

Bespoke Survey Research

April 2024

Pet Retail and Pet Health

Volume 24 | Quarterly Survey
1,250 US Consumers Balanced To Census
Tickers Covered: CHWY, AMZN.

KPIs and Key questions

- Consumers who shop Freshpet continue to have a positive opinion of Freshpet. Freshpet trails only Chewy when it comes to overall opinions.
- The share who have shopped Freshpet in the last month is tracking roughly in-line with our check during q1.
- Pet owners continue to favor in-store purchases over online.
- Retailers like Chewy have made positive strides in our survey versus the likes of Amazon when it comes to pet related purchases.

Noteworthy Stats:

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

44.5% Of pet owners take their pet to the vet annually.

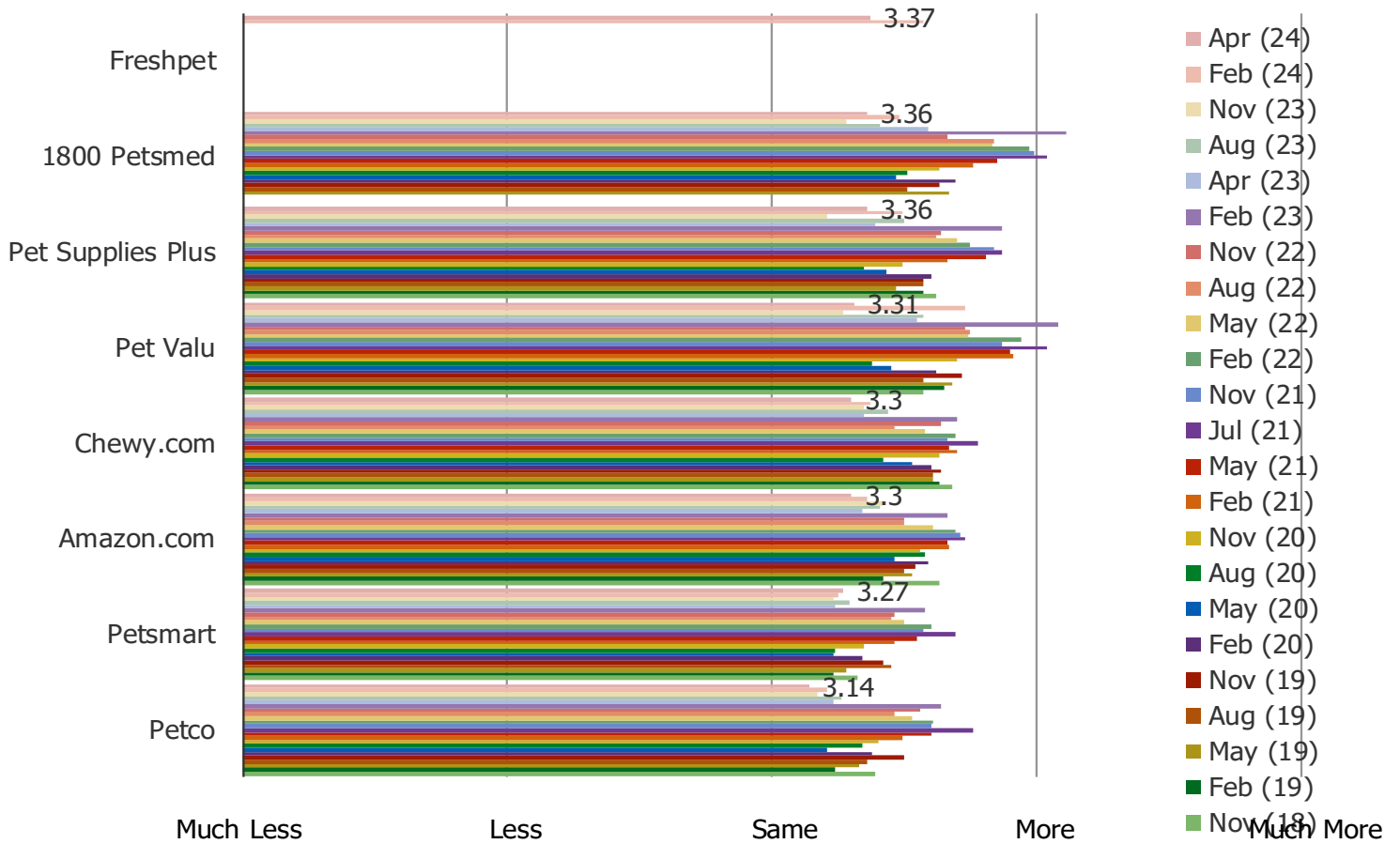
44.4% Of pet owners who have taken their pet to a vet thought their most recent vet bill was expensive.

23.1% Of pet owners who have taken their pet to a vet declined a recommended service.

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?

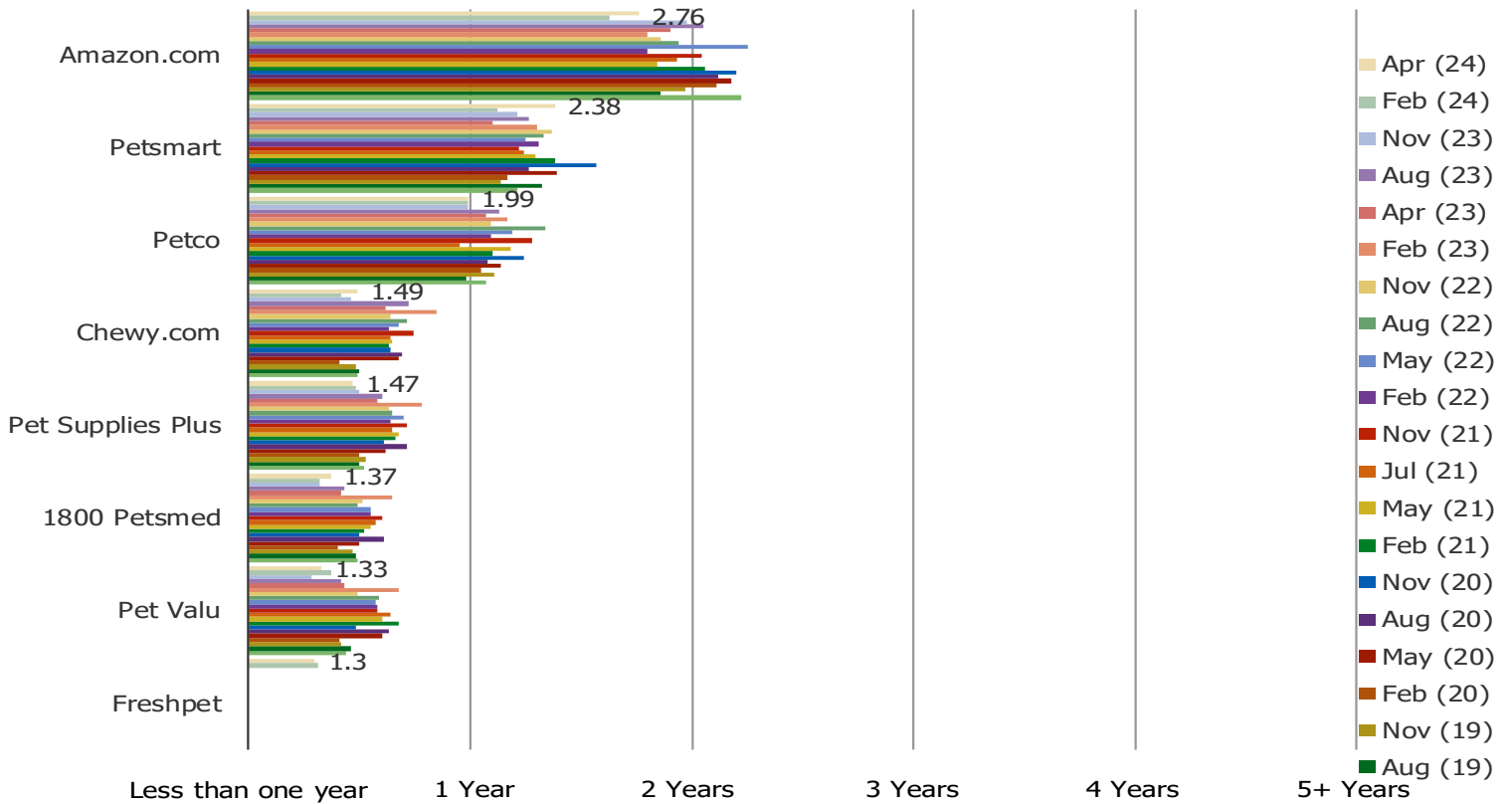
Posed to those who regularly or occasionally shop the following for pet food and products



