



FULL HOUSE: **People and Pets in the Pandemic**

BLUEPEARL PET HOSPITAL'S 2020 PET OWNER REPORT





About BluePearl Specialty and Emergency Pet Hospital

Founded in 1996, BluePearl is one of the largest specialty and emergency veterinary practices in the U.S. today.

BluePearl has more than 100 hospitals in 29 states that together employ 7,000+ Associates, including 1,330+ veterinarians, 1,600+ veterinary technicians, and 4,100+ other professionals. Each year, our compassionate teams provide high-quality care for more than 1 million pets and their families. BluePearl clinicians also participate in clinical studies to discover new treatments and procedures that improve pet health. As part of the Mars Veterinary Health family of brands, BluePearl is committed to its purpose — A BETTER WORLD FOR PETS® — because pets make a better world for us.

Learn more at [BluePearlVet.com](https://www.BluePearlVet.com)



Every year, BluePearl Specialty and Emergency Pet Hospital surveys more than 300,000 pet owners. While these surveys generally serve as a way for BluePearl teams to better deliver high-quality, compassionate care to clients and their pets, this year's survey expanded its scope of interest to learn more about how pet ownership has evolved during the pandemic.*

Since COVID-19 emerged last spring, the human-animal bond has proven to be stronger than ever. People across the United States and world have increasingly looked to companion animals — for companionship, entertainment, stress relief, and hope. To better understand how the pandemic is impacting the human-animal bond, BluePearl approached this year's survey with a lens on client behaviors and attitudes as they relate to pet care and ownership.

**KEY FINDINGS
BASED ON
39,000
CLIENT SURVEY
RESPONSES**

Majority of pet owners are working remote and expect for this to continue.
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The pet-pet owner relationship is extending beyond psychological benefits of comfort and companionship for pet owners to increased pet owner attunement to pet behaviors and health needs.
.....

Pet ownership (through adoption or other means) is on the rise.
.....

Pet owners are more committed to prioritizing veterinary care for their pets, as veterinary visits increase.

**top 5
reasons**

**clients sought
veterinary care**



Veterinary Visits Surge

When asked about the number of primary veterinary care and specialty and/or emergency care visits clients made in the past three months, a majority (77%) said they had taken their pet to a primary veterinarian for a check-up or treatment. While not as frequent, 45% of pet owners stated they visited a specialty and/or emergency hospital at least once in the past three months.

BluePearl expects patient visits to remain steady or increase in 2021, 2022, and beyond, as a high rate of pet owners will continue to work remotely and continue adopting and/or adding pets to their households.

*survey conducted between August 7 and September 8, 2020



Pet Whisperers

Tuning into their pet's habits and health

Pet owners are not only focused on how their pets can comfort them, but also on how they can better support and care for their pets. While the survey showed that pets are providing the majority of pet owners with a greater sense of comfort and companionship (84%), it also showed that pet owners are paying closer attention to their pet's daily habits and health needs.

As people spend more time at home with their pets observing their cats and dogs, they may become more sensitive to behavioral and emotional cues. By understanding these subtle cues and changes in pet behaviors, owners can better tell if their pet is ill or injured and seek veterinary care when necessary.

49% OF PET OWNERS
discovered more about what their pet does all day

.....

69% OF PET OWNERS
are more observant of changes in their pet's health

.....

79% OF PET OWNERS
are more likely to seek veterinary care if their pet is not acting like herself/himself

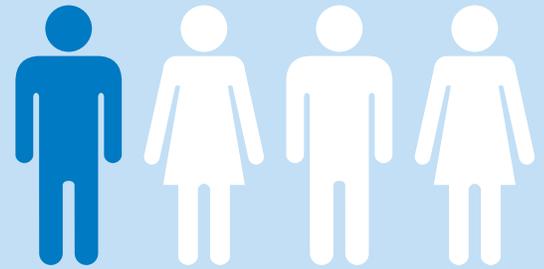
Working @Home

More than half of pet owners are working remotely and expect this to continue

During the initial months of the pandemic, U.S. states and local authorities adopted social distancing measures, closed or limited hours of businesses, and mandated stay-at-home orders. As a result, many people began to work from home.

