

TAKING BACK WHAT'S OURS



**Pet Parent Perceptions on
Shopping the Independent
Channel**

TEASER : ENORMOUS PET SHOPPER STUDY COMING SOON... SPONSORED BY COMPANIES THAT CARE ABOUT YOU!

Stay a Step Ahead with our Latest Key Insights on the Who, What, When, Where, Why and How of Pet Shopping

Three Online Panel Studies

- July – August 2023
 - U.S. Dog Owners and Cat Owners (n=2181)
 - n=1200 completes
 - 923 Dog
 - 600 Cat
- } Some panelists own both
- n=506 completes
 - 354 Dog
 - 268 Cat
 - n=475 completes
 - 354 Dog
 - 248 Cat

Extended Research

- August
- Independent / Local Pet Store Shoppers
- n=51 completes

BENEFITS FOR INDIEPET.ORG MEMBERS

- Today: Highlights from 2023 independent pet shopping study
- Upcoming Months: Full Report, Web sessions (Indiepet.org) outlining strategies and tactics



Disclaimer: We take great pride in our work. However, while we make every effort ensure the accuracy and completeness of the research information, we take no responsibility and assume no liability for any omission or accuracy of the third-party survey data/panels we contract. Recipients of this or any research information should always rely on their own judgments and conclusions from other relevant sources, publications, suppliers, retailers, industry professionals, etc., before making any investments.

THANK YOU TO OUR STUDY SPONSORS!



THINGS YOU KNOW

- Everyone is now in the pet business.
- You must know your consumer better than your competitors do.
- Your consumer can now buy any pet product, anywhere, anytime, so make sure you offer a compelling reason or two for them to buy from you.
- Your consumer is not loyal.
- Your consumer wants to order off menu.
- Your consumer wants to be entertained.



