

Coronavirus: economic impact on veterinary practice

Results from RCVS survey #2
1-5 May 2020



COVID-19



Second survey on the economic impact of Covid-19 on veterinary clinical practices

Background

1. The RCVS is running a series of surveys to assess the immediate impact of Covid-19 on veterinary clinical practices over the coming months. These surveys have been 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. The first such survey was held on 3-7 April 2020 and the results from that survey can be accessed at www.rcvs.org.uk/coronavirus-surveys. This report relates to the second survey, which was carried out between Friday 1 May and Tuesday 5 May 2020.
2. The following are the notable changes since the first survey:
 - a. Fewer practices are impacted by veterinary surgeons and veterinary nurses self-isolating/or with Covid-19, around 20% compared with 30%. Fewer practices also have 'other support staff' self-isolating, 20% compared with 35% in the first survey.
 - b. Following the new RCVS guidance for clinical practices that was released on 9 April, effective 14 April, the majority of respondents (69%) reported their practices were now seeing a 'reduced caseload, including some routine work', whilst 26% were seeing 'emergencies only'. This compares with 97% of practices who were limiting the service they provided to 'emergencies' or 'emergencies and urgent cases' in the first survey.
 - c. Practice turnover has improved, with the modal (most frequent) response being a reduction of 25-50% (46% of respondents) compared with 51%-75% reduction in the first survey (42% of respondents). Meanwhile 6% of respondents are reporting turnover reducing by over 75%, compared with 24% of respondents reporting such a reduction in the first survey

Sample and response rate

3. 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 3,139. The survey was also publicised on social media.
4. The survey gathered 251 responses (an 8% response rate), with a 92% completion rate and an average completion time of just nine minutes. This compares to 532 responses (a 17% response rate), with a 90% completion rate and an average completion time of just eight minutes, for the first survey.

Demographics / practice information

5. 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 and demonstrated that the sample composition was similar to the first survey.

Table 1: What type of practice do you own/manage?

| | |
|---|-----|
| Small-animal-only practice (including small animal practices that treat exotics) | 74% |
| Mixed practice | 12% |
| Equine-only practice | 8% |
| Referral practice | 2% |
| Farm-animal-only practice | 2% |
| Other (please specify) | 2% |
| n=251 | |

Table 2: How many full-time equivalent (FTE) veterinary surgeons / veterinary nurses are there in your practice?

| | Veterinary surgeons | Veterinary nurses |
|---------------------|----------------------------|--------------------------|
| Fewer than 3 | 49% | 40% |
| 4-10 | 43% | 43% |
| 11-25 | 6% | 8% |
| 26-50 | 1% | 1% |
| More than 50 | 0% | 0% |
| N/A | N/A | 8% |
| | n=249 | n=249 |

Table 3: Which of the following best describes your practice?

| | |
|---|-----|
| An independent, stand-alone practice (e.g. a partnership) | 58% |
| Part of a corporate group | 18% |
| Part of a joint venture with a corporate group | 17% |
| An independent, stand-alone practice that is part of a larger group (with some shared centralised support functions) | 4% |
| A charity / veterinary school / out-of-hours-only provider / other | 3% |
| n=251 | |

6. In relation to the type of areas covered, 42% serve a mixture of urban and rural, 39% of practices serve an urban area, and 19% serve a rural area.
7. In this second survey respondents were asked in which country their primary practice premises was based, 83% were based in England, 11% Scotland, 3% Wales and 3% Northern Ireland.
8. 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.

