

Bespoke Survey Research

February 2024

Pet Retail and Pet Health

Volume 23 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: CHWY, AMZN, FRPT, WOOF.

KPIs and Key questions

- ❑ This quarter, we asked about NPS for a number of players in the pet space. Chewy NPS came in at ~41, while Freshpet NPS came in at ~19 (above retailers like Petco, Petsmart, Pet Supplies Plus, and Pet Value).
- ❑ Customer opinions of Freshpet are very positive and a touch stronger relative to Chewy, Petsmart, and Petco.
- ❑ Pet owners shifted their shopping preferences in the direction of online buying during the pandemic quarters of our survey's history. In the quarters following the pandemic, preferences have shifted a bit back in the direction of in-store.
- ❑ Over the past year or so, pet owners have been increasingly likely to say they take their pet to the vet annually for checkups (and decreasingly likely to say 2X per year).

Noteworthy Stats:

28.7% Of pet owners have shopped Chewy in the past month.

50.2% Of pet owners take their pet to the vet annually.

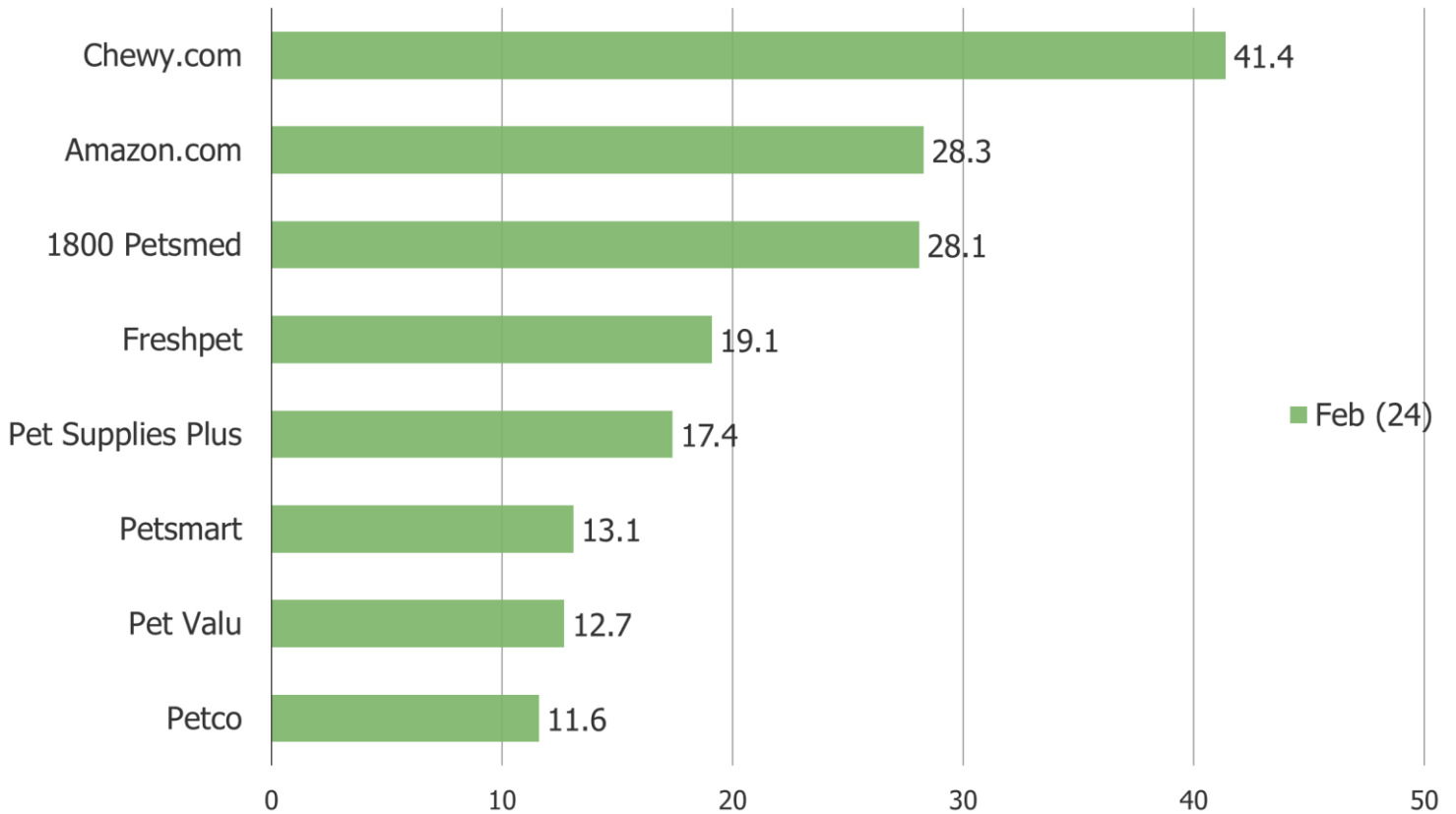
43.0% Of pet owners who have taken their pet to a vet thought their most recent vet bill was expensive.

20.6% Of pet owners who have taken their pet to a vet declined a recommended service.

MOST RECENTLY ADDED QUESTIONS

HOW LIKELY WOULD YOU BE TO RECOMMEND THE FOLLOWING TO A FRIEND OR COLLEAGUE WHO OWNS A PET?

Posed to pet owners who regularly or occasionally shop the below.



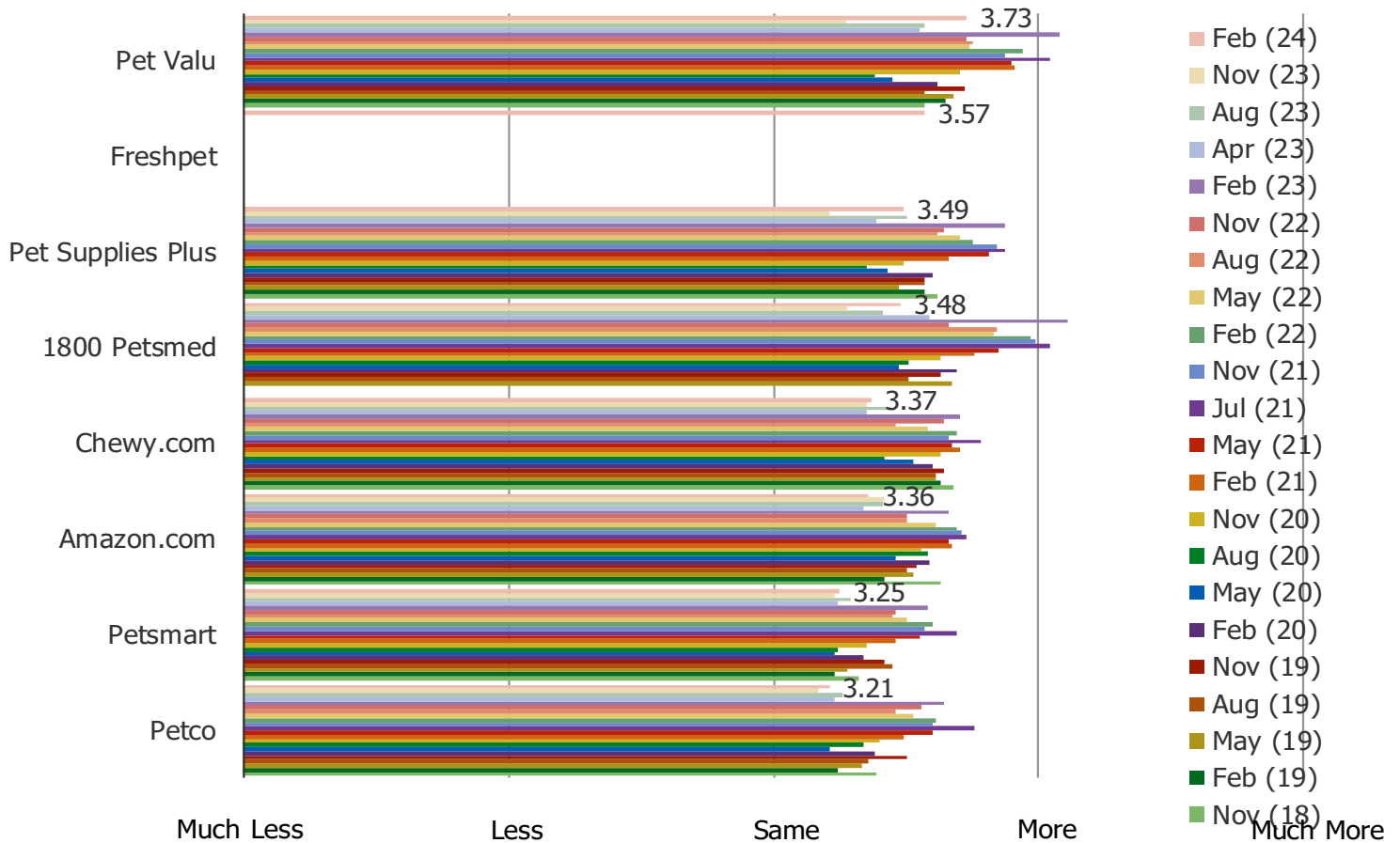
NPS of respondents who ordered Freshpet in the past month is 39.

	N=
Petsmart	283
Petco	225
Pet Valu	63
Pet Supplies Plus	109
Amazon.com	307
Chewy.com	237
1800 Petsmed	64
Freshpet	68

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?

