

Coronavirus: economic impact on veterinary practice

Results from RCVS survey #1
3-7 April 2020



COVID-19



Survey on the economic impact of Covid-19 on veterinary clinical practices

Background

1. Between Friday 3 April and Tuesday 7 April 2020, the RCVS ran a short survey to assess the immediate impact of Covid-19 on veterinary clinical practices. The survey was developed to gather key information about how the Covid-19 pandemic has affected veterinary practices in the UK, specifically from a business and economic perspective, with a view to informing further policy decisions and, where appropriate, communications with government. It is anticipated that this will be the first of a series of such surveys to monitor the ongoing impact of the pandemic.

Sample and response rate

2. The survey called for the experience of individual practices and was designed to be completed by one person in each practice who was best placed to provide the necessary information. Consequently the survey was sent to those practices where the RCVS held a unique email address, totalling some 3,096. The survey was also publicised on social media and in a press release, which led to around 30 requests for a link to complete the survey.
3. The survey received 532 responses (a 17% response rate), with a 90% completion rate and an average completion time of just eight minutes.

Demographics / practice information

4. The survey was entirely anonymous: no data was gathered about the individuals completing the survey and no identifying data was gathered about practices. A number of questions was asked about the type, size and ownership structure. This provided the potential for additional analysis and cross-tabulation of the data.

Small-animal-only practice (including small animal practices that treat exotics)	70%
Mixed practice	14%
Equine-only practice	11%
Referral practice	2%
Other (please specify)	2%
Farm-animal-only practice	1%
	n=528

Table 2: How many full-time equivalent (FTE) veterinary surgeons / veterinary nurses are there in your practice?		
	Veterinary surgeons	Veterinary nurses
Fewer than 3	47%	47%
4-10	42%	39%
11-25	9%	12%
26-50	1%	1%
More than 50	<1%	<1%
	n=529	n=527

Table 3: Which of the following best describes your practice?	
An independent, stand-alone practice (e.g. a partnership)	54%
Part of a corporate group	20%
Part of a joint venture with a corporate group	19%
An independent, stand-alone practice that is part of a larger group (with some shared centralised support functions)	5%
A charity / veterinary school / out-of-hours-only provider / other	3%
	n=529
<i>Percentages sum to over 100% due to rounding</i>	

- In relation to the type of areas covered, 40% of practices serve an urban area, 37% serve a mixture of urban and rural and 23% serve a rural area.
- Respondents were also asked to provide the first part of their practice postcode (e.g. SW1P), so that in future further analysis could be conducted to identify areas where Covid-19 may have had the most significant economic impact.