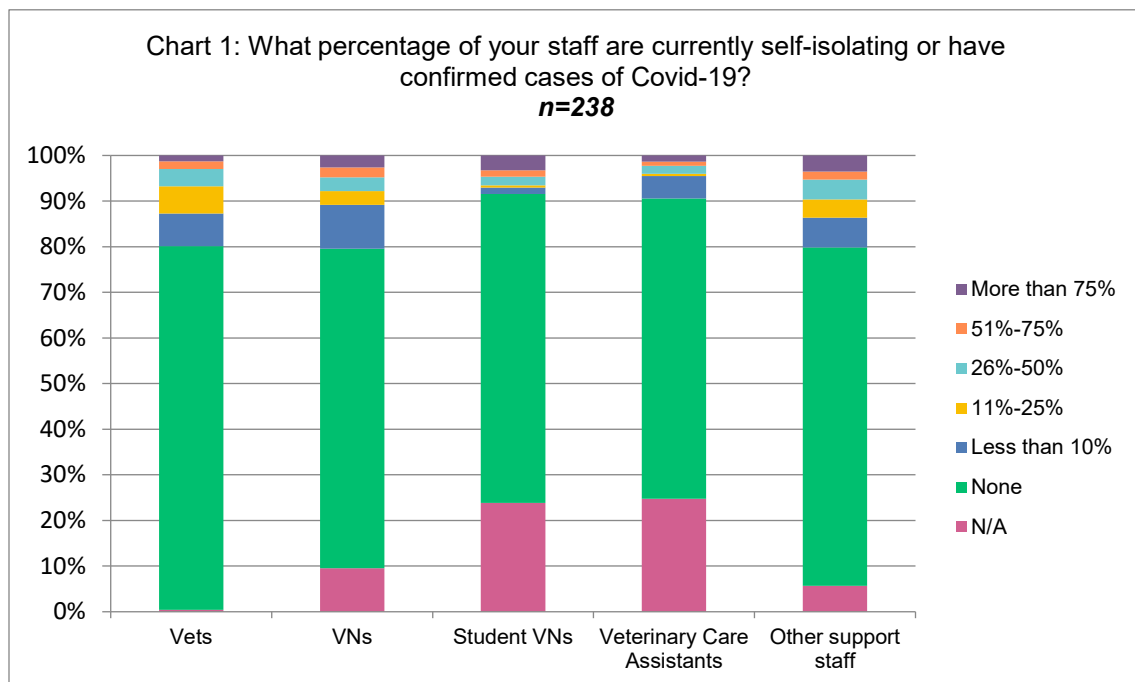
24/7 Emergency Cover

9. 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 (OOH) aspect of this work.

10. Similarly to the first survey, the majority of practices (53%) used a dedicated out-of-hours service provider, with 37% of practices covering their own out-of-hours work using their own veterinary surgeons. Only 5% of practices co-operated with other local practices to share out-of-hours work, the remaining 5% used locums or used another means, including an out-of-hours provider, for some of their caseload or species treated.
11. On 9 April the RCVS released new guidance for clinical practices during Covid-19, effective from 14 April. Practices were asked whether this new guidance had led to them change their approach to providing 24/7 emergency cover, with some 28% of practices reporting it had.
12. From the 28% of respondents that reported that their practice had changed its approach to delivering 24/7 emergency cover as a result of the new guidance, of these 39% were now covering their own out-of-hours using their own staff, 37% were now using a dedicated out-of-hours provider and 19% were using 'another way'. Where respondents replied 'another way' they were given a free-text option to specify. The majority of these respondents indicated that practices were still using the same approach to OOH but they had changed the balance as to how this was delivered, for example, increasing the hours covered by an OOH provider.

Self-isolating staff

13. The following chart shows the impact of self-isolation and/or Covid-19 cases on veterinary practices. Compared with the first survey (April 2020), fewer practices appear to be impacted by veterinary surgeons and veterinary nurses self-isolating/or with Covid-19. Around 20% of practices have veterinary surgeons and veterinary nurses self-isolating/or with Covid-19, compared with 30% in the first survey, whilst 20% had 'other support staff' self-isolating, compared with 35% in the first survey.



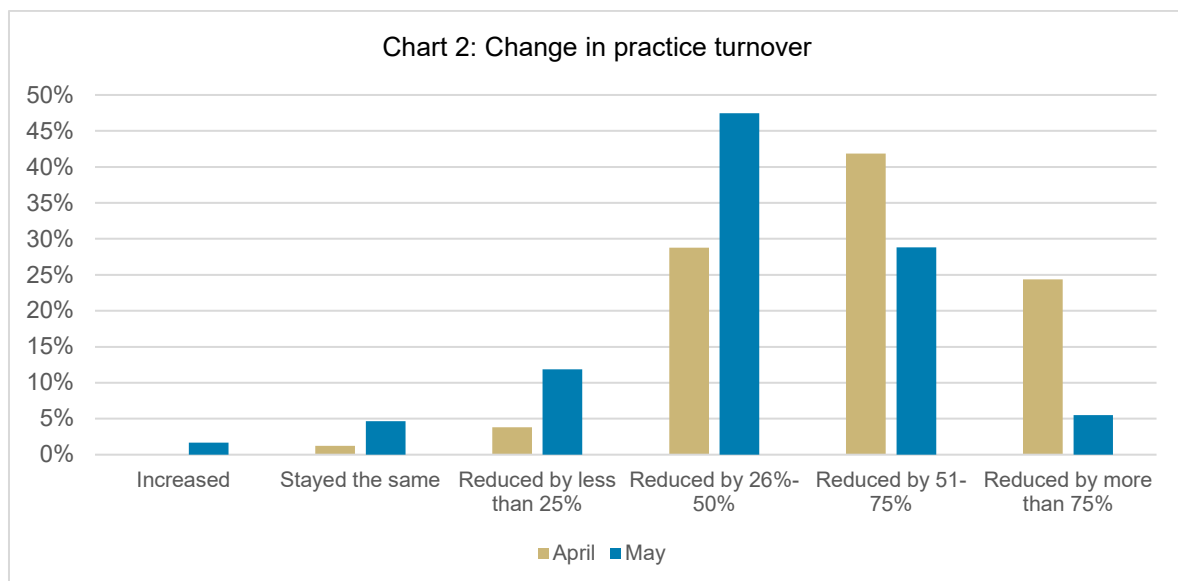
Impact on turnover and services provided

14. Respondents were asked what 'in-person' services their practices were providing following the new RCVS guidance for clinical practices that was released on 9 April, effective 14 April. The majority (69%) were seeing a 'reduced caseload, including some routine work', 26% were seeing 'Emergencies only', 3% were seeing a 'near normal' caseload and 1% were seeing not seeing any cases 'in person'. In the first survey (April 2020), 97% of practices were limiting the service they provided to emergencies or emergencies and urgent cases.
15. Practices were asked how their turnover had changed since 14 April compared to how it was pre-Covid, presented in Table 4 below.

