

**KEY TAKEAWAYS:**

FOR PET PRODUCTS, CHEWY CONTINUES TO GAIN SHARE OF MOST RECENT PURCHASES AND AMAZON HAS LOST SHARE OVER TIME.

CUSTOMER OPINION TOWARD CHEWY REMAINS VERY STRONG/POSITIVE AND A CUT ABOVE COMPETITORS.

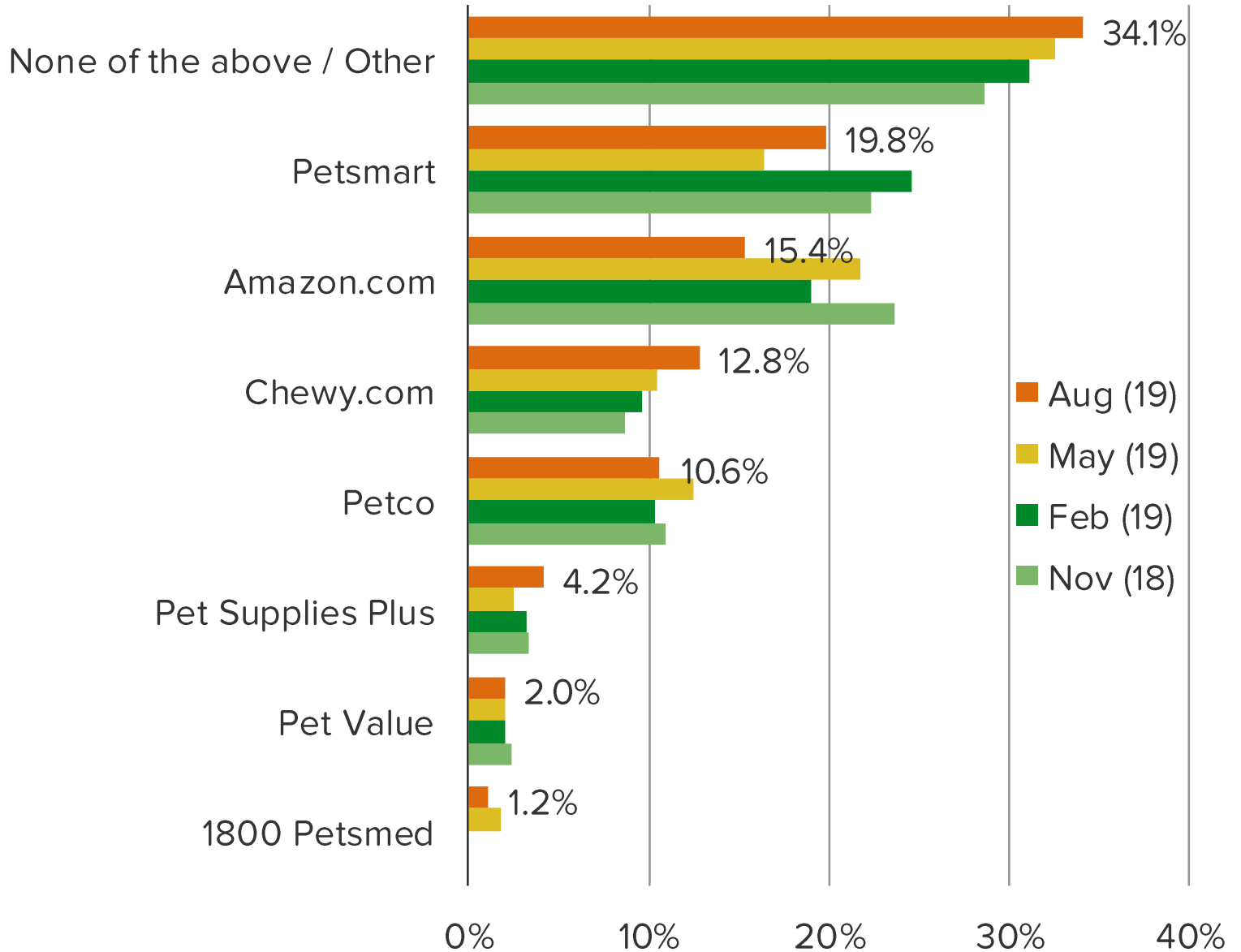
PURCHASE RECENCY AND AMOUNT SPENT PER ORDER WORSENEED SEQUENTIALLY ACROSS ALL RETAILERS (NOT CLEAR YET IF THIS IS SEASONAL).

PET OWNER SENTIMENT TOWARD RETAILERS REMAINS MOSTLY POSITIVE WITH SOME POCKETS OF SOFTENING Q/Q.

# PET SHOPPING ENGAGEMENT AND MARKET SHARE

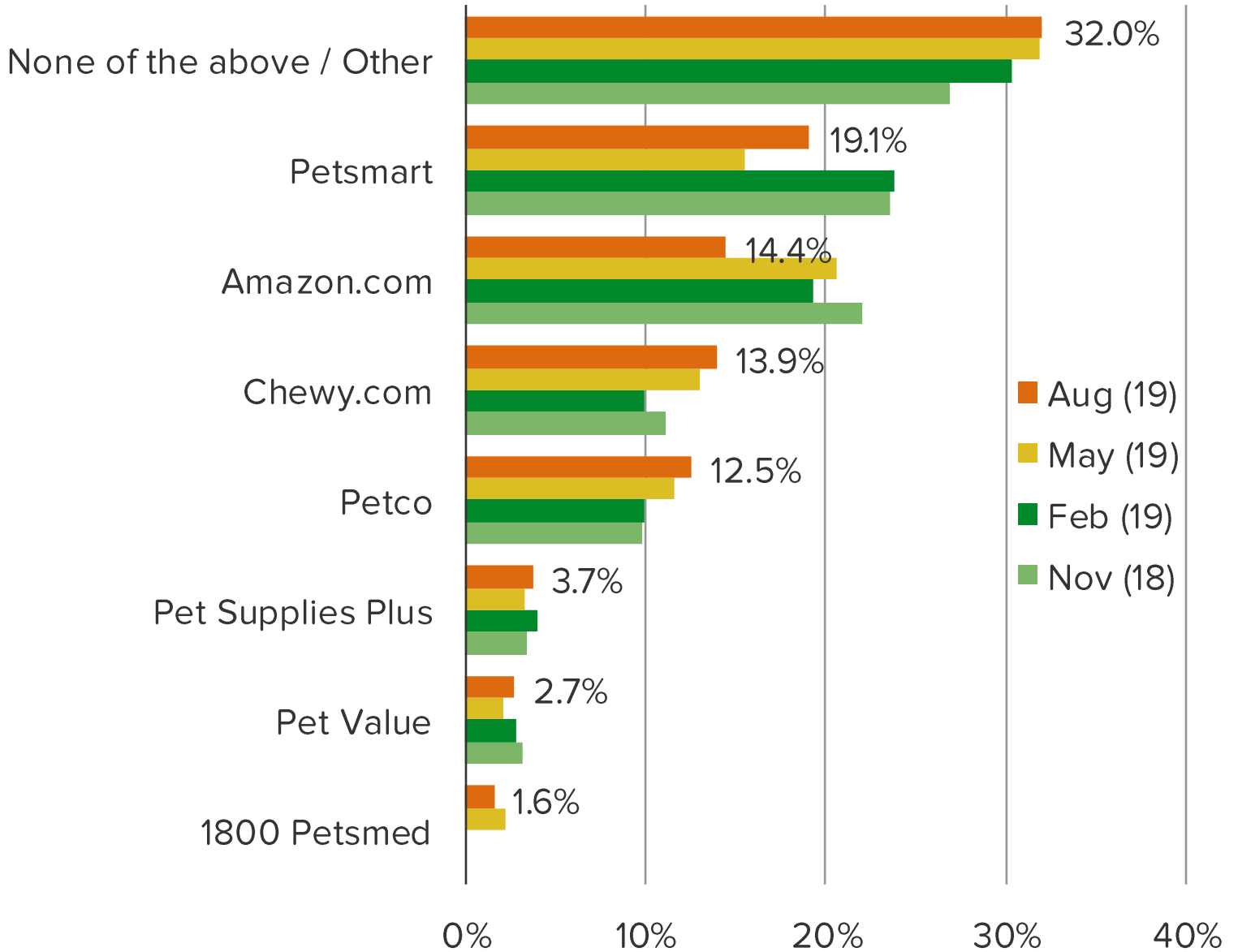
**THINKING ABOUT THE LAST TIME YOU PURCHASED PET FOOD PRODUCTS, FROM WHICH RETAILER DID YOU MAKE A PURCHASE?**