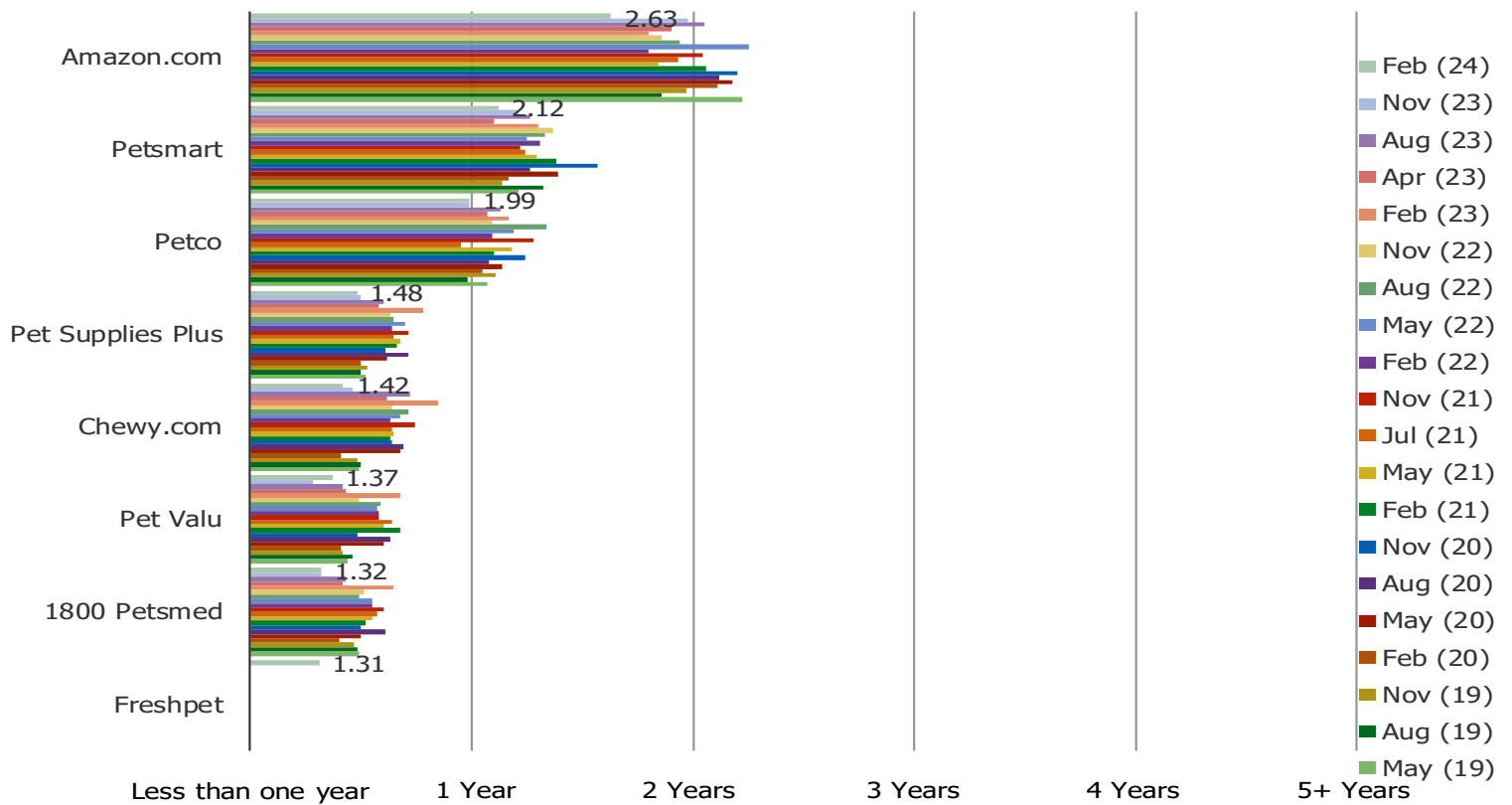
Posed to those who regularly or occasionally shop the following for pet food and products



	N=
Petsmart	283
Petco	225
Pet Valu	63
Pet Supplies Plus	109
Amazon.com	307
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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

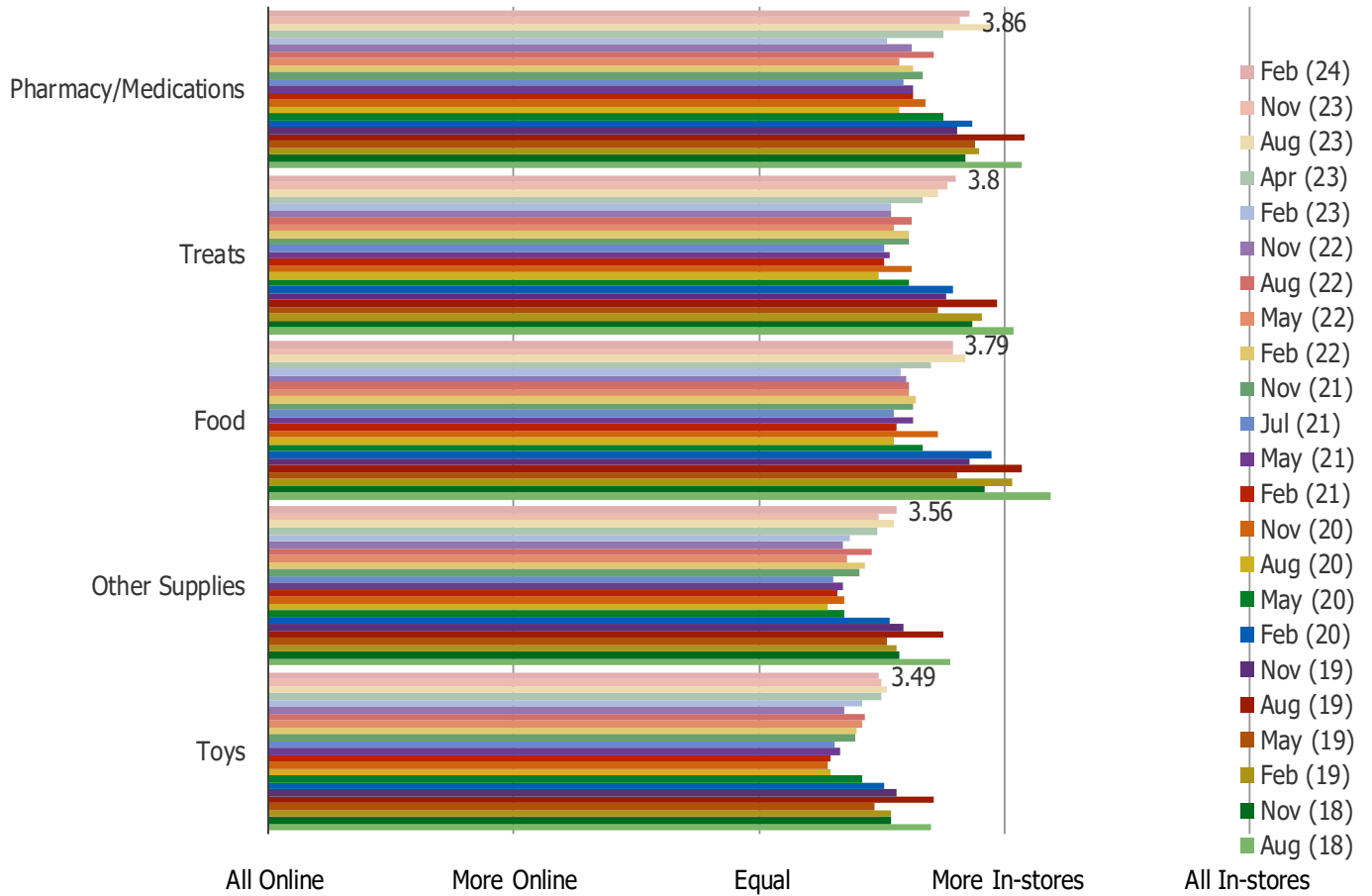


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Petsmart	283
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PET PRODUCT TYPES: IN-STORES OR ONLINE