	N=
Petsmart	303
Petco	241
Pet Valu	48
Pet Supplies Plus	100
Amazon.com	289
Chewy.com	245
1800 Petsmed	58
Freshpet	57

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

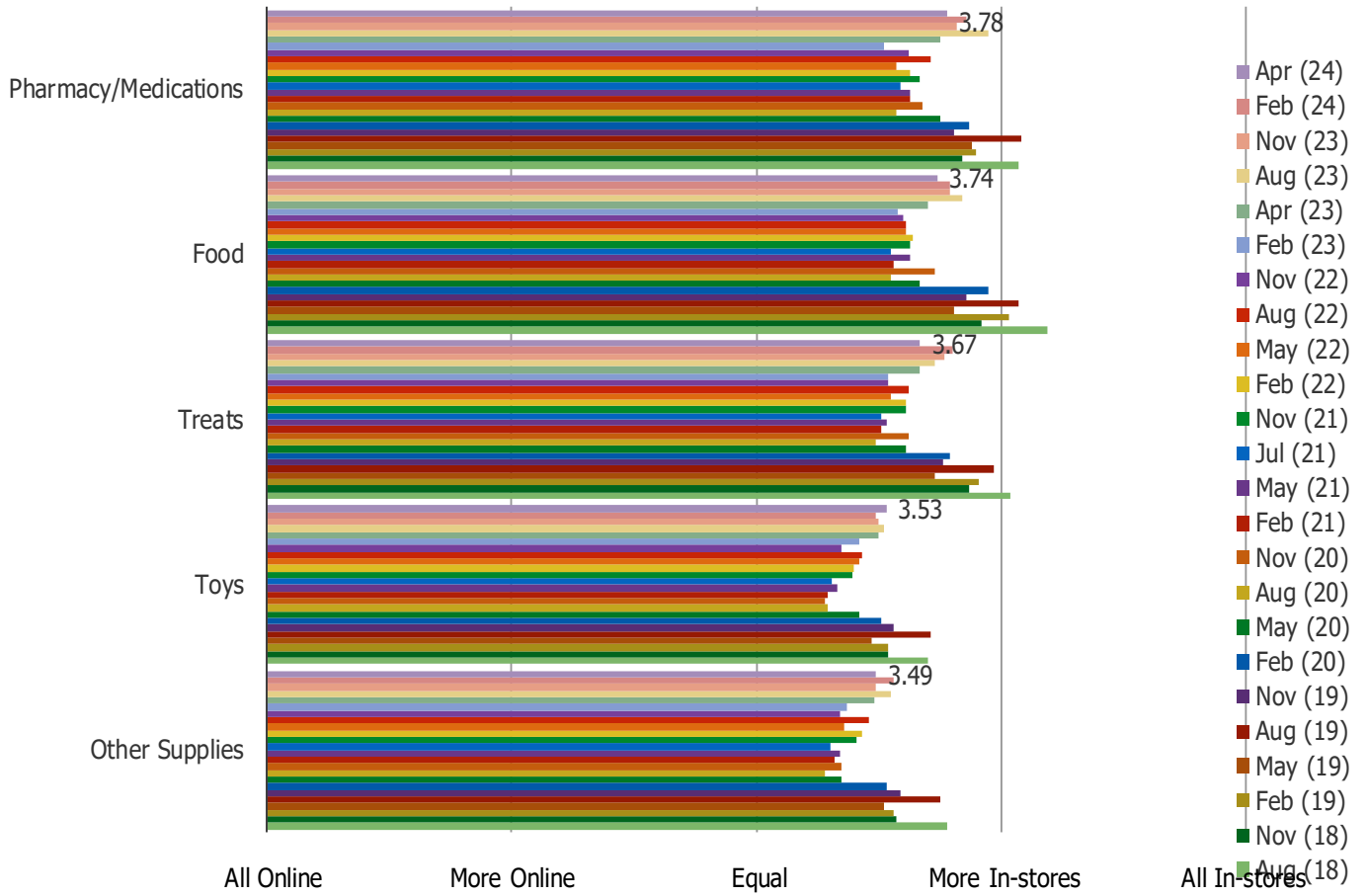


	N=
Petsmart	306
Petco	368
Pet Valu	561
Pet Supplies Plus	509
Amazon.com	320
Chewy.com	364
1800 Petsmed	551
Freshpet	552

PET PRODUCT TYPES: IN-STORES OR ONLINE

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

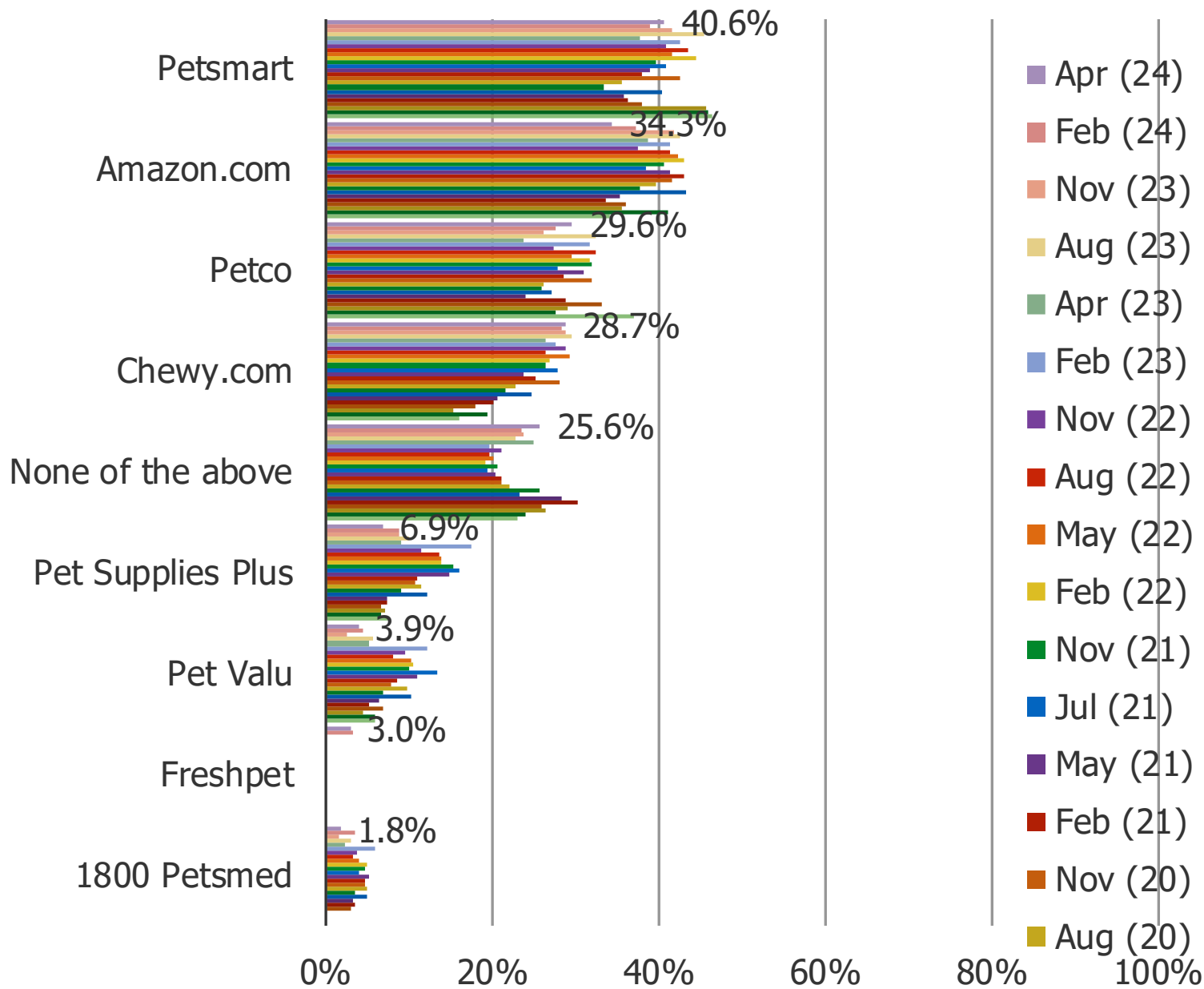
Posed to pet owners.