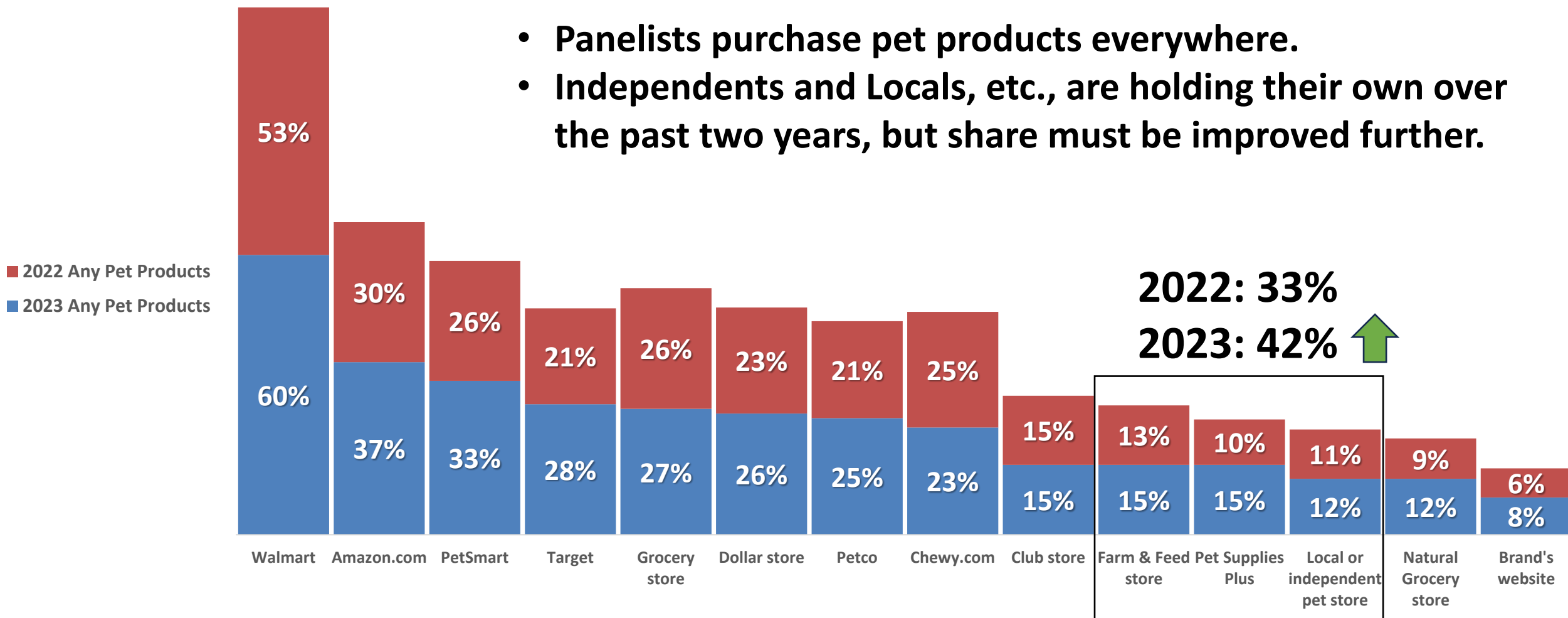


TODAY'S PET PARENTS OUR ISSUES TO SOLVE

- We love our pets, but not all of us like shopping for them. (We are bored.)
- We want the best for our pets, but a lot of us don't really know what that means.
- We want to feed quality food & treats, but our spending abilities vary wildly.
- We are bombarded by an abundance of substitutable competing products.
- We are confused by conflicting or dissonant messaging.

WHERE HAVE YOU PURCHASED PET PRODUCTS IN THE PAST YEAR?

- Panelists purchase pet products everywhere.
- Independents and Locals, etc., are holding their own over the past two years, but share must be improved further.



Seems we don't seem to mind:

- **Getting limited / abbreviated info**
- **Not talking to or even seeing another human**
- **Passively shopping for our pets**
- **Missing out on a lot of what is new**

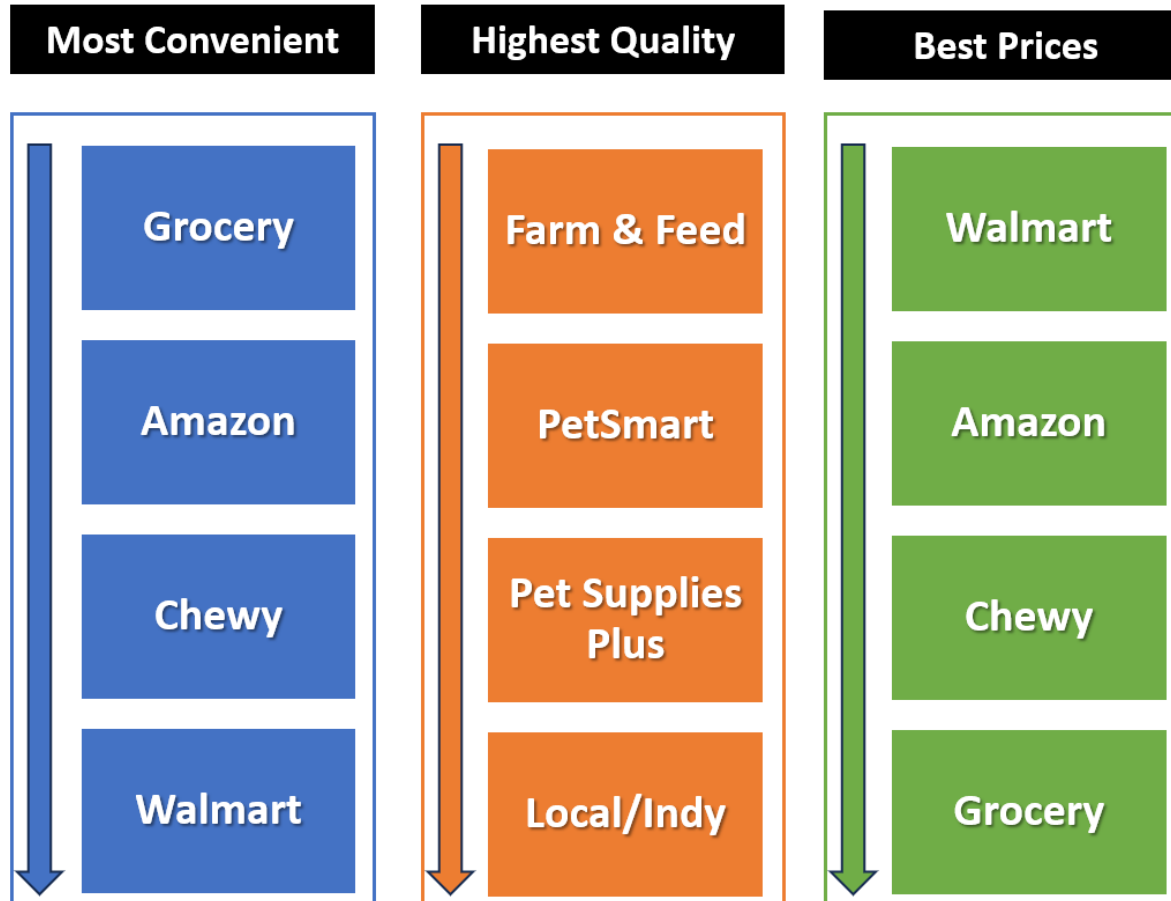
Or maybe we just don't realize we're missing it.



