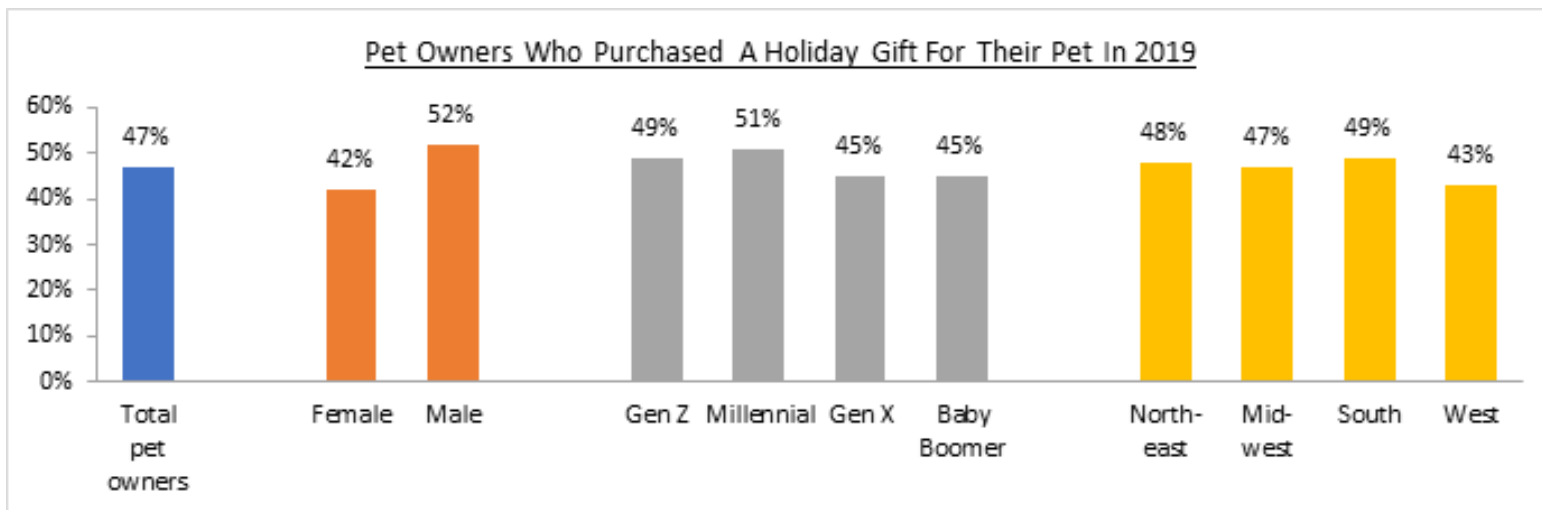


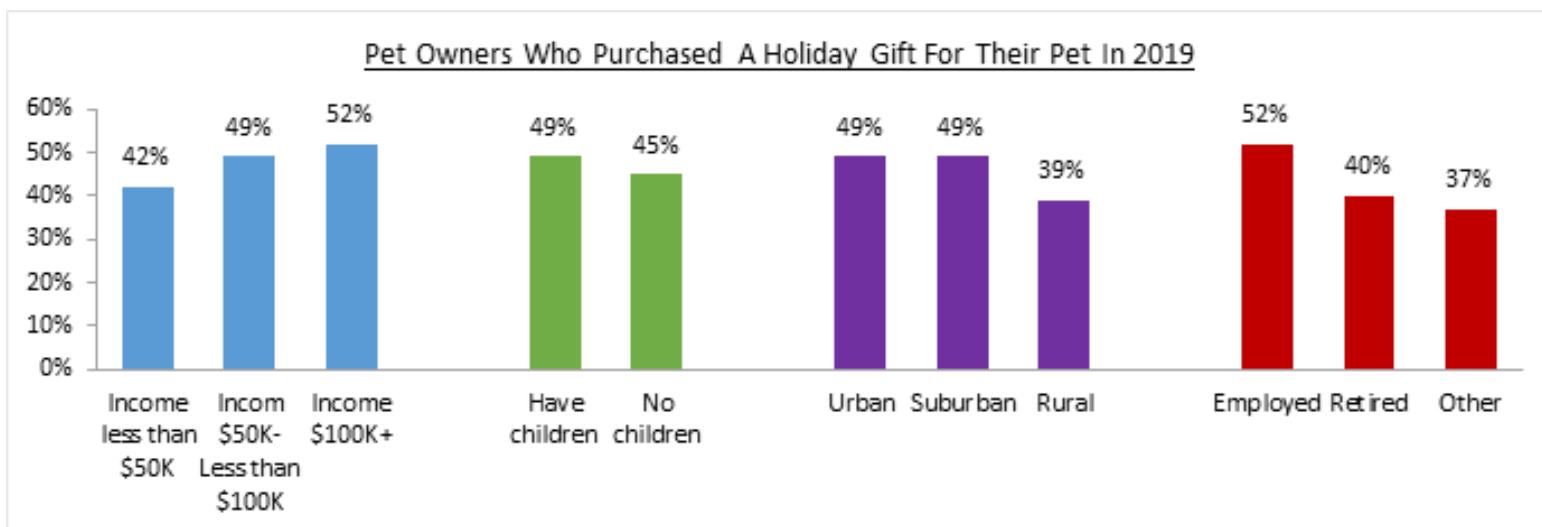
Holiday Gifts For Pets

Did you purchase a holiday gift for your pet in 2019?

- 47% of pet owners surveyed said they purchased a holiday gift for their pet in 2019.
- A higher than average percentage of male pet owners, Millennial pet owners, pet owners with higher incomes and employed pet owners indicate they purchased a holiday gift for their pet last year.