Table 4: Since 14 April how has your practice turnover changed compared to how it was pre-Covid-19?

| | |
|---------------------------------|--------------|
| Increased | 2% |
| Stayed the same | 5% |
| Reduced by less than 25% | 12% |
| Reduced by 26%-50% | 47% |
| Reduced by 51-75% | 29% |
| Reduced by more than 75% | 6% |
| | n=236 |

16. Chart 2 below compares the impact on practice turnover in the first survey (April) compared with the current survey (May). It should be noted that in April respondents were asked 'To what extent has your weekly practice turnover reduced since social distancing (lockdown) measures were put in place (ie 23 March 2020)?' and in May Since 14 April how has your practice turnover changed compared to how it was pre-Covid-19?.



17. In the first survey a table was provided showing the impact on the turnover of small animal practices, mixed practices and equine practices. The low response rate in some categories makes it inappropriate to report the data in this format again. It is, however, notable that the

modal (most frequent) response had improved for small animal and equine practices, but not mixed practices, where it had stayed the same. The following table indicates the modal response for each practice type.

Table 5: Reduction in turnover broken down by practice type

| | Small Animal | | Mixed | | Equine | |
|--------------------------|--------------|--------------|-------------|-------------|-------------|-------------|
| | April | May | April | May | April | May |
| Increased | | | | | | |
| Not reduced at all | | | | | | |
| Reduced by less than 25% | | | | | | |
| Reduced by 26%-50% | | X (51%) | X (47%) | X (48%) | | |
| Reduced by 51-75% | X (48%) | | | | | X (53%) |
| Reduced by more than 75% | | | | | X (65%) | |
| | n=346 | n=171 | n=66 | n=31 | n=55 | n=19 |

Practice closures

18. As might be expected given the improvements in turnover and the increased services being provided following the change to RCVS guidance, it would appear that some practices that had closed may now have reopened. In this survey 76% had not closed, or had no immediate plans to close, any practice premises, compared to 71% in the last survey.

Table 6: Are any of your premises currently closed, or do you have immediate plans to close any premises?

| | April | May |
|-----------------------|--------------|--------------|
| Yes - Main premises | 5% | 3% |
| Yes - Branch premises | 24% | 21% |
| No | 71% | 76% |
| | n=499 | n=238 |

In the April survey respondents were asked 'Have you closed, or do you have immediate plans to close, any premises?' the question was amended in May (as above) to capture those that may have closed, but now reopened practice premises.

Use of locums

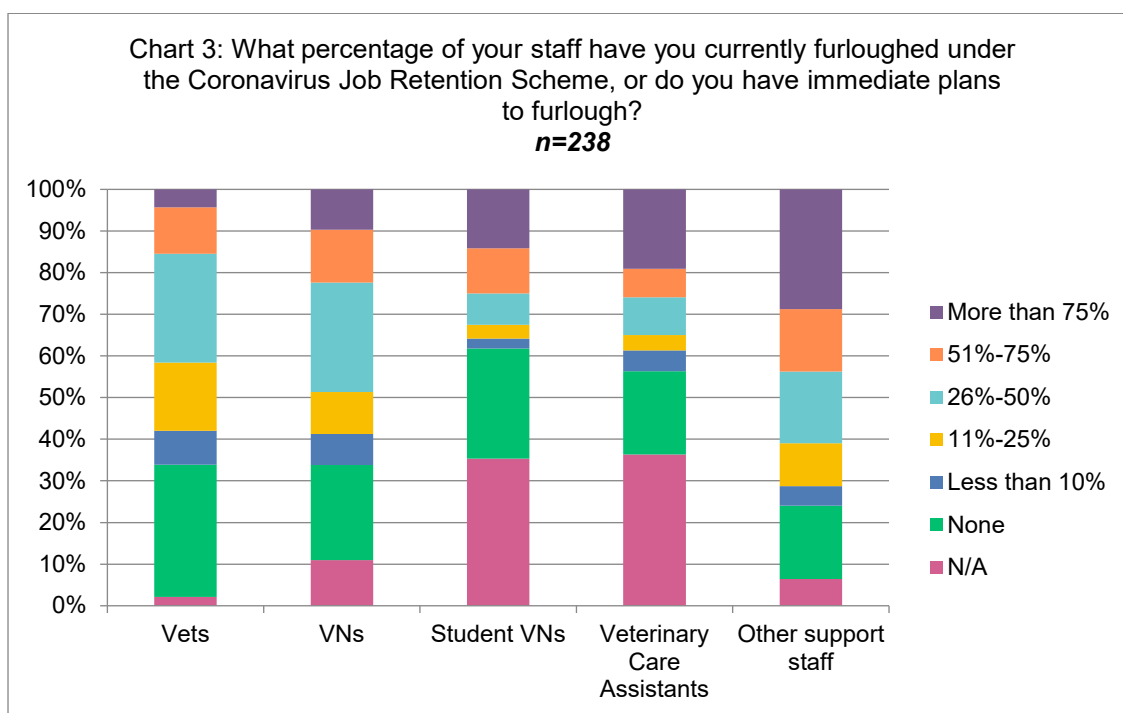
19. Similarly to the first survey, 56% reported using locums (53% in the first survey), of these, 84% had decreased their use (83% in the first survey).