We're selling our souls for short-term convenience and the perception of lower prices.

**If the most important thing is a pet's health, then why these disconnects?
How does the Independent Channel capitalize?**

RETAILER PERCEPTIONS



Right or wrong, it is generally perceived that Indy is:

- Less convenient
- More of a drive
- More pricey

However...

PERCEPTIONS ON SHOPPING INDEPENDENTS

■ Mostly Shop Independent Pet
 ■ Mostly Shop Other Retail

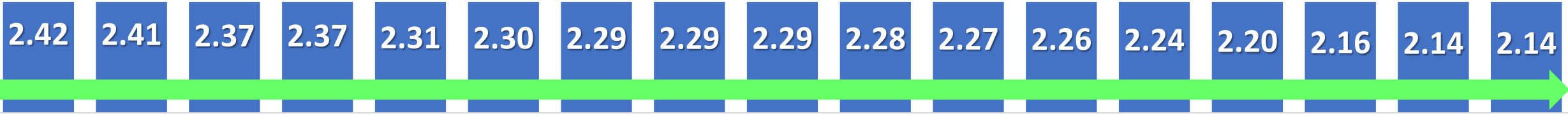
What the outside thinks about shopping Indy

THE INDEPENDENT CHANNEL: YOU JUST GOTTA TRY IT. THEN YOU GET IT.



What Indy shoppers like about shopping Indy

INDEPENDENT SHOPPERS GET IT!



- Location
- Pet is allowed
- High quality products
- Clean store
- Closer to my home
- Friendly sales associates
- Convenient to shop at
- Fun / entertaining to shop at
- Quick check-out
- Good variety of natural products
- More variety / Deeper assortment of...
- Great product displays / merchandising
- Knowledgeable sales associates
- Good prices on the brands and products...
- Great sales
- In store sampling and demonstrations
- Fun Pet Friendly Events - Santa,...



