

Bespoke Survey Research

August 2023

Pet Retail and Pet Health

Volume 21 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: CHWY, AMZN.

KPIs and Key questions

1. Respondents who have taken their pet to the Vet continue to tell us their most recent visit was more expensive than they thought it would be, but the share who said that has declined over our past few quarterly surveys.
2. The share of pet owners who declined services during their most recent visit stepped back q/q and relative to earlier in the year. Among those who did decline services, the top reason was cost/too expensive.
3. Chewy is one of the customer least likely customer bases to price check Amazon when buying.
4. Shopping engagement with pet retailers and sentiment toward those retailers is mostly unchanged.
5. Overall, Chewy has held up or improved in KPIs we track. In a specific question asking pet owners where they'd buy from today if they needed pet food or products, and increasing share are selecting Chewy and a declining share are selecting Amazon.

Noteworthy Stats:

29.4% Of pet owners have shopped Chewy in the past month.

43.9% Of pet owners taken their pet to the vet annually.

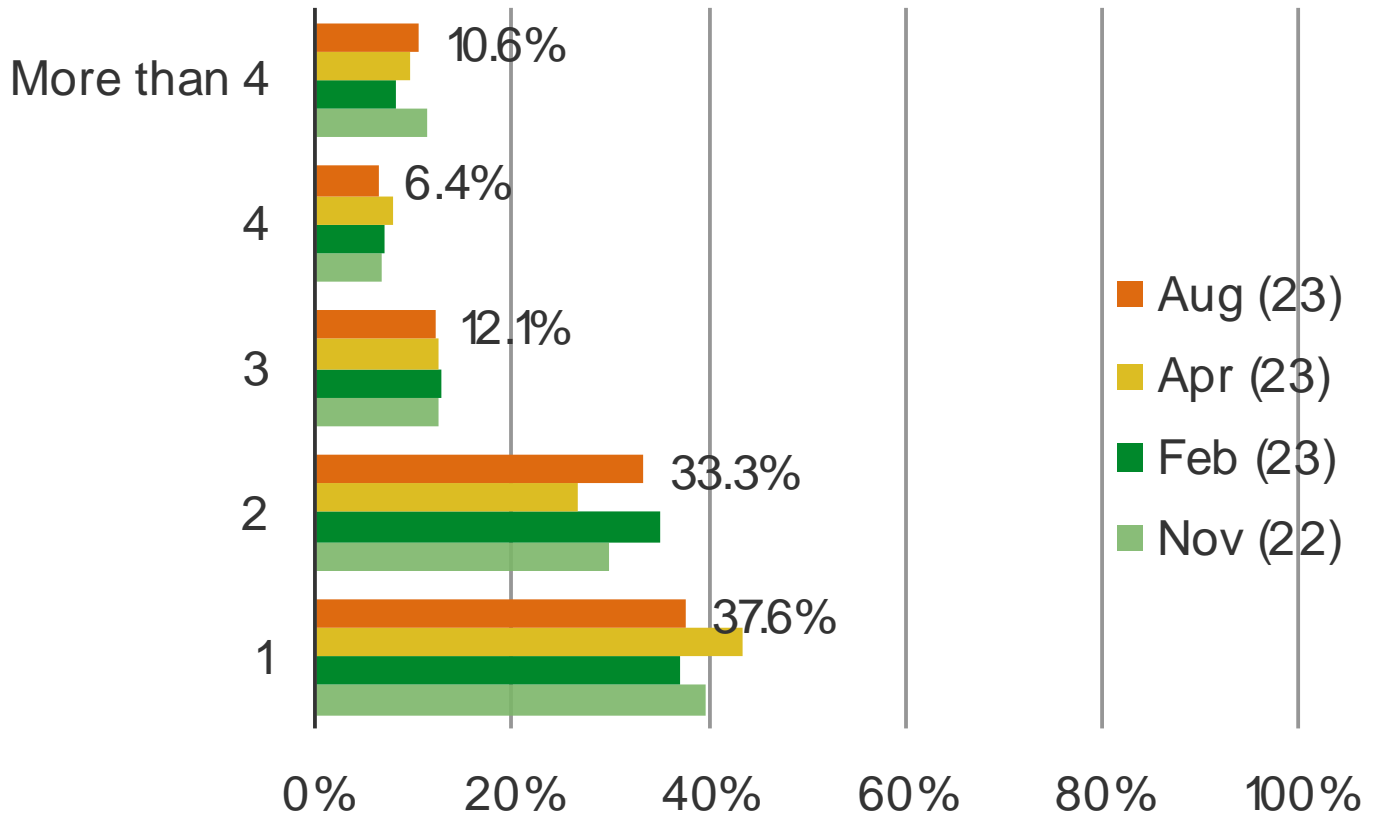
38.6% Of pet owners who have taken their pet to a vet thought their most recent vet bill was expensive (a decline q/q).

21.2% Of pet owners who have taken their pet to a vet declined a recommended service.

MOST RECENTLY ADDED QUESTIONS

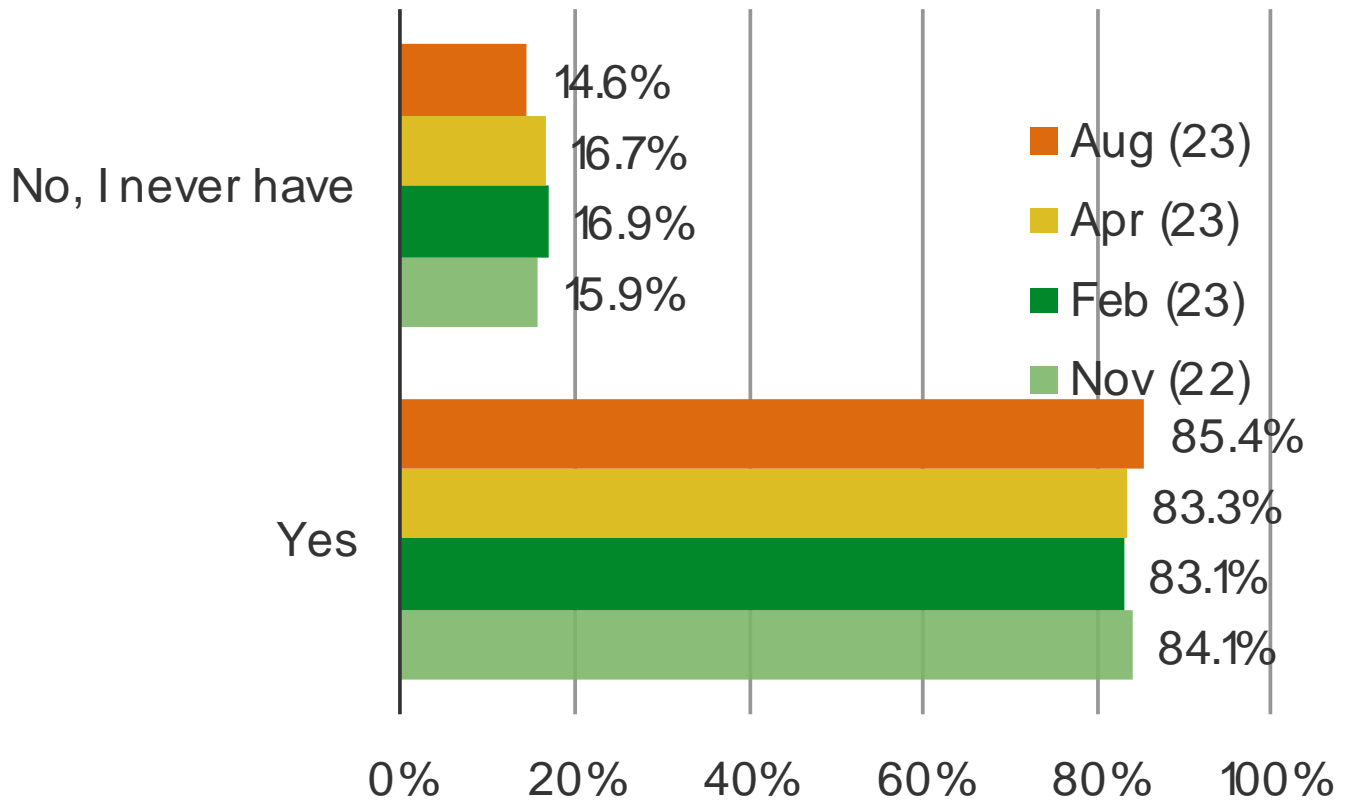
HOW MANY PETS DO YOU HAVE?

Posed to pet owners (N = 654).



