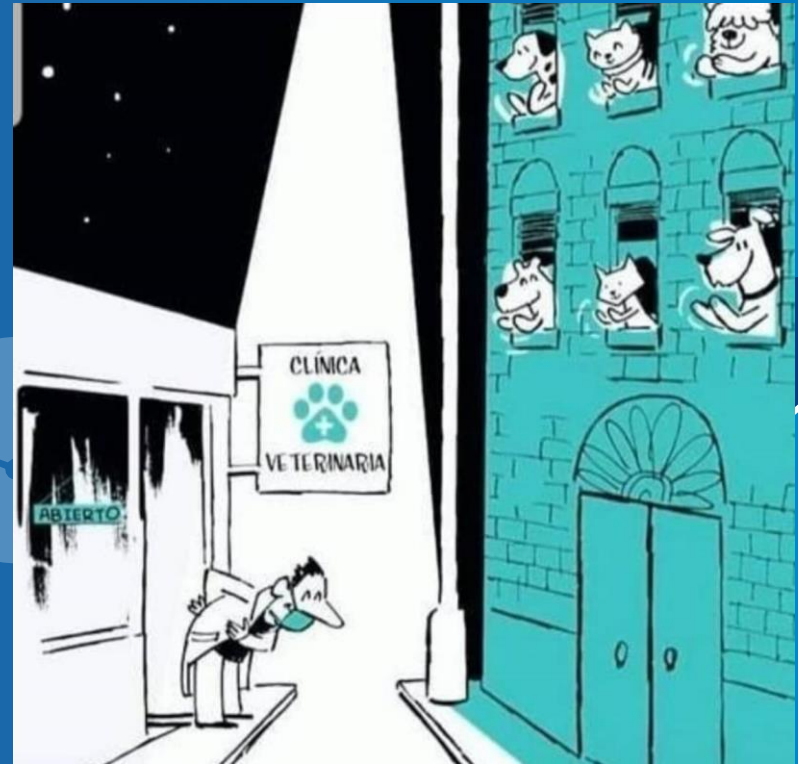


# PetTrak™

Monthly market insights  
millions of pets, billions of transactions  
capturing the entire market nationally



# Introduction



- **Headquarters in U.K.**
- **Local office in Guelph**
- **1,000 employees worldwide**
- **Focused on animal health and agriculture research**



**Colin Siren**

Senior Vice President

- **16 years animal health experience**
- **Co-author of 5 JAVMA Articles, 3 of which examined economics of companion animal medicine in the U.S. post-2008.**

# How has the COVID Crisis Affected our Behaviour?



I'm **carrying on as normal**, going to work, socializing and interacting as normal

3%



I'm **reducing contact** with others, but still going out and socializing in person with friends or family

3%



I'm **limiting personal contact** to just a few people outside of my home, and going out a few days a week to shop or get food

20%



I'm **going out about once a week** to get groceries, but otherwise I'm staying at home and having no personal contact with others