Source: APPA COVID-19 Pulse Study – Volume 3

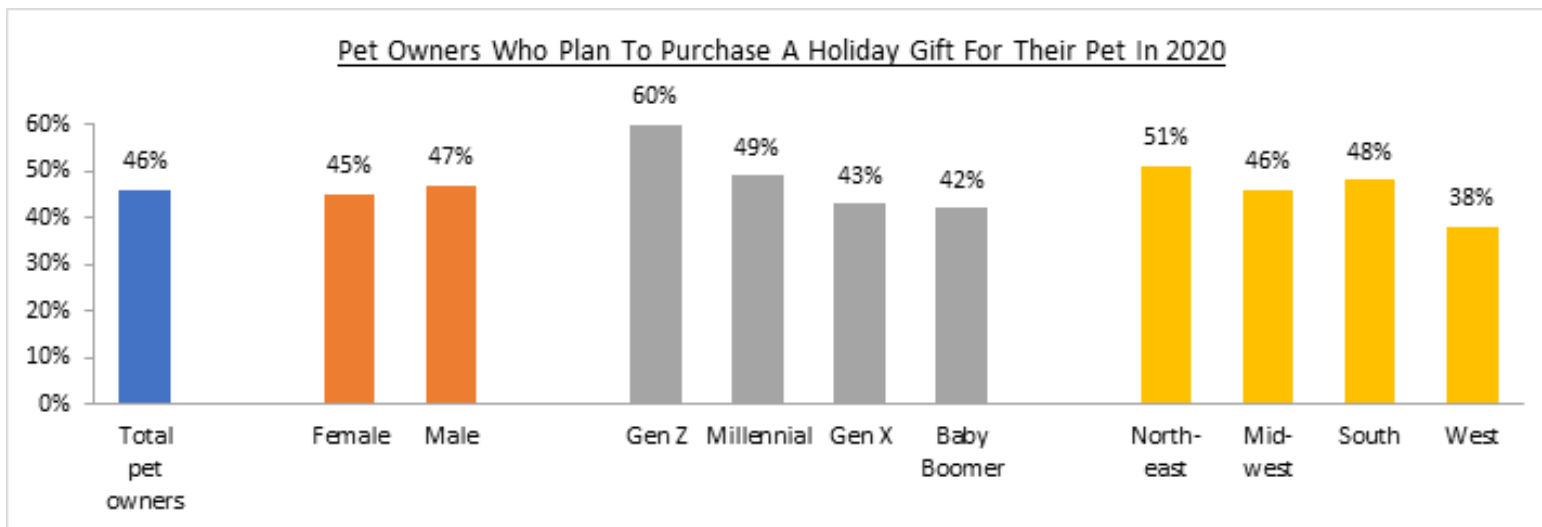


Source: APPA COVID-19 Pulse Study – Volume 3

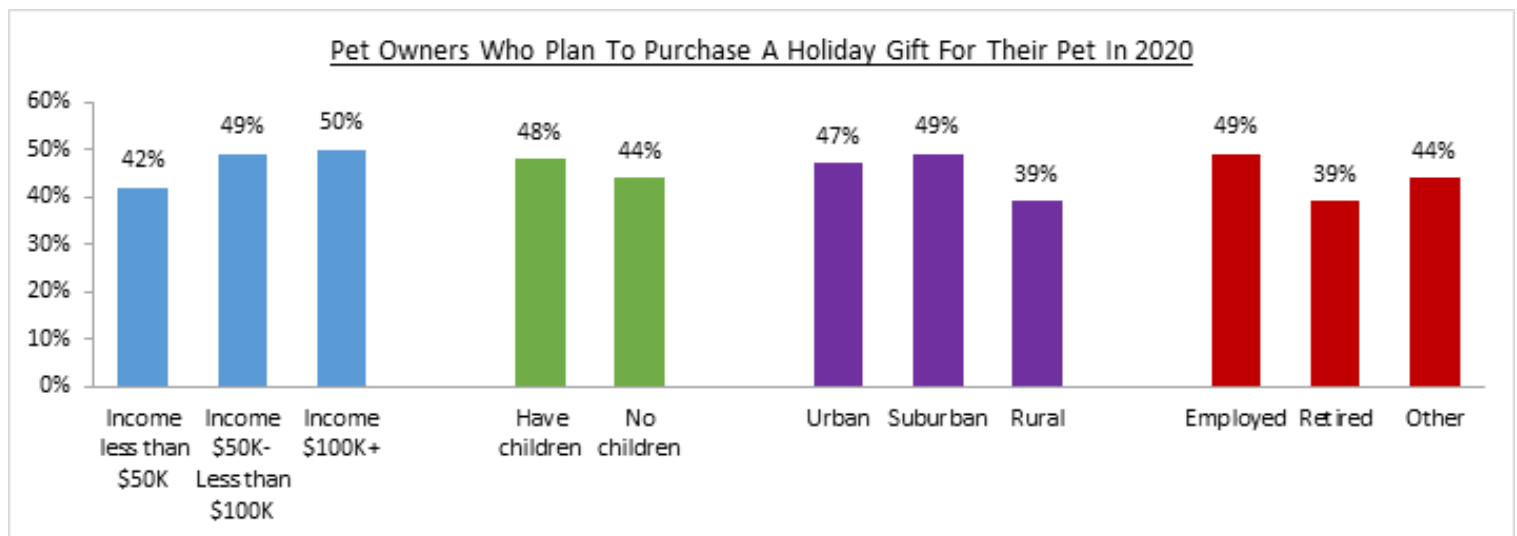
Holiday Gifts For Pets

Do you plan to purchase a holiday gift for your pet in 2020?

- 46% of pet owners surveyed say they plan to purchase their pet a holiday gift this year regardless of the pandemic or the recession.
- Significantly more Gen Z pet owners plan to purchase a holiday gift for their pet as compared to the other generations.
- Pet owners in the Northeast, pet owners with higher incomes, those who live in suburban communities and those who are employed indicate higher than average percentages planning to purchase holiday gifts for their pets.



Source: APPA COVID-19 Pulse Study – Volume 3



Source: APPA COVID-19 Pulse Study – Volume 3

Holiday Gifts For Pets

How do you plan to purchase holiday gifts for your pet?

- When asked how they intend to purchase holiday gifts for their pets, a net of 58% plan to shop online, while 44% say they plan to shop in person at a brick and mortar store
- 40% of pet owners plan to purchase holiday pet gifts at an online only outlet such as Amazon or Chewy.
- Millennials are more likely than the other generations to utilize an online only outlet, as are pet owners in the West, those with young children at home, those who live in urban areas and those who are employed.
- Those pet owners who intend to shop in person for their pet's holiday gift are more often from rural areas and households with no young children at home.