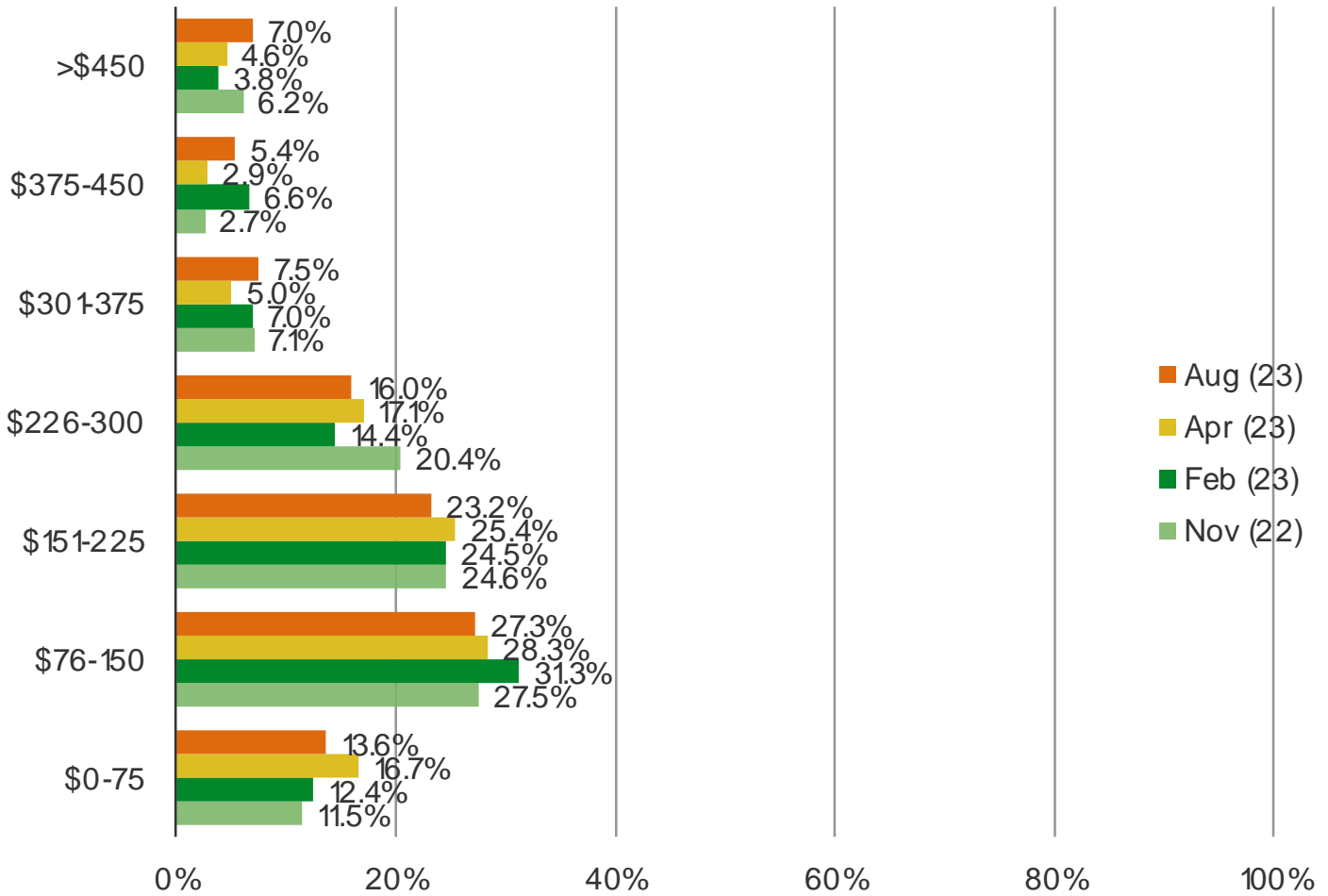
HAVE YOU EVER TAKEN YOUR PET TO THE VETERINARIAN?

Posed to pet owners (N = 652).



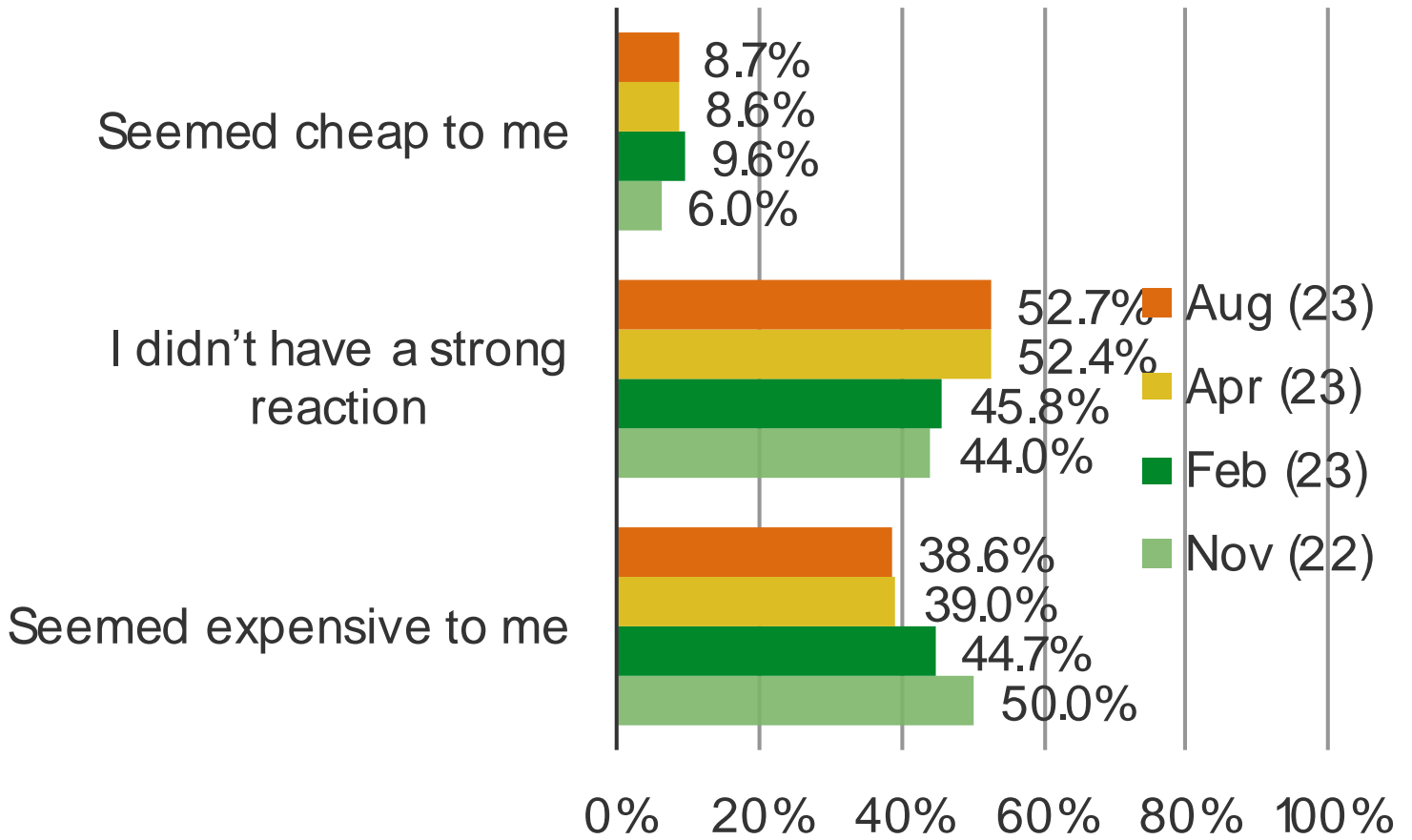
HOW BIG WAS YOUR LAST VET BILL?

Posed to pet owners who have taken their pet to a vet (N = 557).