RESPONDENTS WHO PURCHASED ITEMS IN THE PAST MONTH

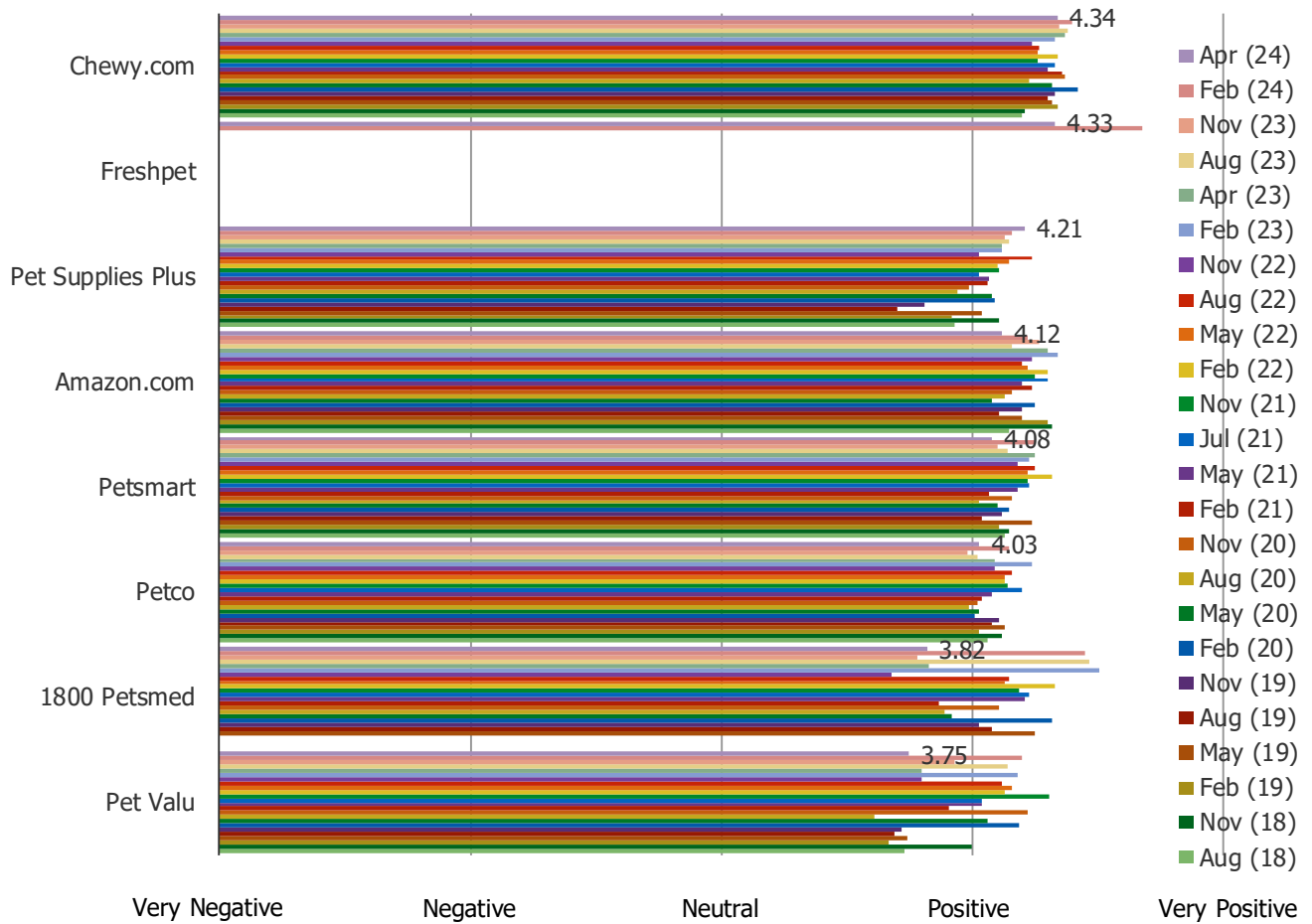
HAVE YOU SHOPPED ANY OF THE FOLLOWING RETAILERS IN THE PAST MONTH FOR PET PRODUCTS?
(SELECT ALL THAT APPLY)

Posed to pet owners



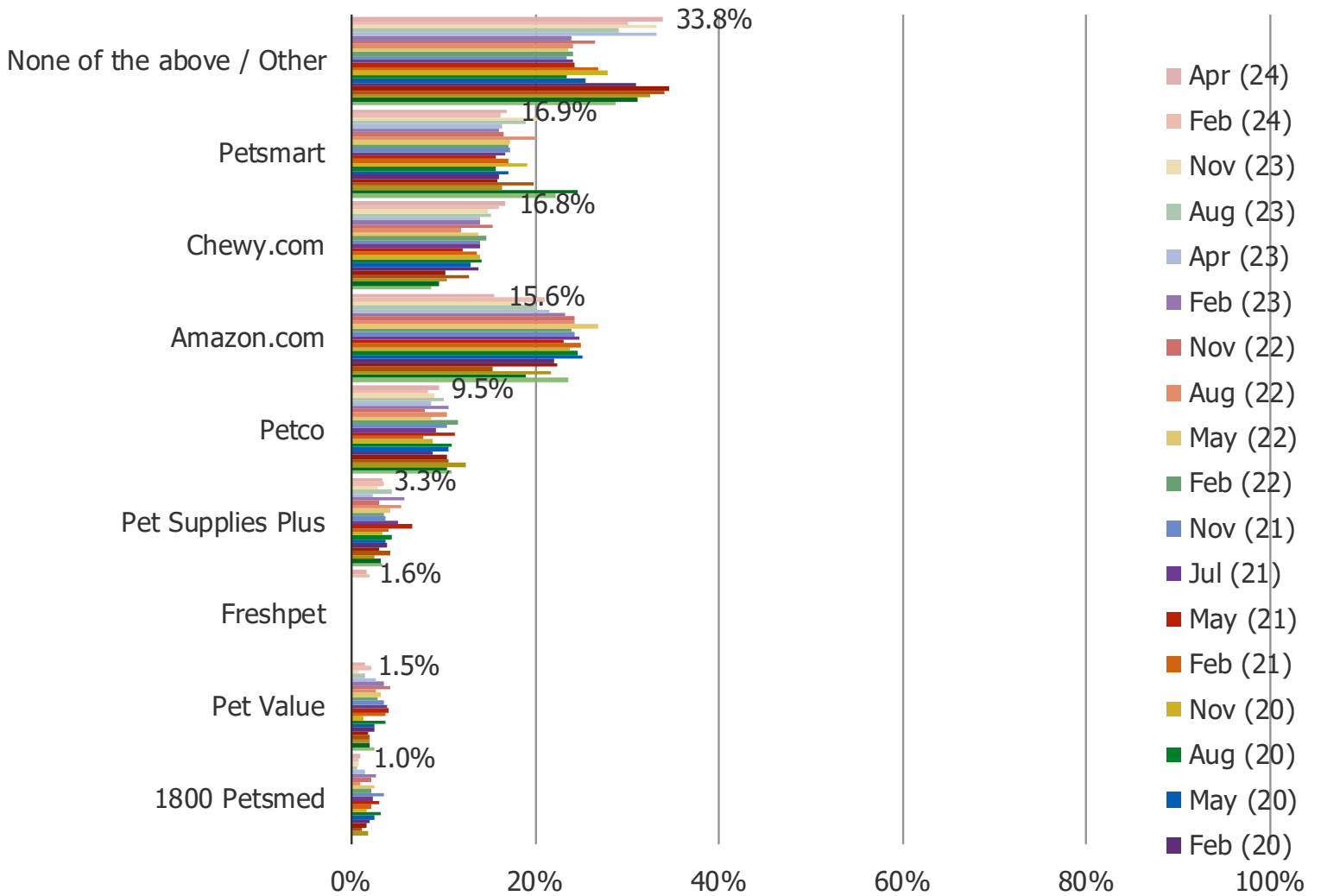
WHAT IS YOUR OPINION OF THIS RETAILER IN GENERAL FOR PET PRODUCT PURCHASES?