INDEPENDENT SHOPPER SKEWS

Higher incomes

More likely to have one child

More likely to be married

More likely to be Gen Z /
Millennial

More likely to own a dog and
less likely to own a cat

Considerably less likely than
average to buy pet supplies
at Walmart

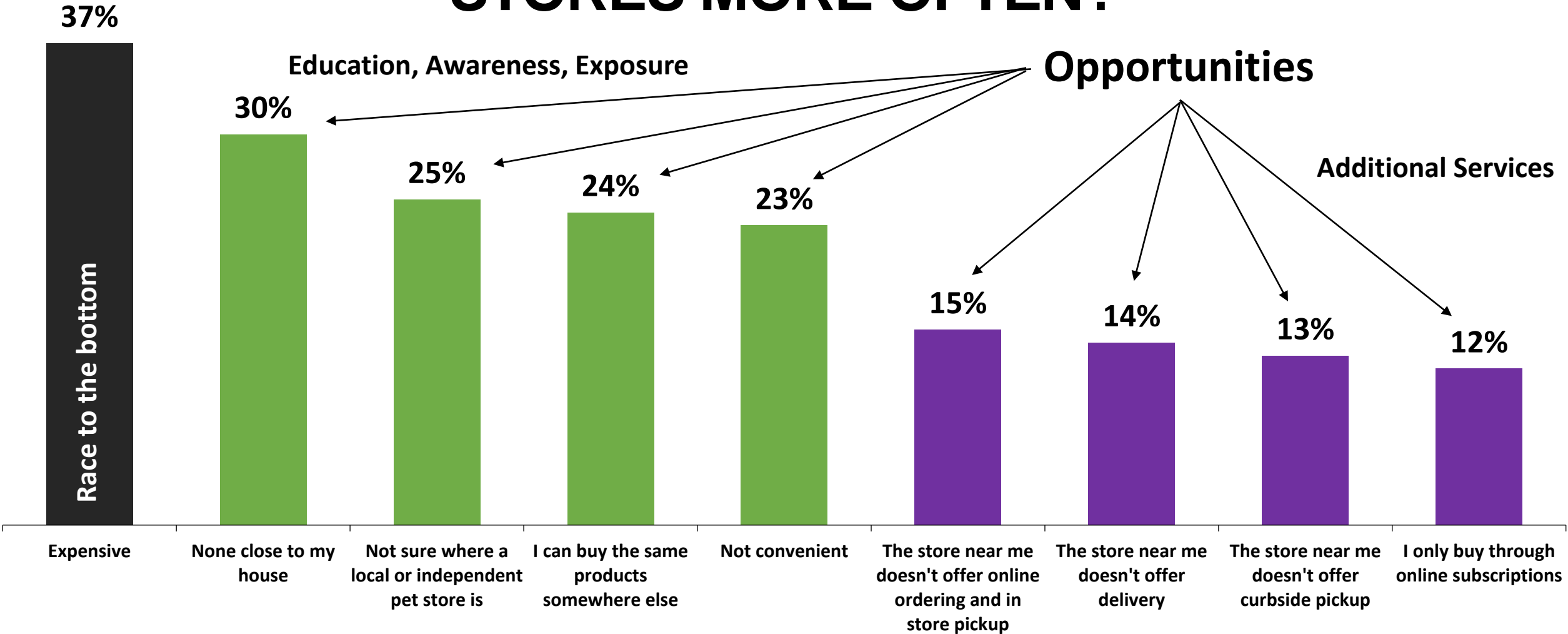
Considerably more likely to
feed a grain-free diet and to
think that grain-free diets
are good for dogs