60%



I'm **self-quarantining** at home and not going out at all

15%

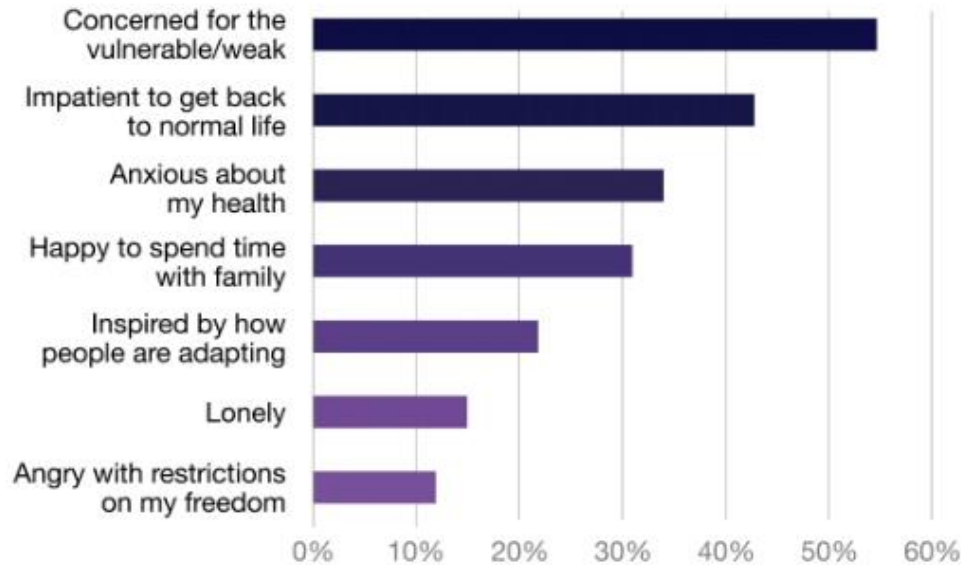


Polling for Global News

[Sean.Simpson@Ipsos.com](mailto:Sean.Simpson@Ipsos.com) for Details

## How are you feeling amid COVID-19?

Which best describes how you're feeling today?