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



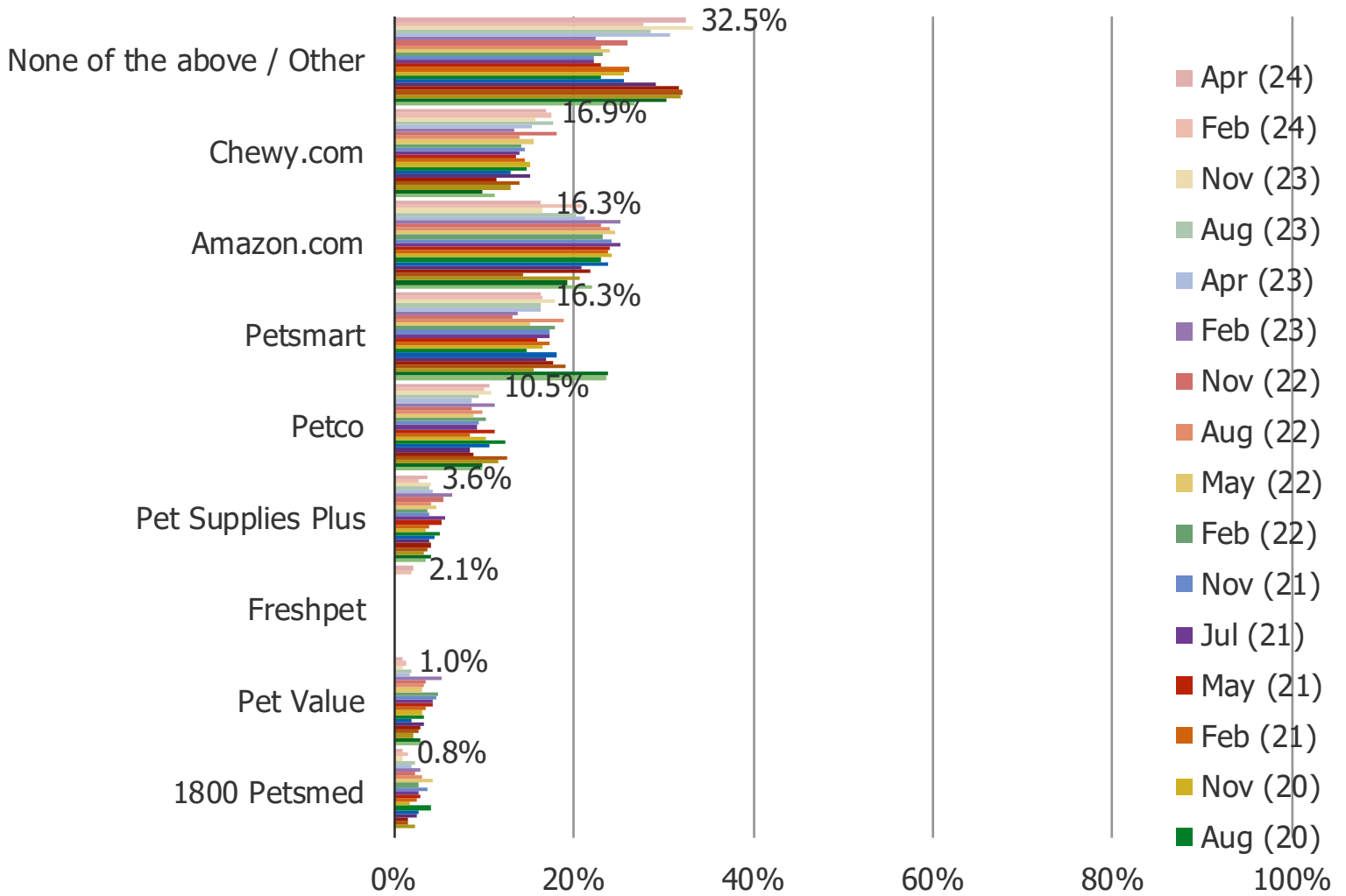
THINKING ABOUT THE LAST TIME YOU PURCHASED PET FOOD OR PRODUCTS, FROM WHICH RETAILER DID YOU MAKE THE PURCHASE?

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?

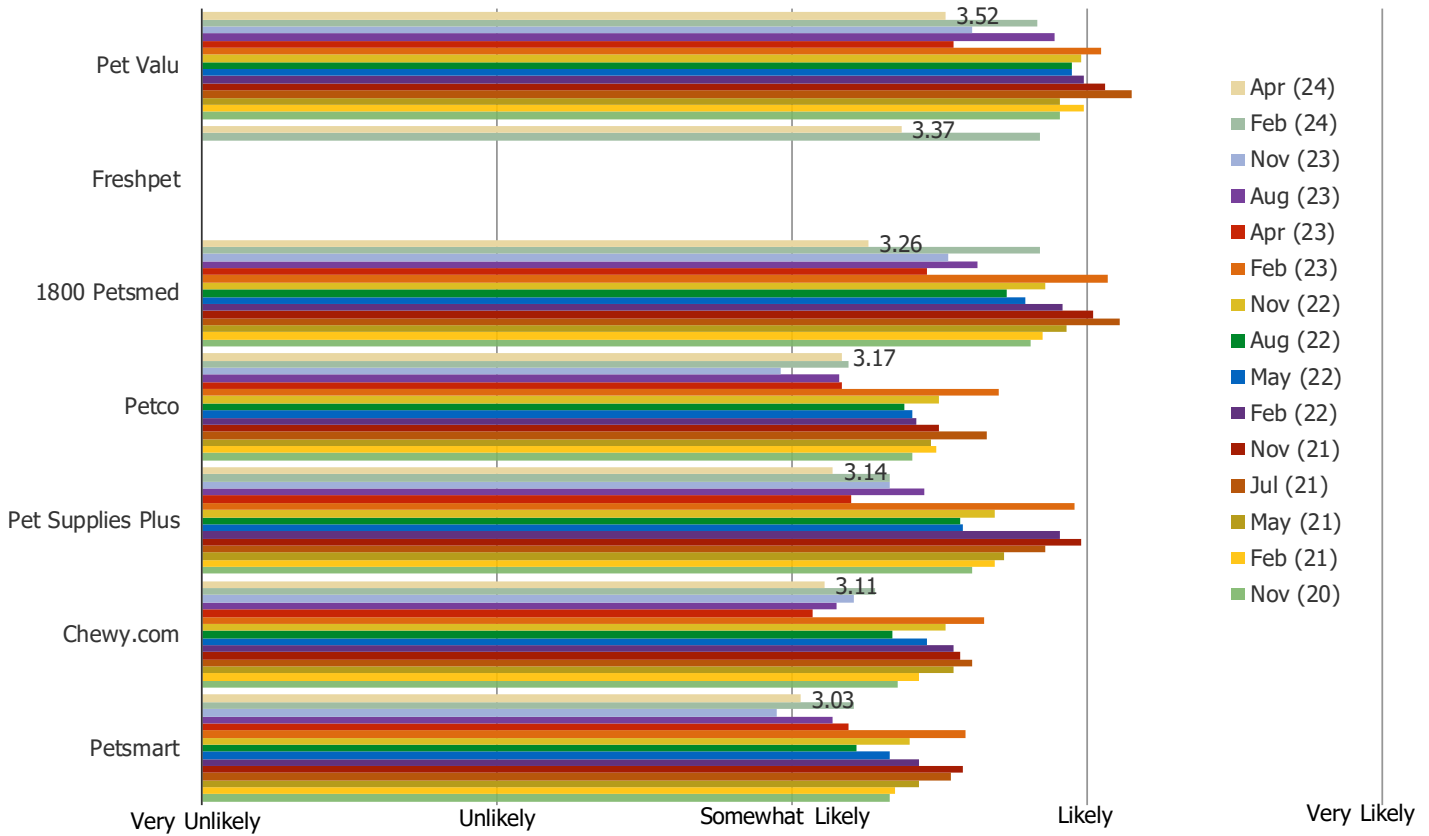
Posed to pet owners.



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?