Posed to all pet owners



**THINKING ABOUT THE NEXT TIME YOU NEED TO PURCHASE PET FOOD OR PRODUCTS, WHICH RETAILER WILL YOU BE MOST LIKELY TO PURCHASE FROM?**

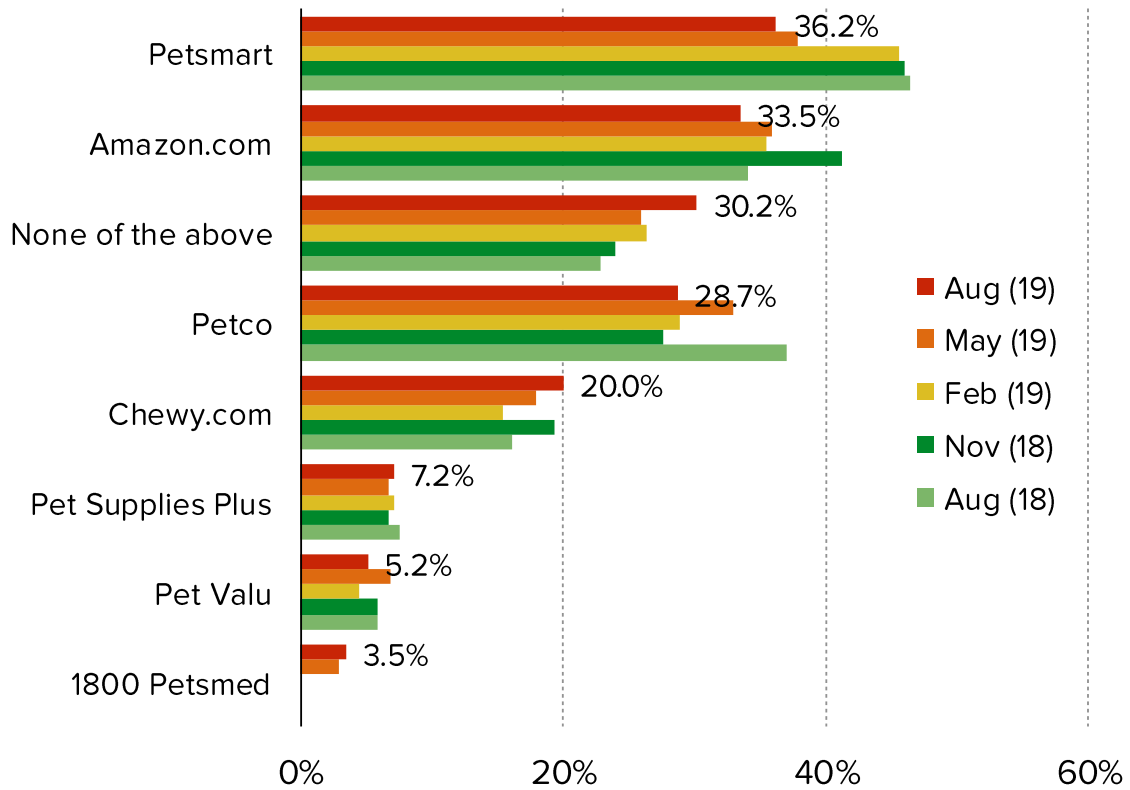
Posed to all pet owners



# RESPONDENTS WHO PURCHASED ITEMS IN THE PAST MONTH

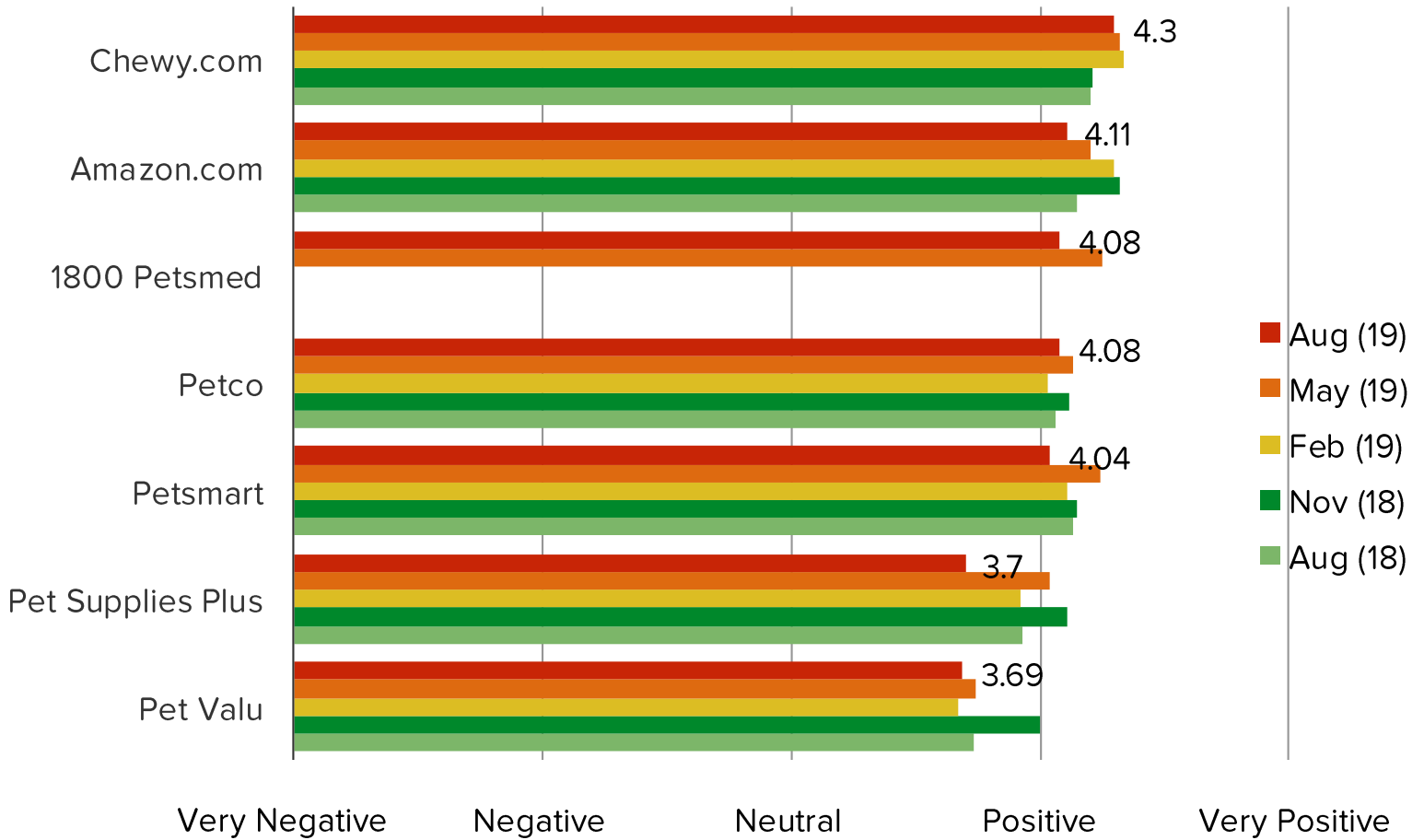
**HAVE YOU SHOPPED ANY OF THE FOLLOWING RETAILERS IN THE PAST MONTH FOR PET PRODUCTS? (SELECT ALL THAT APPLY)**