Government support

20. Regarding the sources of government support, the overwhelming majority (87%) had used or planned to use the Job Retention Scheme (87%), 8% Business interruption Loans and 4% Self-Employment Income Support. Some 8% of respondents reported having used no form of government support.
21. Some 8% of respondents responded in the 'other, please specify' category, with the majority of these having accessed Local Authority or small business grants.

Furloughing and redundancy

22. The majority (66%) of respondents currently had furloughed or intended to furlough veterinary surgeons and veterinary nurses (62% and 64% respectively in the first survey) and 75% for other support staff (78% in the first survey). In both surveys, 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. Chart 3 below shows the detailed breakdown of how respondents are using the furlough scheme.
23. It should be noted that in the April survey respondents were asked 'what percentage of your staff have you furloughed, or do you have immediate plans to furlough?' in the May survey, however, they were asked 'what percentage of your staff are currently furloughed under the Coronavirus Job Retention Scheme, or do you have immediate plans to furlough'. This change in wording was to help identify any trends for practices having used the furlough, but now having brought staff back to work.



24. Those responding that they had chosen not to furlough staff were given tick-box options as to the reasons for not furloughing (adjusting for those that used the question to report they had furloughed n=59). The most frequent response was 'Staff required to cover workload' (31%) followed by 'single-handed practice / small practice team' (17%). This compares with 33% and 26% respectively in the first survey, although direct comparison is not possible as in the first survey respondents were given a free-text box for their answers (the pre-populated answers for the second survey were derived from the most frequent answers from the first).

25. Those that had chosen to furlough staff were given tick-box options as to the issues furloughing created. Table 7 presents the responses given.

| Table 7: If you have furloughed staff, what issues has furloughing created? (tick all that apply) | |
|--|-----|
| Increased stress or impact on the mental health of teams continuing to work | 64% |
| Loss of nurse or administrative support / other expertise | 47% |
| Concerns about sickness or absence in teams continuing to work | 44% |
| Difficulties creating an acceptable rota | 43% |
| Impact on mental health of those furloughed | 42% |
| Divisions within teams / difficulties applying the Scheme fairly | 28% |
| No or minimal issues | 18% |
| Difficulties providing Branch practice cover | 16% |
| Lack of clarity about the Scheme / issues with the administrative burden of the Scheme | 15% |
| Difficulties providing OOH service | 11% |
| Other (please specify) | 8% |
| Those on reduced hours paid less than furloughed workers | 8% |
| n=219 | |

26. Direct comparison with the first survey is not possible as in the initial survey respondents were given a free-text box for their answers, (the pre-populated answers for the second survey were derived from the most popular answers from the first). In the first survey the most frequent response (39%) was that 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, similarly to the May survey, 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%.

27. Around 9% of practices had made, or had immediate plans to make staff redundant, compared to 6% in the first survey. Whilst those who 'did not know' remained similar, at 20% and 21% in the second and first surveys respectively.

Reduced pay and hours

28. In response to increasing reports that veterinary staff were taking pay cuts or having their hours reduced, new questions were introduced to assess the impact of such measures.

29. Some 13% of respondents reported that their staff had 'taken pay cuts for working the same hours as normal'. Follow up questions were asked about the percentage of staff taking such cuts and the percentage pay cuts they had taken, given the low response rate to the question it is not possible to report these results.

30. Some 40% of respondents reported their staff had reduced their hours. Chart 4 (overleaf) shows the percentage of staff that had reduced their hours. It is notable that there is clustering at the extremes of 'Less than 10%' and 'More than 75%' across all of the practice team.