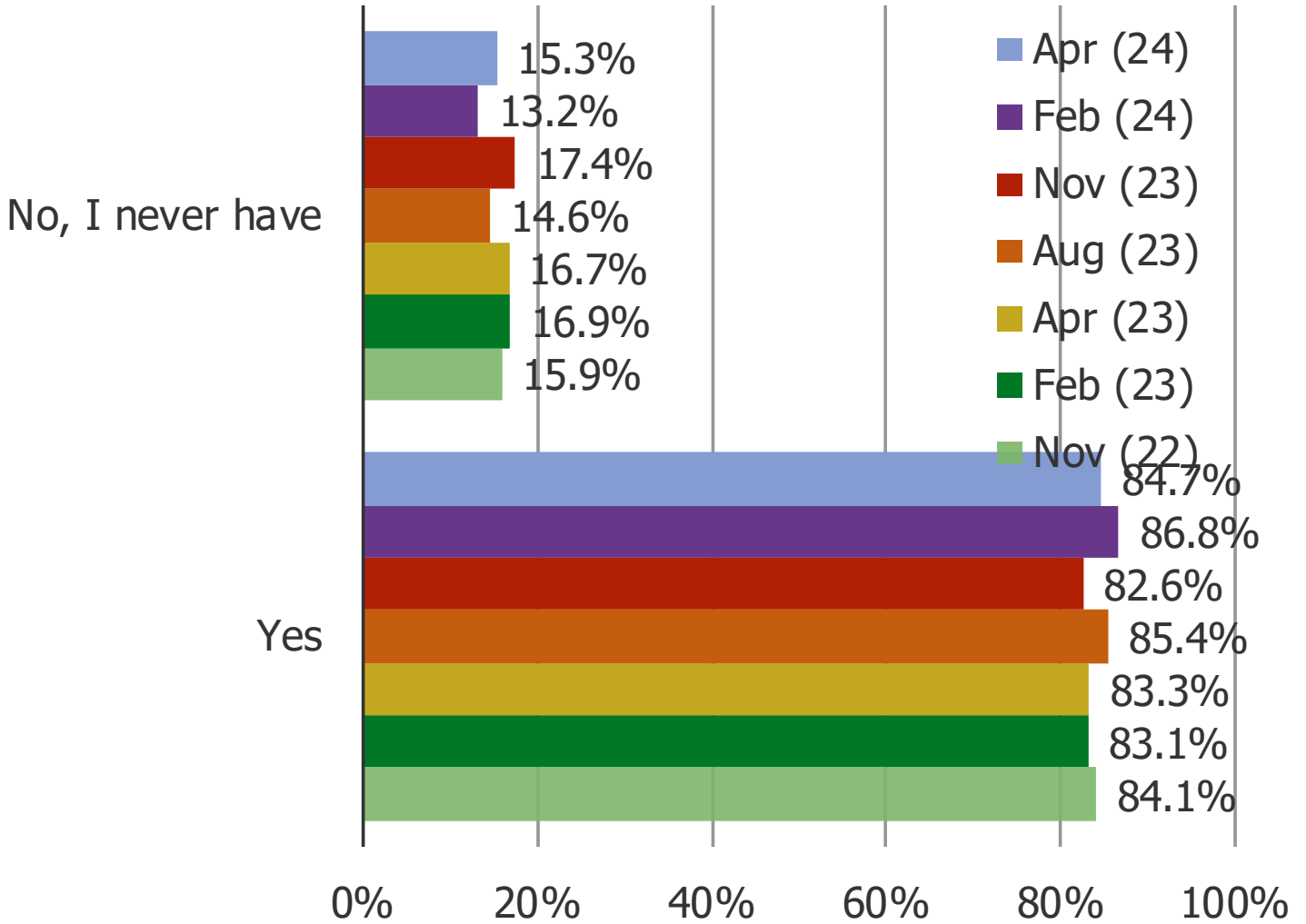
Posed to pet owners who regularly or occasionally shop each of the following.



VETERINARY SERVICES

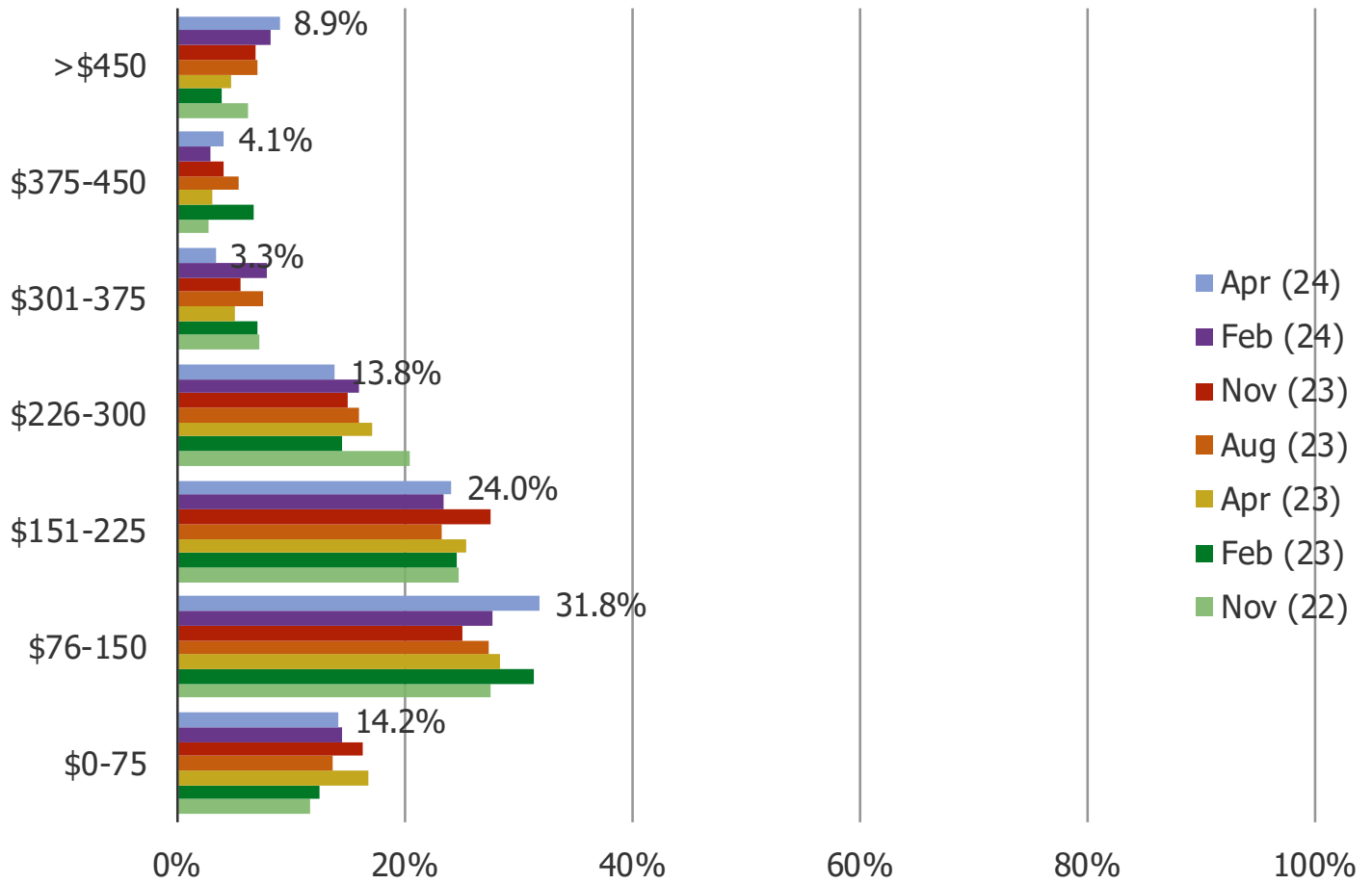
HAVE YOU EVER TAKEN YOUR PET TO THE VETERINARIAN?

Posed to pet owners (N = 609).



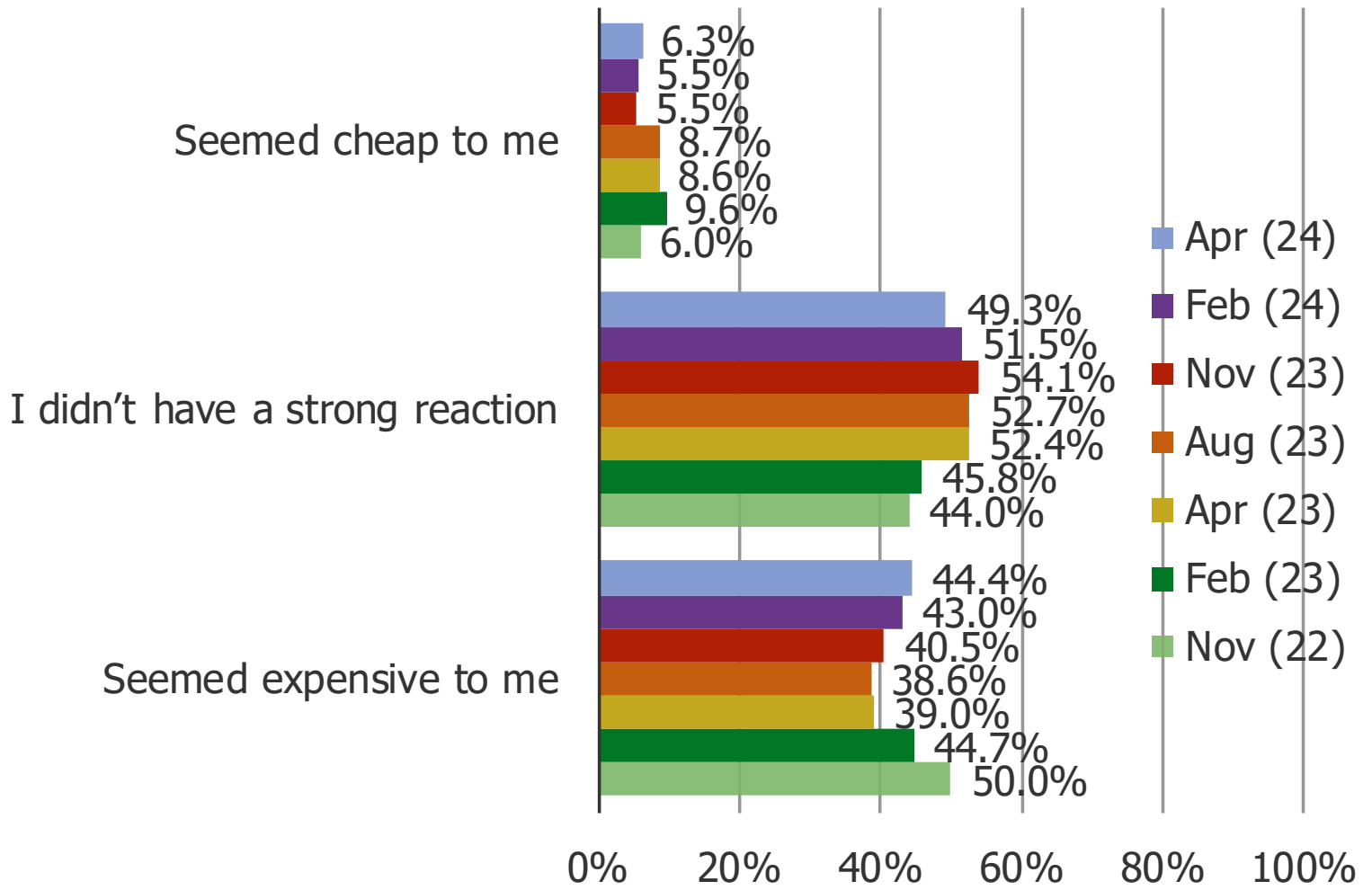
HOW BIG WAS YOUR LAST VET BILL?