Posed to pet owners



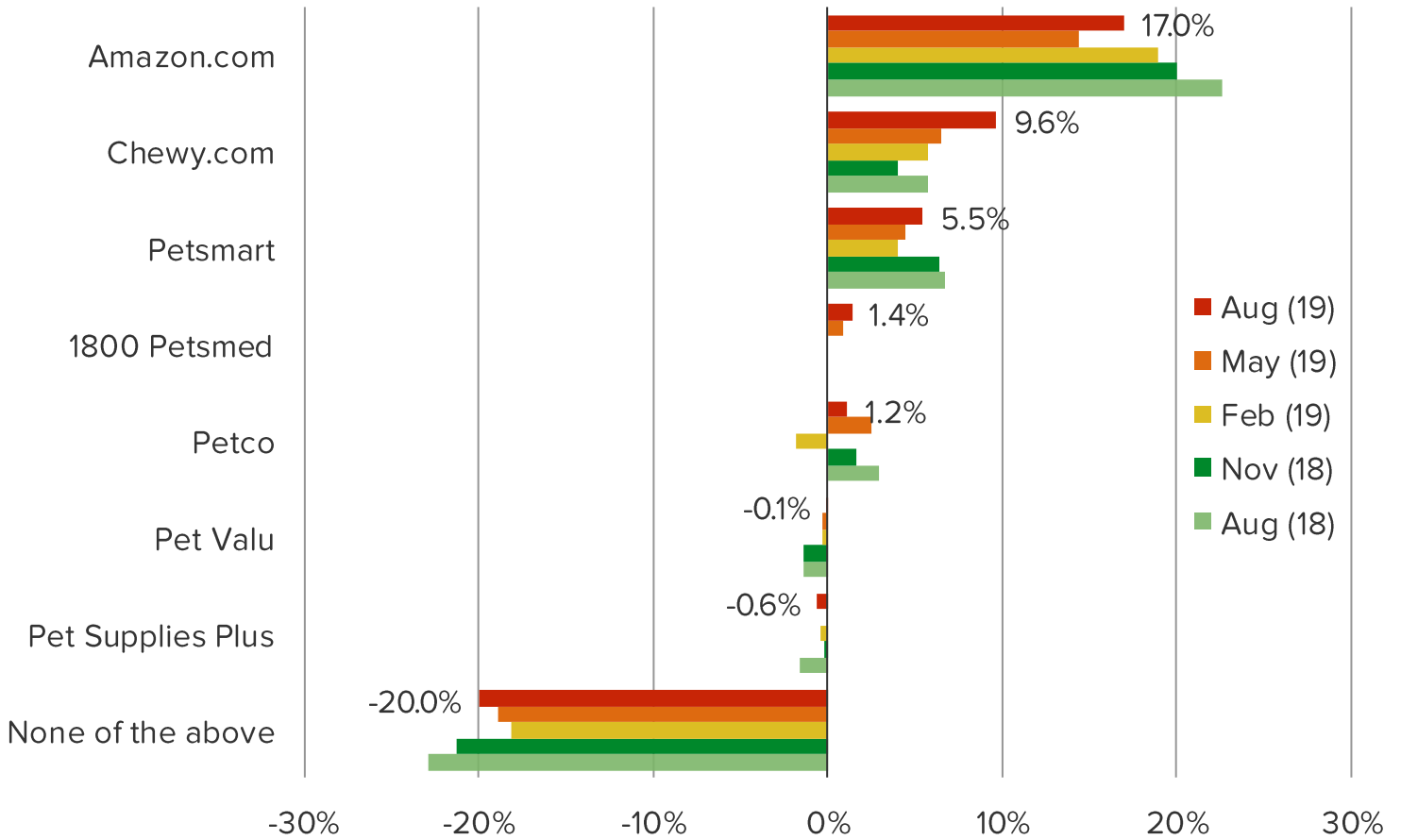
**WHAT IS YOUR OPINION OF THIS RETAILER IN GENERAL FOR PET PRODUCT PURCHASES?**

Posed to pet owners who have shopped each of the following retailers in the past month



**IN THE PAST YEAR, HAVE YOU INCREASED OR DECREASED THE AMOUNT OF SHOPPING YOU DO AT ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)**

Posed to pet owners



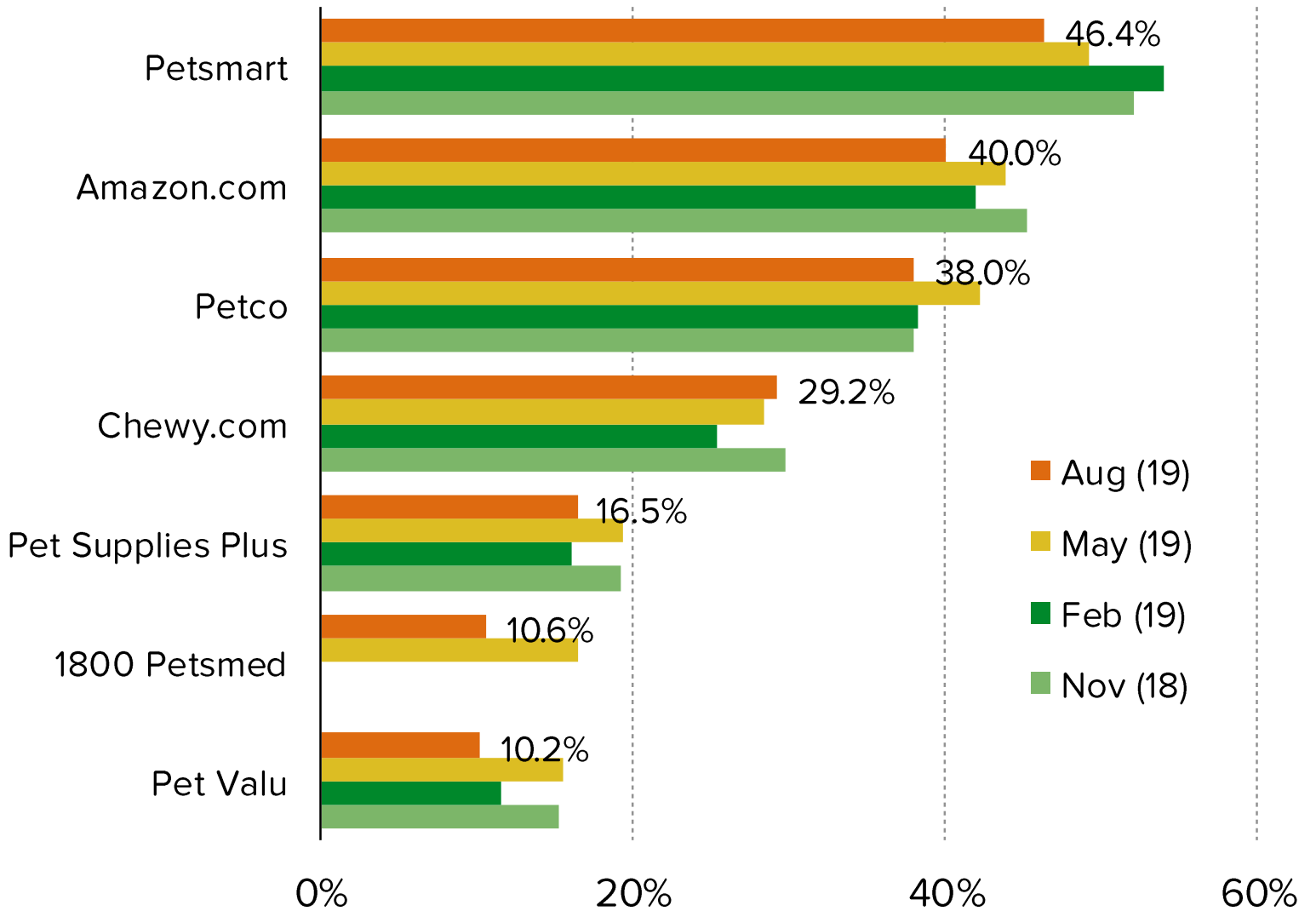
\*Those who have increased shopping minus those who have decreased shopping