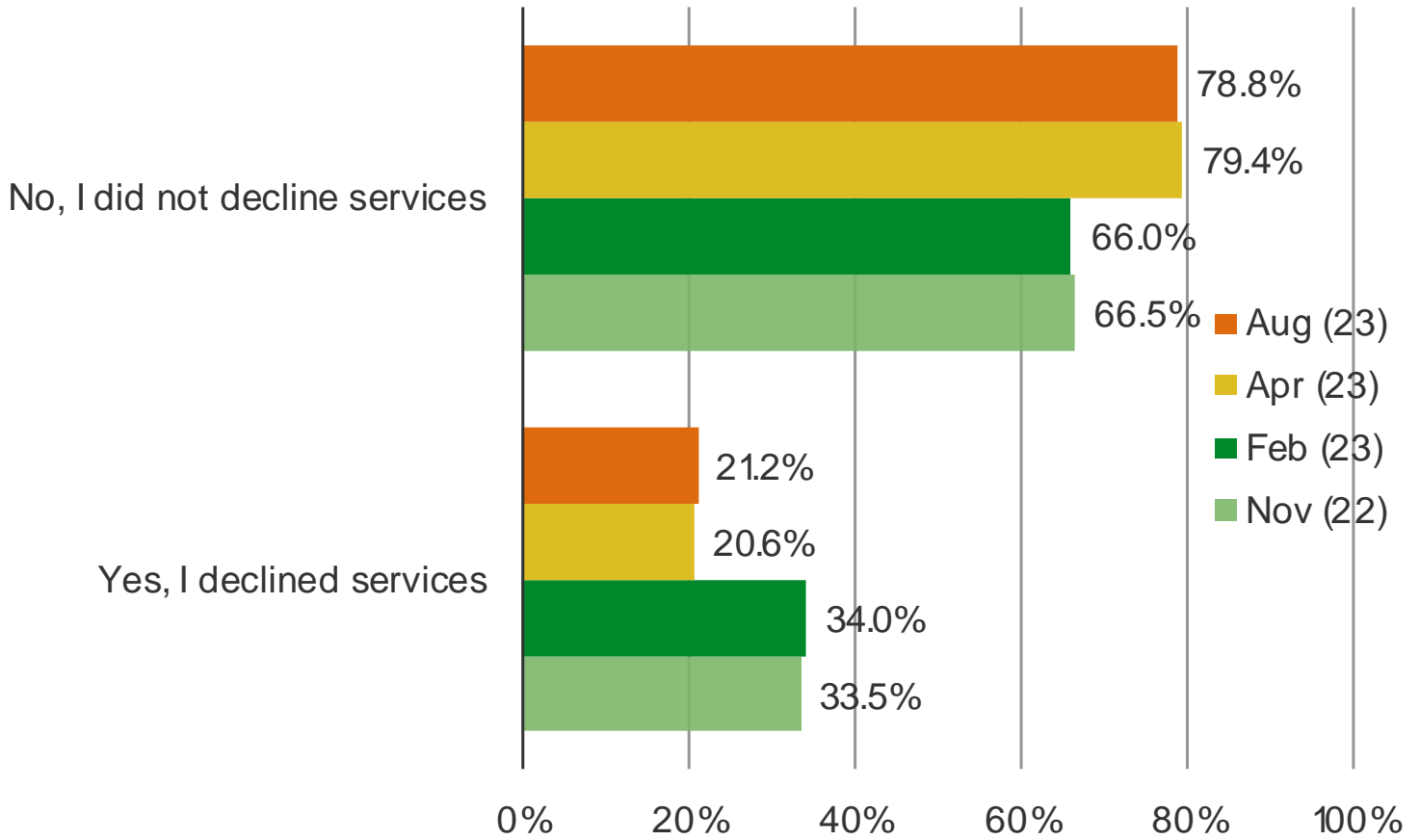
HOW DID YOU REACT WHEN YOU RECEIVED YOUR MOST RECENT VET BILL?

Posed to pet owners who have taken their pet to a vet (N = 552).



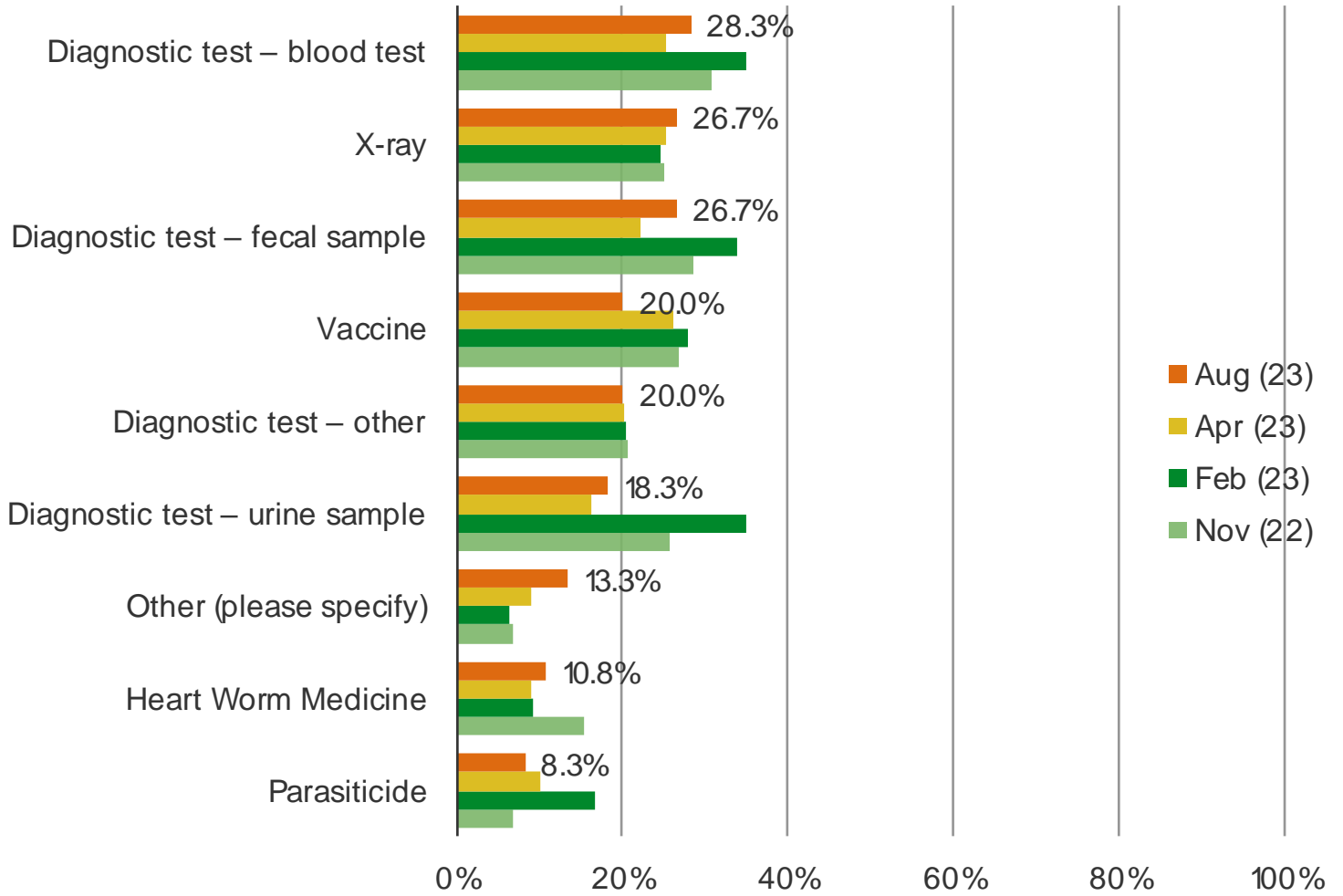
AT YOUR MOST RECENT VET VISIT, DID YOU DECLINE ANY SERVICES THAT THE VET RECOMMENDED FOR YOUR PET?

Posed to pet owners who have taken their pet to a vet (N = 557).