How Pet Owners Plan To Purchase Holiday Gifts For Their Pets

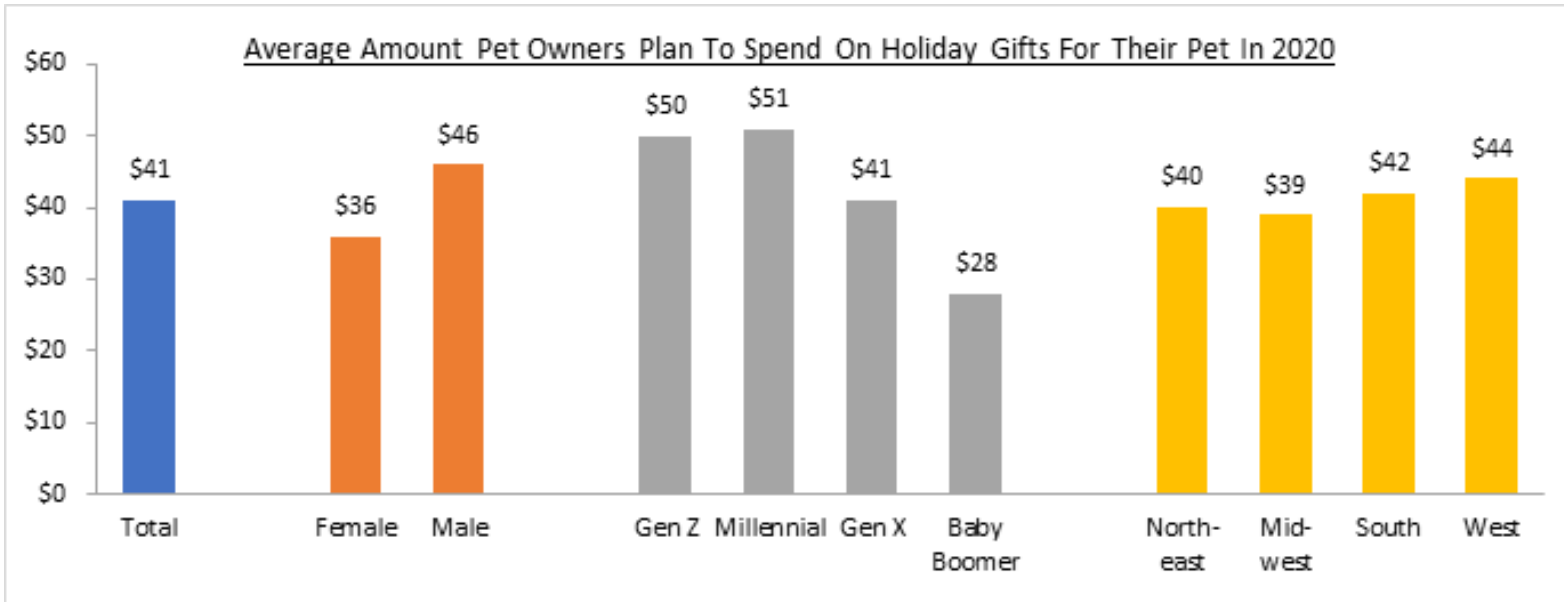


Source: APPA COVID-19 Pulse Study – Volume 3

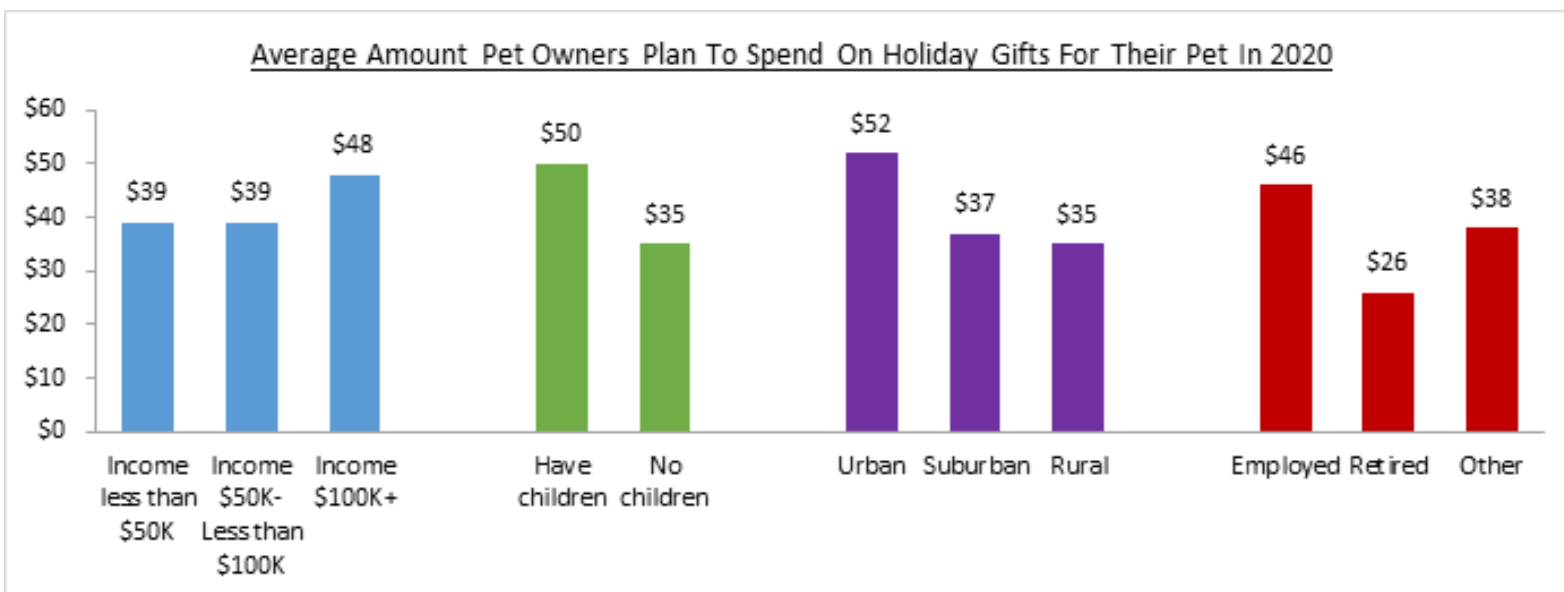
Holiday Gifts For Pets

How much do you plan to spend on holiday gifts for your pet?

- Pet owners plan to spend an average of \$41 on gifts for their pet this holiday.
- Those demographic groups planning to spend \$50 or more are Gen Z, Millennials, those with young children and those who live in urban communities.



Source: APPA COVID-19 Pulse Study – Volume 3



Source: APPA COVID-19 Pulse Study – Volume 3

	Total	Gender		Generation			
		Female	Male	Gen Z	Millennial	Gen X	Baby Boomer
Online only outlet (Amazon, Chewy)	40%	43%	38%	41%	52%	39%	31%
Online, delivered directly to my home	22%	17%	27%	27%	29%	18%	15%
Online, but pick up at a store drive-up or curbside	9%	6%	12%	8%	11%	11%	4%
Online, but pick up inside a store	6%	6%	6%	4%	8%	7%	3%
In person, at a brick and mortar store	44%	47%	42%	43%	38%	45%	49%
Not sure	9%	10%	8%	5%	6%	9%	14%