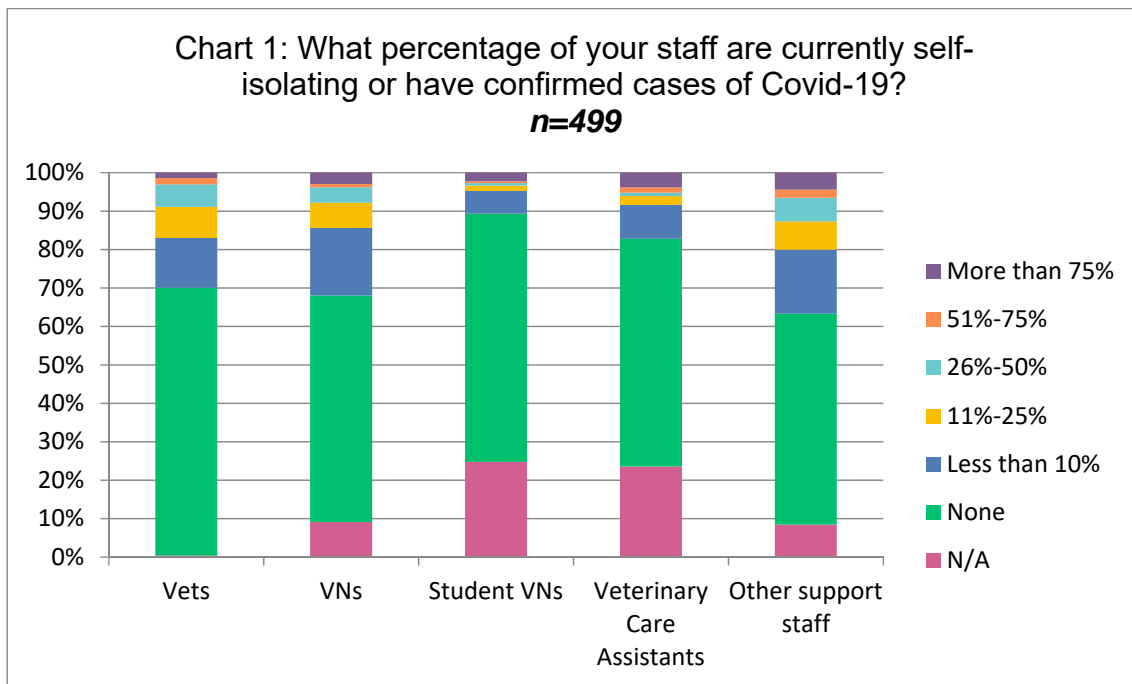
24/7 Emergency Cover

- Unlike other sectors where people can mothball their businesses and furlough all their workers, the RCVS requires veterinary surgeons to continue to take steps to deliver 24/7 emergency care. This creates unique issues for the profession and we wished to understand better how practices were managing the out-of-hours aspect of this work.
- The majority of practices (55%) used a dedicated out-of-hours service provider with only 37% of practices covering their own out-of-hours working using their own veterinary surgeons. Only 3% of practices co-operated with other local practices to share out-of-hours work. The remaining 5% used locums or used another means, including using an out-of-hours provider for some of their caseload or species treated.
- Meanwhile, 19% of respondents reported that their practice had changed its approach to delivering 24/7 emergency cover as a result of Covid-19, of these 48% were now covering their own out-of-hours using their own staff, 32% were using 'another way' and 27% were now using a dedicated out-of-hours provider. Where respondents replied 'another way' they were given a free-text option to specify, the vast majority of these respondents indicated that practices were still using same approach to OOH but they had changed the balance as to how this was

delivered, for example, they might be extending opening hours and using their OOH provider less.

Self-isolating staff

10. The following chart shows the impact of self-isolation and/or Covid-19 cases on veterinary practices. Around 30% of practices have been impacted by veterinary surgeons and veterinary nurses self-isolating/or with Covid-19, whilst almost 35% have 'other support staff' self-isolating.



Impact on turnover and services provided

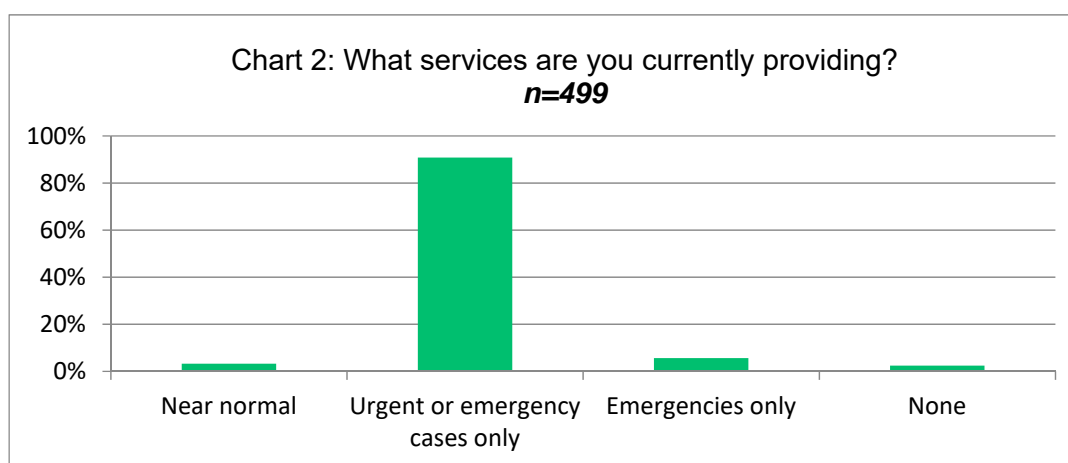
11. Social distancing measures have had a profound impact on weekly practice turnover.

Not reduced at all	1%
Reduced by less than 25%	4%
Reduced by 26%-50%	29%
Reduced by 51-75%	42%
Reduced by more than 75%	24%
	n=497

12. The following table shows the impact on small animal practices, mixed practices and equine practices, indicating that the turnover of equine practices has been more profoundly impacted than small animal practices or mixed practices.