Even prior to the pandemic, telework was on the rise; however, it has now substantially increased. Today, it is estimated that one in four U.S. workers is working entirely from home.

When employed BluePearl clients were asked if they currently were working remotely, 59% indicated they were. Additionally, more than one-quarter of pet owners said they expect to work remotely for a year or more.



1 IN 4 U.S. WORKERS NOW WORK FROM HOME

Animal House

Pet ownership is on the rise

Now more than ever, companion animals are playing a vital role in people's lives — whether it's entertaining pet owners as they work from home, motivating owners to get physically active outdoors, providing companionship, or serving as a form of stress relief.

When clients were asked if they had adopted and/or added a pet to their household during the pandemic, 10% indicated they did. The rates of adoption and/or an addition of a pet were higher among multi-pet households, with approximately one out of every five multi-pet households adding another pet during the pandemic — and this is expected to continue. Eighteen percent of those pet owners who have already adopted a pet said they planned to adopt another pet in the future.

18%
OF PANDEMIC
PET ADOPTERS
PLAN TO ADOPT
ANOTHER PET IN
THE FUTURE

Juggling Act

Balancing the demand for care with online and telehealth options

Updated hospital protocols and guidelines for client interactions, along with a rise in overall patients, have lengthened the time it takes to provide veterinary care. BluePearl has taken immediate action to help alleviate these new obstacles by implementing online patient check-in and check-out and utilizing novel ways to meet the needs of clients at home. This includes increasing telehealth offerings, encouraging remote completion of intake and discharge forms, and discussing treatment plans and cost estimates over the phone. In addition, BluePearl introduced online payment options for clients in some regions— with plans to launch online payment options across the nation.

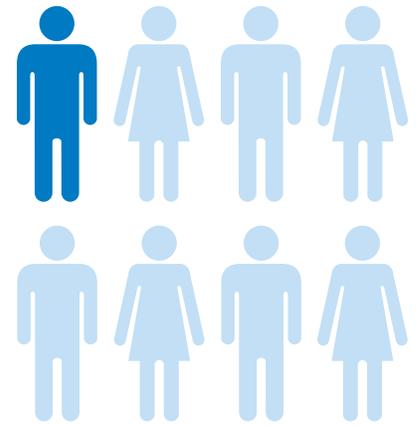


1 IN 5 MULTI-PET HOUSEHOLDS ADDED ANOTHER PET DURING COVID-19

Parvo on the Rise

While clients with fewer visits cited personal safety and healthy pets as reasons for not seeking veterinary care, and 1 in 8 of these clients are waiting until they can accompany their pet, BluePearl says holding off on essential veterinary care, specifically preventive care like routine vaccinations, can lead to the spread of highly contagious, potentially deadly diseases for pets.

In fact, BluePearl has observed an alarming increase in the number of parvovirus cases and hospitalizations during the COVID-19 pandemic. Analysis of data across BluePearl hospitals showed a 70% increase in the number of parvovirus cases relative to ER cases in 2020 as compared to the same time periods in 2015 to 2019.



1 in 8 clients with fewer veterinary visits are holding off until they can accompany their pet

70%
INCREASE IN PARVOVIRUS CASES
RELATIVE TO EMERGENCY CASES

POTENTIAL REASONS FOR THE UPTICK IN PARVOVIRUS CASES

Shelter animals (i.e., fosters and adoptions) may have been released without completion of their vaccination series.

Stay-at-home orders prompted trend in people spending more time outdoors, which could have increased environmental exposure (i.e., dog parks).

Disruptions in the timing of or prevention of puppies receiving full vaccine series, resulting in incomplete immunity.