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

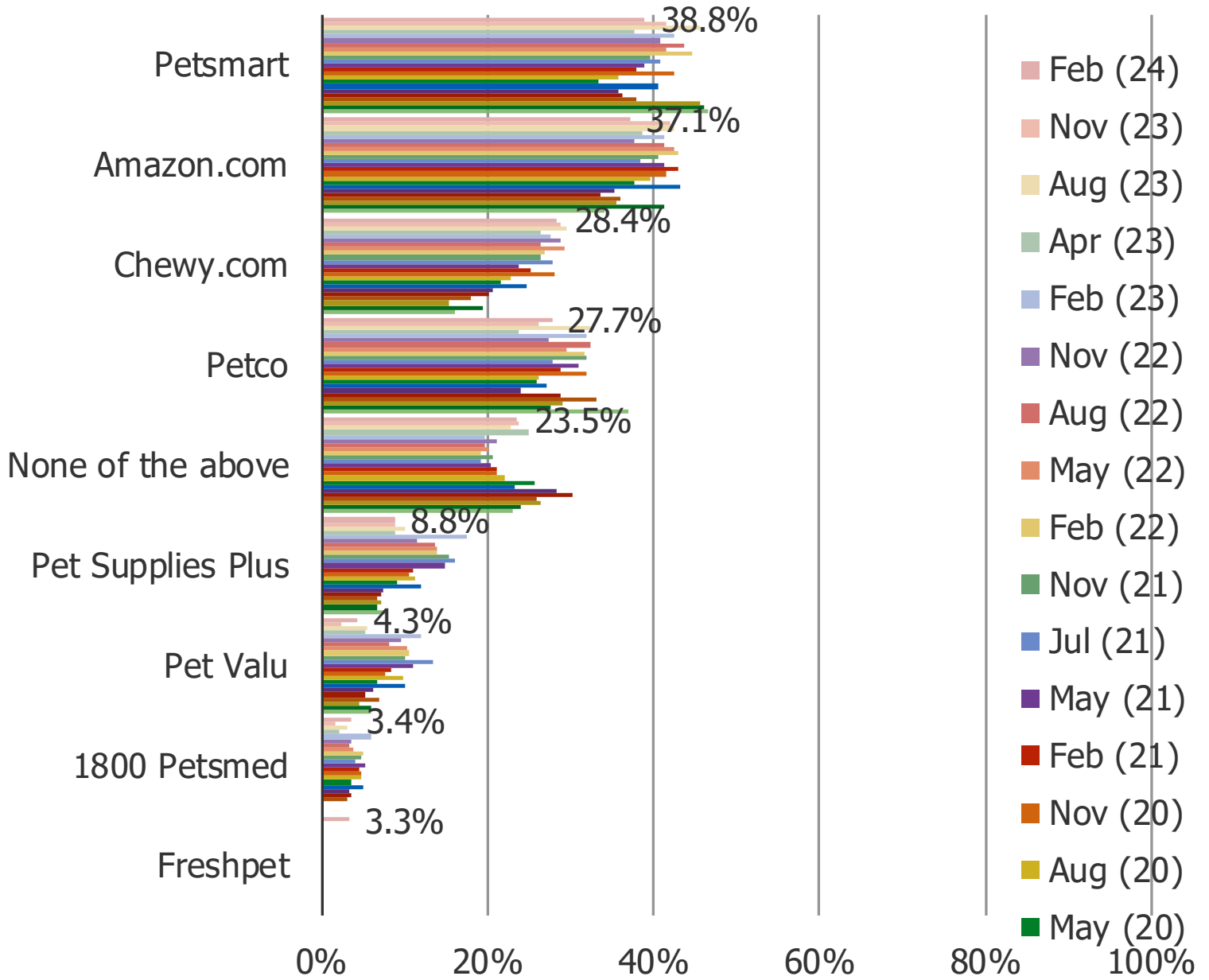
Posed to pet owners.



RESPONDENTS WHO PURCHASED ITEMS IN THE PAST MONTH

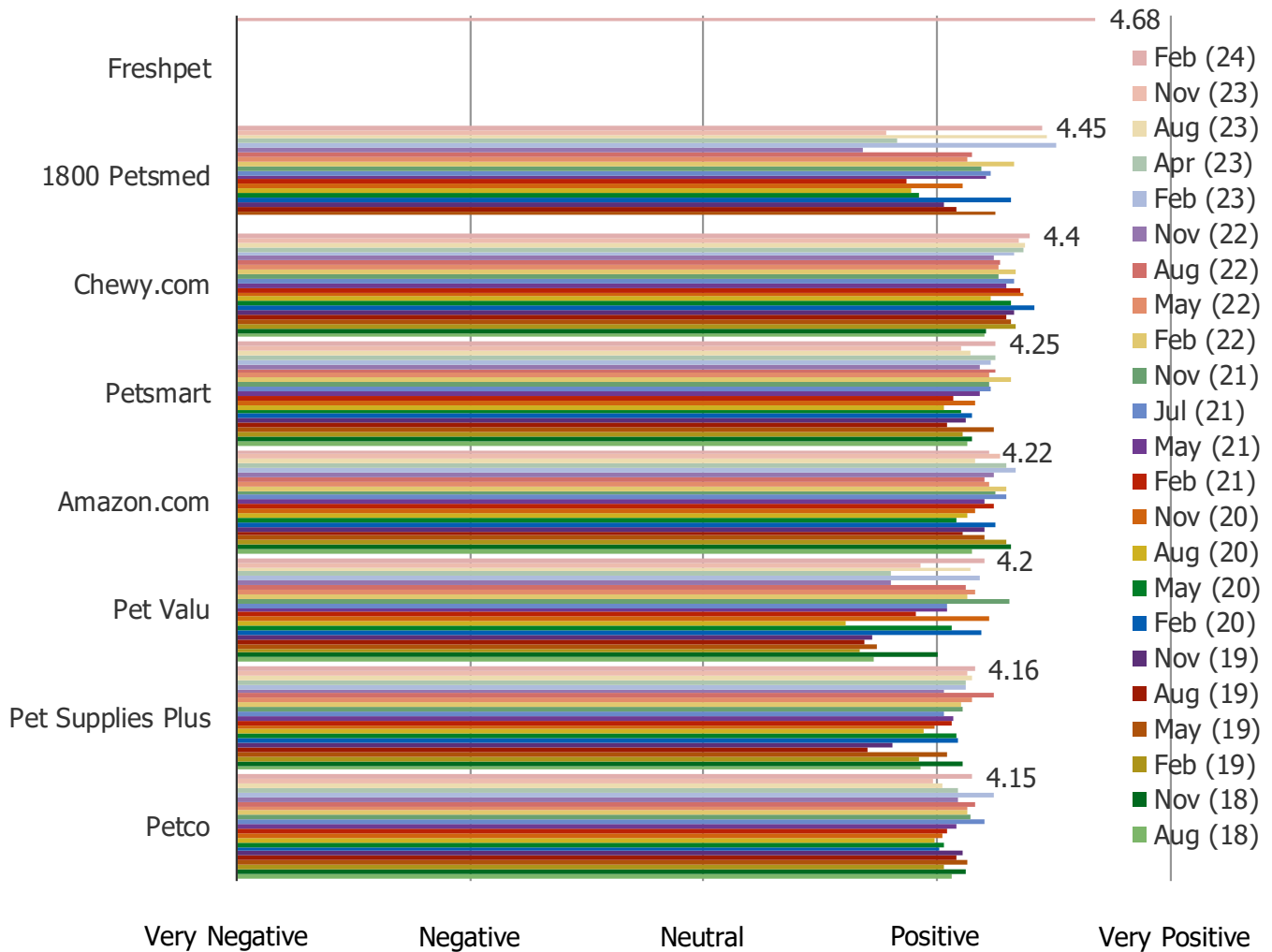
HAVE YOU SHOPPED ANY OF THE FOLLOWING RETAILERS IN THE PAST MONTH FOR PET PRODUCTS?
(SELECT ALL THAT APPLY)

Posed to pet owners



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

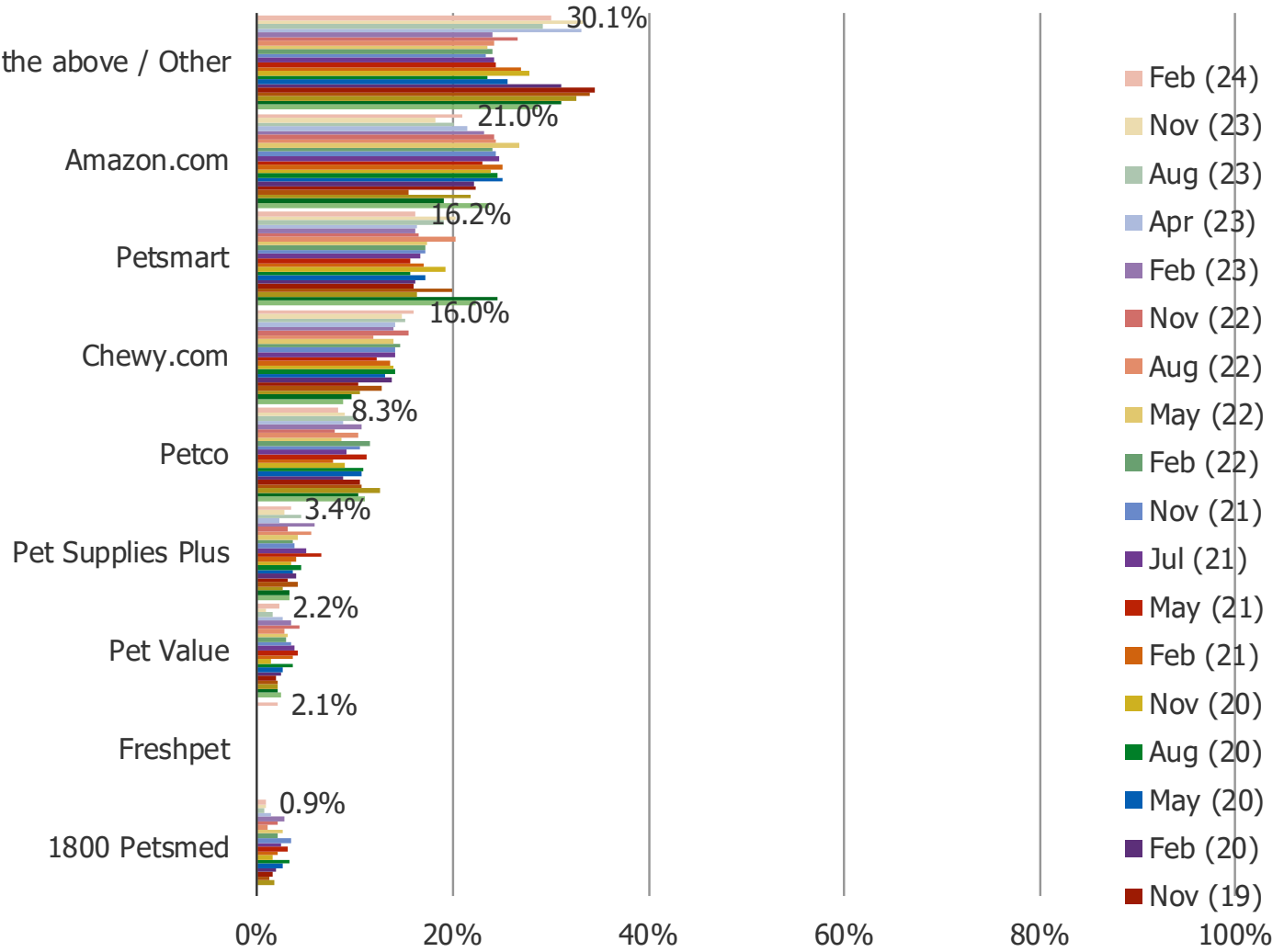
Posed to pet owners who have shopped each of the following retailers in the past month