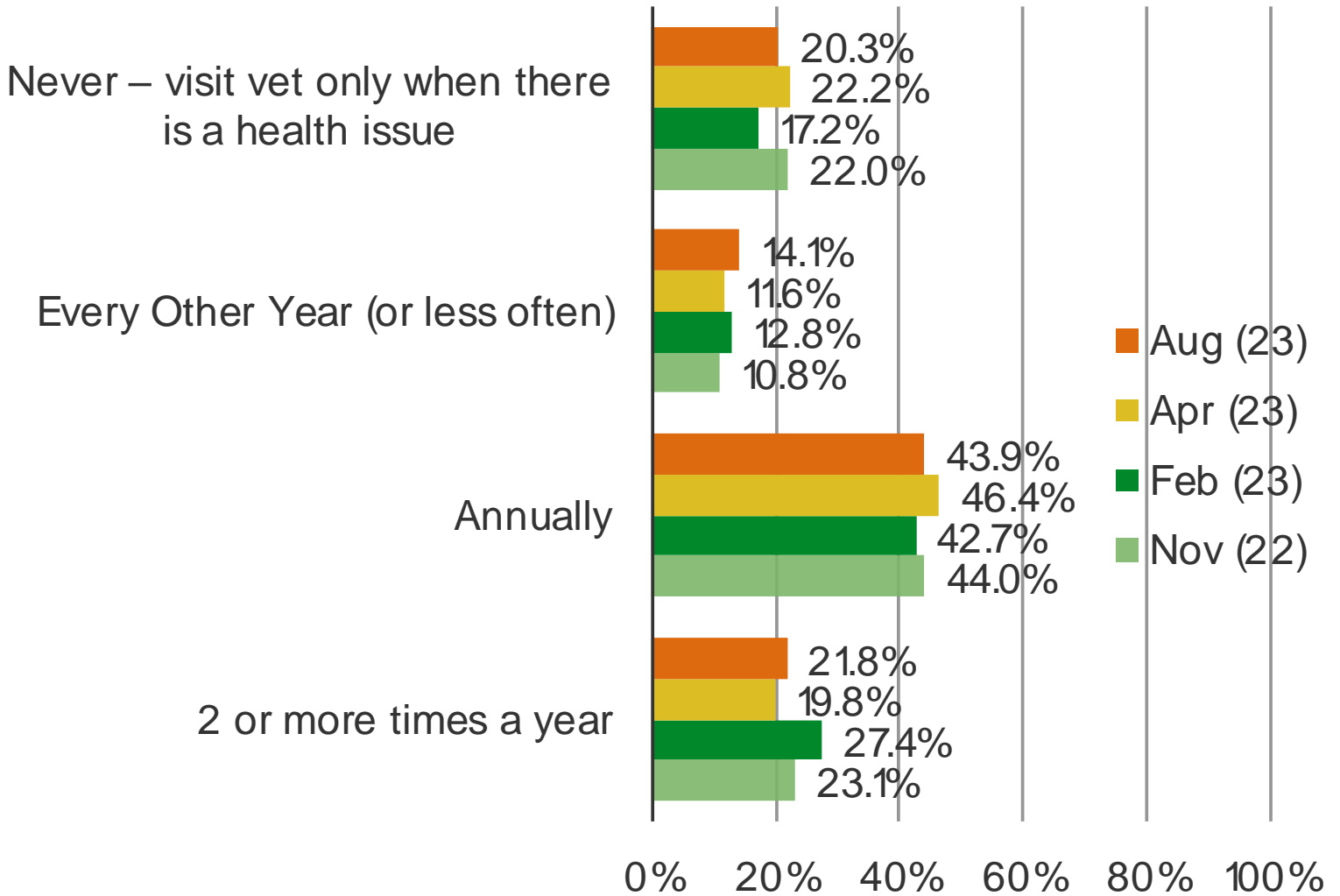
WHICH SERVICES DID YOU DECLINE? SELECT ALL THAT APPLY

Posed to pet owners who have taken their pet to a vet and declined any recommended service (N = 120).



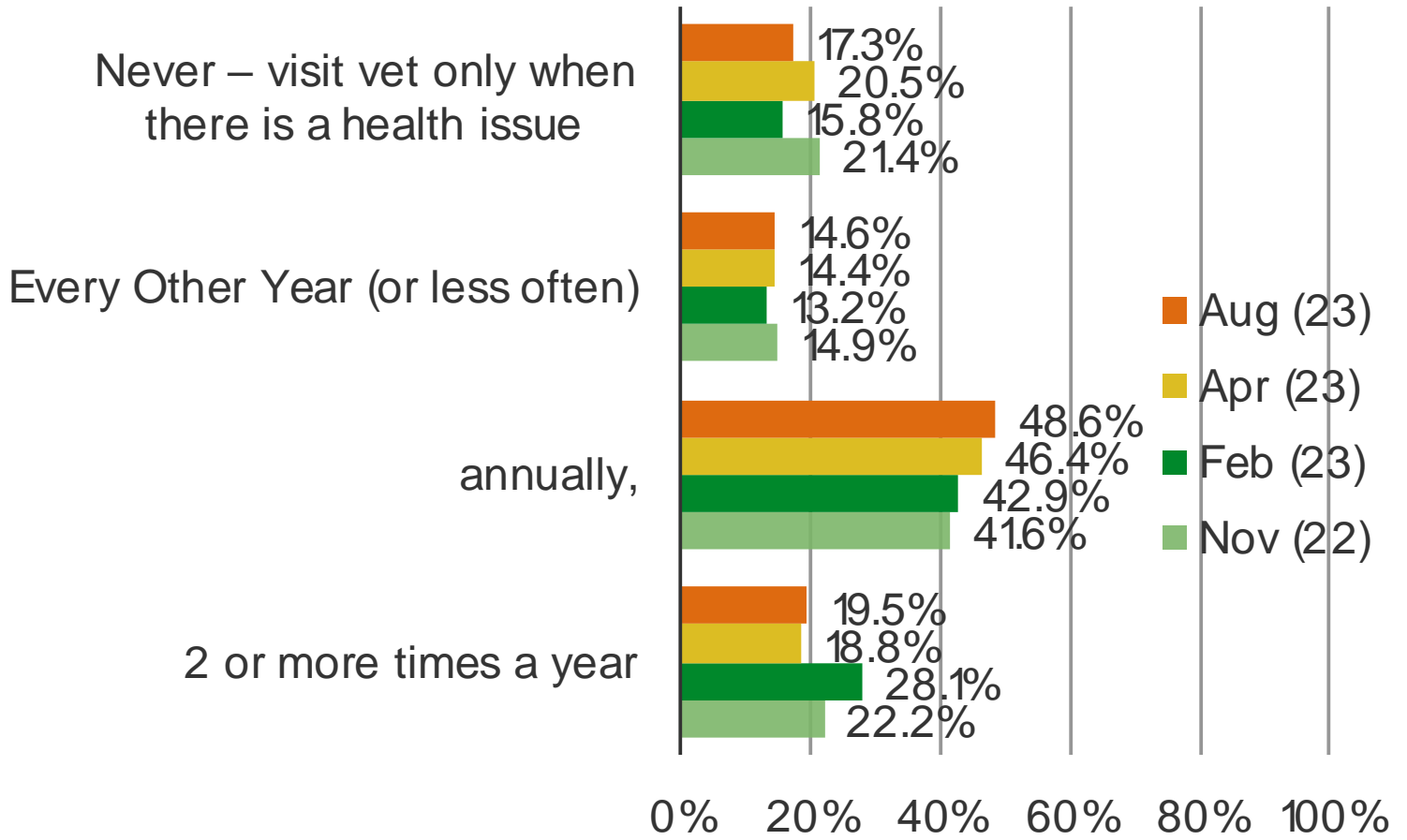
IN THE PAST, HOW OFTEN HAVE YOU TAKEN YOUR PET TO THE VET FOR A CHECK UP? (I.E., THERE IS NOTHING WRONG WITH YOUR PET BUT YOU TAKE THEM FOR A CHECKUP)

Posed to pet owners (N = 652).



GOING FORWARD, HOW OFTEN DO YOU PLAN TO TAKE YOUR PET TO THE VET FOR A WELLNESS CHECK UP? (I.E., THERE IS NOTHING WRONG WITH YOUR PET BUT YOU TAKE THEM FOR A CHECKUP)