Considerably more likely to
be vegetarian / vegan

**INDEPENDENTS GENERALLY
HAVE MORE ENGAGED
(AND SOMEWHAT MORE LOYAL)
SHOPPERS.**

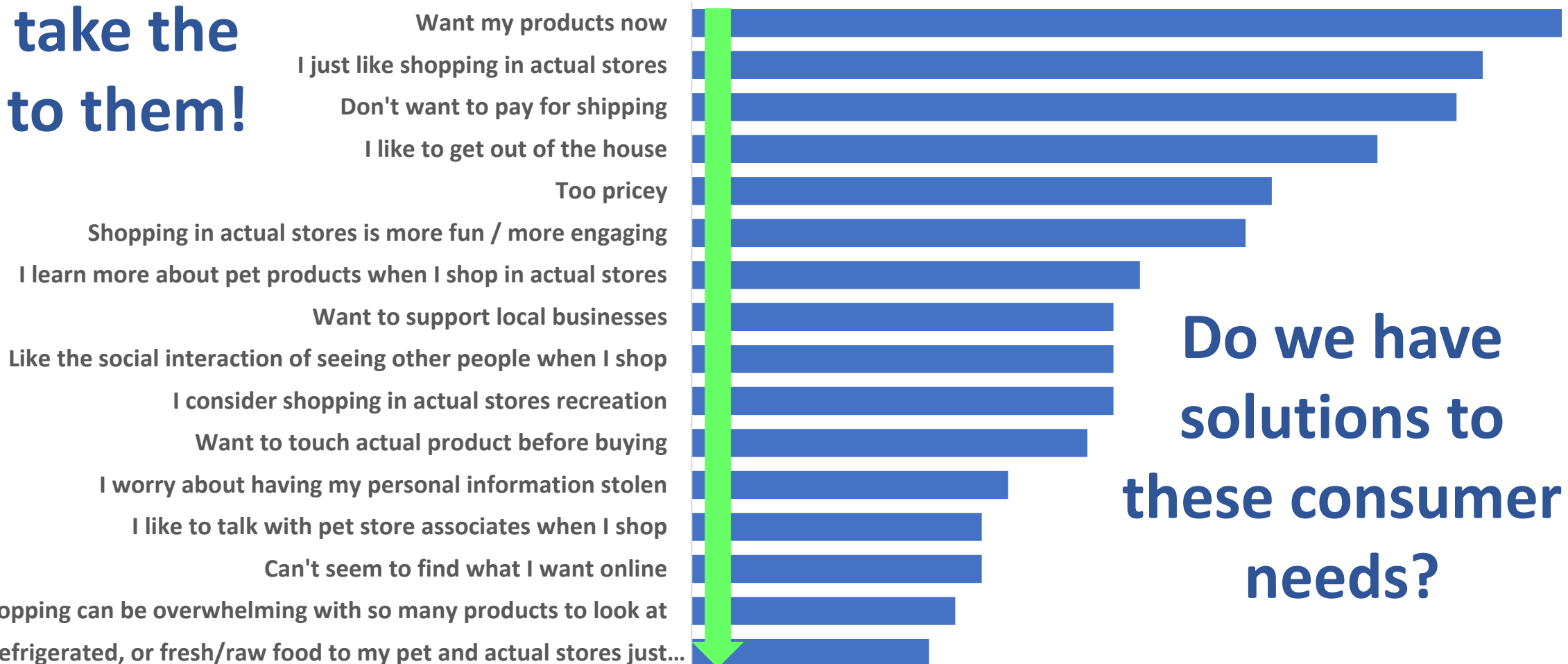
**WE JUST NEED MORE OF
THEM.**

WHY DON'T YOU SHOP AT INDEPENDENT PET STORES MORE OFTEN?



WHY SOME CONSUMERS DON'T SHOP ONLINE / DON'T SHOP ONLINE MORE OFTEN

Let's take the fight to them!



Do we have solutions to these consumer needs?



**LET'S DIG A BIT DEEPER INTO INDEPENDENT
CHANNEL SHOPPING TRIPS...**

**We asked 51 Independent Channel
shoppers to share some specific insights
about their most recent in-channel
shopping trip...**

Go Independents!

WE MUST BE DOING SOMETHING RIGHT!

- **63%** of our shoppers claimed to shop that specific store at *least monthly* – and only one shopper said it was their first-ever visit to that store.
- **90%** had visited their Indy store in the *past month*
- **86%** of our shoppers *bought something* at the store on that trip (down from 100%).
- **Over half** *bought something they hadn't planned to purchase* on that trip.



Go Independents!

WE MUST BE DOING SOMETHING RIGHT!

- **53%** of our shoppers *talked to a store associate* (besides check-out) on that trip. (This is down 3bp from last year).
- **30%** of our shoppers *traveled 4+ miles* to visit that store (down from 51%), and one in four claimed that that store is not the nearest available place at which to purchase their pet products.
- **96%** of our shoppers (Top 3 Box) *were at least somewhat satisfied* with their most recent shopping trip (down from 100% last year).