	N =
Petsmart	226
Petco	161
Pet Valu	25
Pet Supplies Plus	51
Amazon.com	216
Chewy.com	165
1800 Petsmed	20
Freshpet	19

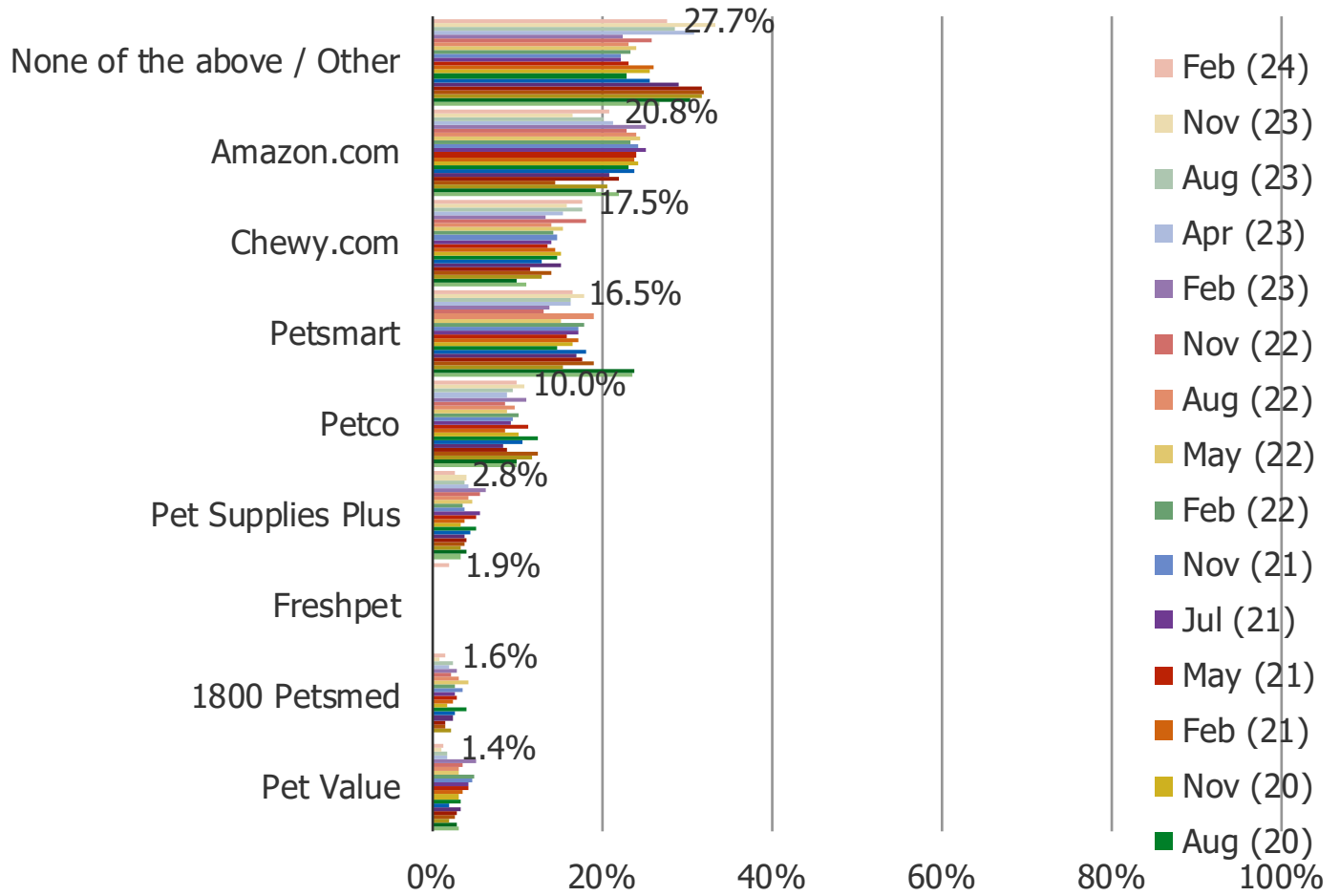
THINKING ABOUT THE LAST TIME YOU PURCHASED PET FOOD OR PRODUCTS, FROM WHICH RETAILER DID YOU MAKE THE PURCHASE?

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?

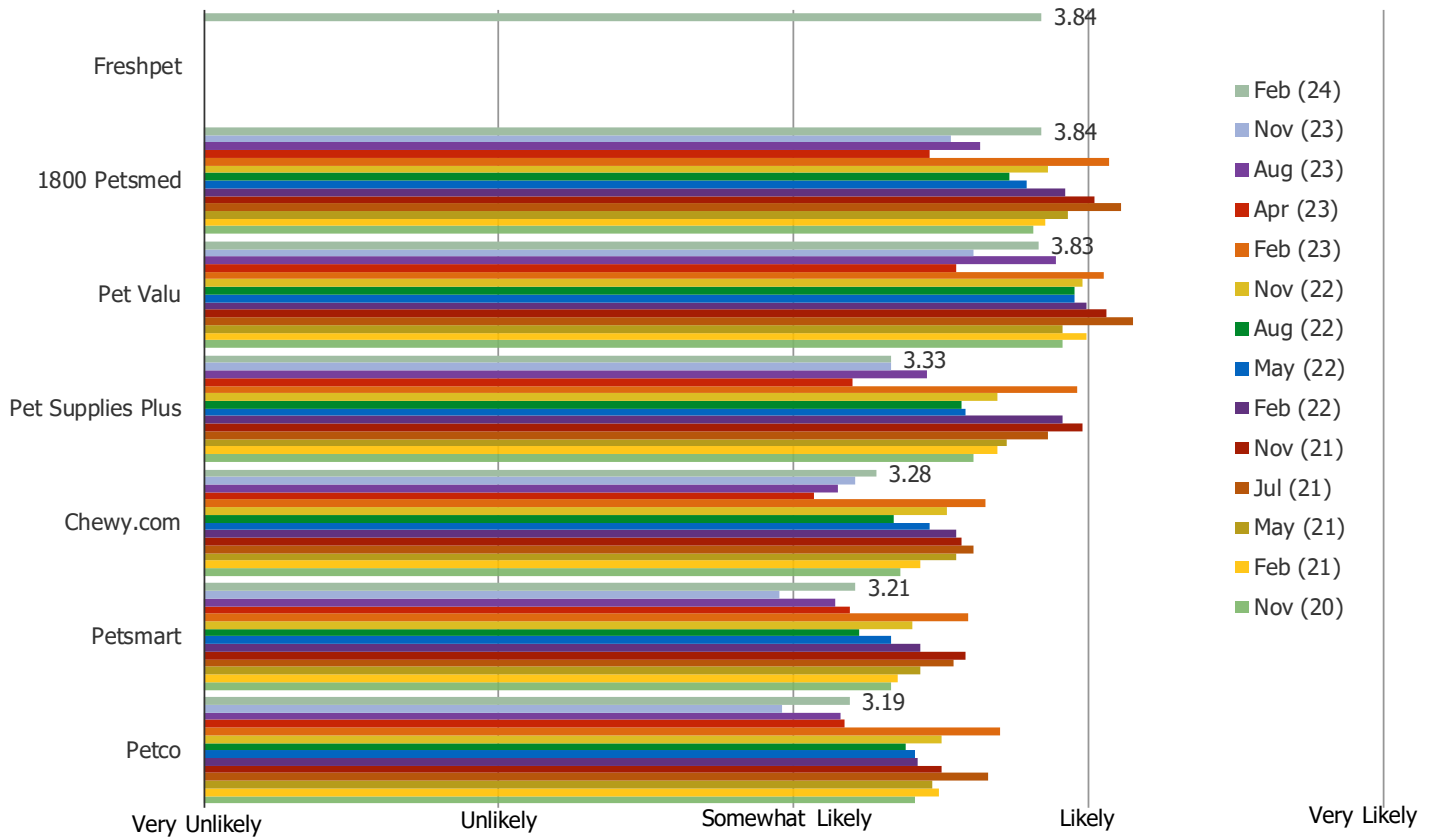
Posed to pet owners.



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?