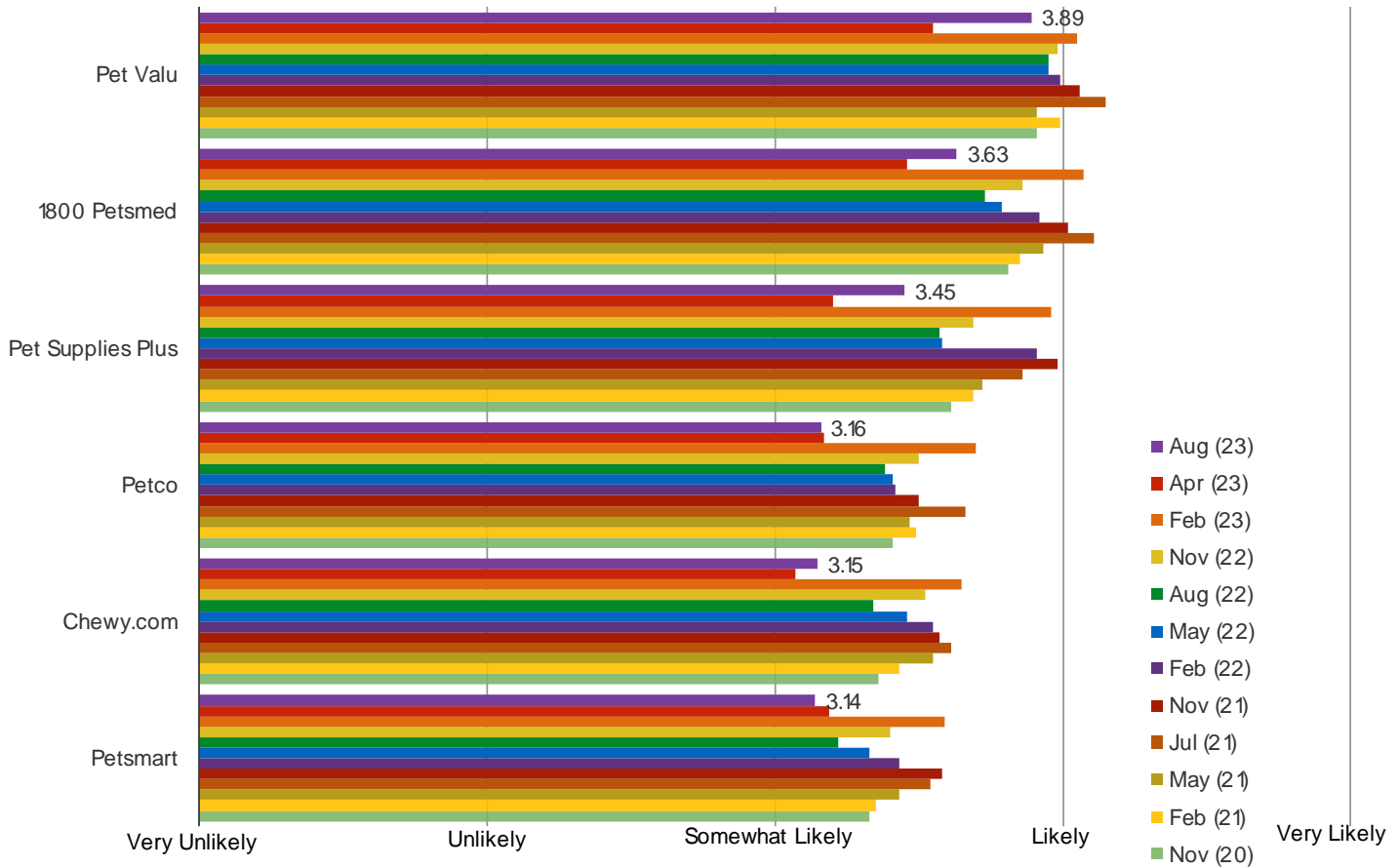
Posed to pet owners (N = 652).



CROSS-SHOPPING AMAZON

WHEN YOU SHOP FOR PET FOOD OR PRODUCTS FROM THE FOLLOWING, HOW LIKELY ARE YOU TO PRICE CHECK THE ITEM ON AMAZON BEFORE MAKING THE PURCHASE?

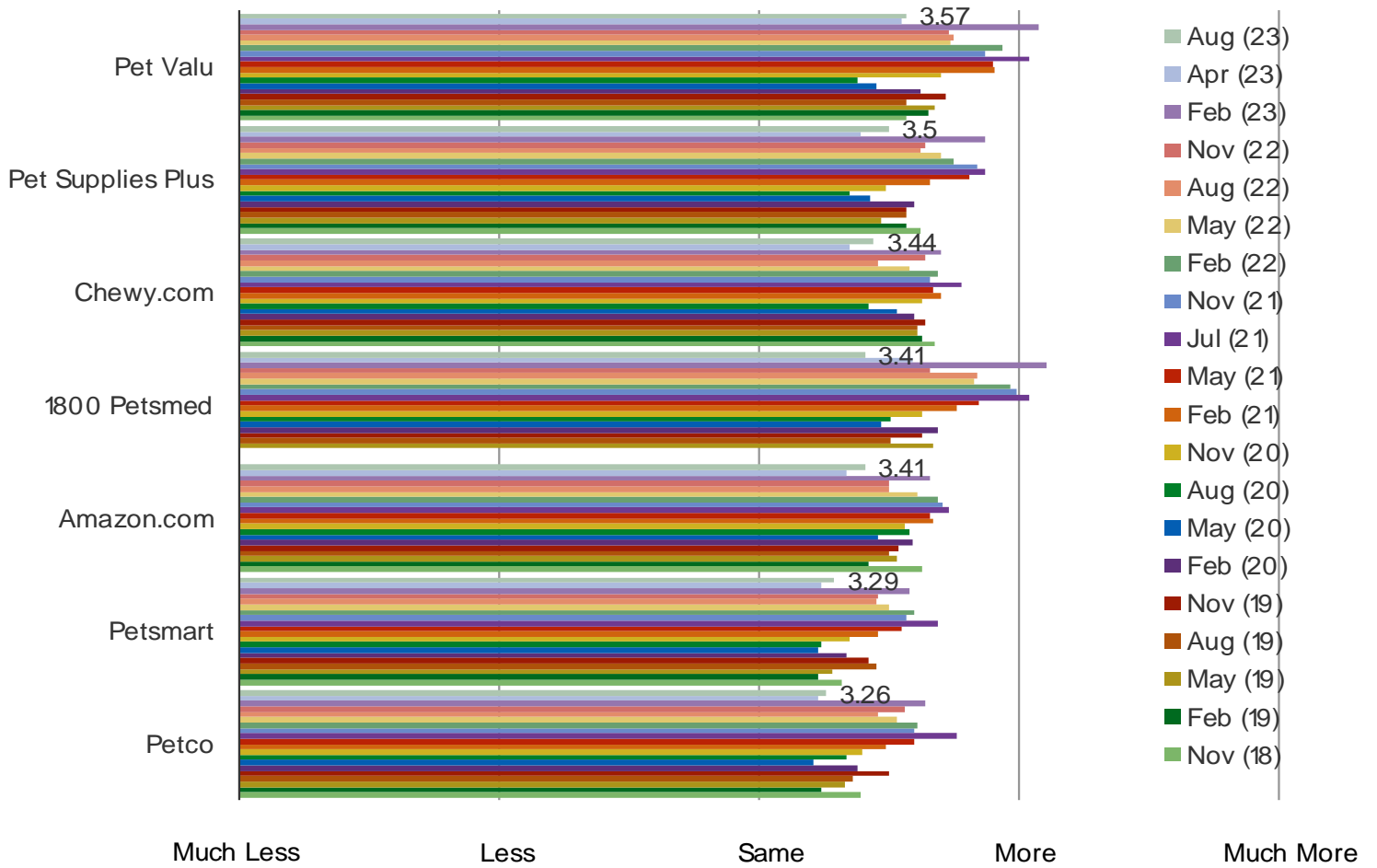
Posed to pet owners who regularly or occasionally shop each of the following.



RESPONDENTS WHO REGULARLY OR OCCASIONALLY SHOP EACH RETAILER

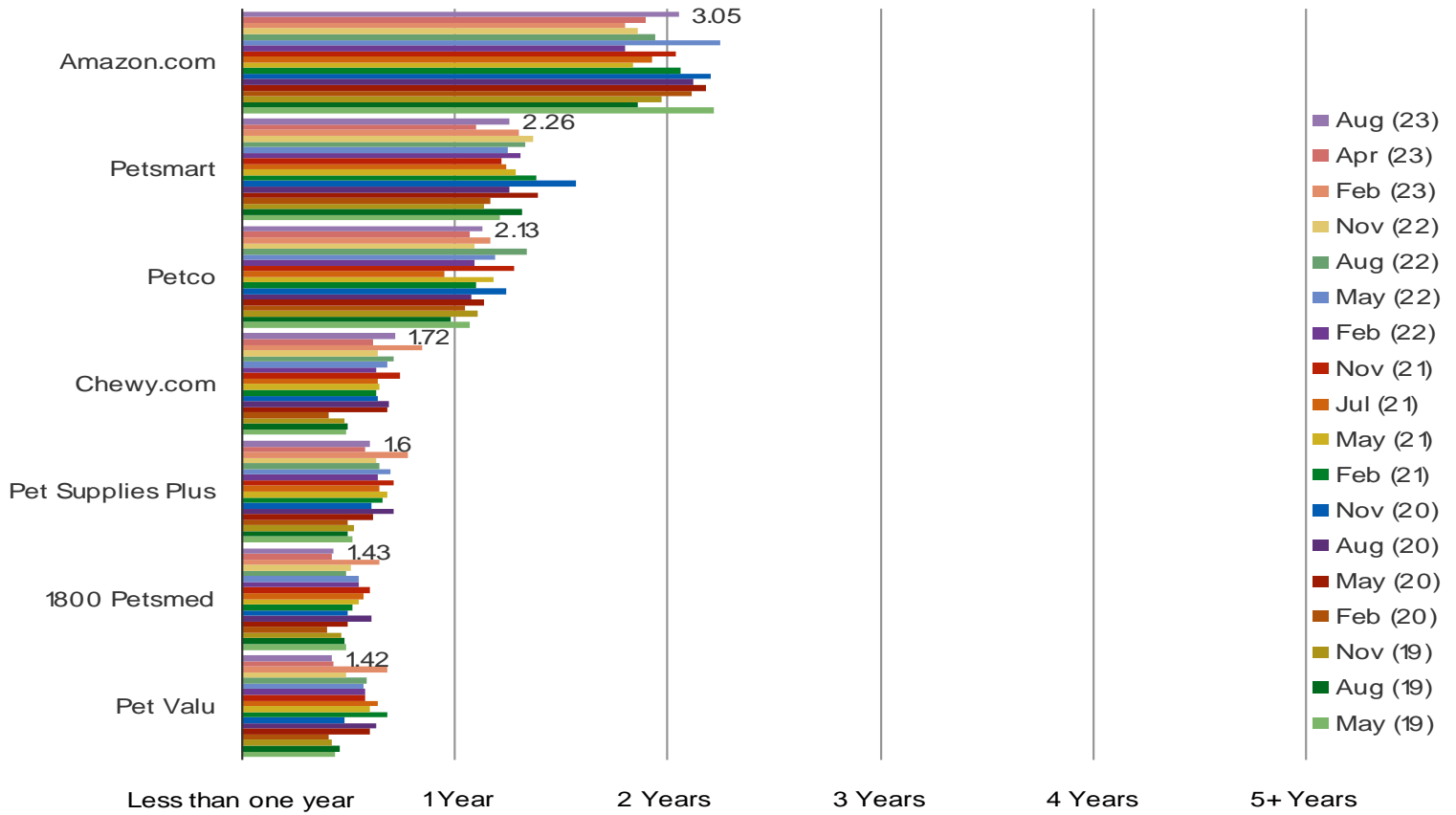
DO YOU EXPECT TO USE THIS RETAILER FOR PET FOOD AND PRODUCTS MORE OR LESS OFTEN THAN YOU ARE NOW GOING FORWARD?