Financial hardships, such as job loss, preventing or delaying owners from seeking routine vaccinations



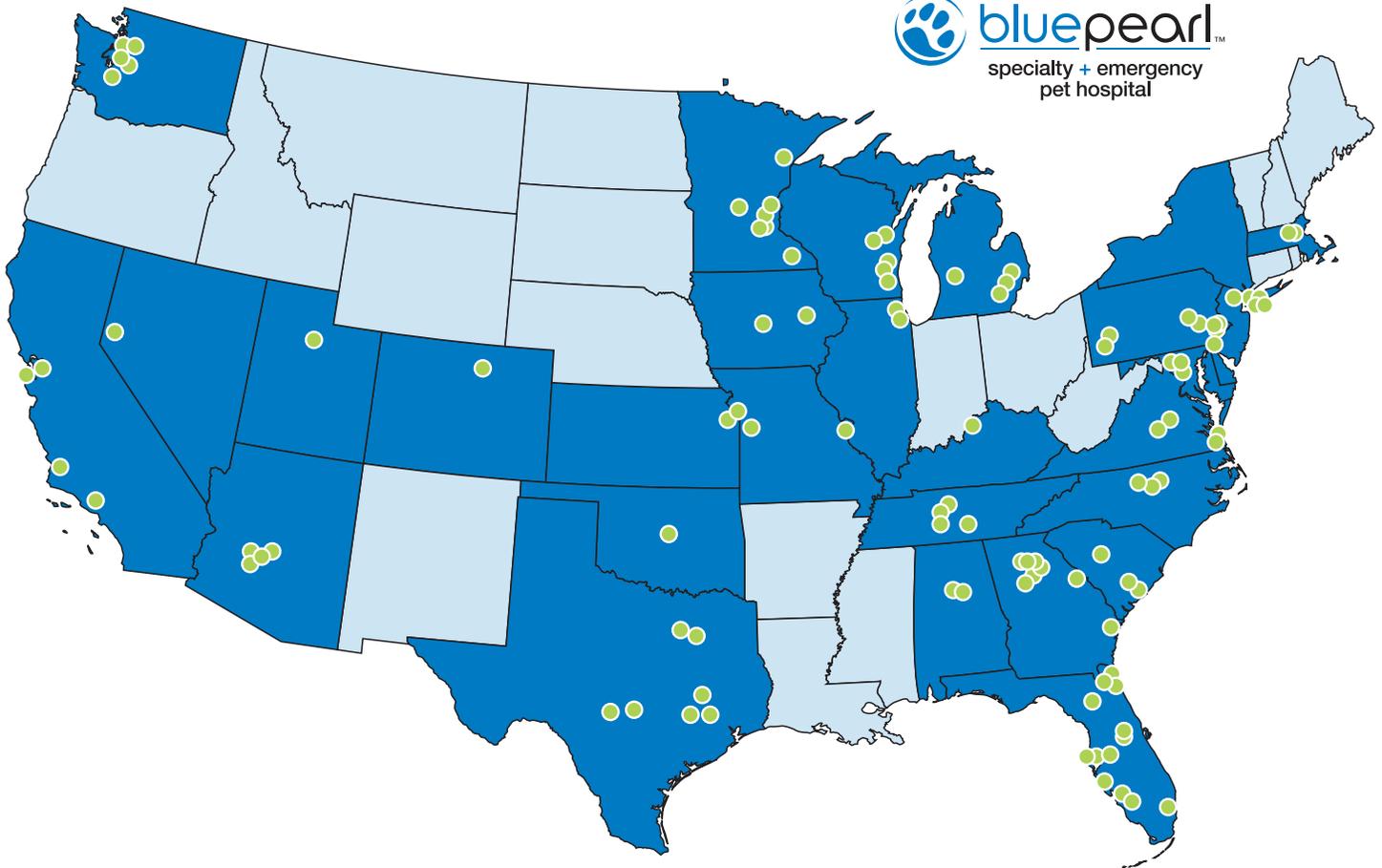
Worth Every Penny

Pet spending expected to continue despite uncertain economy

Despite economic uncertainty, BluePearl clients plan to maintain spending on their pets, with only a relatively small percentage of clients indicating they plan to cut back (21%). This finding signifies the ever-present power of the human-animal bond and the value placed on the emotional, psychological, and physical benefits of pet ownership.

BluePearl Hospitals Nationwide

Enriching lives through remarkable care for pets.



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