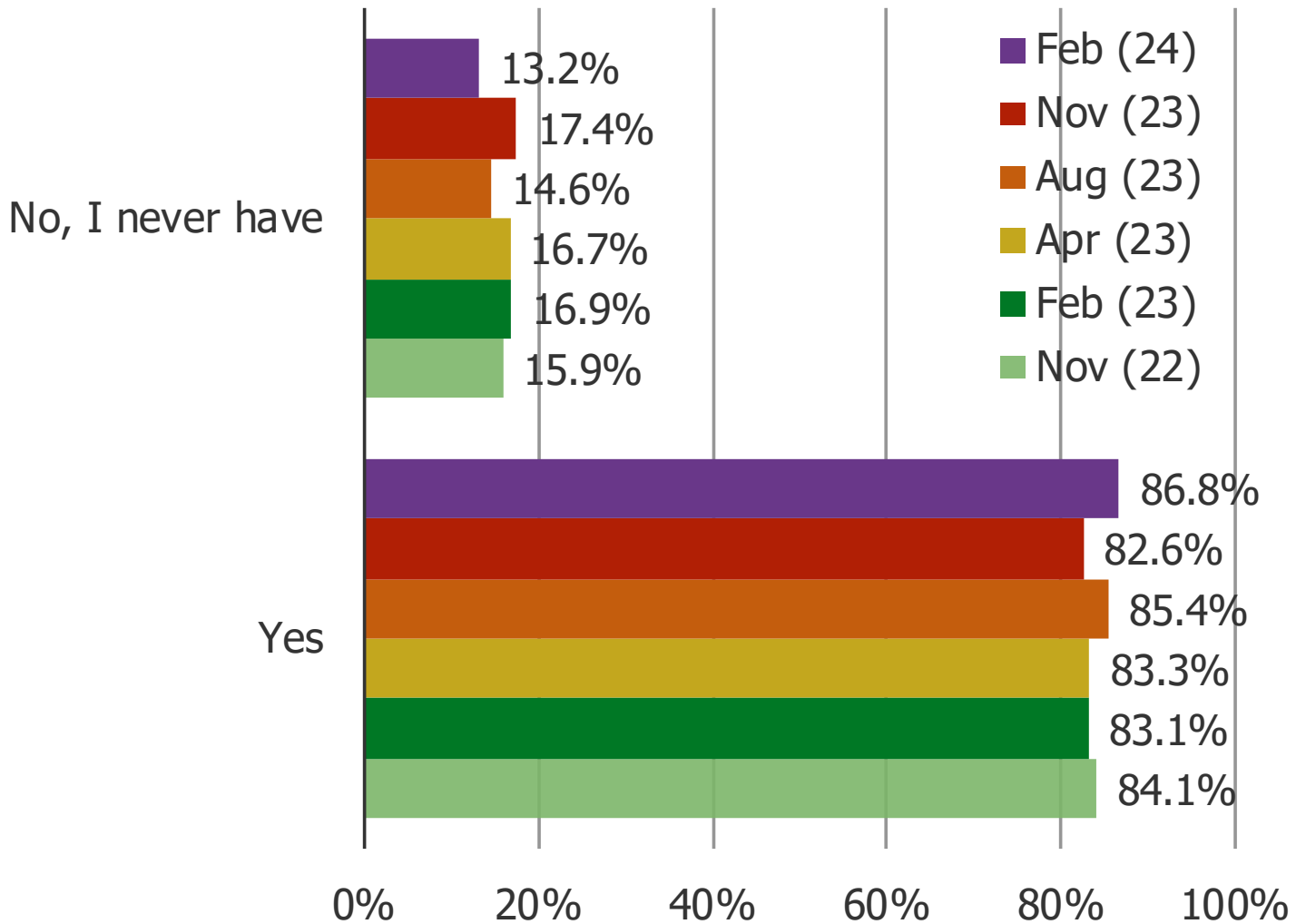
Posed to pet owners who regularly or occasionally shop each of the following.



VETERINARY SERVICES

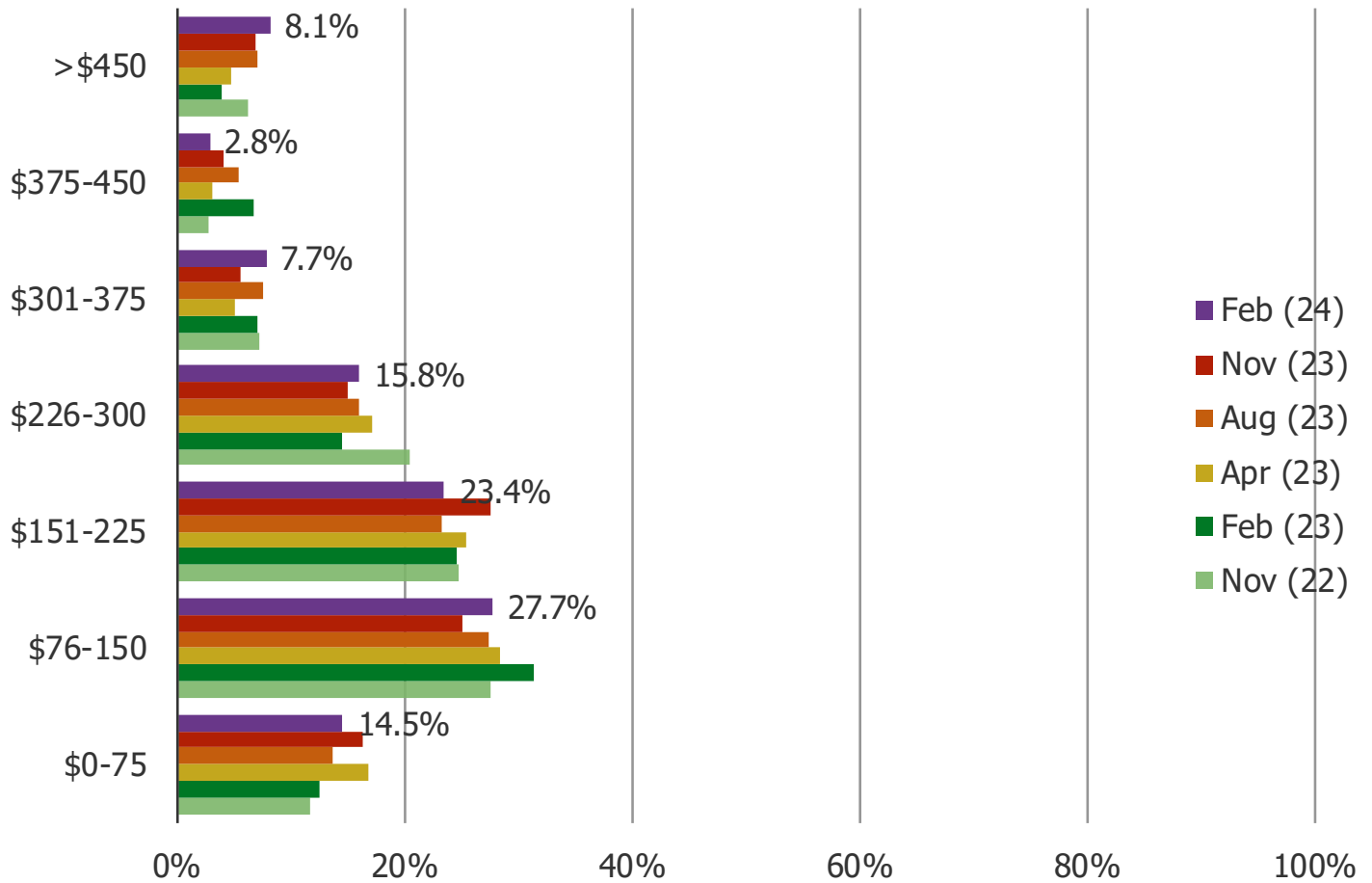
HAVE YOU EVER TAKEN YOUR PET TO THE VETERINARIAN?

Posed to pet owners (N = 582).



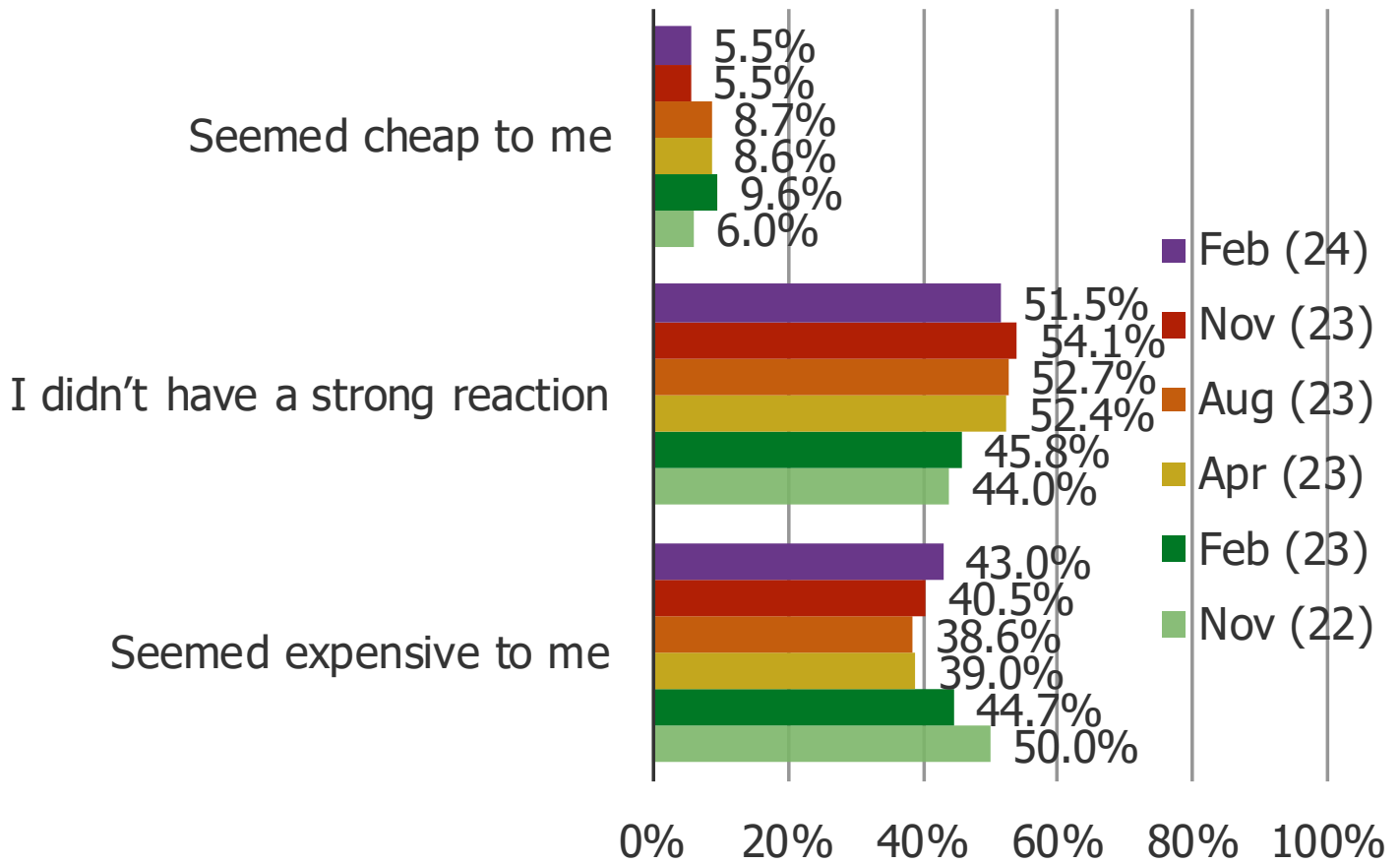
HOW BIG WAS YOUR LAST VET BILL?