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



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

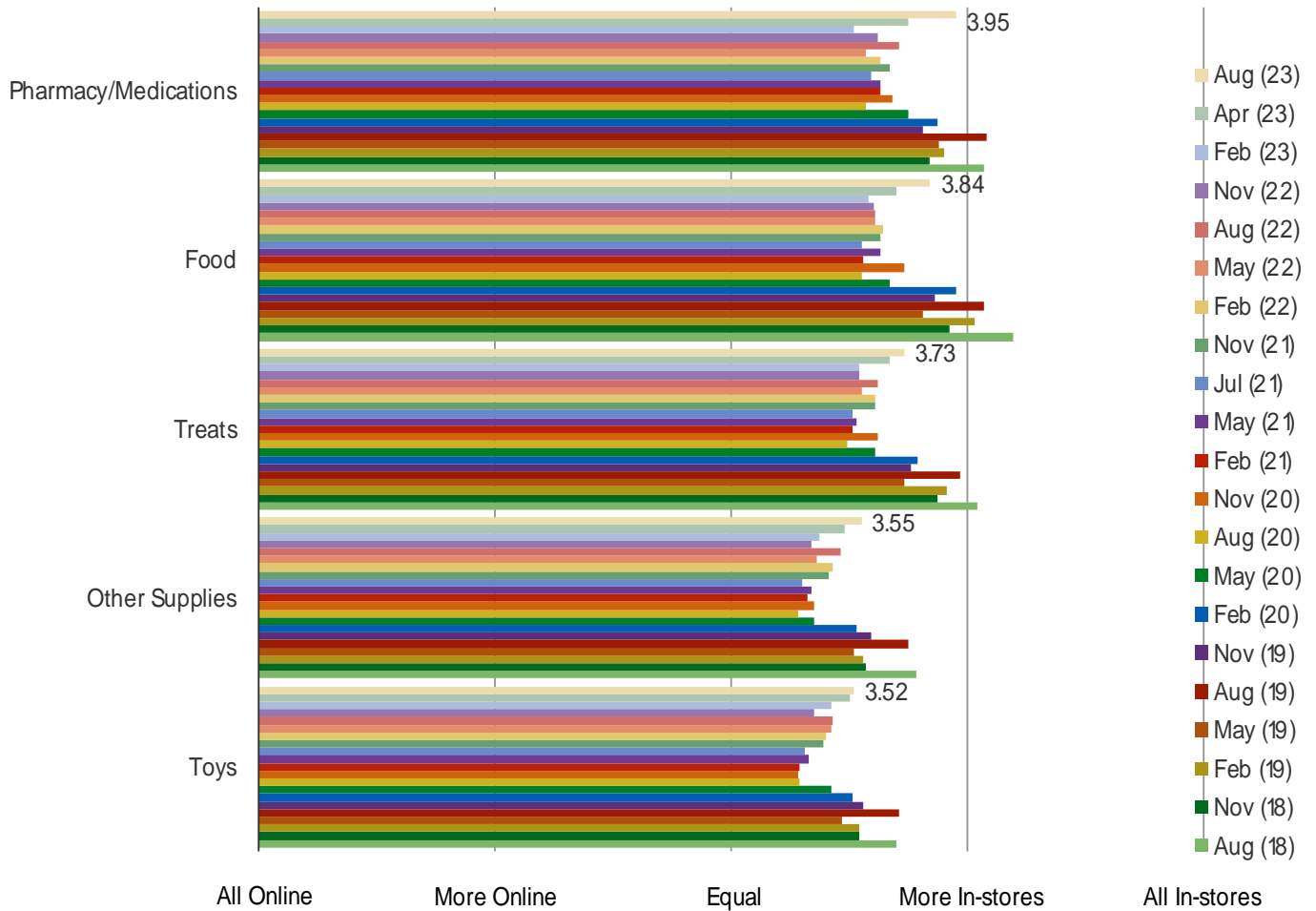
Posed to those who regularly or occasionally shop the following for pet food and products



PET PRODUCT TYPES: IN-STORES OR ONLINE

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

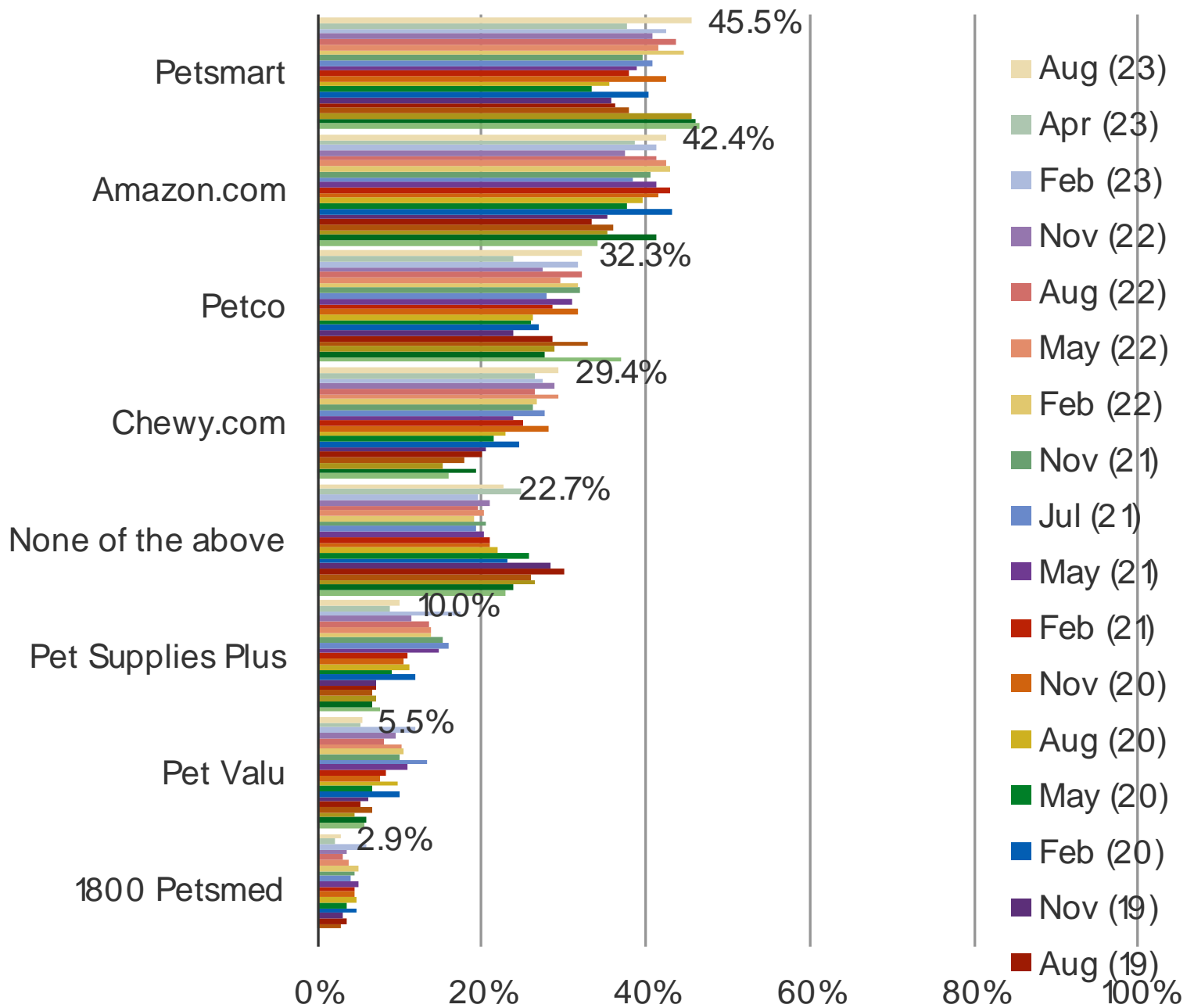
Posed to pet owners.