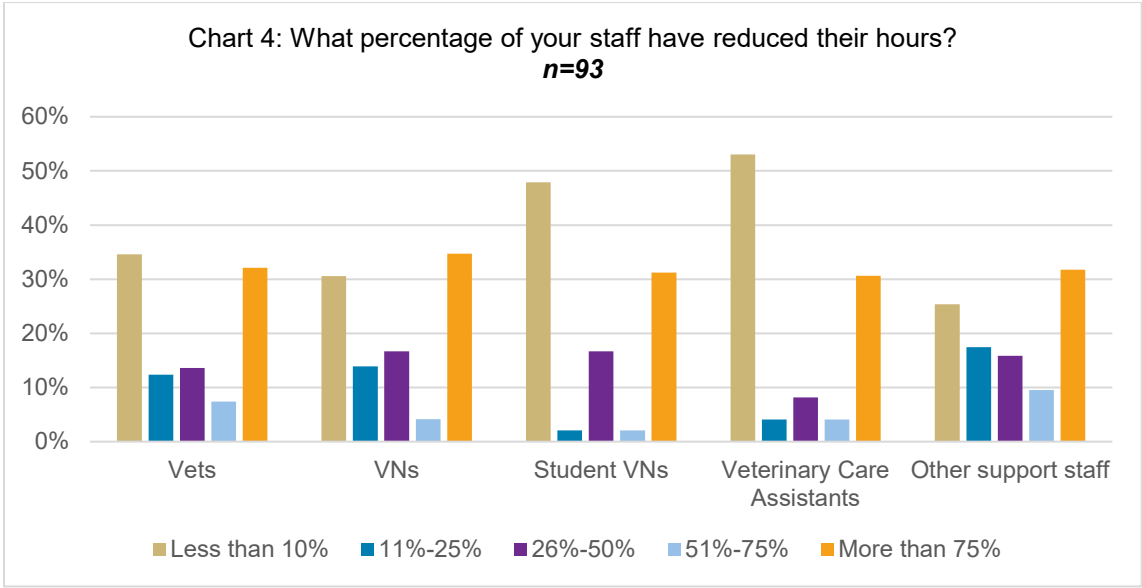
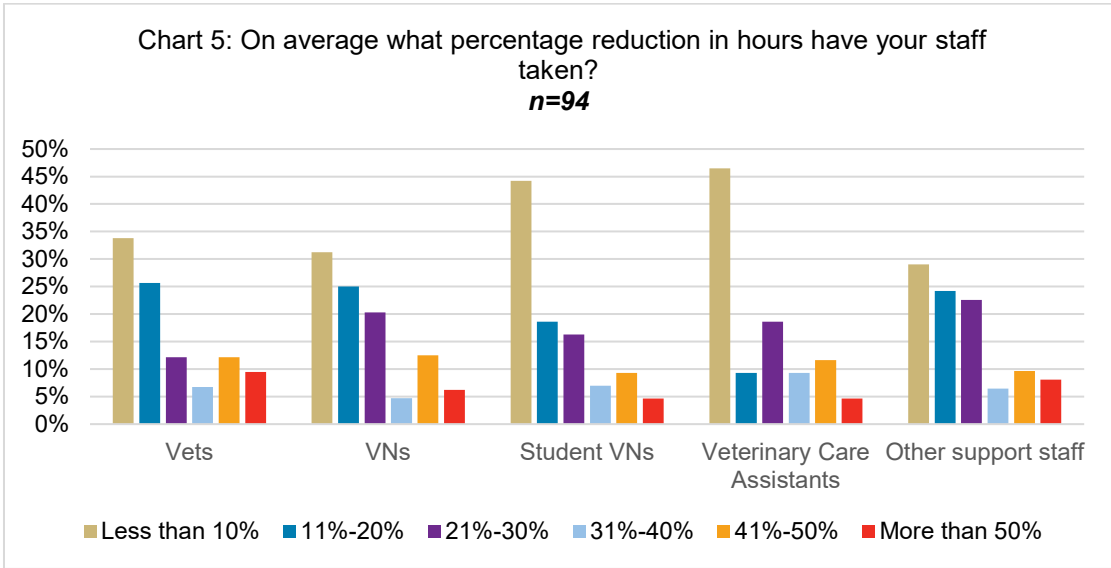
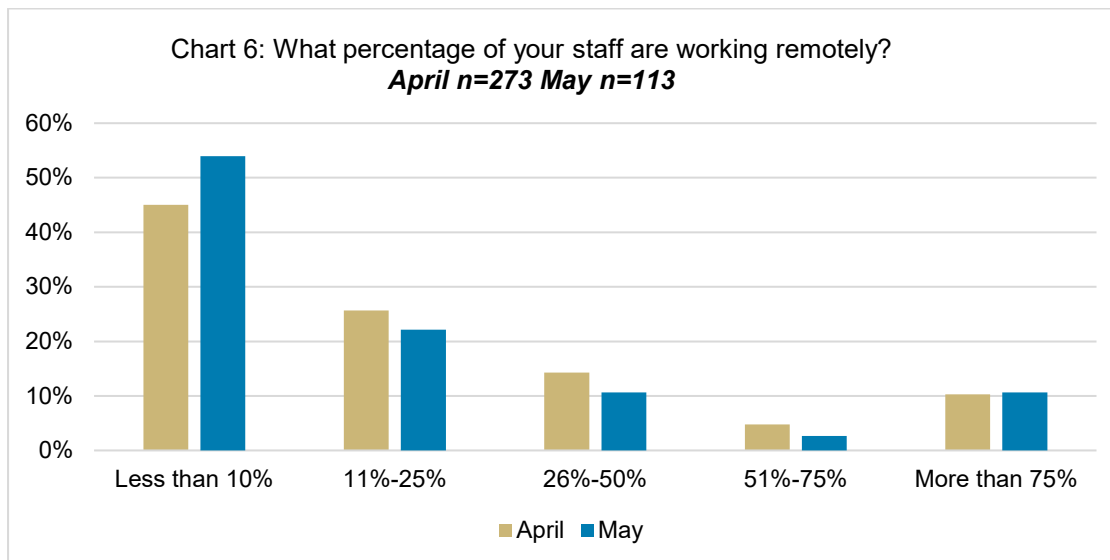


Chart 5, below, shows the average percentage reduction in hours taken by staff. Over the entire practice team the modal (most frequent) response is a less than 10% reduction.