Posed to pet owners who have taken their pet to a vet (N = 516).



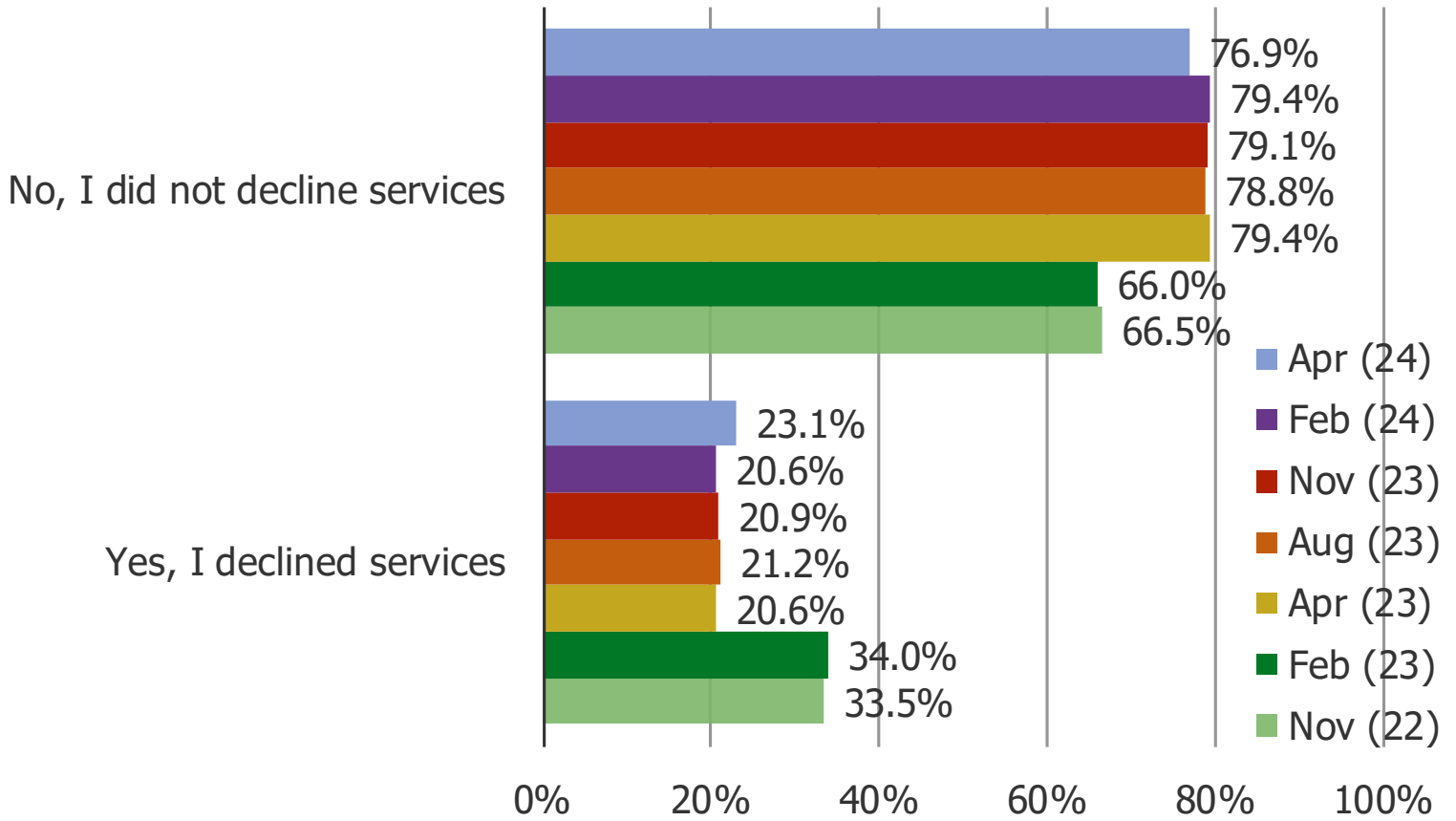
HOW DID YOU REACT WHEN YOU RECEIVED YOUR MOST RECENT VET BILL?

Posed to pet owners who have taken their pet to a vet (N = 511).



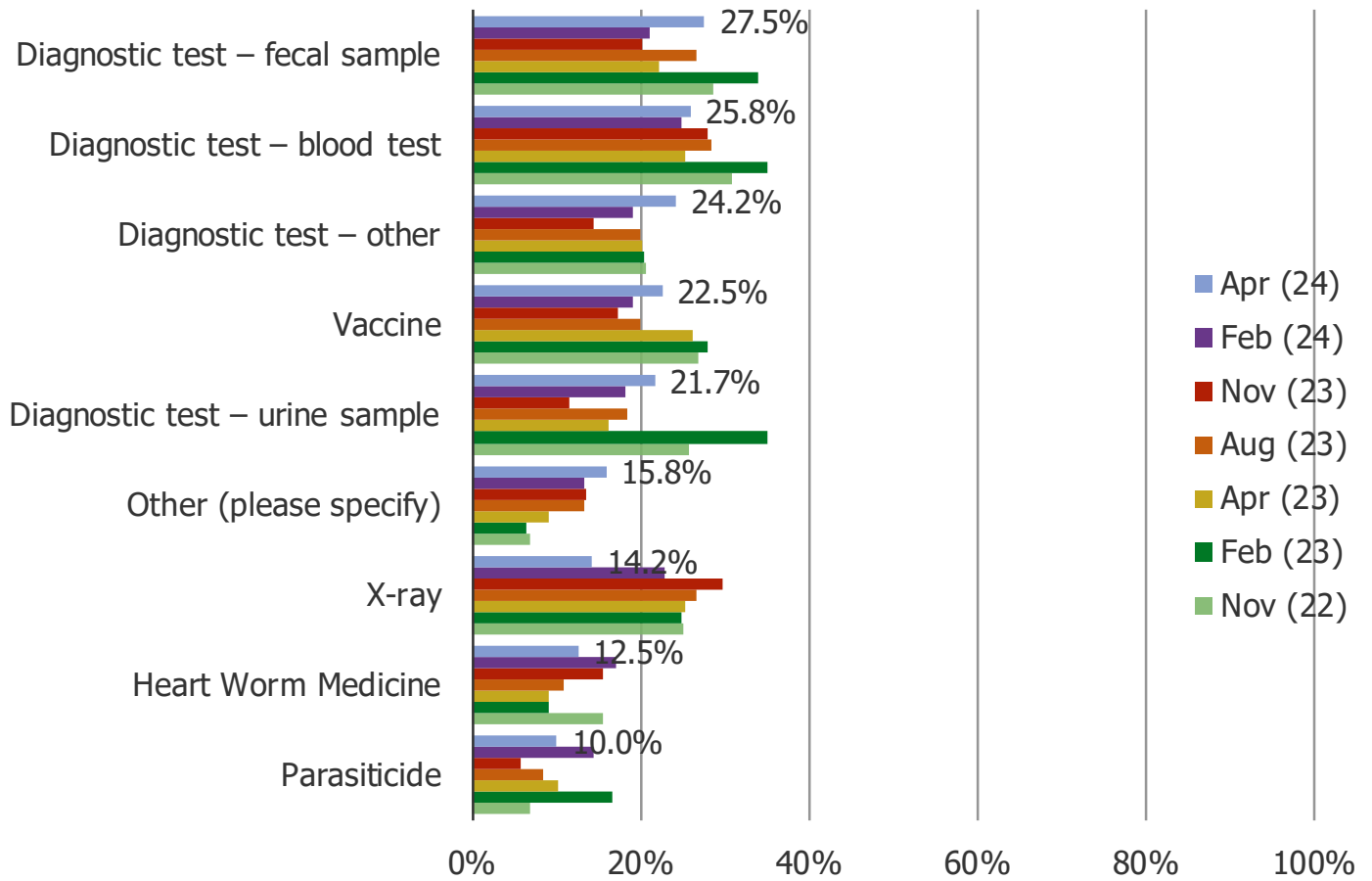
AT YOUR MOST RECENT VET VISIT, DID YOU DECLINE ANY SERVICES THAT THE VET RECOMMENDED FOR YOUR PET?