RESPONDENTS WHO PURCHASED ITEMS IN THE PAST MONTH

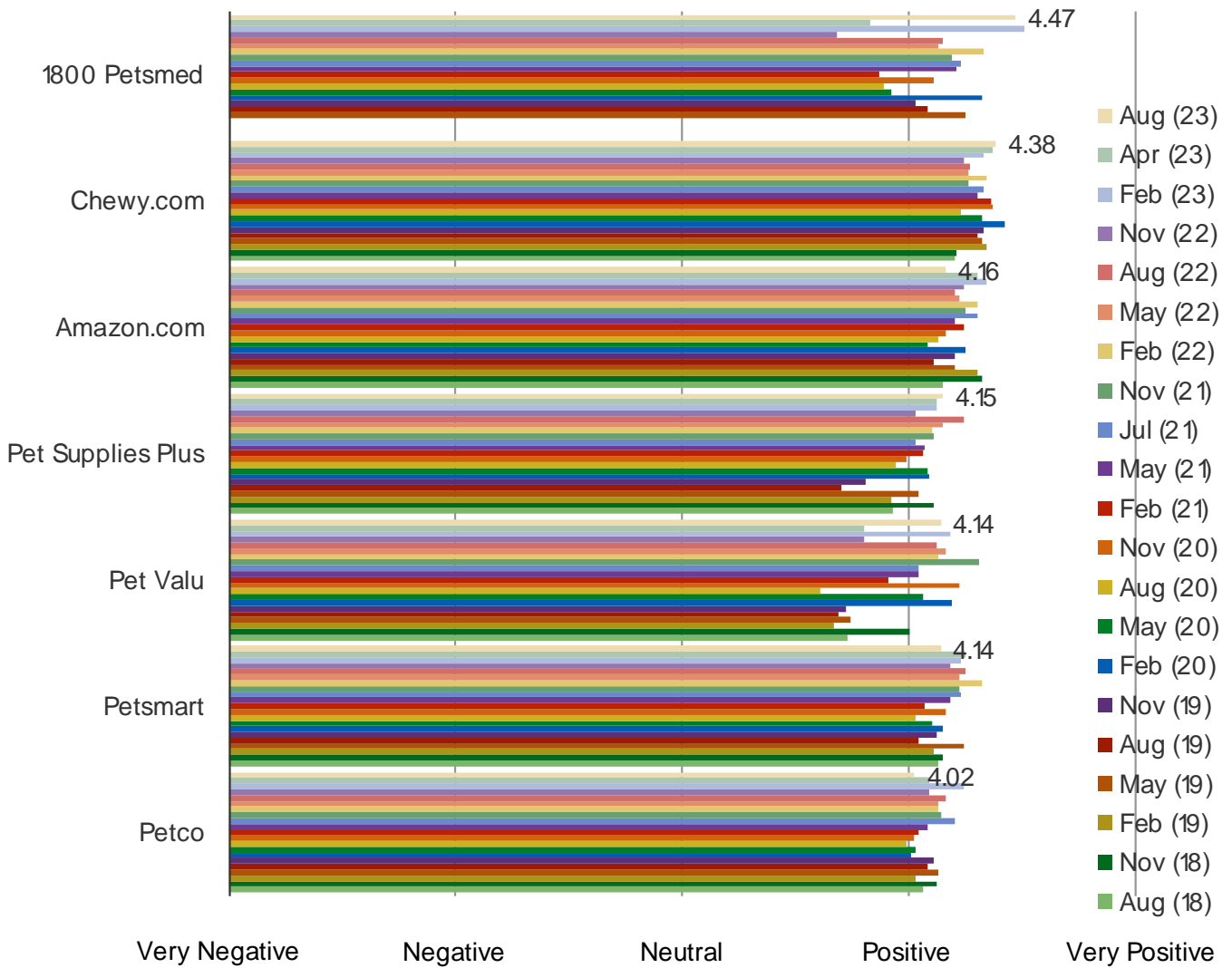
HAVE YOU SHOPPED ANY OF THE FOLLOWING RETAILERS IN THE PAST MONTH FOR PET PRODUCTS?
(SELECT ALL THAT APPLY)

Posed to pet owners



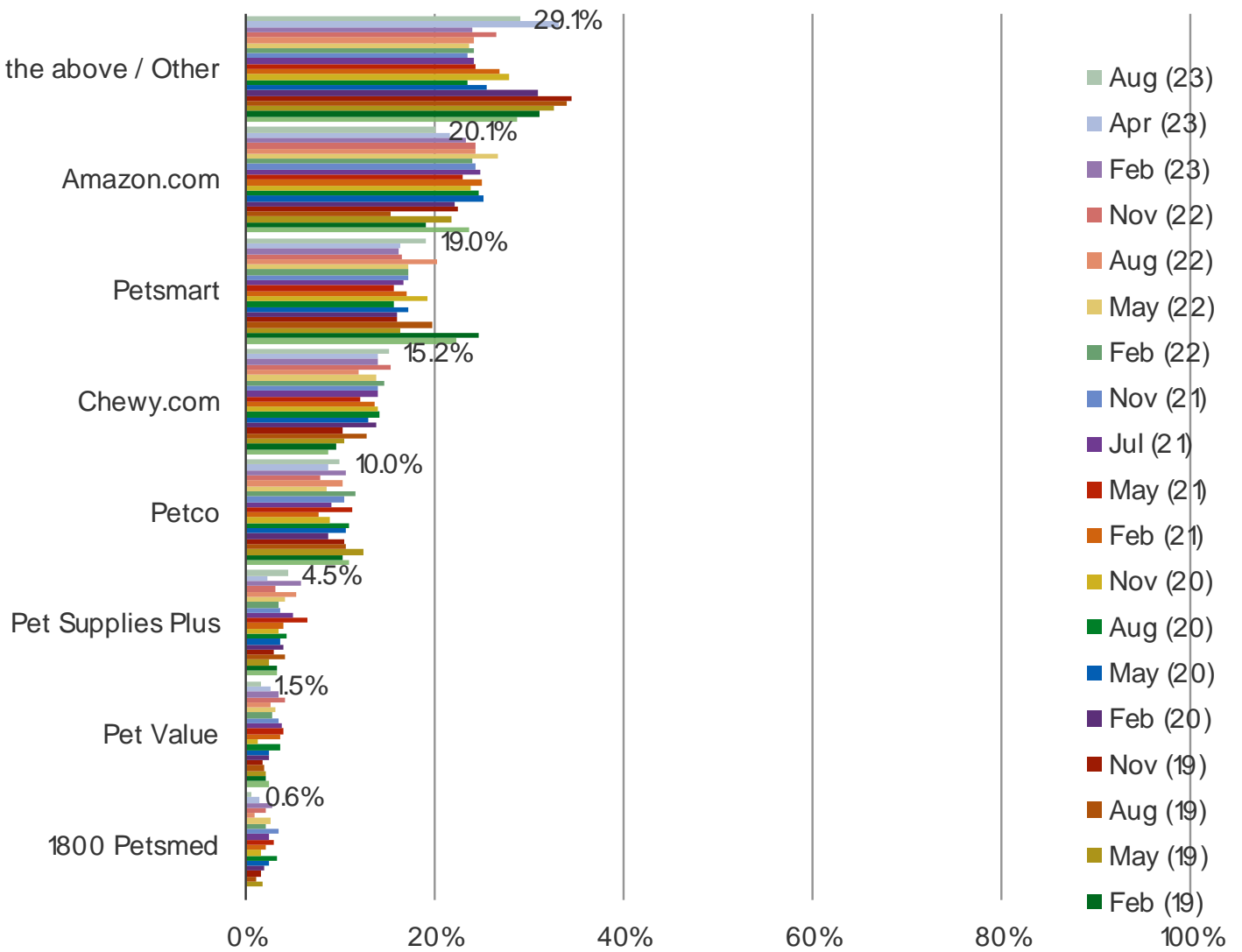
WHAT IS YOUR OPINION OF THIS RETAILER IN GENERAL FOR PET PRODUCT PURCHASES?