	Region				Income		
	Northeast	Midwest	South	West	Less than \$50K	\$50K- Less than \$100K	\$100K+
Online only outlet (amazon, chewy)	38%	34%	40%	49%	39%	40%	45%
Online, delivered directly to my home	23%	22%	22%	21%	21%	21%	25%
Online, but pick up at a store drive-up or curbside	8%	12%	7%	9%	9%	9%	8%
Online, but pick up inside a store	7%	7%	5%	6%	6%	8%	4%
In person, at a brick and mortar store	47%	47%	42%	43%	45%	46%	40%
Not sure	3%	11%	11%	8%	10%	7%	9%

Bold numbers are significantly higher.

	Children in Household		Type of Community			Employment Status		
	Yes	No	Urban	Suburban	Rural	Employed	Retired	Other
Online only outlet (amazon, chewy)	49%	34%	50%	36%	37%	44%	30%	39%
Online, delivered directly to my home	29%	17%	30%	18%	19%	25%	21%	15%
Online, but pick up at a store drive-up or curbside	9%	8%	7%	9%	9%	10%	5%	7%
Online, but pick up inside a store	8%	4%	8%	5%	4%	8%	-	4%
In person, at a brick and mortar store	38%	49%	37%	45%	54%	41%	51%	50%
Not sure	7%	10%	5%	11%	8%	8%	10%	10%

Bold numbers are significantly higher.