Remote working (working from home)

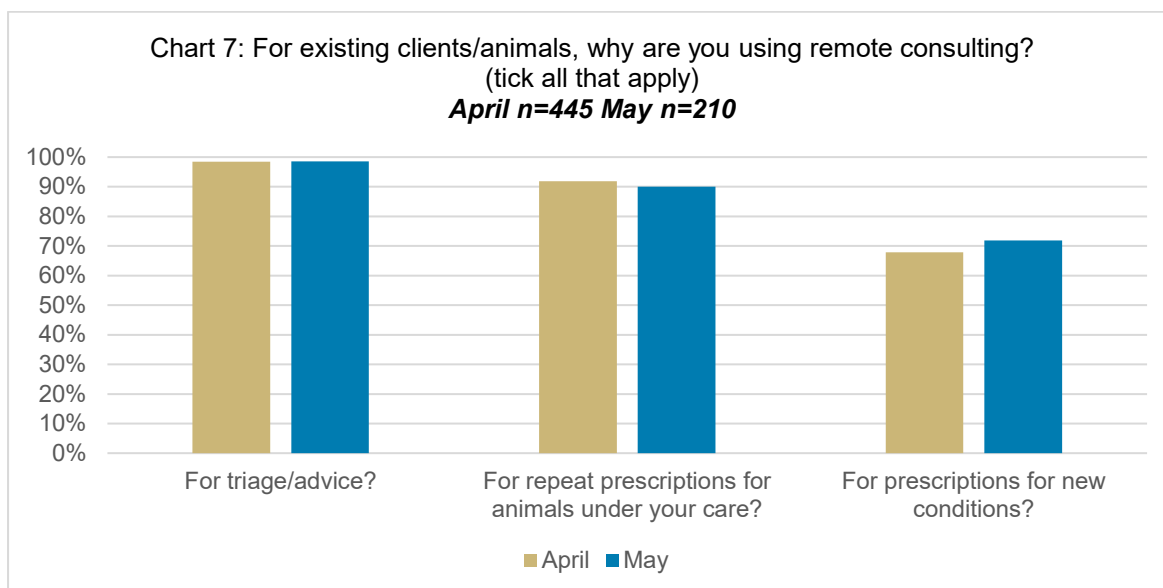
31. Fewer respondents reported they had practice staff working remotely (48%) compared to over half of respondents (55%) in the first survey. Chart 6 shows the percentage of staff working remotely in those practices that reported having staff working remotely



Remote consulting

32. As in the last survey, 90% of respondents reported using remote consulting as a result of social distancing measures. Of those using remote consulting, 30% were using it for existing clients and animals only, whilst 70% were using it for both existing and new clients/animals. It is worth noting, however, that similarly to the last survey, 16% of survey respondents (41) skipped the question as to whom remote consulting services were being provided, a considerably higher percentage than other questions.

33. Chart 7 shows how respondents are using remote consulting for existing clients/animals.



34. From those that indicated they were using remote consulting for 'both existing and new clients/animals', 100% were using it for triage/advice, whilst 51% were also using it for prescriptions for new conditions. No respondents indicated they were only using remote consulting for new clients/animals. 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 in the first survey.

Difficulty obtaining equipment and supplies

35. It would appear that difficulties obtaining equipment and supplies have worsened since the first survey, although direct comparison is complicated by a change to the question structure and the provision of more tick-box answers based on free-text responses provided in the first survey. Only 15% of respondents had reported no issue obtaining equipment or supplies, compared with 56% in the first survey. Meanwhile, 50% had difficulty obtaining Personal Protective Equipment (PPE) compared with 43% in April.

| Table 8: Have you had difficulty obtaining any of the following as a result of Covid-19? (tick all that apply) | |
|---|--------------|
| Hand-sanitiser or equivalent products | 66.38% |
| Personal Protective Equipment (PPE) | 50.43% |
| Necessary products are available, but with delays, purchase limits, or substitutes | 38.36% |
| Certain medicines | 27.59% |
| General provisions (e.g. paper towels or loo roll) | 21.55% |
| Necessary products are available but with increased prices | 17.67% |
| No issue obtaining | 15.09% |
| Pet food | 9.48% |
| Oxygen | 3.45% |
| | n=232 |