Posed to pet owners who have taken their pet to a vet (N = 505).



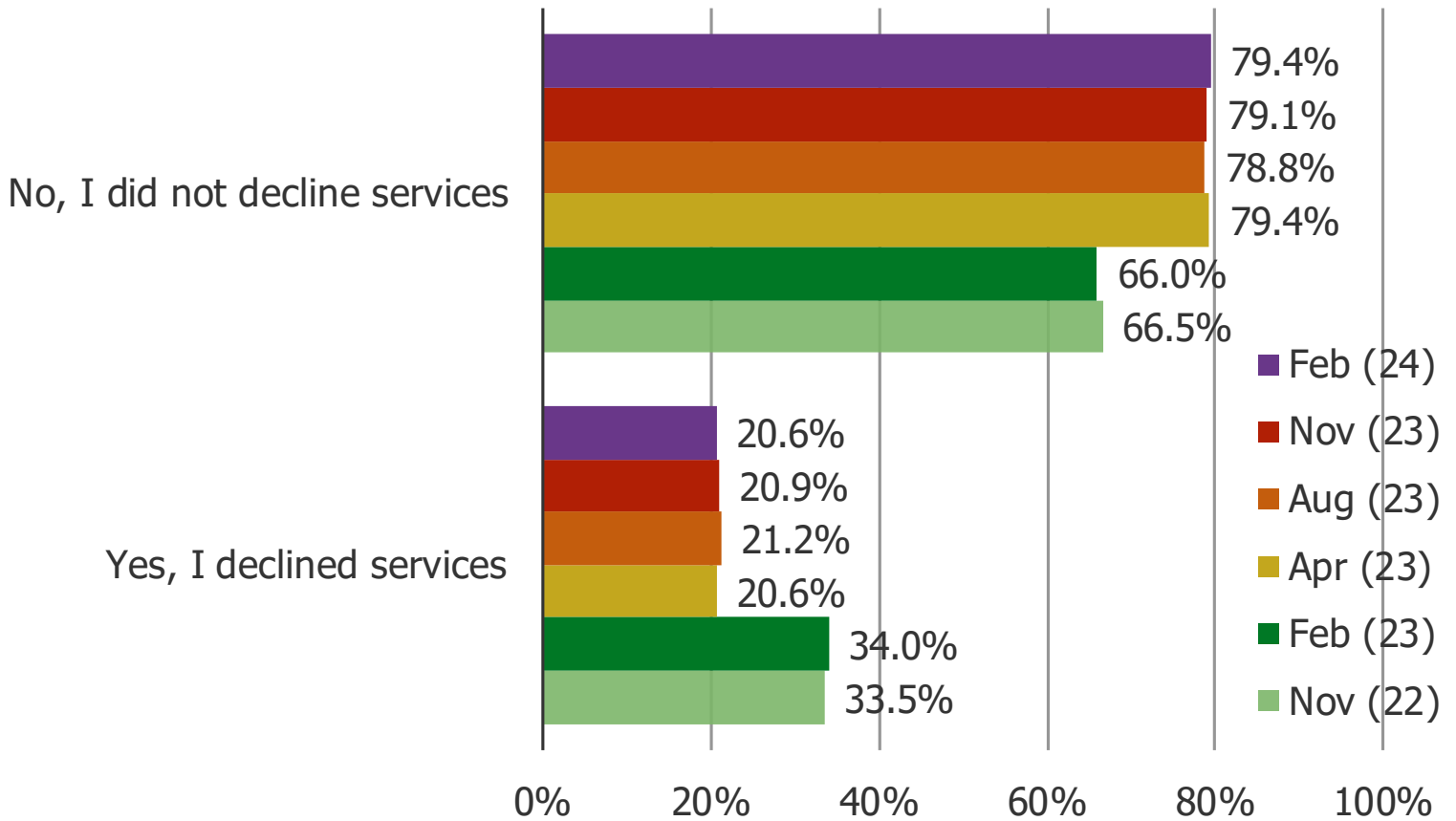
HOW DID YOU REACT WHEN YOU RECEIVED YOUR MOST RECENT VET BILL?

Posed to pet owners who have taken their pet to a vet (N = 505).



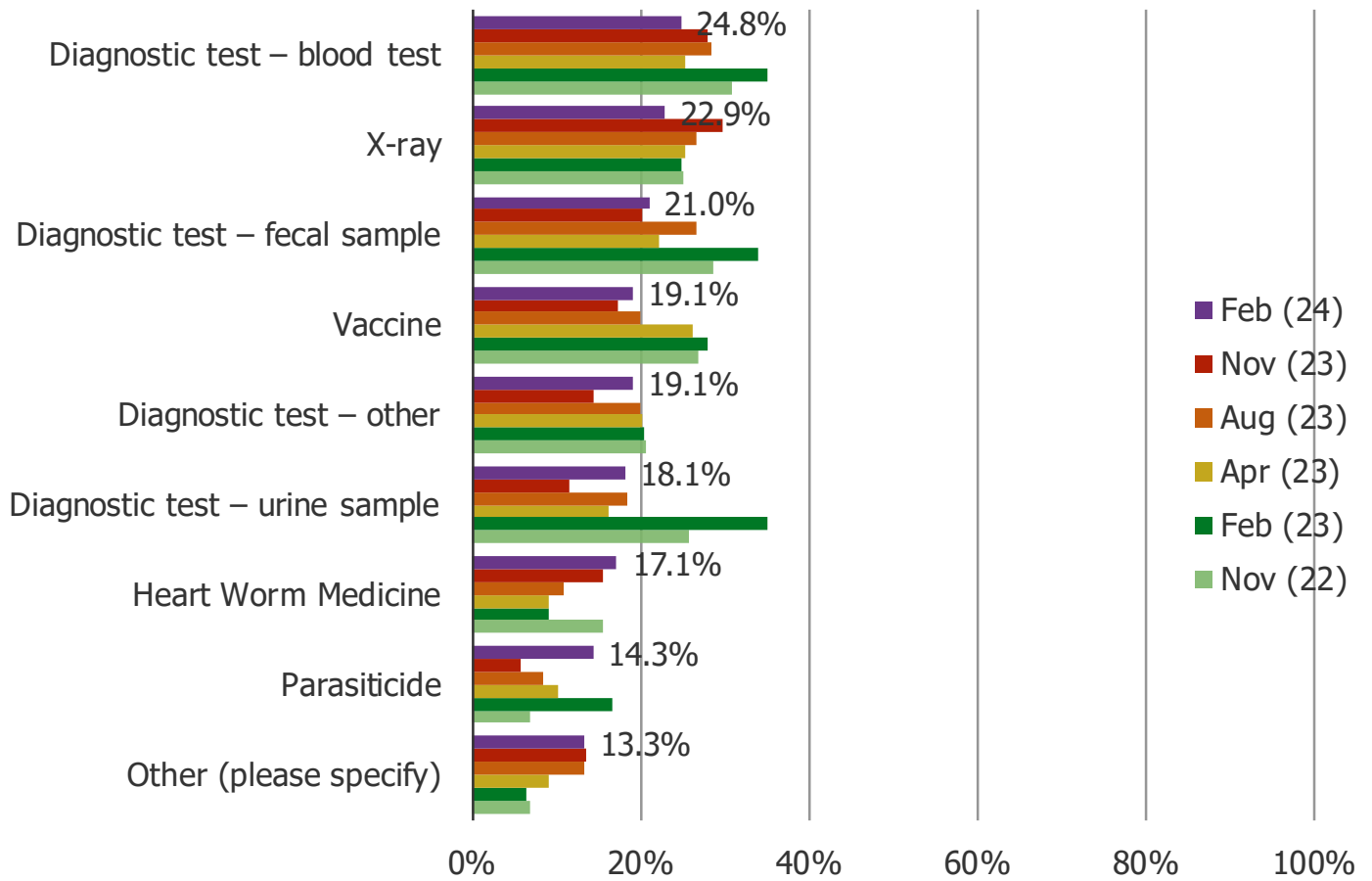
AT YOUR MOST RECENT VET VISIT, DID YOU DECLINE ANY SERVICES THAT THE VET RECOMMENDED FOR YOUR PET?

Posed to pet owners who have taken their pet to a vet (N = 505).