# RESPONDENTS WHO REGULARLY OR OCCASIONALLY SHOP EACH RETAILER

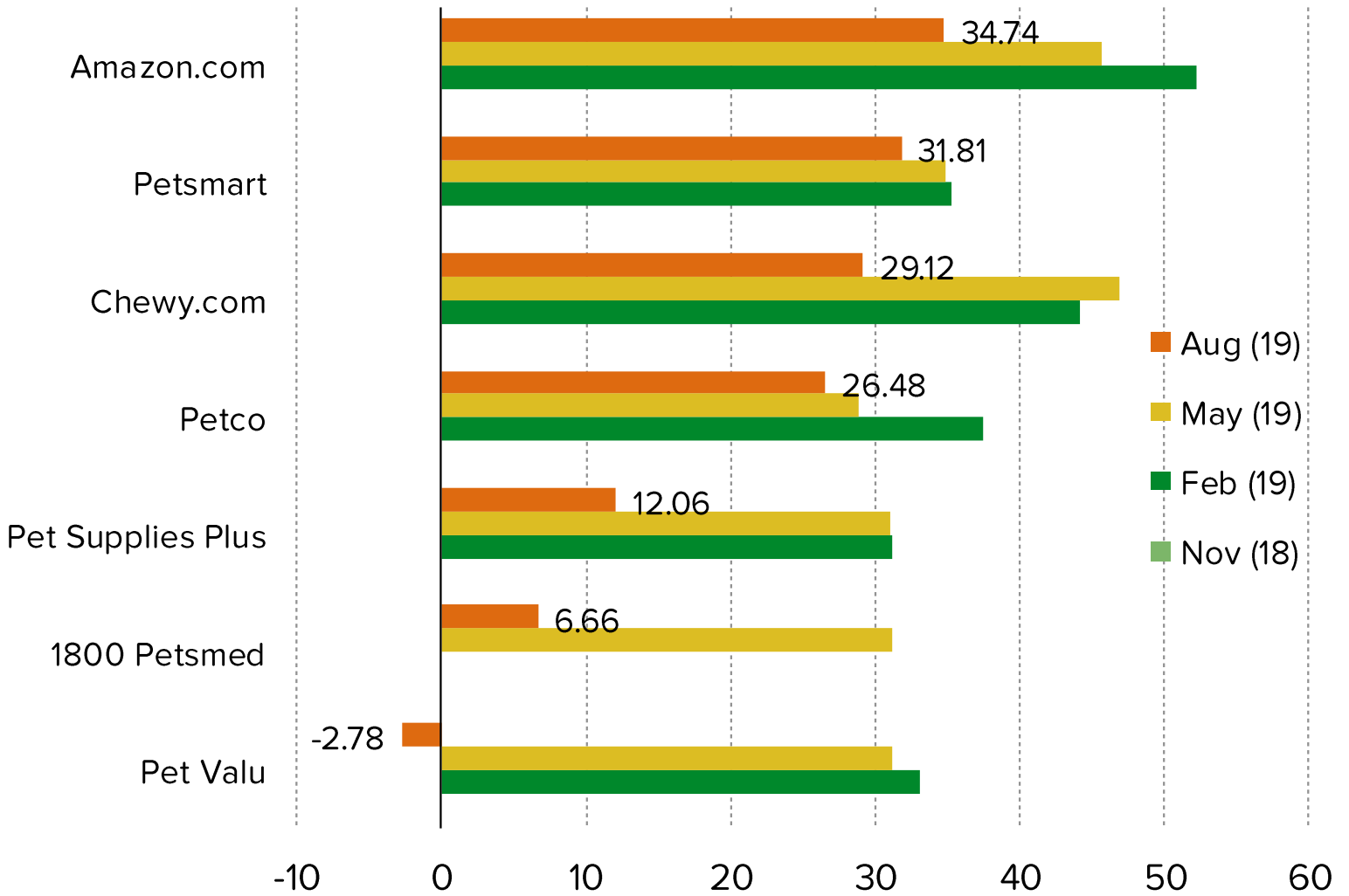
**DO YOU REGULARLY OR OCCASIONALLY SHOP THE FOLLOWING RETAILERS FOR PET FOOD AND PRODUCTS?**

