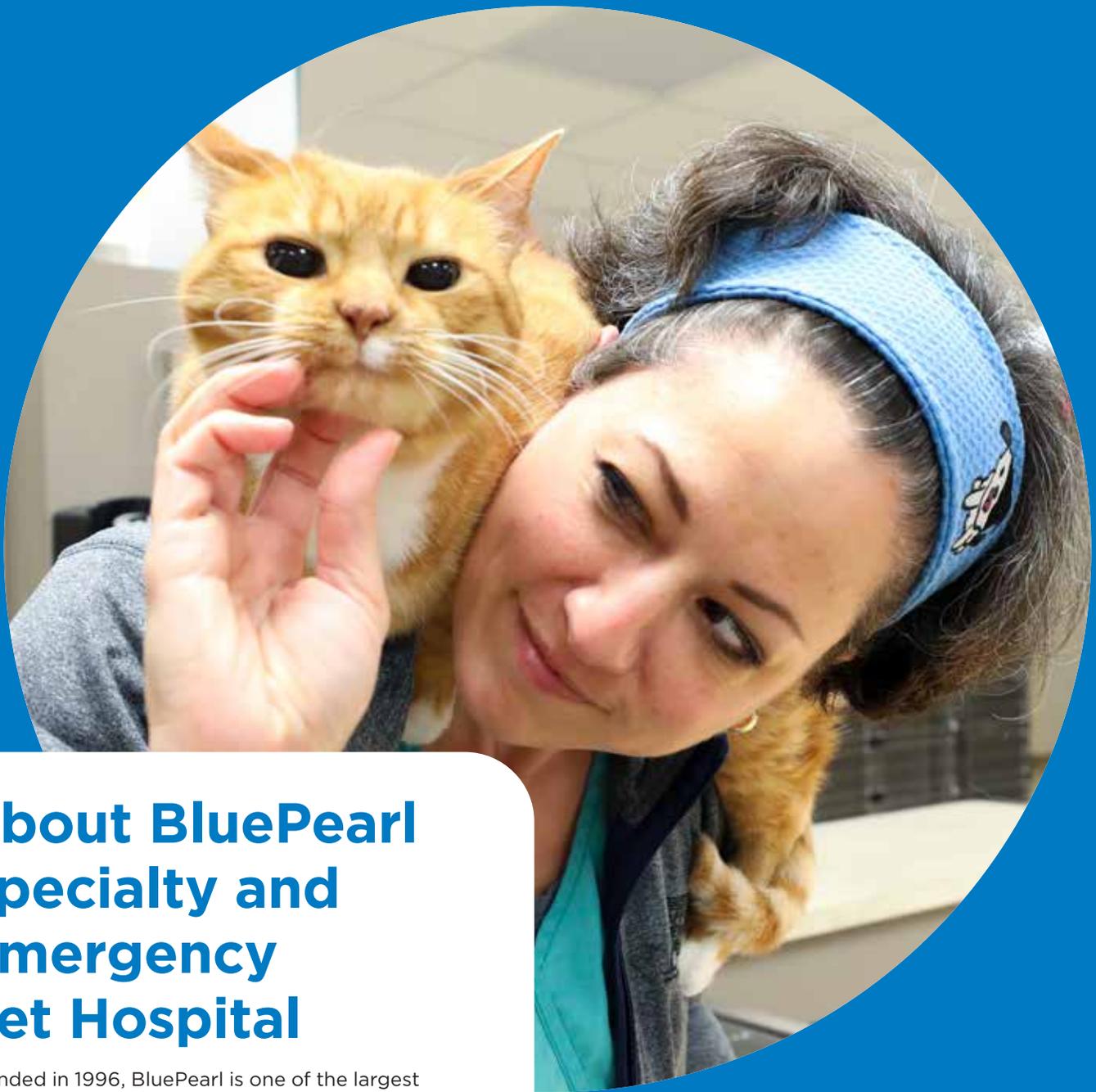




CHANGES, CHALLENGES AND THE CORONAVIRUS

BLUEPEARL PET HOSPITAL'S
2020 VETERINARIAN 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 20,000 companion animal veterinary practices. While these annual surveys generally seek to find ways BluePearl teams can better serve the needs of veterinarians, pet owners, and their pets, this year's survey took a deeper look into how veterinary businesses were and continue to be impacted by the pandemic.

