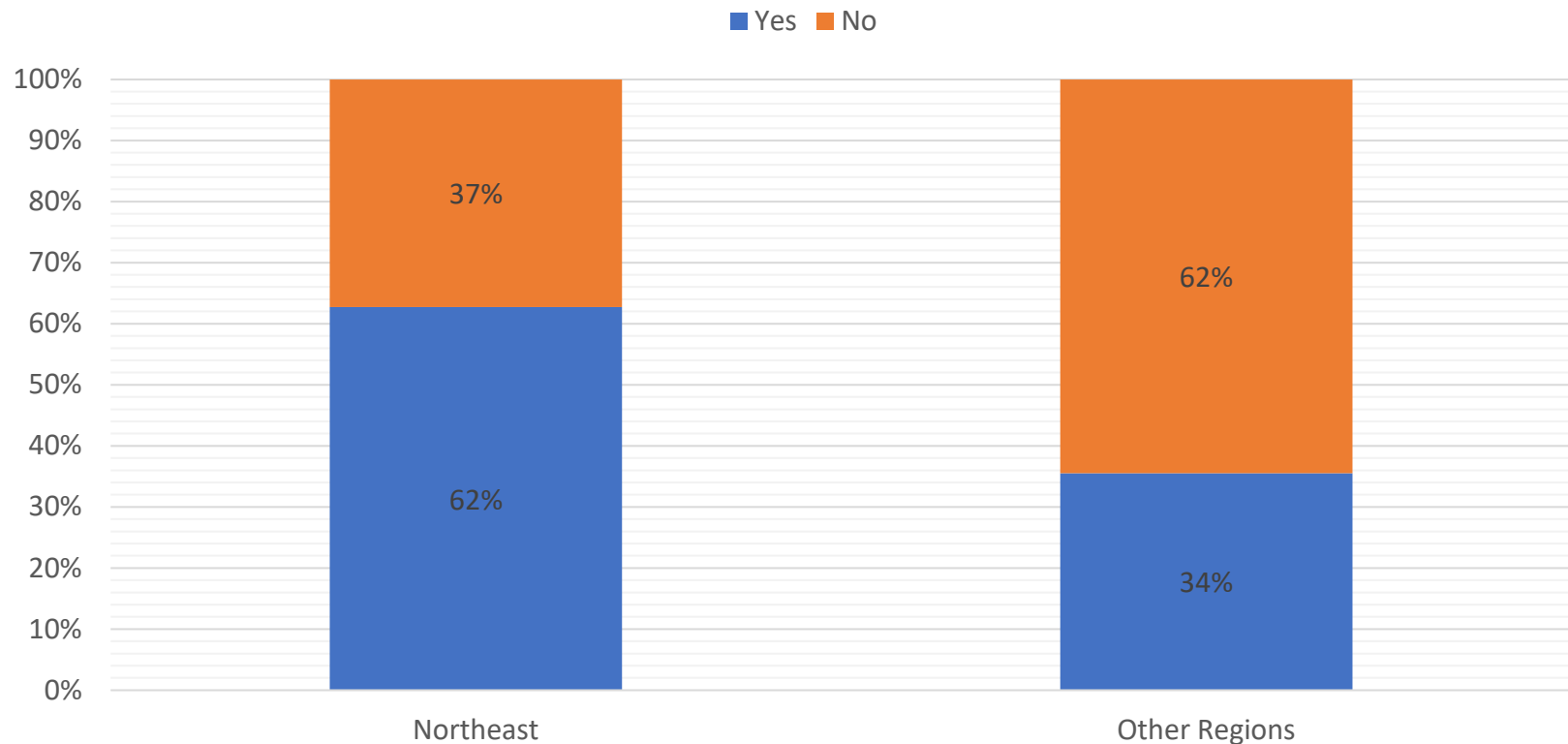
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Week 5 - Northeast vs. Other Regions