Table 5: Reduction in turnover broken down by practice type			
	Small Animal	Mixed	Equine
Not reduced at all	1%	2%	0%
Reduced by less than 25%	3%	5%	2%
Reduced by 26%-50%	30%	47%	9%
Reduced by 51-75%	48%	33%	24%
Reduced by more than 75%	19%	14%	65%
	n=346	n=66	n=55

13. Meanwhile, 97% of practices are limiting the service they provide to emergencies or emergencies and urgent cases.



Practice closures

14. Despite the severe reduction in turnover and services provided, 71% had not closed, or had no immediate plans to close, any practice premises.

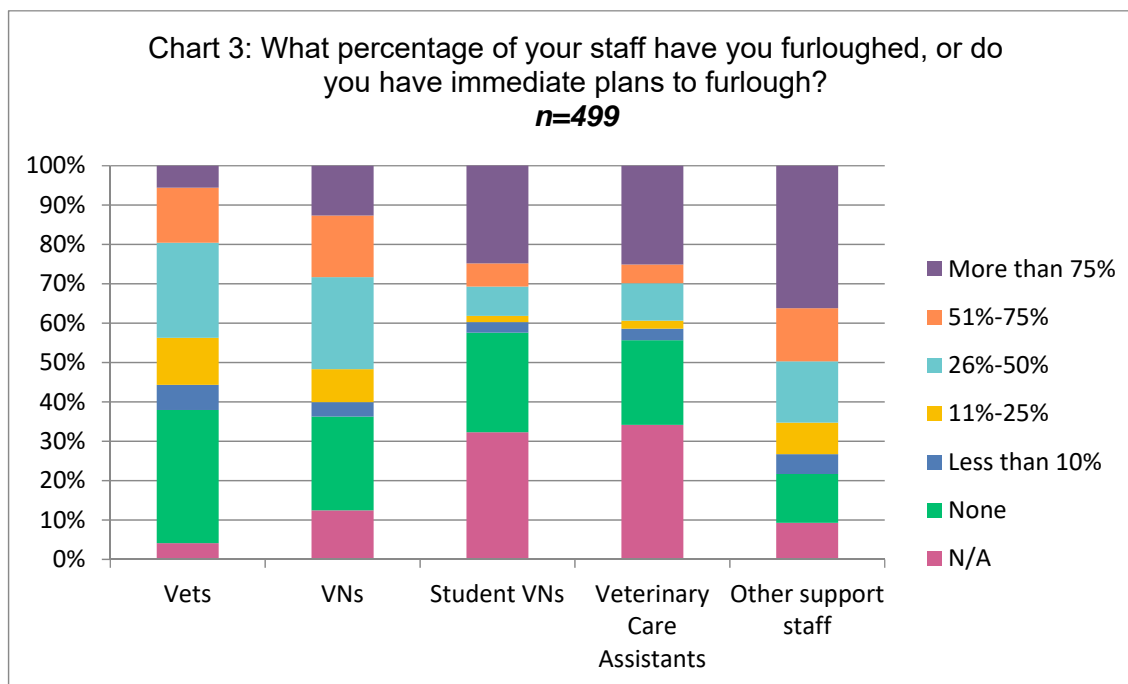
Table 6: Have you closed, or do you have immediate plans to close, any premises? (tick all that apply)	
Yes - Main premises	5%
Yes - Branch premises	24%
No	71%
	n=499

Use of locums

15. Of the 53% of respondents that reported using locums, 83% had decreased their use whilst only 3% had increased their use.