Posed to pet owners



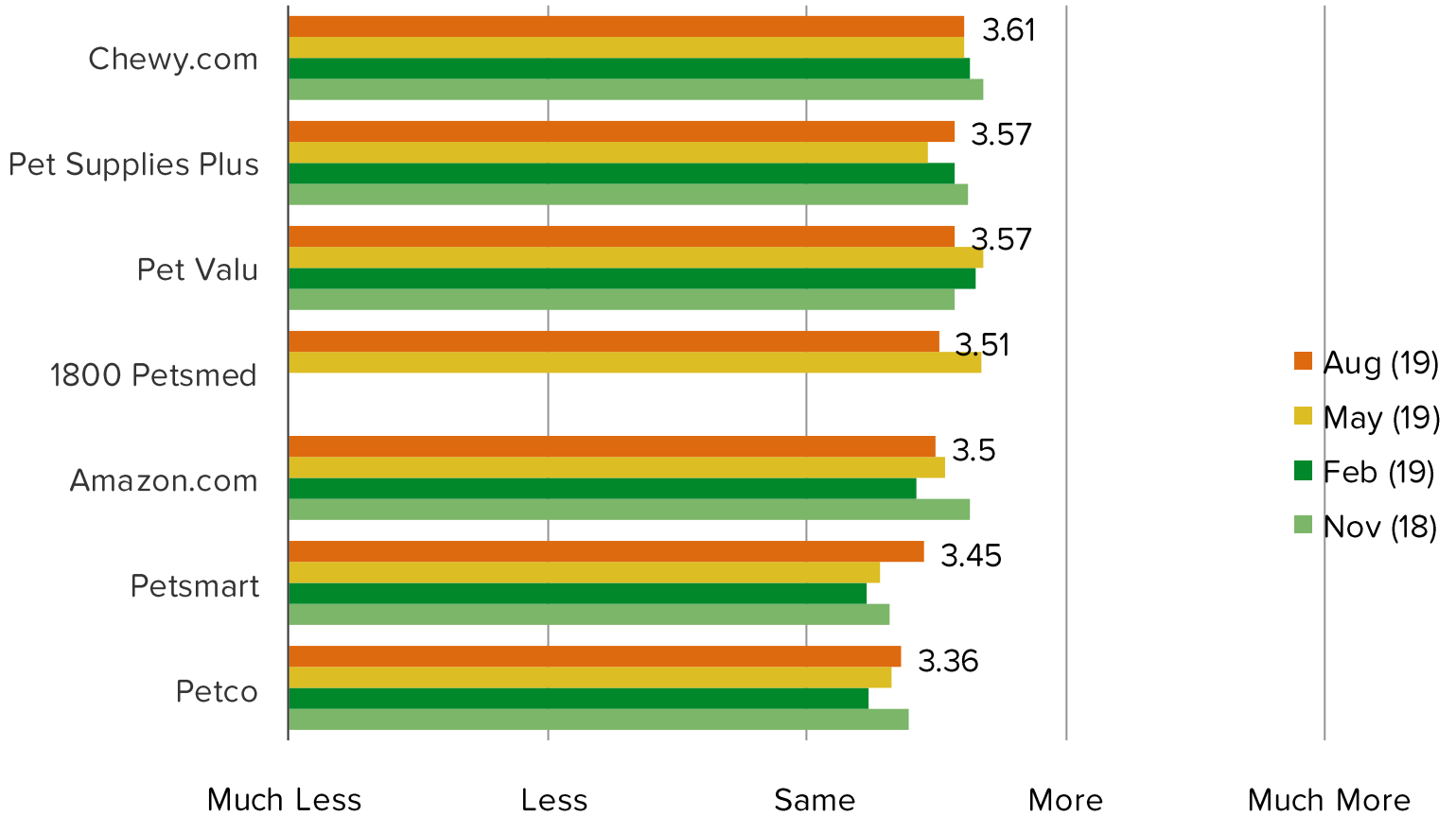
**NET PROMOTER SCORE**

Posed to those who regularly or occasionally shop the following for pet food and products



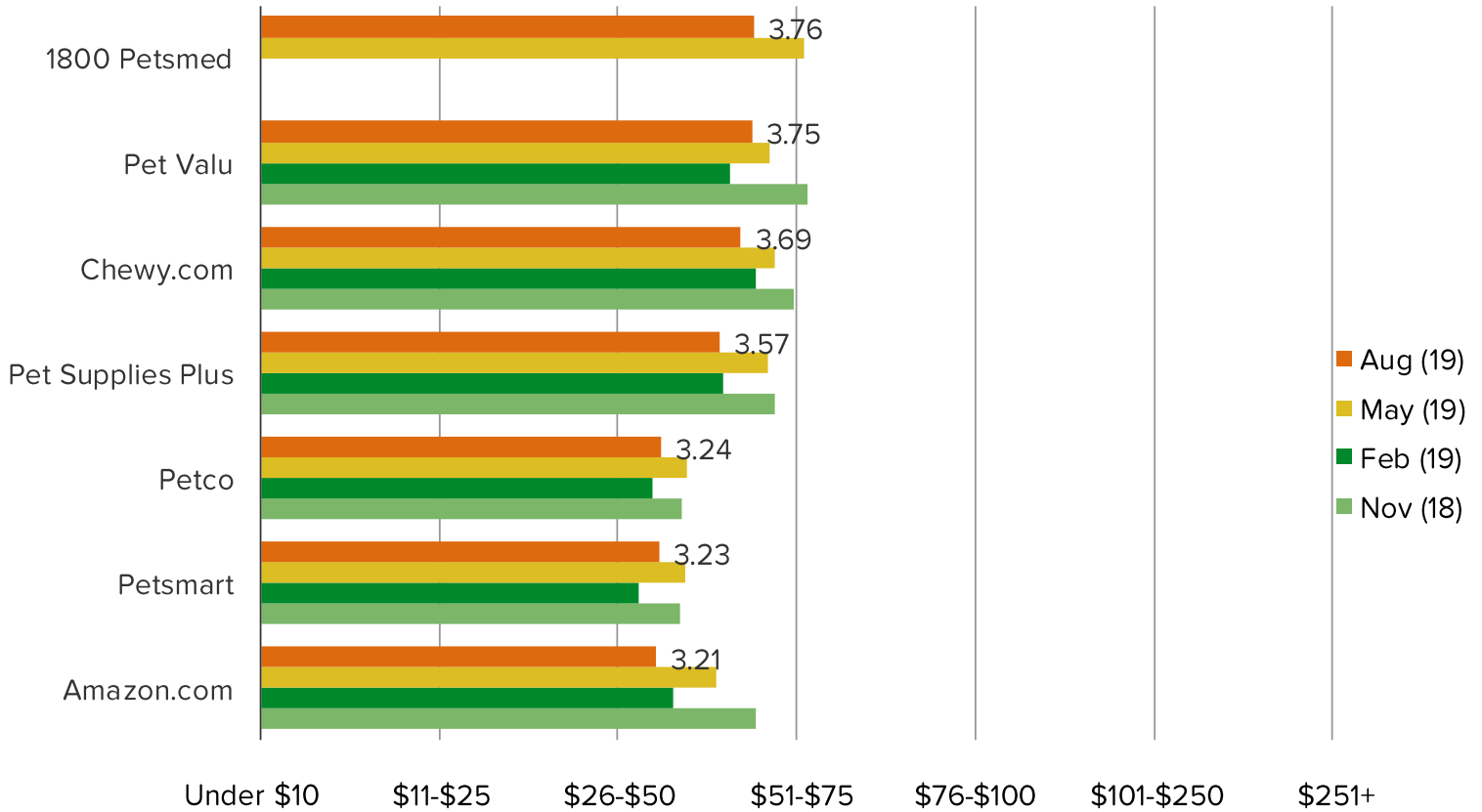
**DO YOU EXPECT TO USE THIS RETAILER FOR PET FOOD AND PRODUCTS MORE OR LESS OFTEN THAN YOU ARE NOW GOING FORWARD?**

Posed to those who regularly or occasionally shop the following for pet food and products