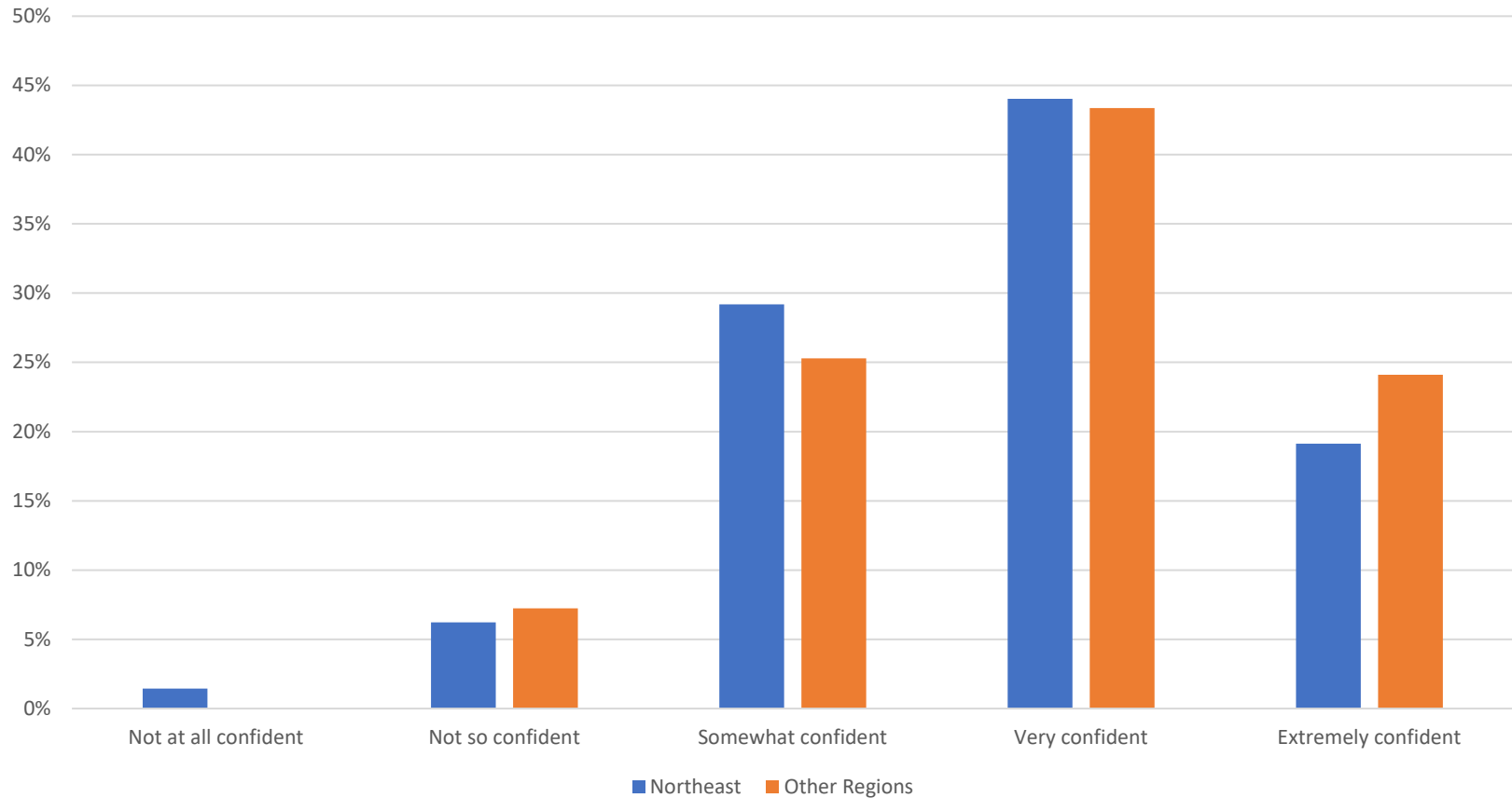
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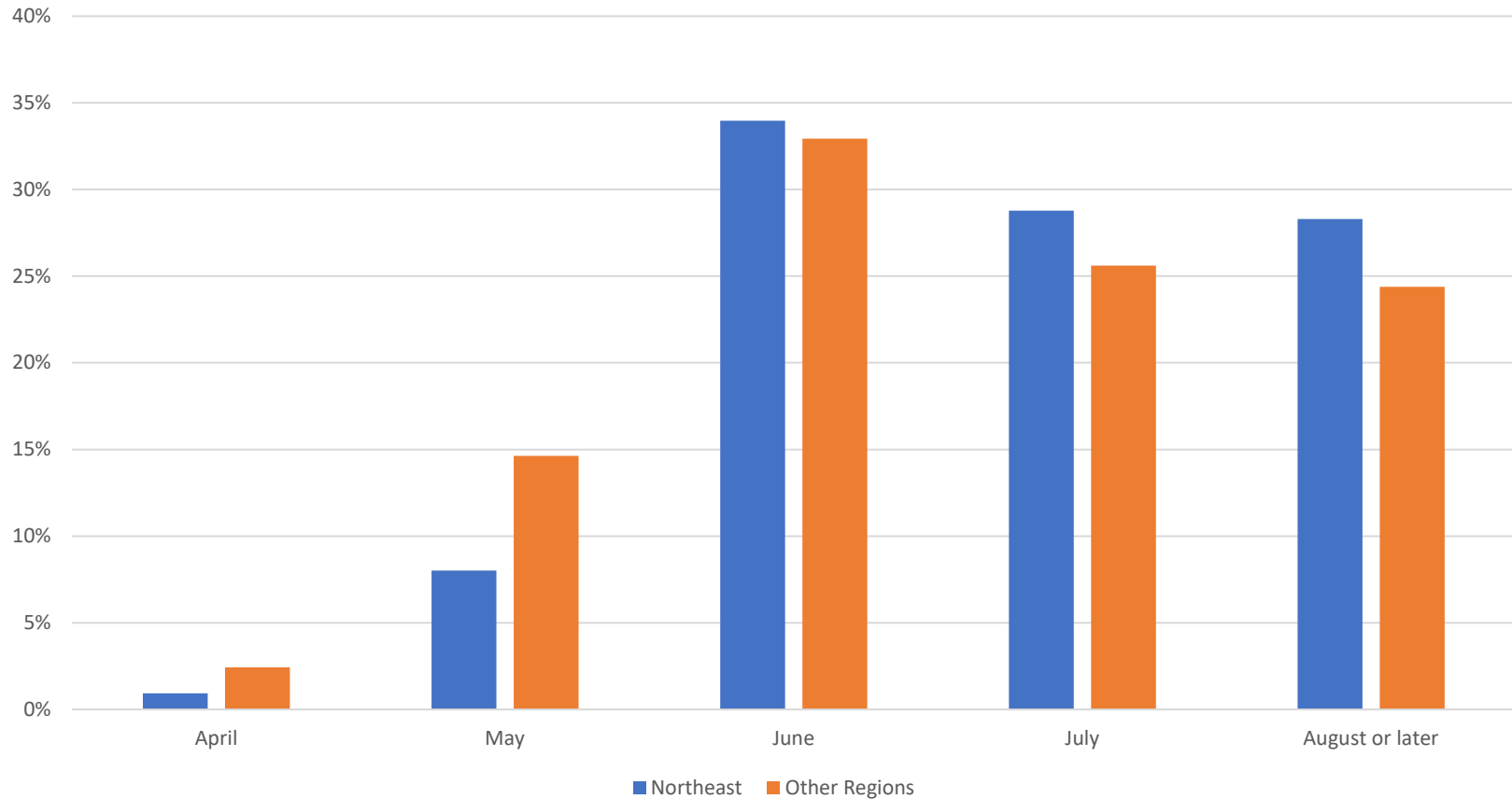
Future Outlook: How confident are you business will return to normal?

Week 5 - Northeast vs. Other Regions



Crystal ball: When do you feel your business could return to normal or improve?

Week 5 - Northeast vs. Other Regions



What would be the main drivers for your hospitals revenue to return?

Week 5 - Northeast vs. Other Regions