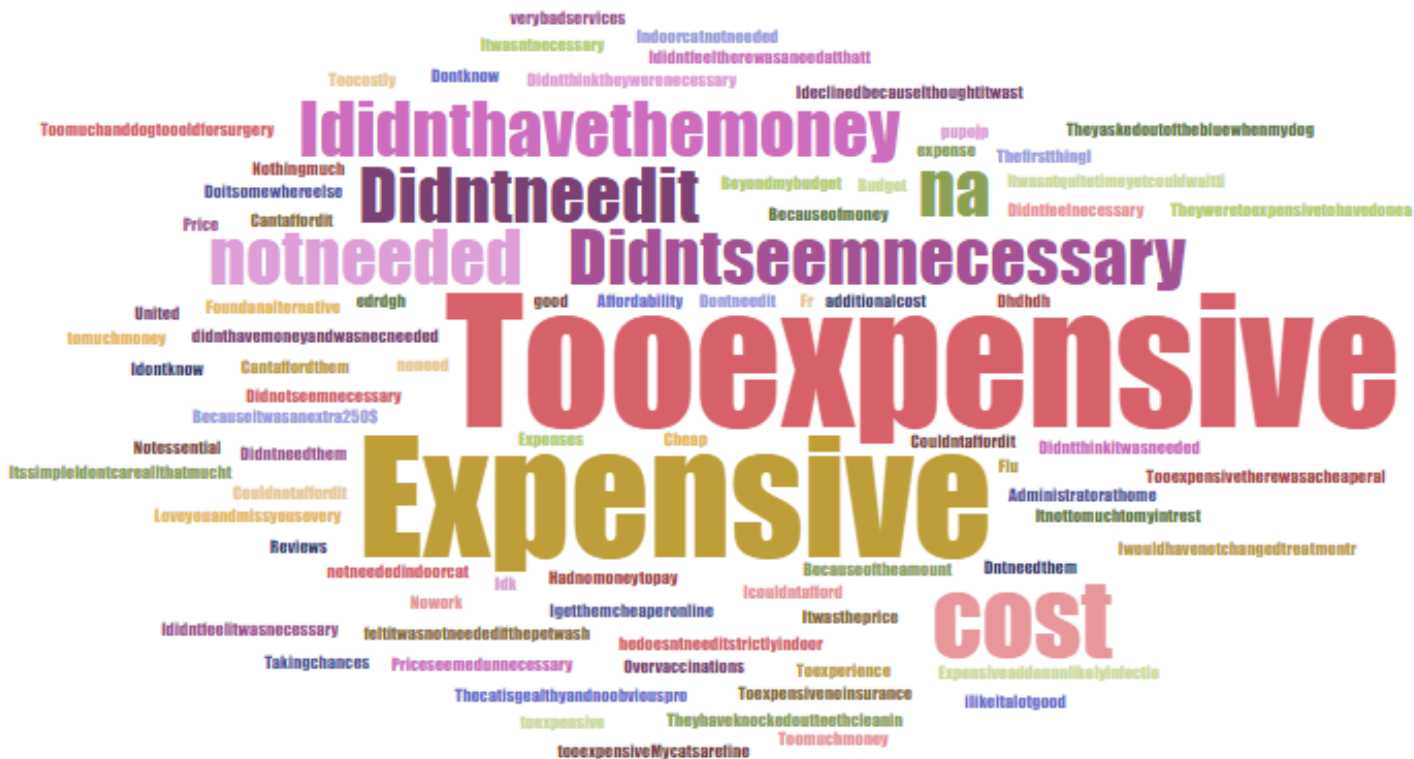
WHICH SERVICES DID YOU DECLINE? SELECT ALL THAT APPLY

Posed to pet owners who have taken their pet to a vet and declined any recommended service (N = 105).



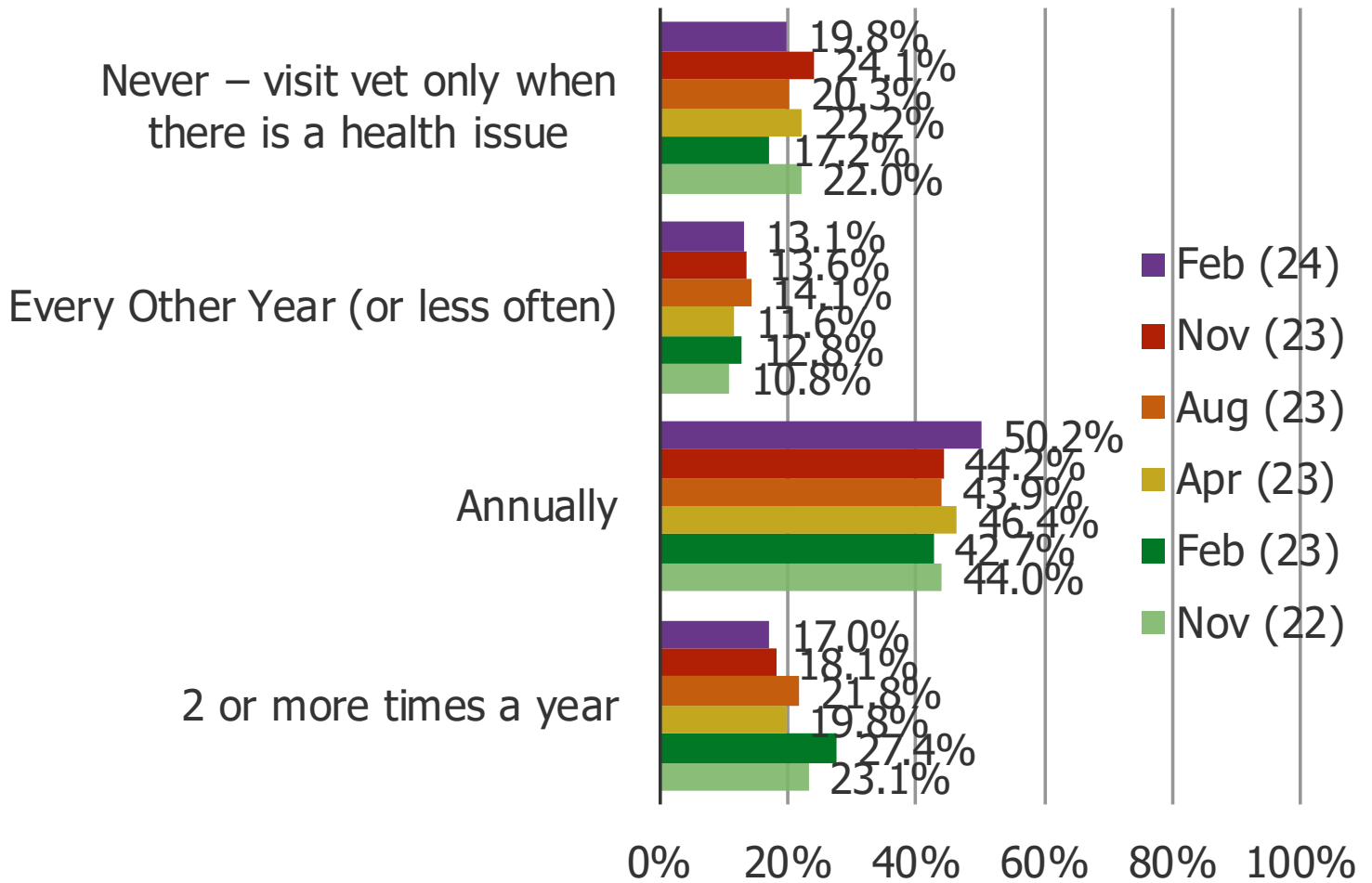
WHY DID YOU DECLINE THESE SERVICES?

Posed to pet owners who have taken their pet to a vet and declined any recommended service (N = 104).



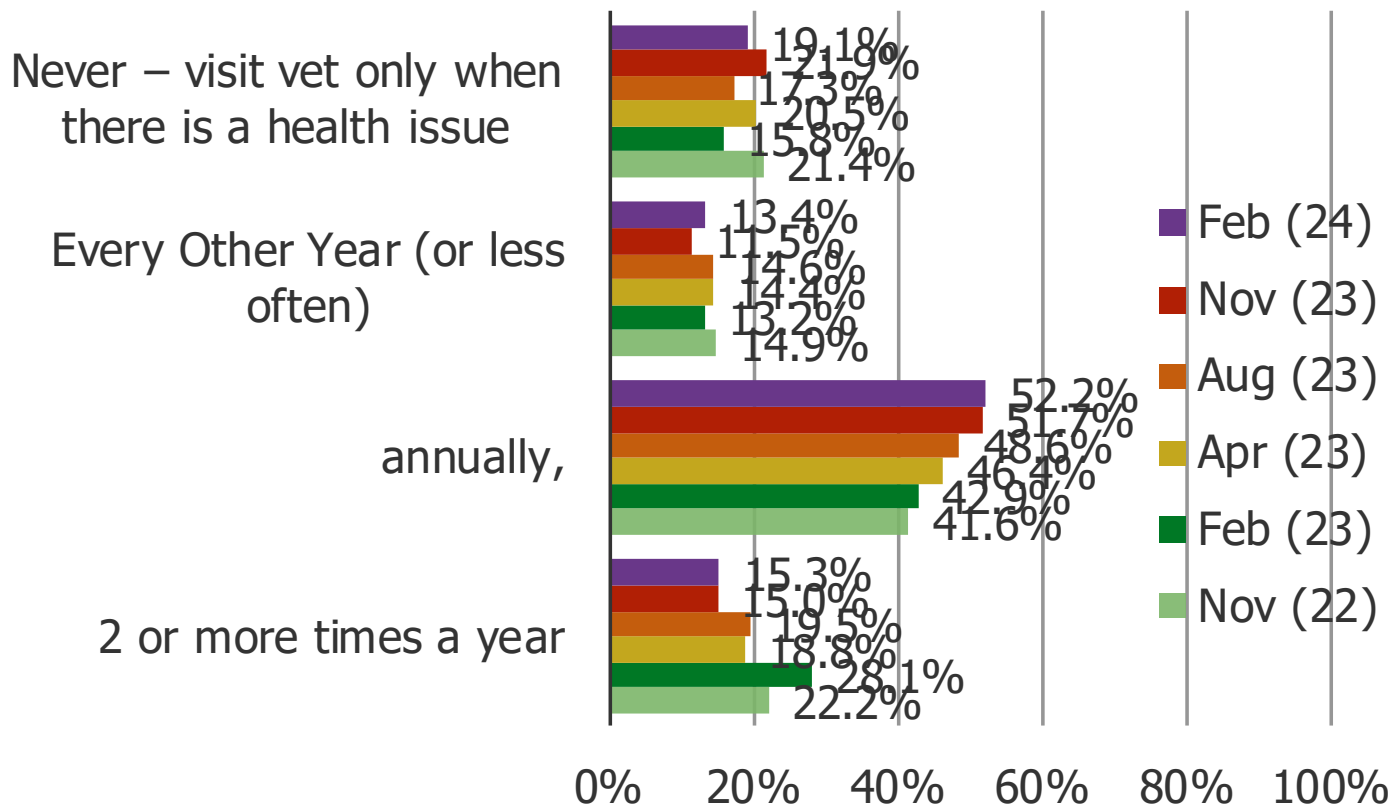
IN THE PAST, HOW OFTEN HAVE YOU TAKEN YOUR PET TO THE VET FOR A CHECK UP? (I.E., THERE IS NOTHING WRONG WITH YOUR PET BUT YOU TAKE THEM FOR A CHECKUP)