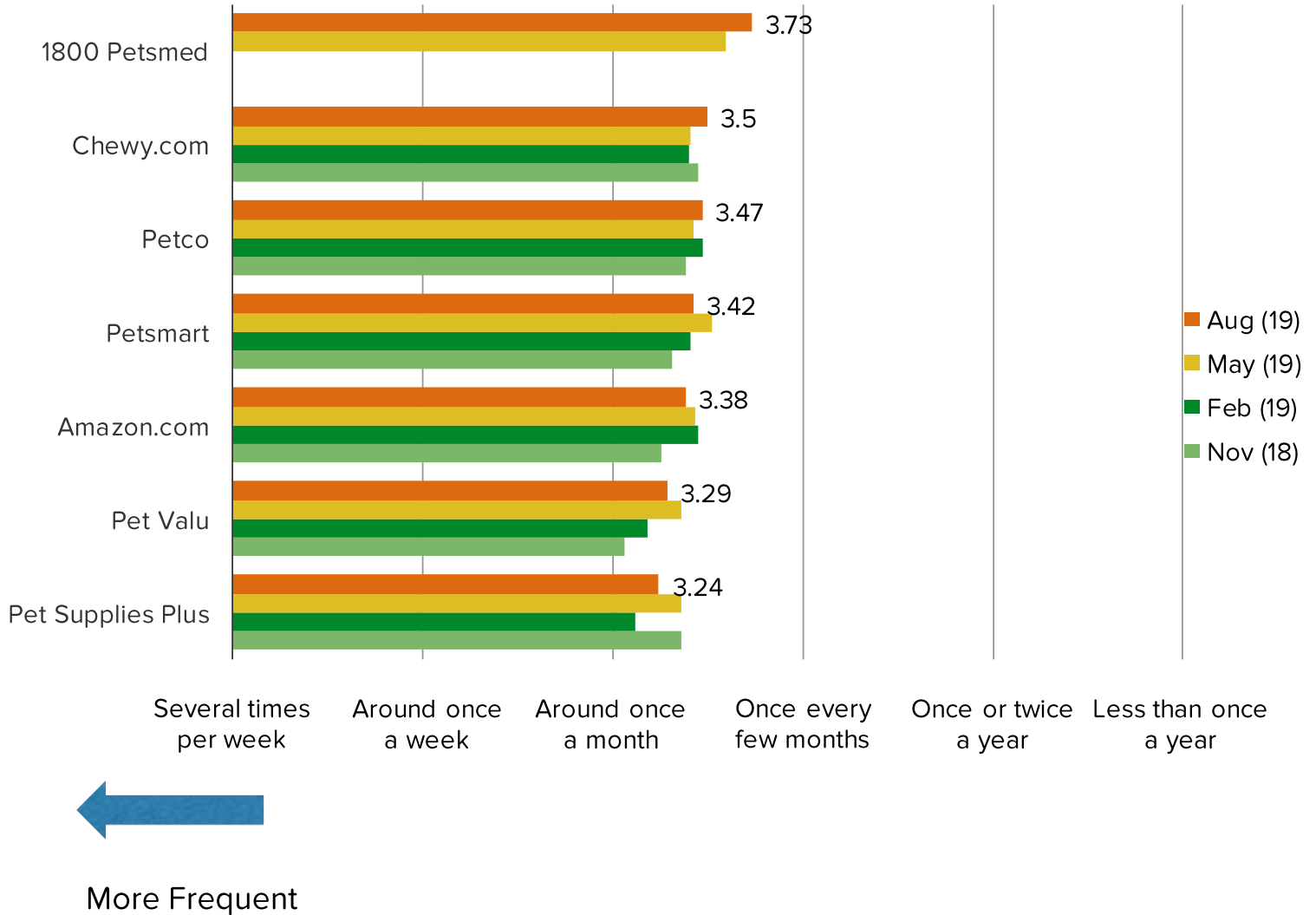
**WHEN YOU SHOP THIS RETAILER FOR PET FOOD AND PRODUCTS, HOW MUCH WOULD YOU ESTIMATE THAT YOUR AVERAGE ORDER SIZE IS?**

Posed to those who regularly or occasionally shop the following for pet food and products



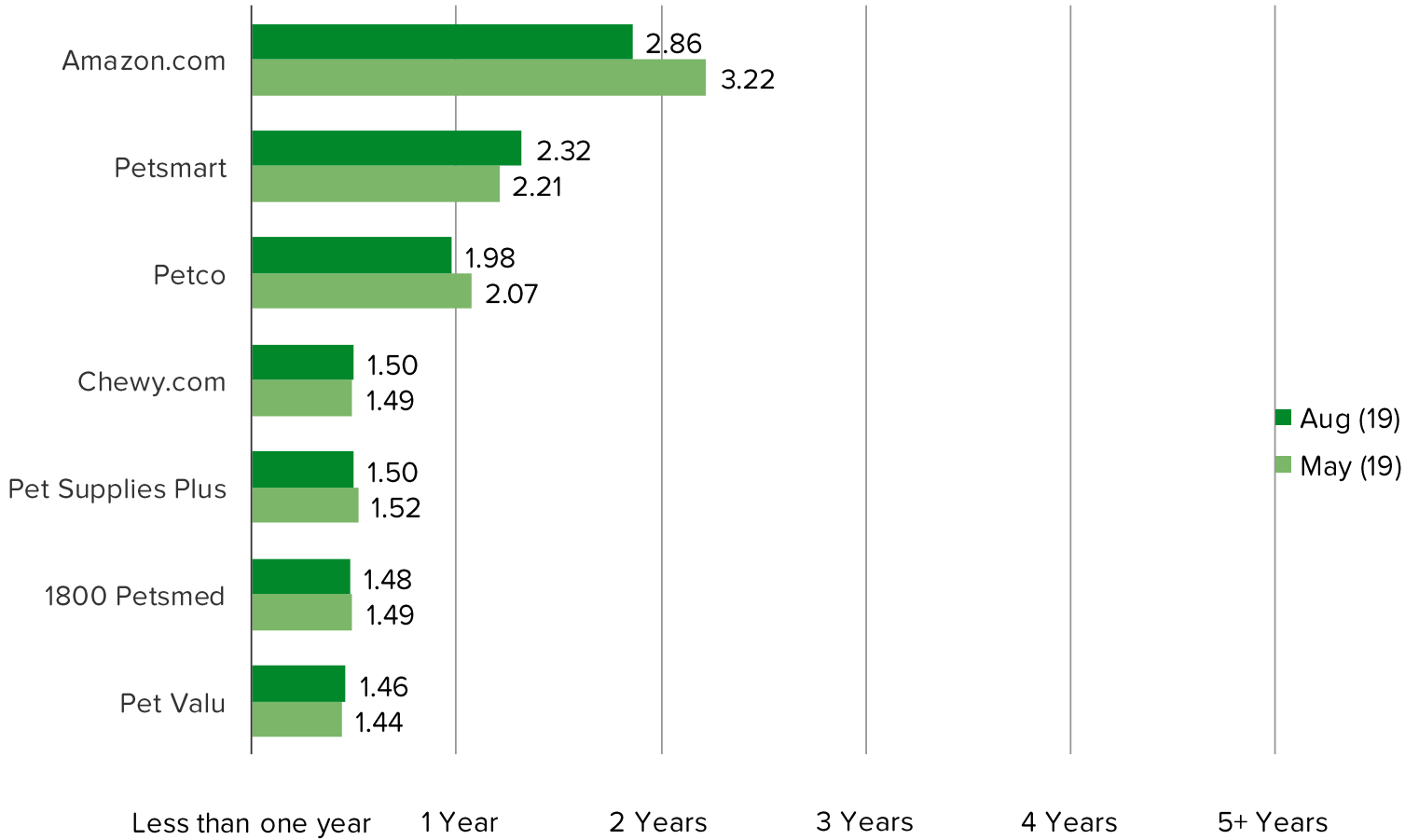
**IN GENERAL, HOW OFTEN DO YOU MAKE PURCHASES OF PET FOOD AND PRODUCTS THROUGH THIS RETAILER?**

Posed to those who regularly or occasionally shop the following for pet food and products