Furloughing and redundancy

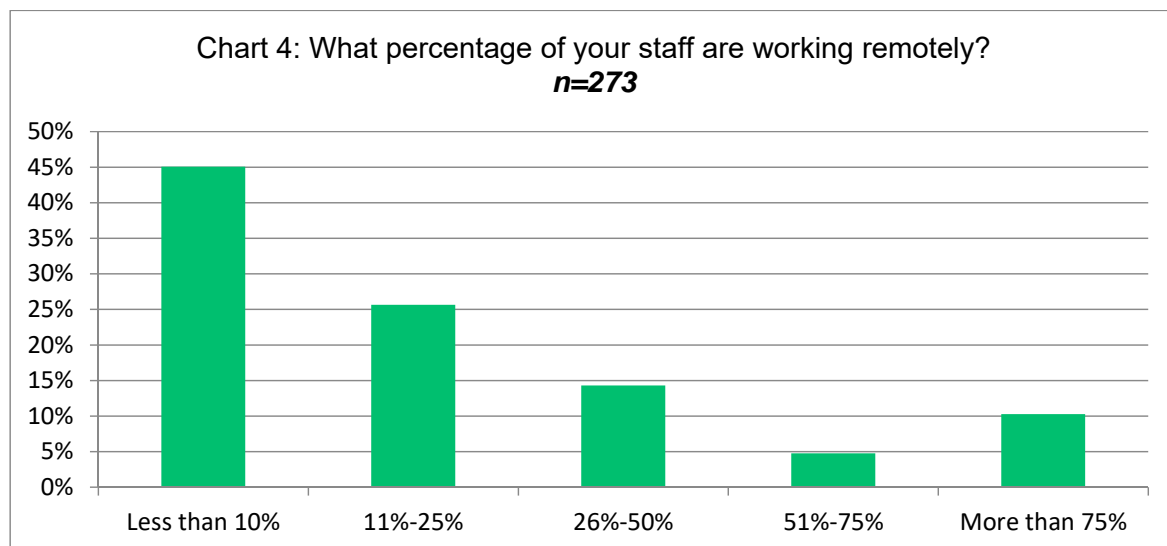
16. 62% of respondents had furloughed or intended to furlough veterinary surgeons, compared to 64% for veterinary nurses and 78% for other support staff. The modal response (most frequent) as to the percentage of staff furloughed was 26-50% for veterinary surgeons and veterinary nurses, and more than 75% for 'Other support staff', Student Veterinary Nurses and Veterinary Care Assistants.



17. A free-text response question was asked, 'if you have not furloughed any staff, why not?', to understand why practice were not making use of the Coronavirus Job Retention Scheme. After adjustment to remove those that replied 'N/A' or that they had in fact furloughed staff, 19% of respondents answered the question (n=101). The most frequent response (33%) was that the staff were still needed to cover the workload. This was followed by: 26% working in single-handed or very small practices; 15% that split shifts or reduced wages instead; 10% waiting to decide; 7% considering furlough a last resort; 6% not furloughing due to concerns about sickness or absence. A further 6% of responses were categorised as 'other'.
18. Those that had furloughed staff were asked a free-text response question, 'if you have furloughed staff, what issues has furloughing created?'. After adjustment for those that said they had not furloughed staff, some 66% of respondents provided an answer (n=350). The most frequent response (39%) was that the furlough had put significant stress on the teams continuing to work and that creating an acceptable rota was difficult. This was closely followed by 30% of responses that noted furloughing had created divisions in the team, was difficult to do fairly and created monetary concerns for those furloughed. Meanwhile, 16% had experienced minimal issues with furlough or noted staff were happy to be furloughed. Struggles with a loss of nurse or administrative support, or other expertise, were highlighted by 12%. Other responses included: difficulties providing out-of-hours or branch services (7%); those on reduced hours earning less than those furloughed (5%); lack of clarity on the scheme's details or concerns about delays in payment (5%); concerns about sickness (5%); administration of the scheme (4%) and the length of the furlough (4%).
19. Only 6% of respondents had made, or had immediate plans to make staff redundant. Further questions were asked to assess the percentages, but the sample size is too low to report meaningfully.

Remote working (working from home)

