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bird's eye view of ...
pet population trends $\qquad$
vet usage patterns $\qquad$
pet product channel purchasing patterns competitive landscape/product \& service remix $\qquad$
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| Household Ownership Rates for Pets, Dogs, \& Cats: 2008-2018 |  |  |  |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
| Any | 54.4 | 53.3 | 53.0 | 55.4 | 55.2 | 55.4 | 55.1 | 55.9 | 55.1 | 54.7 | 54.5 |
| Dogs | 35.9 | 35.9 | 36.0 | 39.1 | 38.3 | 38.7 | 38.8 | 39.9 | 40.4 | 39.2 | 38.6 |
| Cats | 26.0 | 26.1 | 24.8 | 25.6 | 26.1 | 24.4 | 25.1 | 26.3 | 23.7 | 25.2 | 25.1 |
| notching down of dog ownership rates |  |  |  |  |  |  |  |  |  |  |  |

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In last 12 months, what type of veterinary clinic have you used for your $\operatorname{dog}(\mathrm{s})$ ? (in field July/August 2019 survey)

Local, independent vet $\quad 54 \%$
Chain vet located at pet store $\quad 17 \%$
Chain vet located in pet store - $12 \%$
Specialty clinic $\quad 12 \%$
Emergency clinic - $\mathbf{1 0 \%}$
Humane society/animal shelter $\quad 10 \%$
Vet clinic at Walmart $9 \%$
Spay \& nueter clinic
Mobileth - 8\% Mobile/public pop-up vet service -_ $8 \%$ Online/telemedicine consultation__8\%

Holistic/alternative vet 7\%

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| Dog/Cat Owner Households: Online Pet Product Shopping Rates (\%) by Age Bracket |  |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
| Age 18-24 | 7.3 | 4.4 | 5.3 | 3.2 | 3.8 | 6.9 | 13.9 | 21.4 | 21.5 |
| Age 25-34 | 6.3 | 8.9 | 8.0 | 5.5 | 10.5 | 11.5 | 15.2 | 28.8 | 26.5 |
| Age 35-44 | 7.5 | 8.2 | 6.2 | 7.9 | 10.0 | 10.1 | 15.3 | 15.9 | 20.3 |
| Age 45-54 | 6.8 | 6.5 | 7.1 | 8.6 | 10.5 | 8.4 | 11.1 | 15.4 | 24.5 |
| Age 55-64 | 5.5 | 8.0 | 7.4 | 7.3 | 9.5 | 7.6 | 14.1 | 13.6 | 15.4 |
| Age 65-74 | 6.3 | 4.4 | 6.2 | 3.1 | 5.4 | 6.2 | 9.7 | 14.6 | 18.7 |
| Age 75+ | 1.9 | 5.1 | 4.6 | 2.8 | 7.1 | 4.5 | 4.3 | 5.6 | 8.8 |


| Dog/Cat Owner Households: <br> Pet Product Shopping Rates (\%) by Channel, 2010-2018 |  |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 |
| PetSmart/Petco | 42.0 | 42.3 | 42.9 | 44.3 | 44.4 | 44.4 | 46.9 | 45.9 | 46.8 |
| Supermarkets | 43.0 | 44.0 | 42.8 | 42.6 | 42.9 | 41.3 | 47.0 | 45.8 | 44.2 |
| Discount Stores | 28.0 | 26.2 | 26.2 | 24.2 | 25.4 | 22.0 | 25.7 | 24.4 | 21.1 |
| Online | 6.3 | 7.2 | 6.8 | 6.3 | 9.0 | 8.6 | 12.7 | 17.2 | 20.4 |
| Other Pet Stores | 11.9 | 11.5 | 11.5 | 13.9 | 11.9 | 10.8 | 15.6 | 14.6 | 14.4 |
| Wholesale Clubs | 10.4 | 9.2 | 11.7 | 10.4 | 10.6 | 9.4 | 12.4 | 11.0 | 12.0 |
| Veterinarians | 16.0 | 15.1 | 13.6 | 14.1 | 14.2 | 14.6 | 14.6 | 12.1 | 9.4 |

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