Posed to pet owners who have taken their pet to a vet (N = 516).



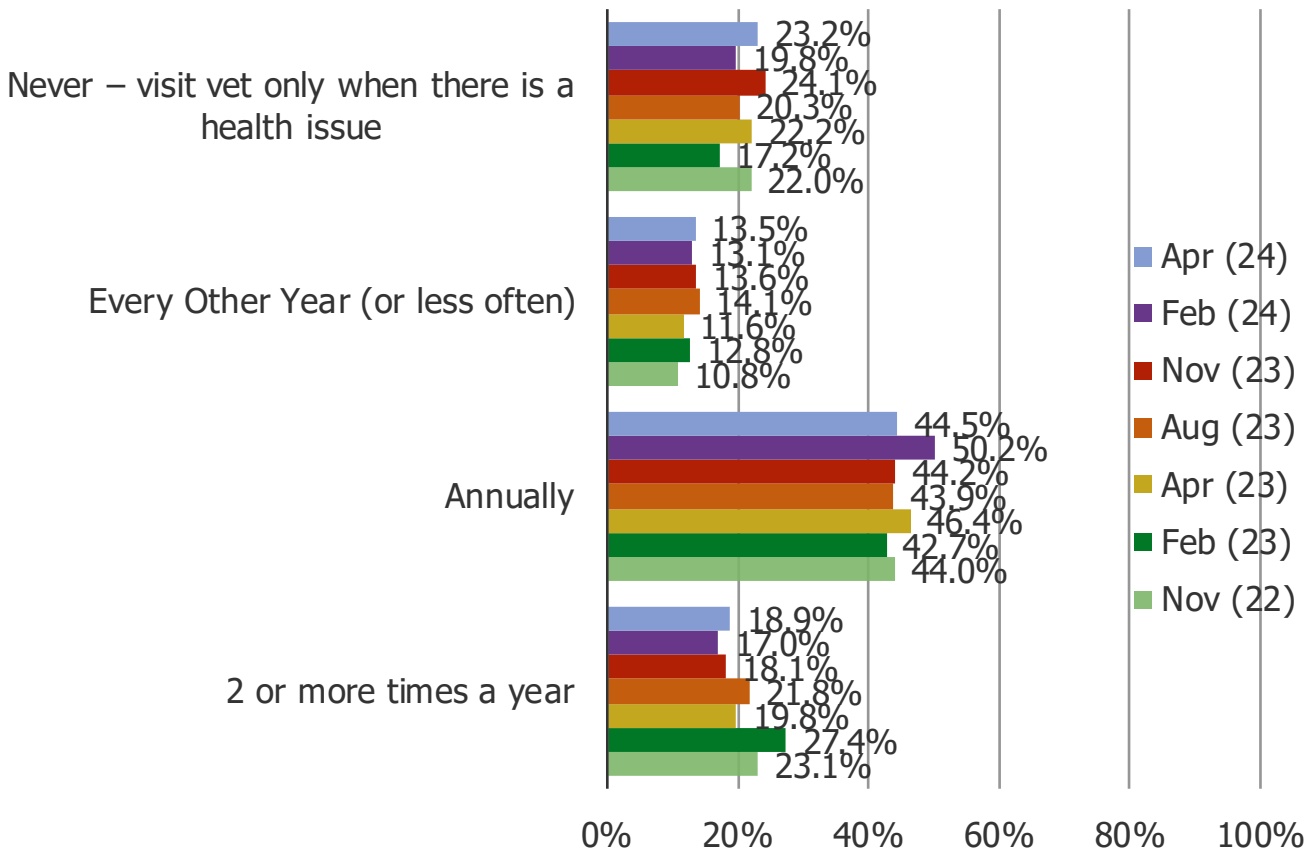
WHICH SERVICES DID YOU DECLINE? SELECT ALL THAT APPLY

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



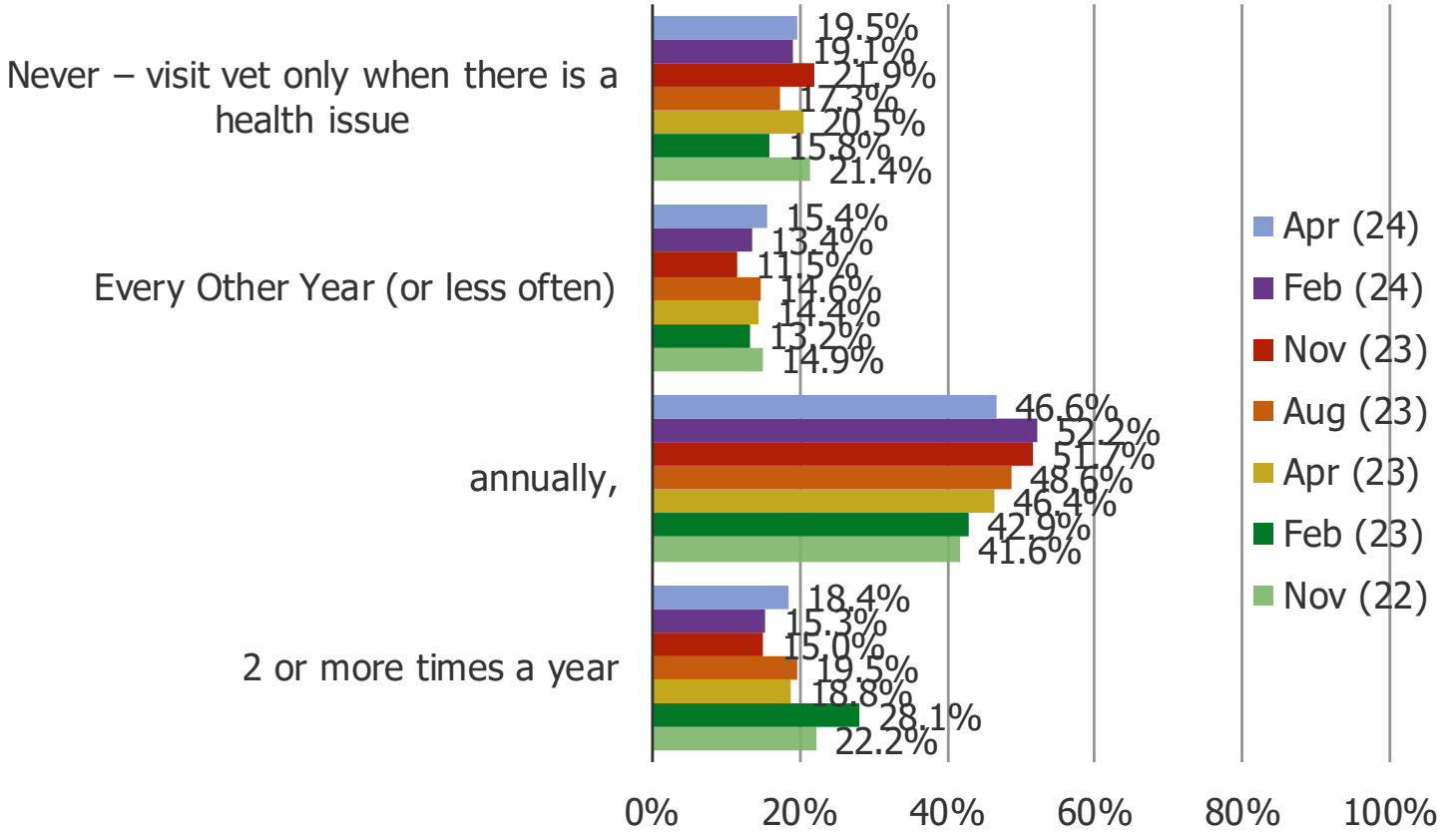
IN THE PAST, HOW OFTEN HAVE YOU TAKEN YOUR PET TO THE VET FOR A CHECK UP? (I.E., THERE IS NOTHING WRONG WITH YOUR PET BUT YOU TAKE THEM FOR A CHECKUP)

Posed to pet owners (N = 609).