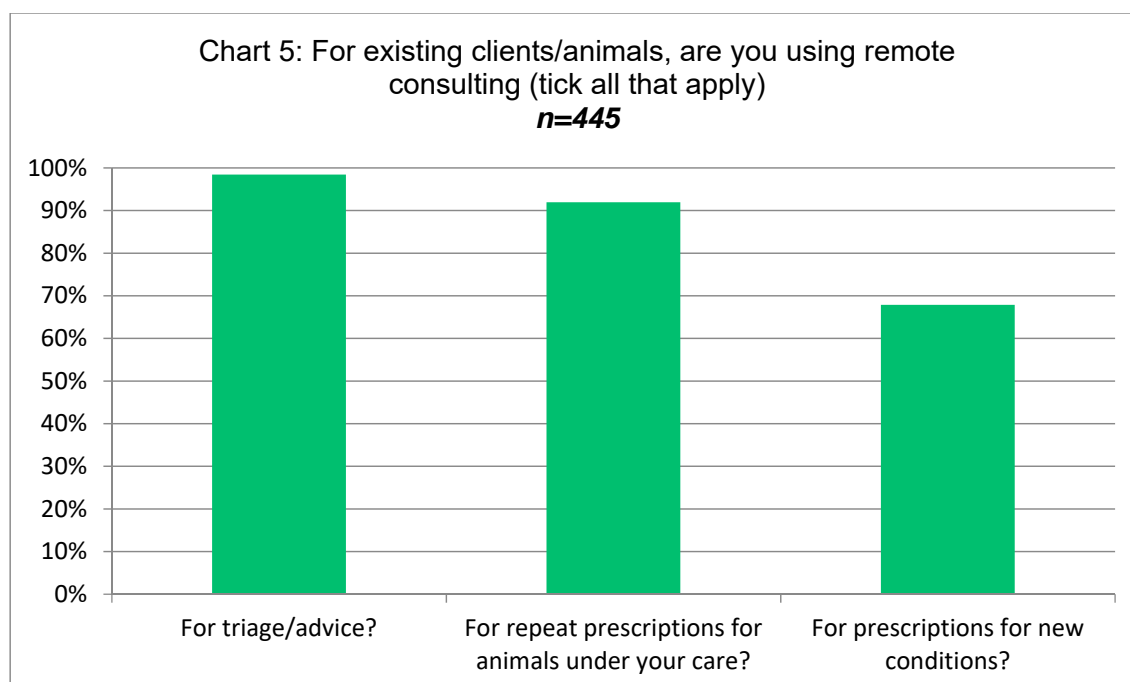
20. Over half (55%) of respondents had practice staff working remotely, of these the percentages of staff working remotely are presented in the following chart.



Remote consulting

21. All respondents answering the relevant question (*n=451*) reported that their practice was using remote consulting for existing clients/animals, whilst 45% were using it for new clients/animals. It is worth noting, however, that 15% of survey respondents skipped this question, a considerably higher percentage than other questions.

22. The following chart shows how respondents are using remote consulting for existing clients/animals. Again it is of note that 16% of respondents skipped this question.



23. Regrettably due to a glitch in the survey logic, responses were not collected as to how remote consulting was being used by the 45% that reported using it for new clients/animals.

Difficulty obtaining equipment and supplies

24. Whilst 56% of respondents reported no difficulty in obtaining equipment and supplies, 43% had difficulties obtaining Personal Protective Equipment (PPE) and 4% had difficulties obtaining oxygen. Meanwhile 27% reported they had difficulty obtaining 'other equipment/medicines/supplies', after removing responses that indicated they had no difficulty obtaining equipment or supplies this reduced to 25% (n=122). In this other category, 61% highlighted difficulty obtaining hand-sanitiser or equivalent products, 23% highlighted difficulties obtaining certain medicines, 13% noted delays, purchase limits or only substitute products being available, 10% identified particular items of PPE such as scrubs or masks, 8% identified general provisions such as paper towels or loo roll, and 6% highlighted difficulties obtaining pet foods.