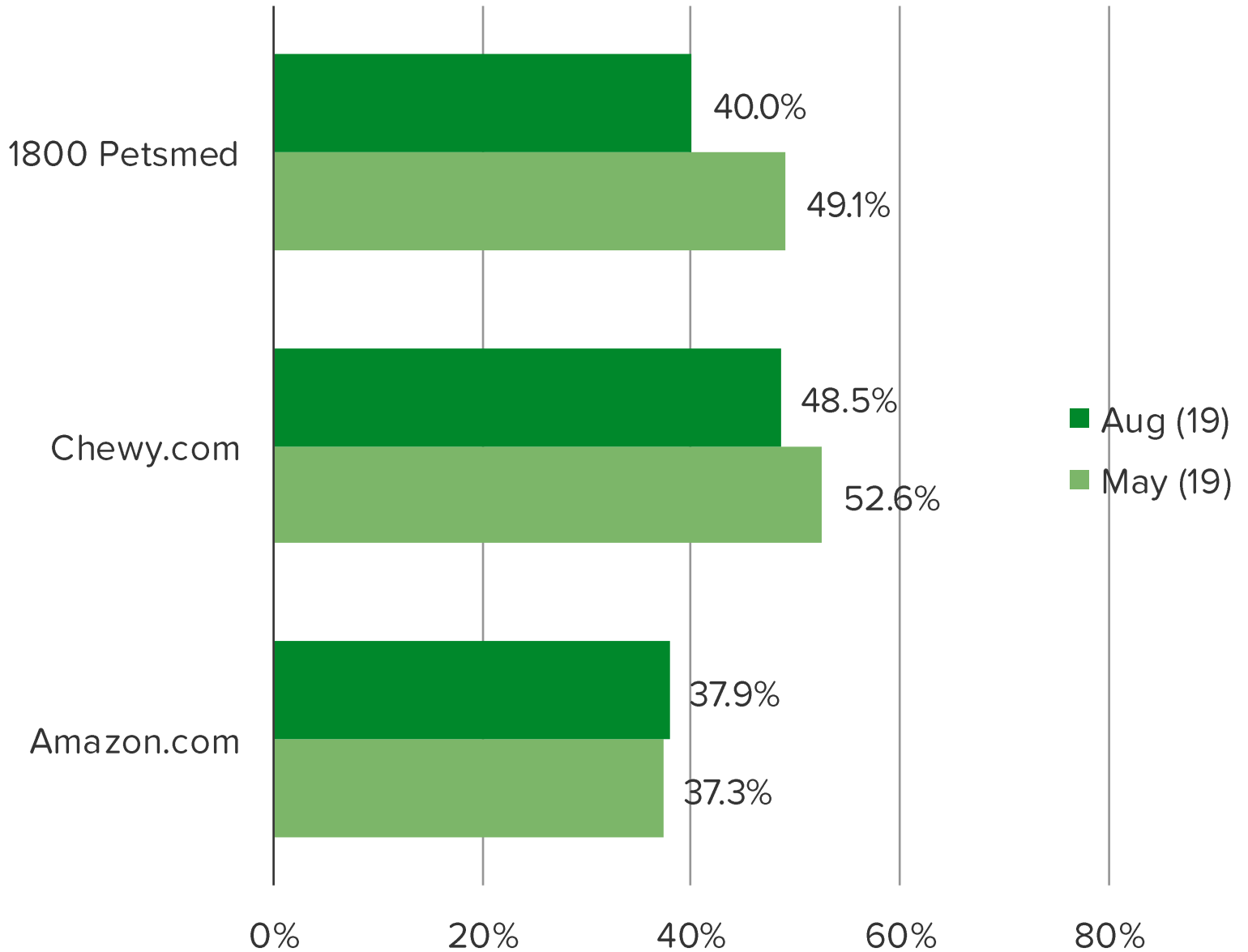
**FOR HOW LONG HAVE YOU BEEN A CUSTOMER OF THIS RETAILER?**

Posed to those who regularly or occasionally shop the following for pet food and products



**DO YOU CURRENTLY USE ANY AUTO-SHIP/AUTO-ORDER PROGRAMS FOR PET PRODUCTS THROUGH THIS RETAILER?**

Posed to those who regularly or occasionally shop the following for pet food and products