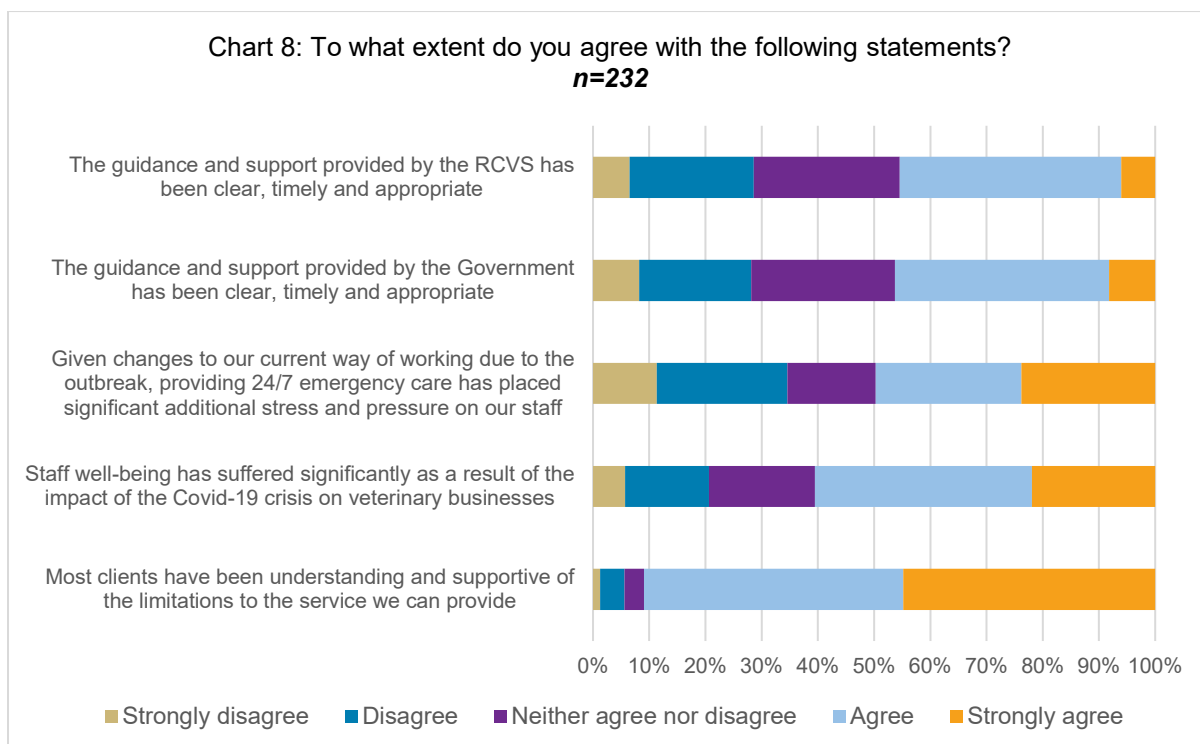
Equipment and supplies provided to support human health (NHS) or social care

36. Direct comparison with the previous survey is not possible as, based on free-text responses to the first survey, the question was widened to include the social care sector and to assess what equipment had been offered and what had actually been supplied by practices. As with the previous survey, however, the most commonly-supplied items of equipment were PPE, with 20% of respondents to the question reporting supplying this to the NHS or social care.

Sentiment analysis

37. In addition to the three questions used in the previous survey about the impact of Covid-19 on staff wellbeing and how clients were responding, respondents were also asked for their views on the guidance and support provided by the RCVS and the government. The responses are presented in Chart 8 (overleaf) with the N/A responses removed.

38. In the second survey a lower percentage of respondents 'agreed' or 'strongly agreed' with the statement 'Staff well-being has suffered significantly as a result of the impact of the Covid-19 crisis on veterinary businesses' - 49% compared with 63% in the first survey. In addition a lower percentage 'agreed' or 'strongly agreed' with the statement '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' – 50% compared with 58% in the first survey.



Free-text responses

39. Respondents were given a free-text box in which to 'suggest how the government or RCVS could support you better through this crisis, or provide any other comments or feedback'. All of these responses (n=115) were read and coded. Due to the wide-ranging nature of the question there was a long tail of responses. The most frequent responses are presented below.

Role of RCVS

40. The most frequent response related to the need for clearer guidance from the RCVS as to what was permissible (31%). Whilst 8% considered the RCVS should allow practices to do more or leave it to the professional judgement of veterinary professionals as to what was acceptable and safe and 7% identified concerns about the how the guidance was being enforced or that other practices were winning business by stretching the interpretation of what was permissible.

Financial Support

41. The next most frequent response related to issues surrounding government financial support schemes (28%). When this 28% of responses was broken down, 40% noted that generally more financial support should be provided by the government or that veterinary practices had fallen through the cracks of available schemes, similarly 40% specifically identified issues surrounding the furlough scheme and in particular the length of the minimum furlough, and 31% highlighted that rates relief should be available to veterinary businesses (percentages do not add to 100% as some responses covered multiple issues e.g. furlough and rates relief).

Government response

42. Government communications or actions to tackle the pandemic were criticised by 11% of respondents.

Government and organisation doing all they can

43. Finally, some 8% of respondents considered that the government, RCVS, or other organisations were doing all they could to tackle to support the profession during the crisis.

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. This follows the survey previously conducted between 3 April and 7 April and allows the RCVS to monitor trends and changes in how Covid-19 is impacting the profession.

The survey should be completed by an individual on behalf of your veterinary practice premises and should take around 15 minutes to complete.

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 and the results of the survey may be published.

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. In which country is your main practice premises based?
 - a. England
 - b. Scotland
 - c. Wales
 - d. Northern Ireland
3. Please give us the first part of the postcode of your main practice premises, eg SW1A or LA1 (this may be used to create a geographic picture of where practices are located, not to track individual responses).
4. 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

5. 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
 - f. N/A

6. 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)

7. 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)

8. On 9 April the RCVS released new guidance for clinical practices during Covid-19, effective 14 April. Has your approach to providing 24/7 emergency cover changed as a result of this guidance?
 - 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)

9. 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

10. 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 | | | | | |

11. On 9 April the RCVS released new guidance for clinical practices during Covid-19, effective 14 April. In following this guidance, what 'in-person' services are you currently providing?
- Business as usual
 - Near normal
 - Reduced caseload, including some routine work
 - Emergencies only
 - None
12. Since 14 April how has your practice turnover changed compared to how it was pre-Covid-19?
- Increased
 - Stayed the same
 - Reduced by less than 25%
 - Reduced by 26%-50%
 - Reduced by 51-75%
 - Reduced by more than 75%
13. Are any of your premises currently closed, or do you have immediate plans to close any premises? (tick all that apply)
- Yes – Main Premises
 - Yes – Branch Premises
 - No
14. Has the Covid-19 crisis affected your used of locums?
- No, we do not use locums
 - Yes, we do use locums, but no change
 - We have increased our use of locums
 - We have decreased our use of locums