Equipment and supplies provided to the NHS

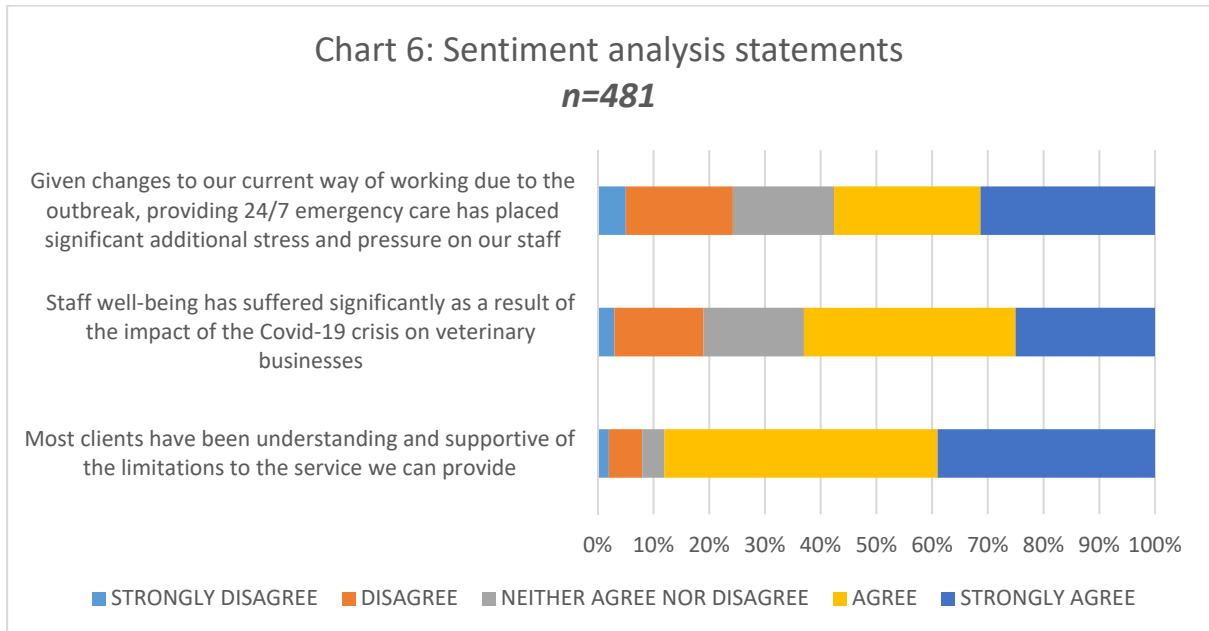
25. The majority of practices (83%) had not provided any equipment or supplies to the NHS.

Table 7: Have you provided any of the following to the NHS for use in tackling Covid-19? (tick all that apply)	
Ventilators	2%
PPE	14%
Oxygen	2%
None	83%
n=481	
<i>Percentages sum to over 100% due to respondents being able to select multiple answers</i>	

26. After adjustment for those responding N/A or None, 36 respondents chose 'other' and offered a free-text response. From these (n=36), 50% had offered equipment but their offer had not been taken up, 26% had provided anaesthetic monitors, drip pumps, syringe drivers or oxygen concentrators, and a further 22% named specific items of PPE they had provided.

Sentiment analysis

27. Respondents were presented with three statements to assess the impact of Covid-19 on staff wellbeing and how clients were responding. The responses are presented in the table below with the N/A responses removed.



Free-text responses

28. Respondents were given a 'free-text' opportunity to comment on how the government and RCVS could better support practices and to provide general comments.

How could the Government support you better through this crisis?

29. Almost three-quarters of survey respondents (n=391) provided an answer to this question. Responses were categorised as follows (percentages do not add up to 100% as some responses covered multiple themes or codes, and not all responses are reported):

Furlough

- Issues relating to the furlough were the most frequent response (19%) the vast majority of these response wanted the furlough period to be reduced or more flexible, others called for the furlough to allow reduced hours or for a commitment for it to be in place for a longer period of time or more generous.

Unique position of the veterinary profession

- The unique position of the veterinary profession in being required to stay open to provide emergency 24/7 care was highlighted in 19% of responses, with respondents noting the profession had fallen between the cracks of a number of the schemes available and that grants and other financial support should be made available.

Permitted work and social recognition

- 17% of response responses called for greater clarity as to what vets could do and recognition of their important role. This could be broken down into: 7% that called for greater recognition of the important work the profession undertakes and communication to the public that taking your animal to the vet was acceptable under lockdown; 6% that called for greater clarity as to what vets were allowed to do under lockdown; and 4% that asked for vets to be allowed to do more.

Clarity and speed of payment

- The need for more detail on schemes and ensure that payments are made as swiftly as possible was highlighted in 13% of responses.

Support for business owners /directors

- Some 12% of responses called for support for directors and business owners that paid themselves primarily through dividends rather than a salary.

Government doing a good job

- 9% of response considered the government was doing a good job.

Other

- 10% of respondents did not know how the government could provide further support to the profession and there was a long tail of additional coded responses with each cod representing under 3% of responses.

How could the RCVS support you better through this crisis?

30. Three-quarters of survey respondents (n=397) provided an answer to this question. Responses were categorised as follows (percentages do not add up to 100% as some responses covered multiple themes or codes):

RCVS Guidance and Enforcement

- The most frequent response (27%) was that the RCVS needed to provide clearer guidance, in particular as to what services it was permissible for veterinary practices to provide. The need for clarity on the permissibility of first and second vaccinations was specifically identified in 9% of responses. Meanwhile 5% of responses wanted greater enforcement of RCVS guidance, in particular when neighbouring practices were seen to be interpreting the rules differently or providing services that were neither urgent or emergencies.
- In 11% of responses it was felt that the RCVS had been too restrictive and that veterinary practices should be allowed to provide a greater range of services.