Posed to pet owners (N = 582).



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)

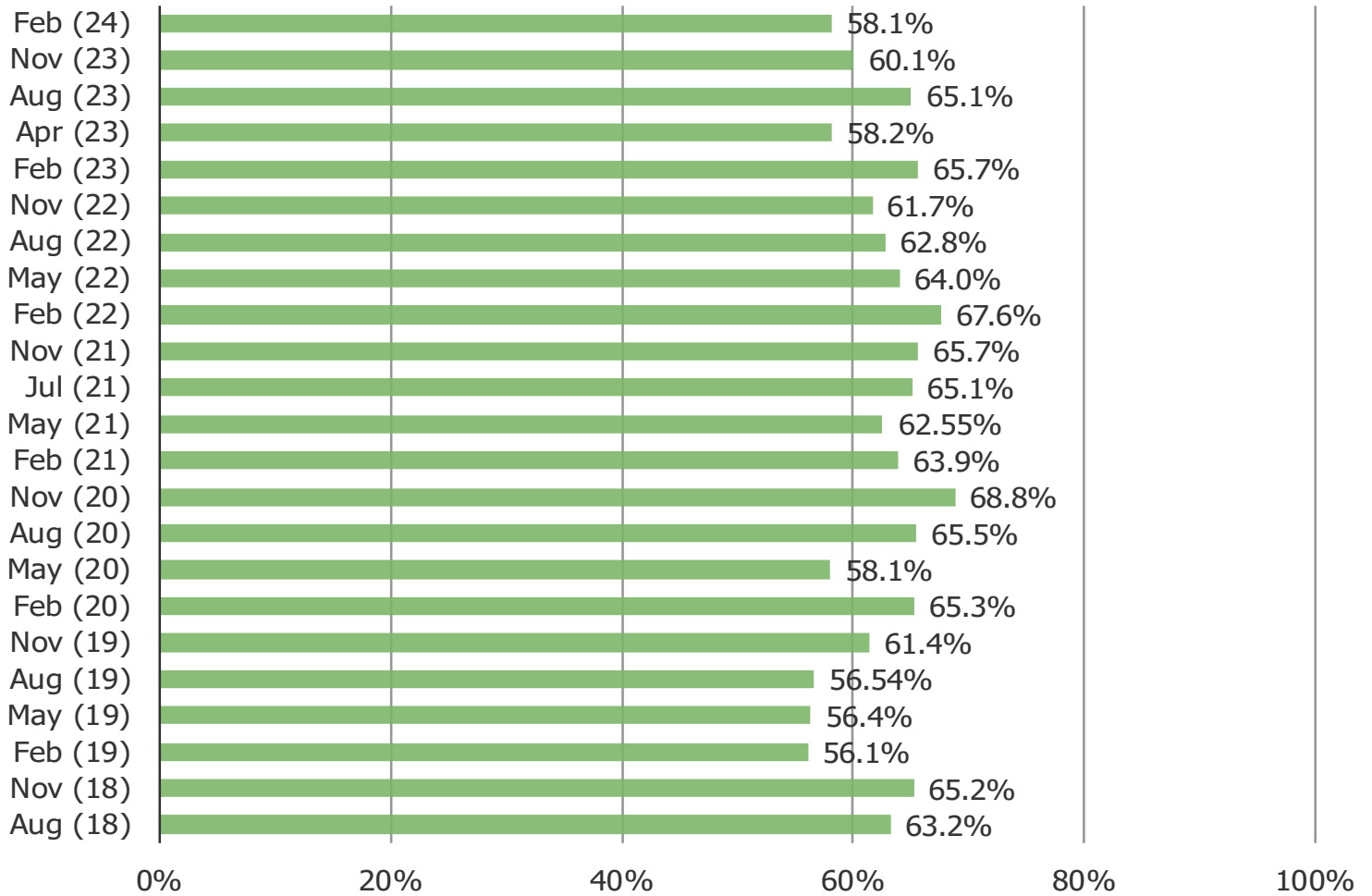
Posed to pet owners (N = 582).



PET OWNER BACKGROUND

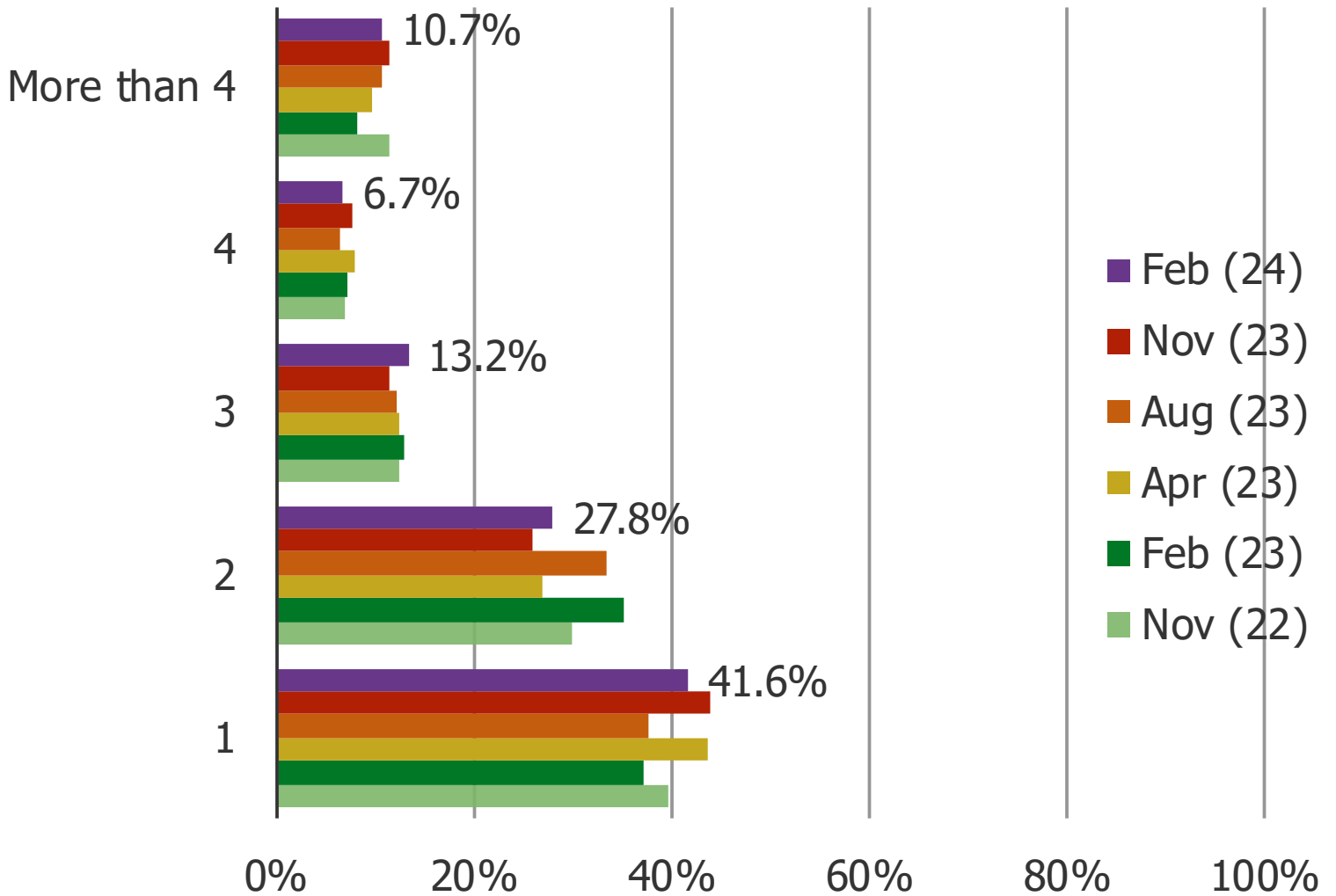
DO YOU CURRENTLY HAVE ONE OR MORE PETS?

Posed to all respondents.



HOW MANY PETS DO YOU HAVE?

Posed to pet owners (N = 582).



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

Posed to pet owners.