15. What sources of Government support have you accessed or do you have immediate plans to access? (tick all that apply)
- a. Job Retention Scheme (furloughing)
 - b. Business Interruption Loans
 - c. Self-employment Income Support Scheme
 - d. None
 - e. Other (please specify)

16. What percentage of your staff have you currently furloughed under the Coronavirus Job Retention Scheme, 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 | | | | | |

17. If you currently have not furloughed any staff, why not? (tick all that apply)
- a. Staff required to cover workload
 - b. Single-handed practice / small practice team
 - c. Splitting shifts / reducing salaries instead
 - d. Still waiting to decide
 - e. Furloughing is a last resort
 - f. Concerned about impact of sickness / absence
 - g. Have used the furlough but now brought, or about to bring, all staff back
 - h. Other (please specify)

18. If you have furloughed staff, what issues has furloughing created? (tick all that apply)
- a. Increased stress or impact on the mental health of teams continuing to work
 - b. Difficulties creating an acceptable rota
 - c. Divisions within teams / difficulties applying the Scheme fairly
 - d. Impact on the mental health of those furloughed
 - e. Loss of nurse or administrative support / other expertise

- f. Lack of clarity about the Scheme / issues with the administrative burden of the Scheme
- g. Those on reduced hours paid less than furloughed workers
- h. Difficulties providing OOH service
- i. Difficulties providing Branch practice cover
- j. Concerns about sickness or absence in teams continuing to work
- k. No or minimal issues
- l. Other (please specify)

19. 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 |
|---------------|------|-----|-------------|----------------------------|---------------------|
| Less than 10% | | | | | |
| 11-25% | | | | | |
| 26-50% | | | | | |
| 51%-75% | | | | | |
| More than 75% | | | | | |
| N/A | | | | | |

20. Have any of your staff taken pay cuts for working the same hours as normal?

- a. Yes
- b. No

If (a) what percentage of your staff have taken pay cuts?

| | 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 | | | | | |

On average what percentage pay cut have your staff taken?

| | Vets | VNs | Student VNs | Veterinary Care Assistants | Other support staff |
|---------------|------|-----|-------------|----------------------------|---------------------|
| None | | | | | |
| Less than 10% | | | | | |
| 11%-20% | | | | | |
| 21%-30% | | | | | |
| 31%-40% | | | | | |
| 41%-50% | | | | | |
| More than 50% | | | | | |
| N/A | | | | | |

Have any of your staff had their hours reduced?

c. Yes

d. No

If (a) what percentage of your staff have had their hours reduced?

| | Vets | VNs | Student VNs | Veterinary Care Assistants | Other support staff |
|---------------|------|-----|-------------|----------------------------|---------------------|
| Less than 10% | | | | | |
| 11-25% | | | | | |
| 26-50% | | | | | |
| 51%-75% | | | | | |
| More than 75% | | | | | |

On average what percentage reduction in hours have your staff taken?

| | Vets | VNs | Student VNs | Veterinary Care Assistants | Other support staff |
|---------------|------|-----|-------------|----------------------------|---------------------|
| Less than 10% | | | | | |
| 11%-20% | | | | | |
| 21%-30% | | | | | |
| 31%-40% | | | | | |
| 41%-50% | | | | | |
| More than 50% | | | | | |

21. 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%

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

- a. Yes
- b. No

If (a) Are you using remote consulting:

- a. For existing clients/animals?
- b. For new clients/animals?
- c. For both existing and new clients/animals?

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

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

23. 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. Hand-sanitiser or equivalent products
- d. Certain medicines
- e. General provisions (e.g. paper towels or loo roll)
- f. Pet food
- g. Necessary products are available, but with delays, purchase limits, or substitutes
- h. Necessary products are available but with increased prices
- i. No issue obtaining
- j. Other equipment / medicines / supplies (please specify – free text)

24. Have you provided any of the following to support human health (NHS) or social care for use in tackling Covid-19? (tick all that apply)

| | Offered | Supplied |
|---|---------|----------|
| Ventilators | | |
| Anaesthetic monitors or syringe drivers | | |
| PPE | | |
| Oxygen | | |
| Oxygen concentrators | | |
| None / N/A | | |

Other equipment / medicines / supplies (please specify – free text)

25. To what extent do you agree with the following statements? (Strongly disagree/ Disagree/ Neither agree nor disagree/ Agree/ Strongly agree)

- Most clients have been understanding and supportive of the limitations to the service we can provide
- Staff well-being has suffered significantly as a result of impact of the Covid-19 crisis on veterinary businesses
- 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
- The guidance and support provided by the Government has been clear, timely and appropriate
- The guidance and support provided by the RCVS has been clear, timely and appropriate

Comments and feedback

26. Please use this space to suggest how the Government or RCVS could support you better through this crisis, or provide any other comments or feedback?