Sentiment towards RCVS

- Encouragingly the second most frequent response (15%) was that the RCVS was doing a good job or that there was nothing more it should do. This compared favourably to the 2% of responses that expressed negative sentiment towards the RCVS.

Lobbying and communication

- The third most frequent response (14%) was that the RCVS should be lobbying government or providing greater support for practices, in particular in relation to reducing the length of furloughing, rates relief or categorising veterinary surgeons as 'essential workers'.
- Some 9% of respondents felt the RCVS needed to be faster, more proactive or responsive with its communications, publication of guidance or advice provided. A further 9% considered the RCVS should be providing more communication to clients as to what services veterinary practices were able to offer.

Fees

- 5% of respondents felt the RCVS had not gone far enough in offering retention fee payments in instalments and felt the RCVS should have reduced or remove the retention fee altogether.

Other responses

- Some 8% of responses referred to previous questions or noted they had no opinion. A long-tail of responses (7%) were categorised as 'other'.

Any other comments or feedback

31. Respondents were provided with an opportunity to provide any comments or feedback. After removing those that replied 'no' or 'none', a quarter of respondents took this opportunity (n=133). The following are the most frequent themes (percentages do not add up to 100% as some responses covered multiple themes or codes, and not all responses are reported due to a long-tail of low-frequency responses):

- 25% used the opportunity to thank the RCVS for listening or to say 'stay safe';
- 19% considered that rules and restrictions were being applied unfairly or unjustly across the profession;
- 15% called for vets to be allowed to do more during the lockdown;
- 14% expressed financial concerns and worries about the length of lockdown;
- 14% wanted more support from the RCVS and greater lobbying of government for financial support;
- 11% expressed negative sentiment towards the College on a range of issues such as guidance, restrictions and fees;
- 6% noted the huge stress the profession had been under and their pride in how it had responded to the challenge.

Annex A: Survey Questions

Survey on the economic impact of Covid-19 on veterinary clinical practices

The following short RCVS survey gathers key information on the impact that changes in working practices precipitated by the Covid-19 pandemic have had on veterinary practices, particularly business and economic.

The survey should be completed by an individual on behalf of your veterinary practice premises.

The data gathered will be used to inform further RCVS policy decisions and ongoing conversations with government, where appropriate. This survey is anonymous, but data may be shared with relevant government departments and third parties.

Demographics

- 1 . What type of practice do you own/manage?
 - a. Small-animal-only practice (including small animal practices that treat exotics)
 - b. Equine-only practice
 - c. Farm-animal-only practice
 - d. Mixed practice
 - e. Referral practice
 - f. Other (please specify)

2. How many full-time equivalent (FTE) vets are there in your practice?
 - a. Fewer than 3
 - b. 4-10
 - c. 11-25
 - d. 26-50
 - e. More than 50

3. How many full-time equivalent (FTE) veterinary nurses are there in your practice?
 - a. Fewer than 3
 - b. 4-10
 - c. 11-25
 - d. 26-50
 - e. More than 50

4. Which of the following best describes your practice?
 - a. An independent, stand-alone practice (e.g. a partnership)
 - b. An independent, stand-alone practice that is part of a larger group (with some shared centralised support functions)
 - c. Part of a corporate group

- d. Part of a joint venture with a corporate group
- e. A charity
- f. Part of a veterinary school
- g. An out-of-hours-only provider
- h. Other (please specify)

5. Which of the following best describes your practice's usual approach to providing 24/7 emergency cover, pre-Covid-19?

- a. Practice covers its own out-of-hours work, using its own veterinary surgeons
- b. Practice covers its own out-of-hours work, with locum help
- c. Practice uses a dedicated out-of-hours service provider
- d. Practice co-operates with other local practices to share out-of-hours work
- e. Practice is primarily or wholly an out-of-hours provider
- f. We handle 24/7 emergency cover another way – please specify (free text)

6. Has your approach to providing 24/7 emergency cover changed as a result of Covid-19?

- a. Yes
- b. No
- c. Don't know

If (a) What best describes what your practice is currently doing to provide 24/7 emergency cover?