13,785 adults polled in 15 countries between Mar 19-21, 2020

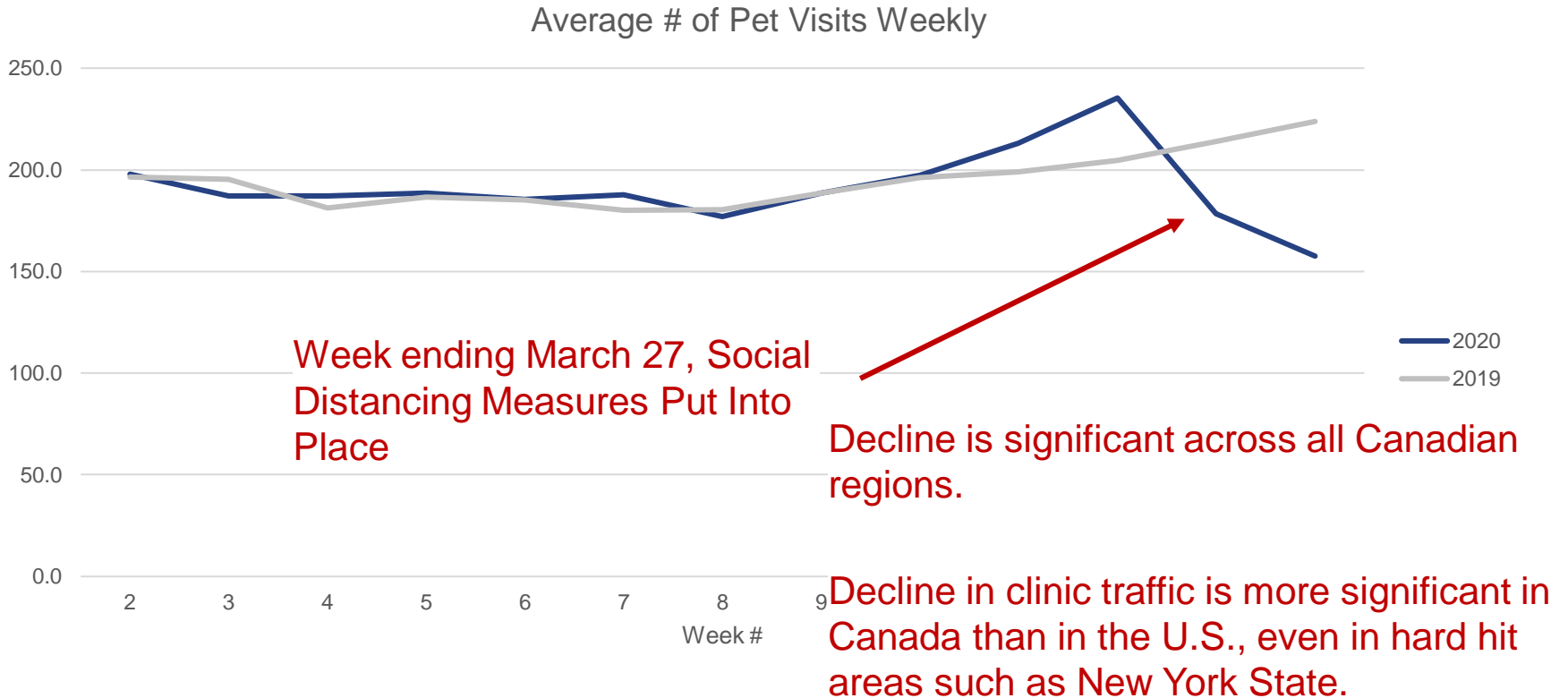


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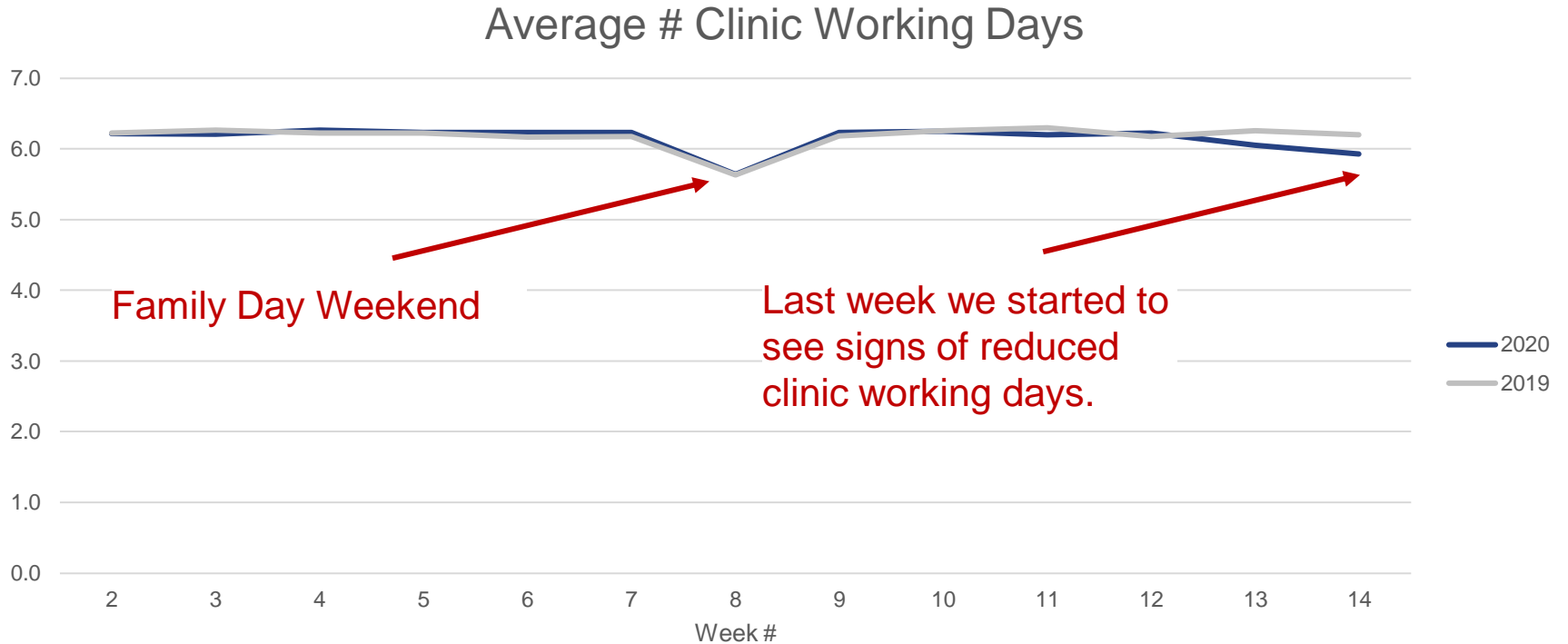
# Our Source for Insights into the COVID Crisis: PetTrak

- Our data source is PetTrak, our global platform for analyzing transactional data from practice management software (PMS)
- Active in the USA, France and Canada
- Includes a nationally representative panel of clinics
- Results are based on hundreds of thousands of patients and millions of transactions
- All data received are anonymized, we identify patients as a record number only
- For today's analysis, we only included clinics for which we have sales data in all weeks from 2019 to present.