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



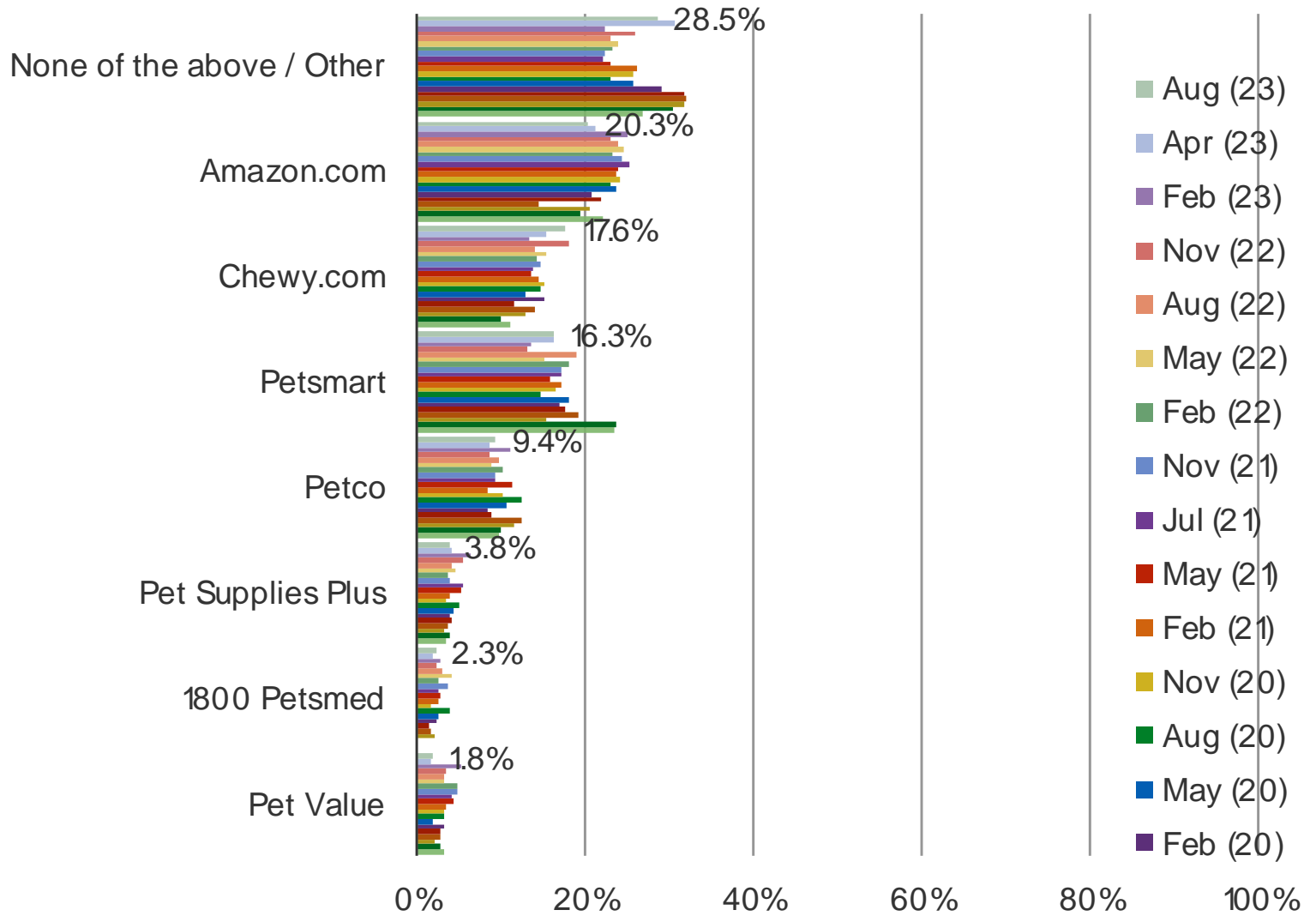
THINKING ABOUT THE LAST TIME YOU PURCHASED PET FOOD OR PRODUCTS, FROM WHICH RETAILER DID YOU MAKE THE PURCHASE?

Posed to pet owners.



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

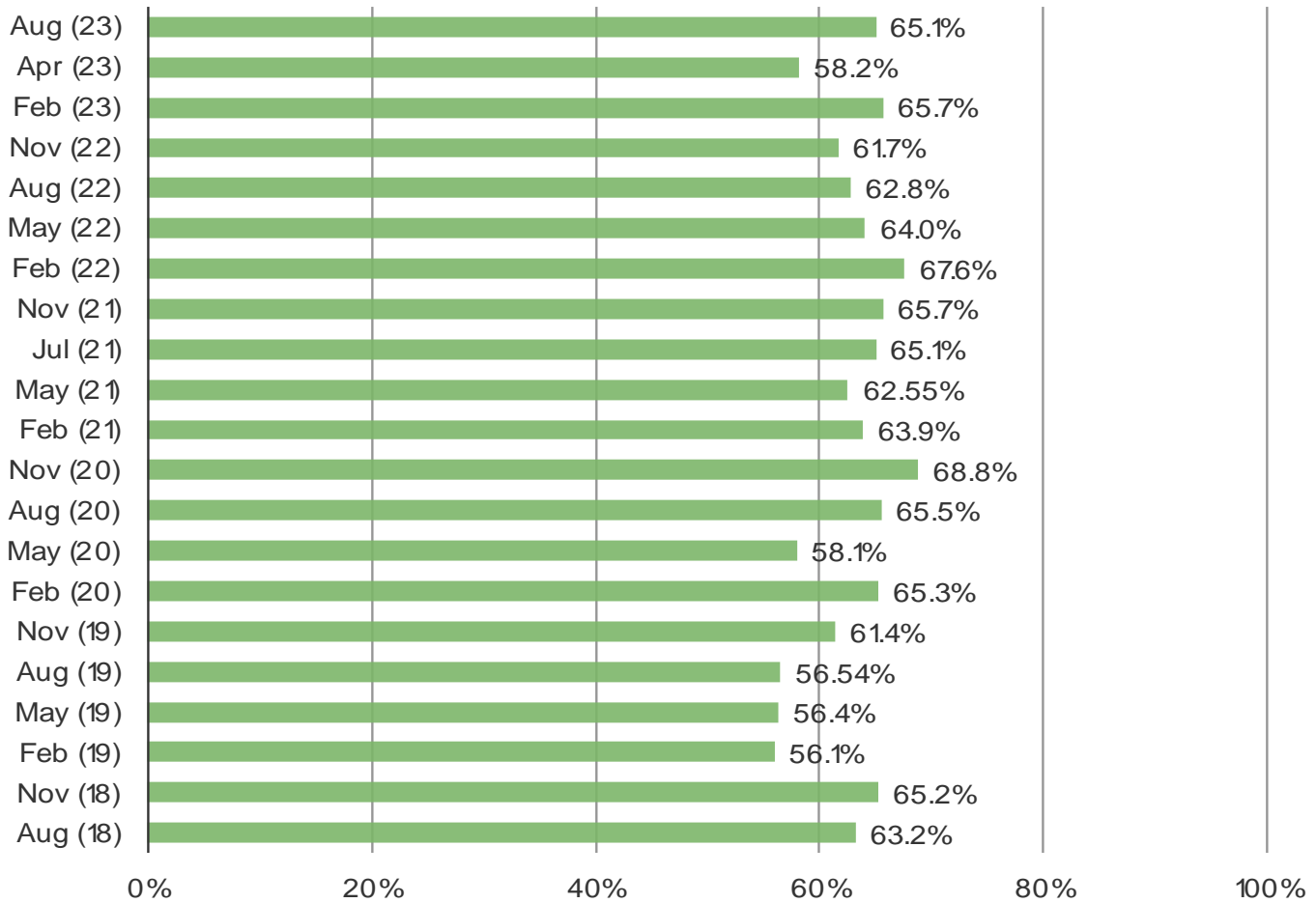
Posed to pet owners.



PET OWNER BACKGROUND

DO YOU CURRENTLY HAVE ONE OR MORE PETS?

Posed to all respondents.



WHAT KIND OF PET(S) DO YOU HAVE? (SELECT ALL THAT APPLY)

Posed to pet owners.