- a. Practice now covers its own out-of-hours work, using its own veterinary surgeons
- b. Practice now covers its own out-of-hours work, with locum help
- c. Practice now uses a dedicated out-of-hours service provider
- d. Practice now co-operates with other local practices to share out-of-hours work
- e. We now handle 24/7 emergency cover another way – please specify (free text)

7. Please give us the first part of the postcode of your main practice premises, eg SW1A or N4 (this may be used to create a geographic picture of where practices are located, not to track individual responses).

8. Please tick the description below that most closely approximates to the area your practice serves:

- a. An urban area
- b. A rural area
- c. A mixture of urban and rural

9. What percentage of your staff are currently self-isolating or have confirmed cases of Covid-19?

	Vets	VNs	Student VNs	Veterinary Care Assistants	Other support staff
None					
Less than 10%					
11-25%					
26-50%					

51%-75%					
More than 75%					
N/A					

10. To what extent has your weekly practice turnover reduced since social distancing (lockdown) measures were put in place (ie 23 March 2020)?

- a. Not reduced at all
- b. Reduced by less than 25%
- c. Reduced by 26%-50%
- d. Reduced by 51-75%
- e. Reduced by more than 75%

11. What services are you currently providing?

- a. Near normal
- b. Urgent or emergency cases only
- c. Emergencies only
- d. None

12. Have you closed, or do you have immediate plans to close, any premises? (tick all that apply)

- a. Yes – Main Premises
- b. Yes – Branch Premises
- c. No

13. Has the Covid-19 crisis affected your used of locums?

- a. No, we do not use locums
- b. Yes, we do use locums, but no change
- c. We have increased our use of locums
- d. We have decreased our use of locums

14. What percentage of your staff have you furloughed, or do you have immediate plans to furlough?

	Vets	VNs	Student VNs	Veterinary Care Assistants	Other support staff
None					
Less than 10%					
11-25%					
26-50%					
51%-75%					
More than 75%					
N/A					

If you have not furloughed any staff, why not? (free text)

If you have furloughed staff, what issues has furloughing created? (free text)

15. Have you made, or do you have immediate plans to make, staff redundant?

- a. Yes
- b. No
- c. Don't know

If (a) what percentage of your staff have you made, or do you have immediate plans to make, redundant?

	Vets	VNs	Student VNs	Veterinary Care Assistants	Other support staff
None					
Less than 10%					
11-25%					
26-50%					
51%-75%					
More than 75%					
N/A					

16. Are any of your staff working remotely (eg at home)?

- a. Yes
- b. No

If (a) What percentage of your staff are working remotely?

- a. Less than 10%
- b. 11%-25%
- c. 26%-50%
- d. 51%-75%
- e. More than 75%

17. Are you using remote consulting as a result of social distancing measures?

- a. Yes
- b. No

If (a) then (tick all that apply):

- a. For existing clients/animals?
- b. For new clients/animals?

If (a) For existing clients/animals, are you using remote consulting (tick all that apply):

- a. For triage/advice?
- b. For repeat prescriptions for animals under your care?
- c. For prescriptions for new conditions?

If (b) For new clients/animals, are you using remote consulting (tick all that apply):

- a. For triage/advice?
- b. For prescriptions for new conditions?

18. Have you had difficulty obtaining any of the following as a result of Covid-19? (tick all that apply)

- a. Personal Protective Equipment (PPE)
- b. Oxygen
- c. No issue obtaining
- d. Other equipment / medicines / supplies (please specify – free text)

19. Have you provided any of the following to the NHS for use in tackling Covid-19? (tick all that apply)

- a. Ventilators
- b. PPE
- c. Oxygen
- d. None
- e. Other equipment / medicines / supplies (please specify – free text)

To what extent do you agree with the following statements?

20. Most clients have been understanding and supportive of the limitations to the service we can provide

21. Staff well-being has suffered significantly as a result of impact of the Covid-19 crisis on veterinary businesses

22. Given changes to our current way of working due to the outbreak, providing 24/7 emergency care has placed significant additional stress and pressure on our staff

Comments and feedback

23. How could the Government support you better through this crisis?

24. How could the RCVS support you better through this crisis?

25. Any other comments or feedback?