# Average Number of Pet Visits Declined Dramatically During the Week of March 27

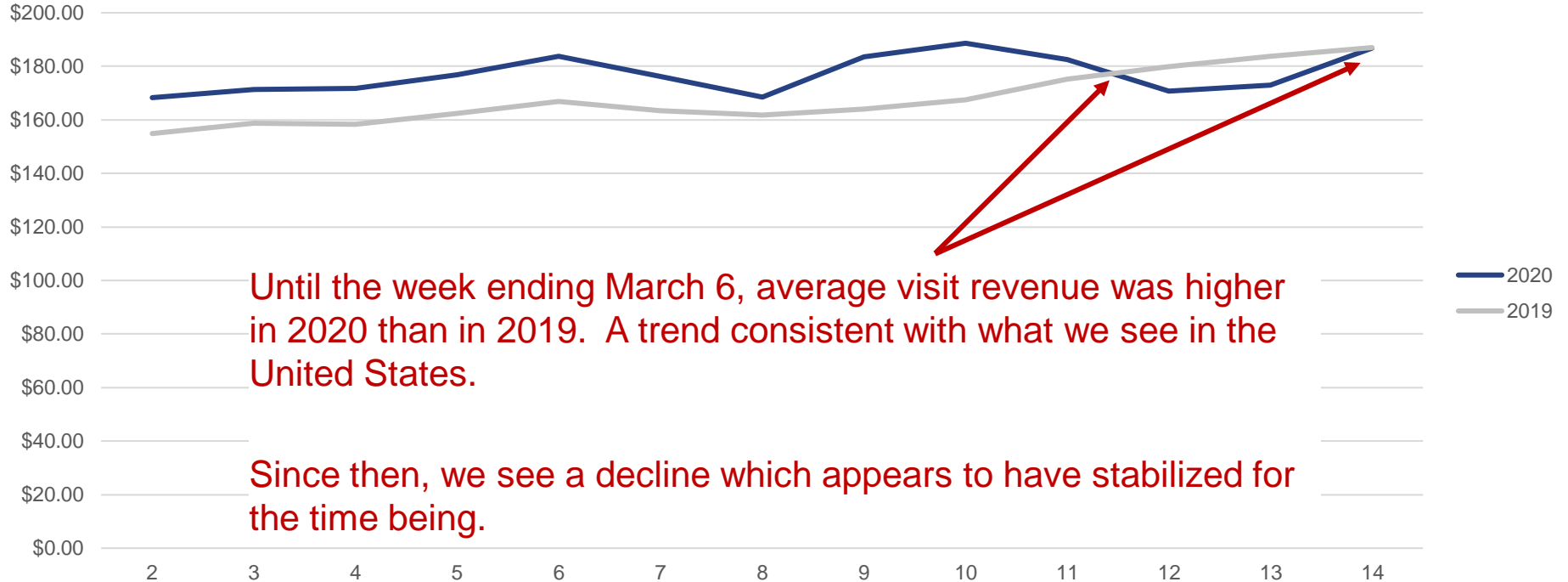


# Average Number of Clinic Working Days in a Given Week Shows Signs of Decline



# After a Strong Start, Average Visit Revenue Appears to Have Slid Below 2019 Levels During a Period where Growth is Typical

Average Visit Revenue



Until the week ending March 6, average visit revenue was higher in 2020 than in 2019. A trend consistent with what we see in the United States.

Since then, we see a decline which appears to have stabilized for the time being.



## Observations and Moving Forward

- We will continue to monitor and report to industry as the COVID crisis unfolds.
- Unlike in 2008, where the impact of the financial crisis and Great Recession was mild in Canada, the global nature of the COVID crisis will almost certainly have a significant and lasting impact on the Canadian economy.
- Analysis of consumer spending in the United States during the Great Recession reveals demand for veterinary services and products were less affected than entertainment and housing...but not “recession proof”.



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