The veterinary landscape is ever changing, but in 2020 pet care clinics across the U.S. faced unprecedented shifts to their systems and operations. As trusted partners in veterinary care, BluePearl sought to uncover and understand the many challenges veterinarians are currently faced with. To reveal these issues, BluePearl modified its approach to the annual survey, focusing solely on COVID-19 challenges and ways in which BluePearl practices can continue to support and help solve issues relating to patient care.

SURVEY METHODOLOGY: This qualitative survey was conducted by BluePearl's Customer Experience team between August 25 and September 21, 2020, using an email invitation and an online survey. A total of 654 responses were collected representing a +/- 3.7% confidence interval at the 95% confidence level. Respondents mirror prior year survey respondents in terms of practice size and role. Practices received no incentive to participate in this research.

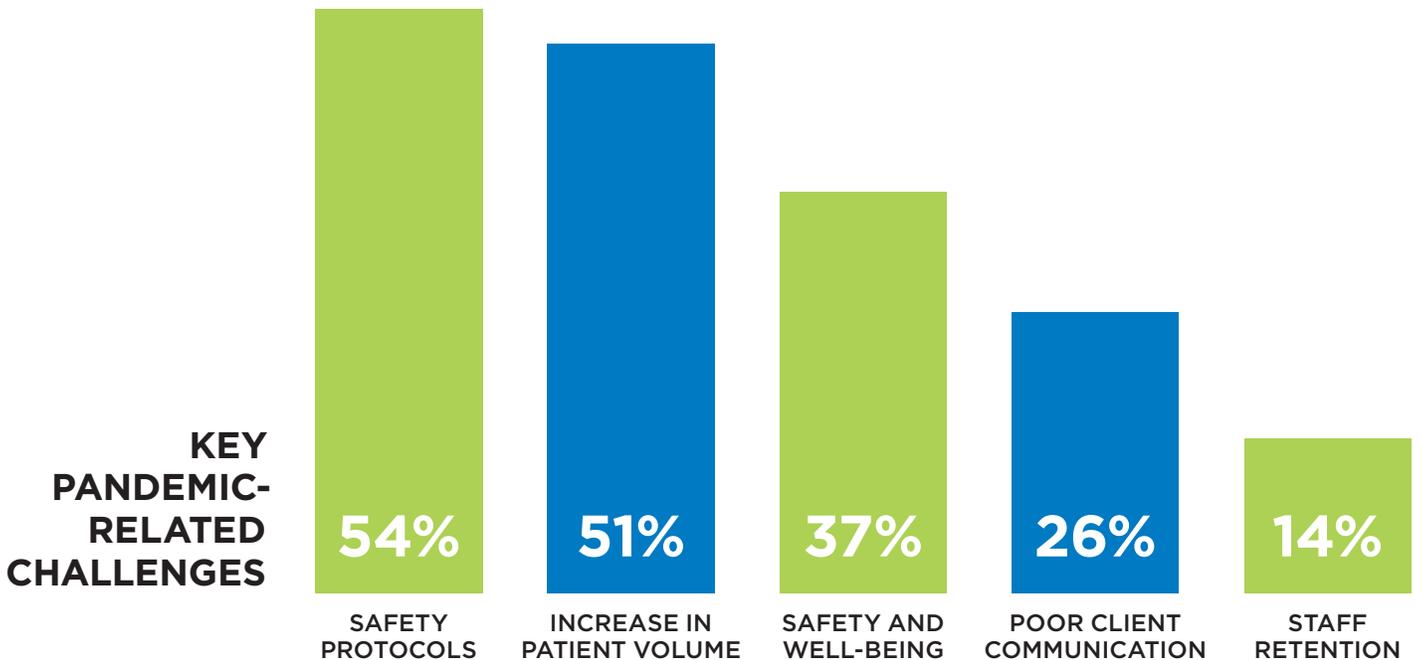
**KEY FINDINGS
BASED ON
654
SURVEY RESPONSES**

An overwhelming majority of primary care veterinarians have experienced an increase in patient visits as compared to a year ago

Nearly half of the respondents indicated they have noticed and/or are experiencing:

- A change in the types of care during COVID-19, seeing more sick/emergent cases
 - An increase in new patients
-

Most primary care veterinarians feel that BluePearl has helped their team during COVID-19, specifically in handling after-hours, urgent care and more advanced cases





COVID Cascade Effect

COVID-19 protocols instated



Trouble with client communications



Staff frustration, fatigue and burnout



Loss of staff

Drivers of Greatest Challenges

Protocols Impeding Client Communication

Given the role veterinary care plays in supporting public health, BluePearl remained open and committed to serving pets and communities throughout the pandemic. BluePearl took numerous steps to continue offering specialty and emergency care to pets while maintaining a safe and healthy environment for clients and Associates, including updating requirements for client interactions, introducing curbside check-in and check-out, and mandating face coverings. Although necessary to ensure the safety of clients, patients, and Associates, new COVID-19 protocols may have impacted client communications by limiting the amount of facetime and/or phone-time with clinicians and other veterinary staff and utilizing telehealth options that clients may not have been accustomed to.