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

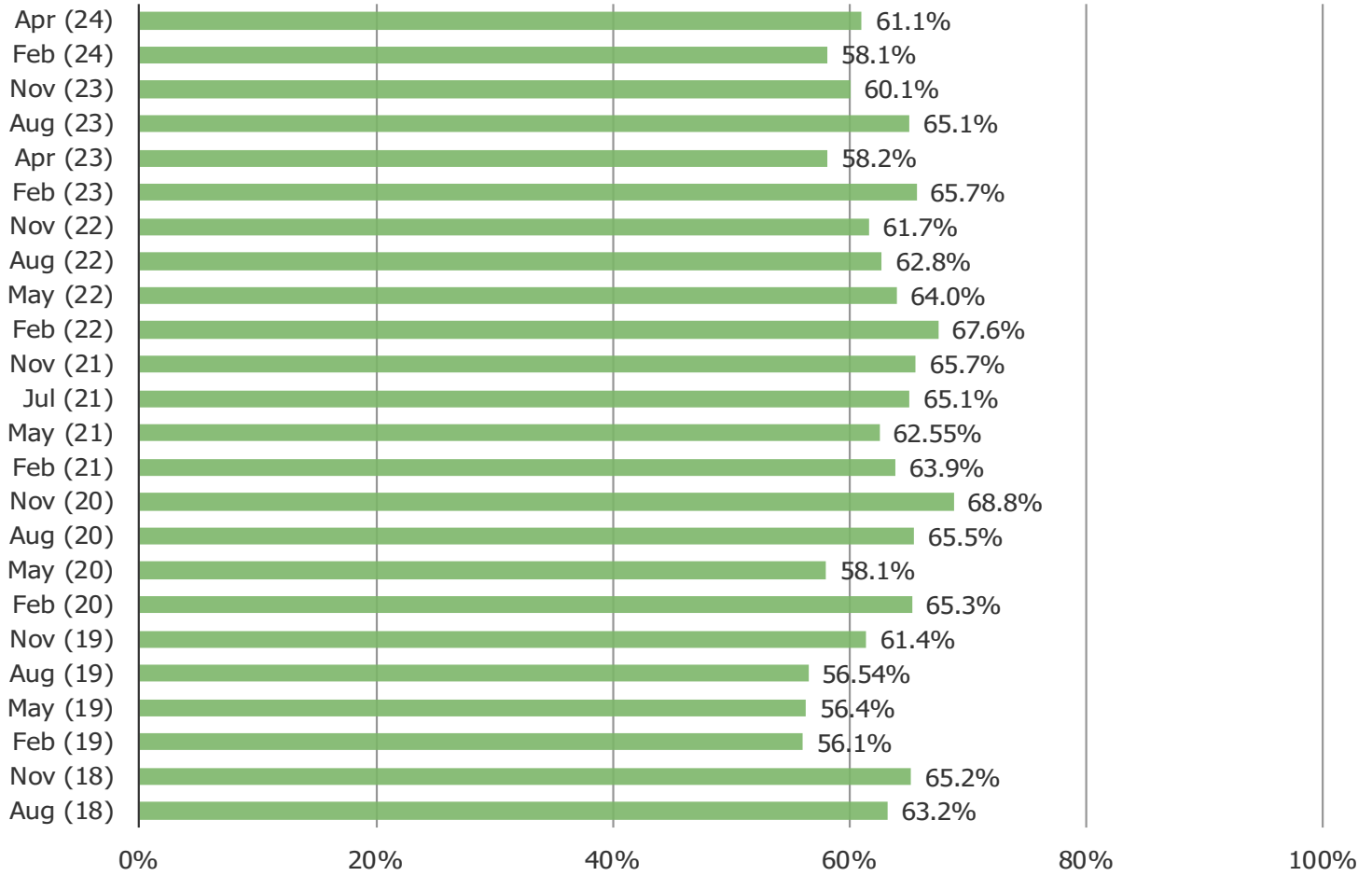
Posed to pet owners (N = 609).



PET OWNER BACKGROUND

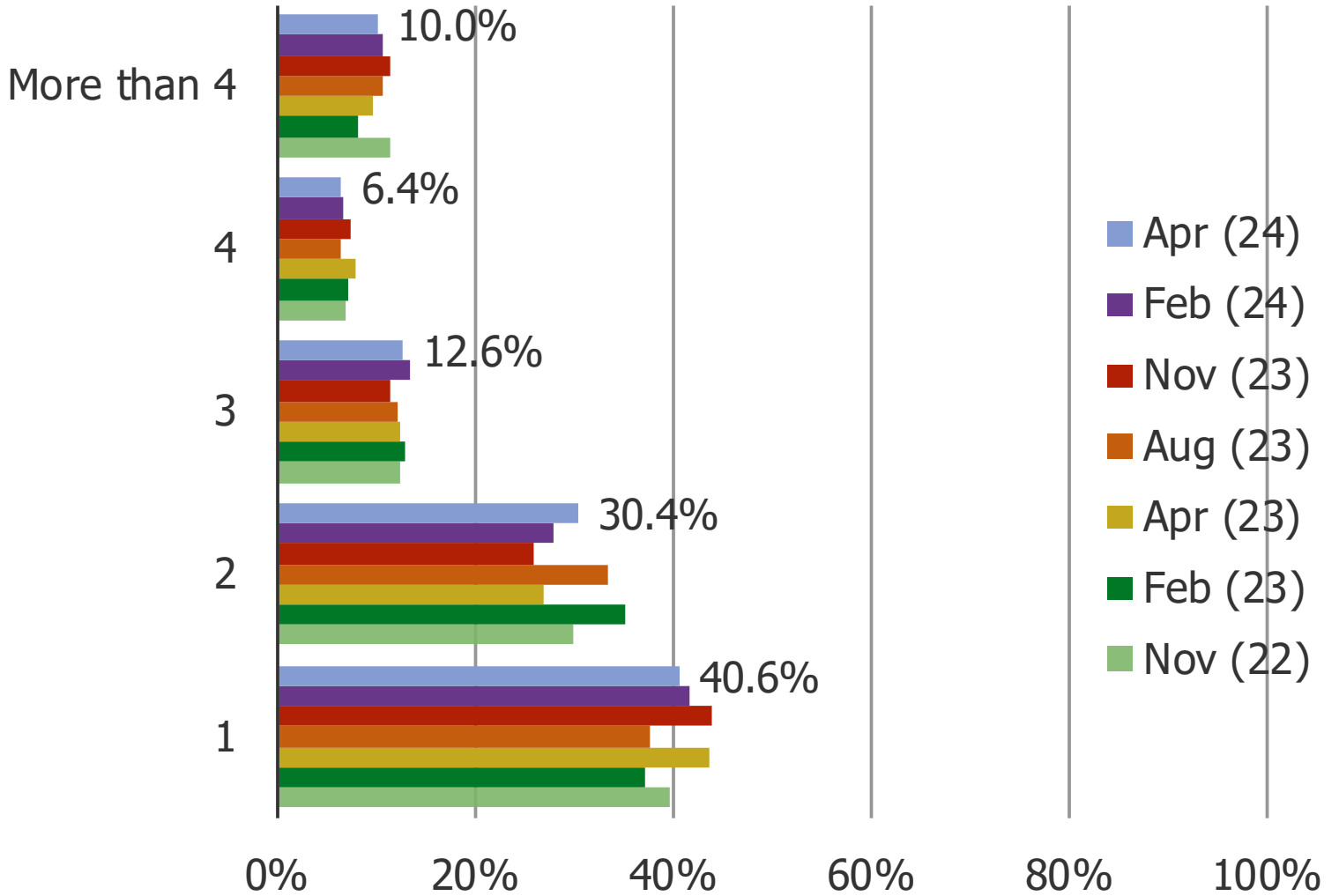
DO YOU CURRENTLY HAVE ONE OR MORE PETS?

Posed to all respondents.



HOW MANY PETS DO YOU HAVE?

Posed to pet owners (N = 609).



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

Posed to pet owners.