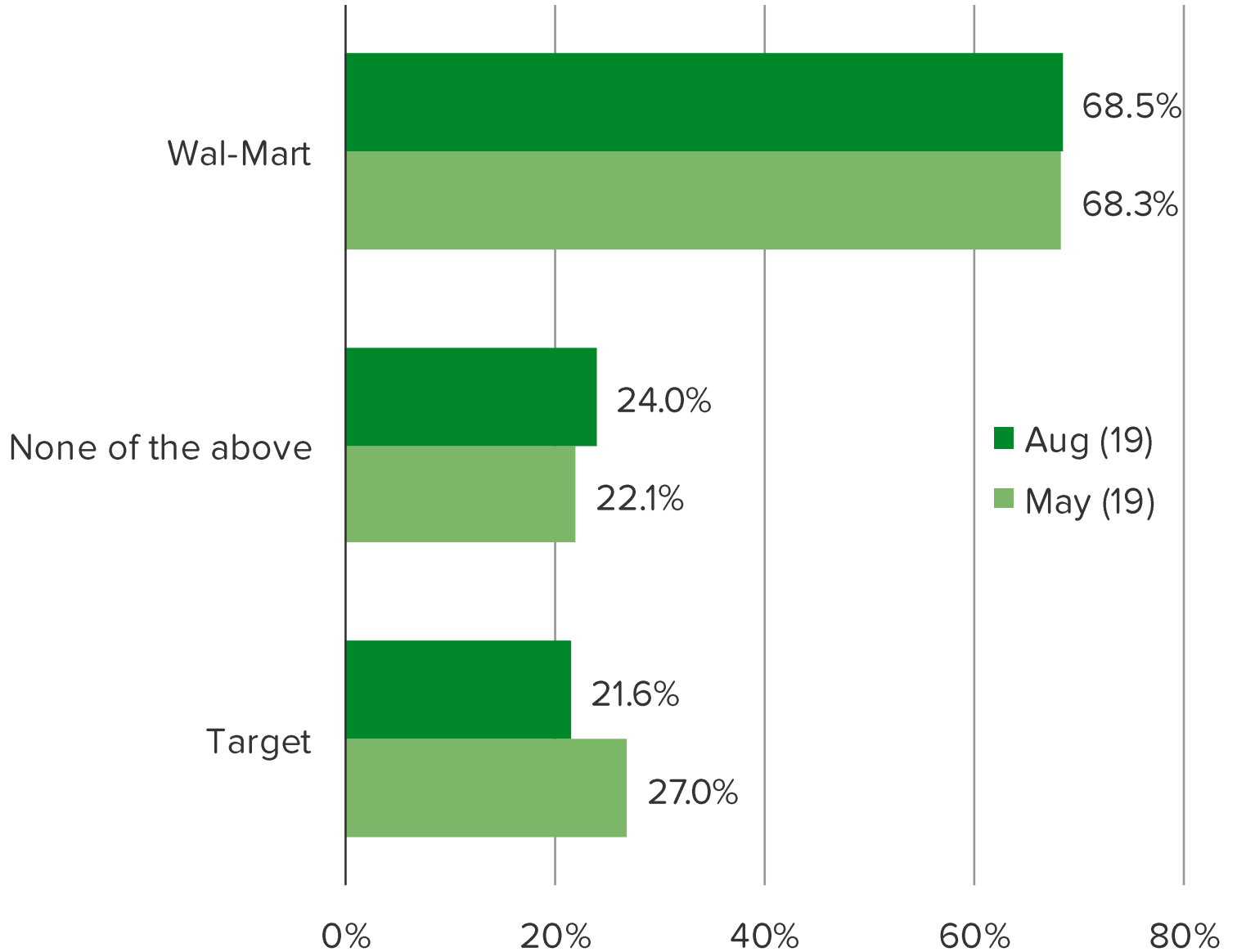




# WMT AND TGT

**DO YOU REGULARLY OR OCCASIONALLY SHOP THE FOLLOWING FOR PET FOOD OR PET PRODUCTS? (SELECT ALL THAT APPLY)**

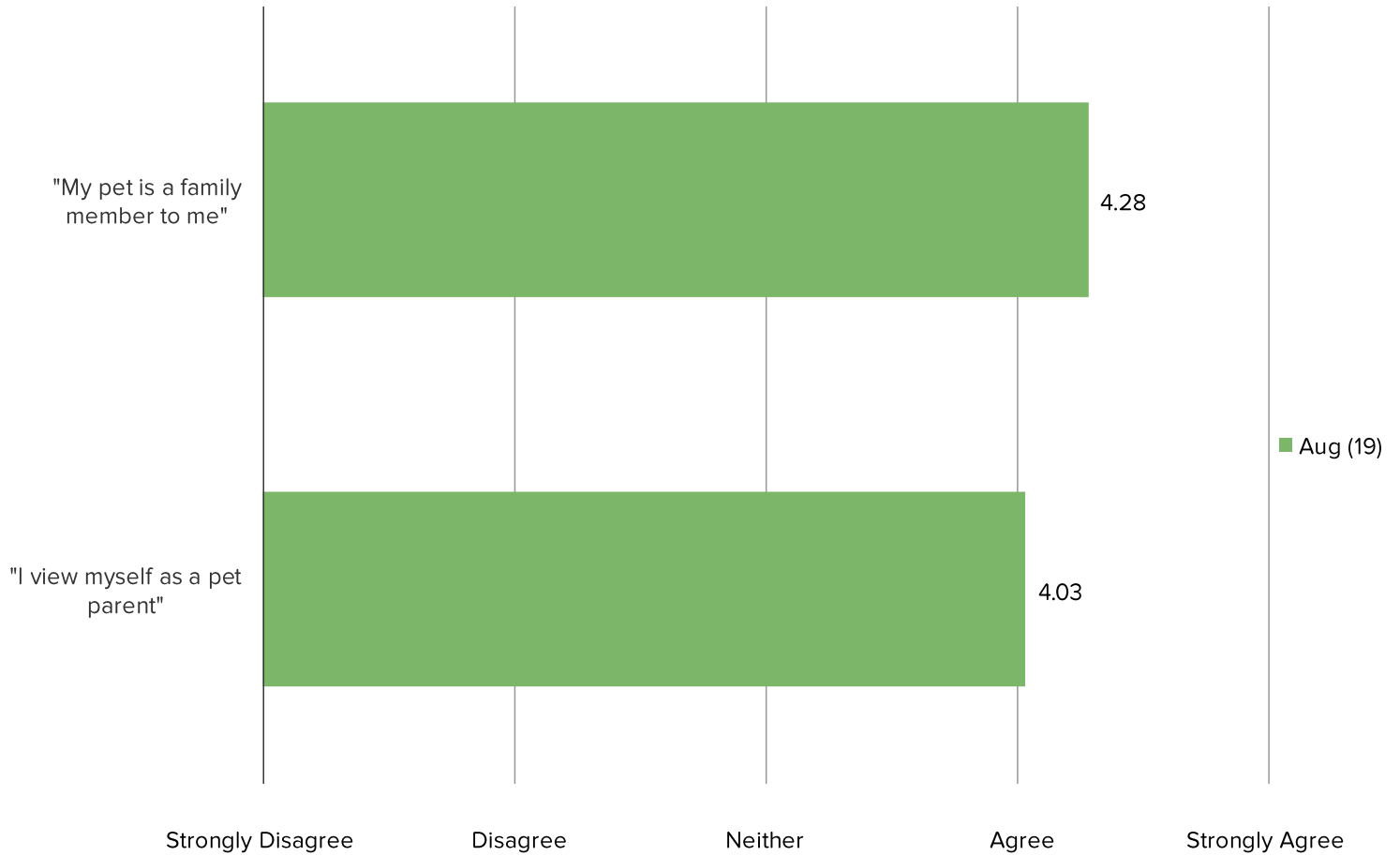
Posed to all pet owners



# PET OWNER SENTIMENT

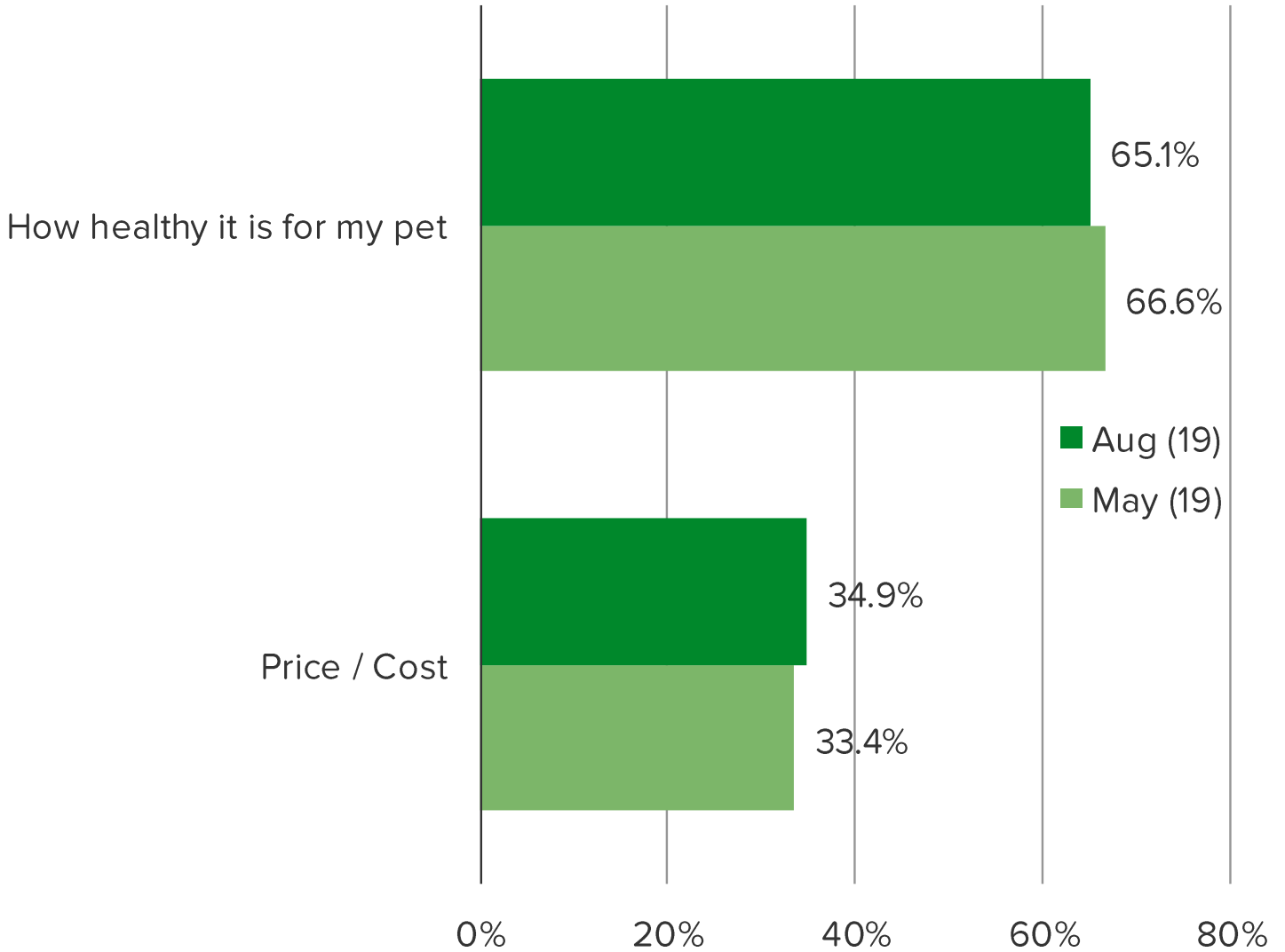
PLEASE RATE HOW MUCH YOU AGREE WITH THE FOLLOWING STATEMENTS:

Posed to all pet owners



**WHEN BUYING PRODUCTS FOR YOUR PET, WHICH WOULD YOU SAY IS MORE IMPORTANT TO YOU?**

Posed to all pet owners



# PET PRODUCT TYPES: IN-STORES OR ONLINE

**DO YOU PREFER TO BUY THE FOLLOWING TYPES OF PRODUCTS IN-STORES OR ONLINE?**

Posed to pet owners