Client Communications Disruptions Leading Staff Retention Challenges

Client communications relating to a pet's end-of-life, including conversations around quality of life, client finances, euthanasia, and more, pose a heavy burden on veterinary professionals and contribute to professional burnout. Burnout and stress as a result of continued exposure to the traumatic events such as pet loss, have been shown to have a profound negative affect on the personal and professional well-being of veterinarians, leading to disproportionately high suicide rates within the profession, according to the U.S. Centers for Disease Control and Prevention.

While only 14% of those surveyed noted staff retention as a great challenge during the pandemic, disruptions in client communications, which are knowingly difficult and highly emotional in nature, may have contributed to increased employee turnover.

Veterinarians Seeking Virtual Education

Approximately 71% of survey respondents expressed interest in live BluePearl virtual continuing education events; most cited common internal medicine, emergency medicine and critical care, and dermatology issues as pertinent topics. This finding underscores the current and future need for emergency and advanced veterinary care and emphasizes a shift from in-person learning to live, virtual learning amongst the veterinary community.

Changing Needs

When asked about the nature of the visits, 44% of primary care veterinarians indicated they have noticed a change in the types of care they were providing during COVID-19 — with most seeing more sick and emergent cases, as well as an increase in new patients.

Veterinarians are seeing more:

- Pets with unusual illnesses, appointment requests for sick pets, as well as an increase in the number of pet “emergency” appointments; however, most of these cases were not true life-threatening emergencies but rather more sick pet appointments
- Pets experiencing vomiting and/or diarrhea, along with behavioral issues or trauma/injuries. (i.e., injuries resulting from outdoor activities like hiking and walking)
- New clients with new pets. Veterinarians are seeing an increase of new clients due to some clinic closures and reduced hours, and newly acquired/adopted pets requiring preventative care
- Lapsed pets returning with more serious, chronic diseases due to lack of previous care and/or intervention (i.e., wellness visits missed, medical issues that were put off and progressed)

IF YOUR PET IS IN CRITICAL CONDITION
OR DISTRESS, RING BELL ON SIDE OF DOOR

ALL OTHER PATIENTS

PLEASE CALL TO INITIATE
CHECKIN: (206)364-1660 Ext 2

ONCE CHECKED IN A

RECEPTIONIST WILL TRIAGE



After-Hours Care Made a Difference

When asked if BluePearl has helped their practice during the COVID-19 crisis, 58% indicated that BluePearl has indeed helped. Most notably, respondents pointed to BluePearl's ability to provide after-hours urgent care and its acceptance of advanced referral cases.

**FROM 2019 TO 2020
BLUEPEARL SAW:**

10X MORE
PATIENTS THAT WERE LESS
THAN ONE YEAR OLD

200,000
MORE PATIENTS THAN IN 2019

OF THE APPROXIMATE
1.1M VISITS

660,000
PETS WERE SEEN FOR
THE FIRST TIME

Increased Wait Times Across the Industry

Client wait times and availability of BluePearl specialists were issues indicated by approximately 20% of survey respondents.

The wave of the current veterinary demand is multifactorial; coming as clinics see an increase in overall patients — with many pets seriously injured or ill — and as the work of providing veterinary care takes longer. New safety protocols require more time, as team members must abide by updated guidelines for client interactions, including curbside patient check-in and check-out and drop-off appointments. Additionally, as an emergency veterinary hospital, BluePearl must see the most emergent cases first, which may increase overall wait times.

BluePearl has taken several steps to help alleviate the many obstacles new protocols pose to clients and the referring veterinary community. In addition to implementing online patient check-in and check-out, BluePearl is utilizing novel ways to meet the needs of clients at home, including urging clients to take advantage of telehealth offerings, encouraging remote completion of intake information prior to arrival, and discussing treatment plans and cost estimates over the phone. Furthermore, BluePearl introduced online payment options for clients in some regions — with plans to launch online payment options across the nation.