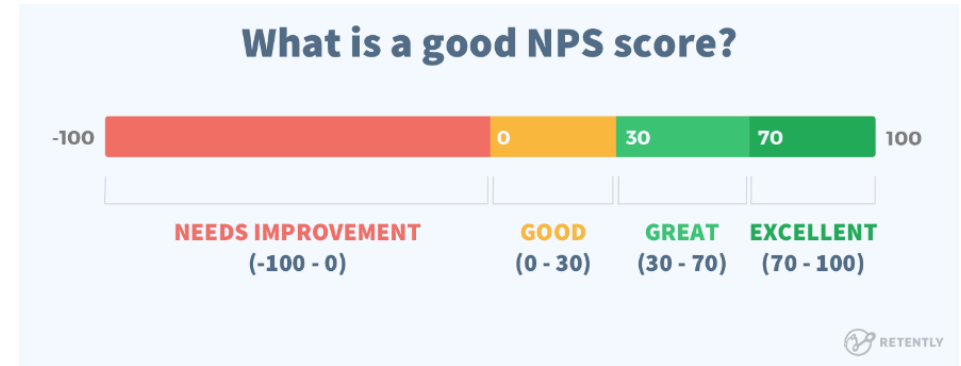
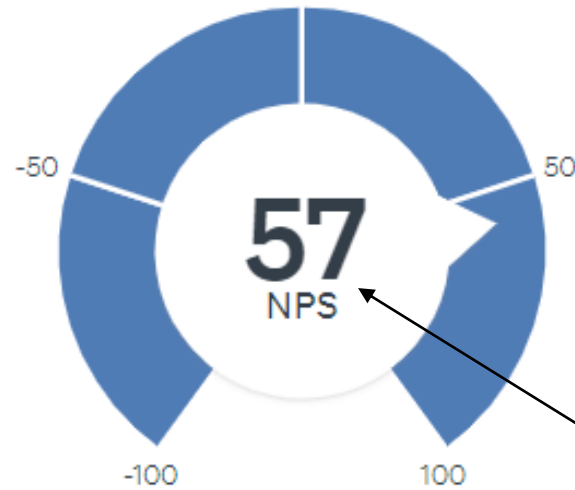
SHOPPERS' RECENT VISIT HIGHLIGHTS

Not Bad, Independents!

On your most recent visit:



HOW LIKELY IS IT THAT YOU WOULD RECOMMEND THIS STORE TO A FRIEND OR A COLLEAGUE?



Down from 72 last year

DETRACTORS (0-6)	PASSIVES (7-8)	PROMOTERS (9-10)	NET PROMOTER® SCORE
4% 2	35% 18	61% 31	57



LET'S COMPETE ON OUR STRENGTHS!

Physical Stores
Human Associates
Friendliness & Connectivity
Locality & Community
Engagements & Theatricality
Knowledge & Expertise
Key Brands
Shopper Goodwill
Etc.



WHAT ARE YOUR SPECIFIC STRENGTHS?

A WORD ON CUSTOMER SERVICE...



CONCIERGE

Observer

Engager

Personal Assistant

Consultant

Navigator

Problem Solver / Pain Killer

Your Connection on the Inside

We want to
be treated like this!

SPECIFIC STRATEGIES AND TACTICS TO FOLLOW IN OUR EXCLUSIVE
WEB MODULES, BUT HERE ARE

SOME KEY OVERARCHING RECOMMENDATIONS:



ROCK EACH STORE VISIT

- **Nothing in retail is more difficult than getting someone to come into your store. So every visit must end with a solution and a sale.**
- **Education & Awareness – customers should learn and see something new every visit.**
- **Friendly concierge-level experts with answers and solutions (grain-free, CBD, etc.)**
- **Destination for Fun / Innovative / Exciting / Engaging / Experiential / Lifestyle, etc.**
- **Be sensory**
- **Unique Activities & Events**
- **Value Adds: Delivery / Online / Curbside / Subscriptions / Bundling**



ESTABLISH YOURSELF AS A PILLAR IN THE COMMUNITY

- Make sure the neighborhood knows where you are.
- Be visible. Be active. Be supportive.
- Consumers love the little guy, so make them guilty and ashamed to shop anywhere else...



DELIGHT YOUR CUSTOMERS

- We can buy anything anywhere anytime – why will we buy from you?
- Retail is full of shops with no engagement, no excitement, no education, etc. We've already got that covered. What will you do differently?
- Have a customer database and survey / poll your customers often. Know your NPS score and work to improve it.
- Always be surprising.
- Reward your best customers frequently.



WIN AT YOUR GAME

- We already have an online solution and a big box solution. How are you different?
- Compete where you can win and be unbeatable at “your thing.”
- Consider making at least three more services/programs/events, etc. “your thing.”



**THANK YOU
INDEPENDENTS!**



**BE SURE TO THANK OUR STUDY SPONSORS AT THE SHOW!
THEY CARE ABOUT YOU AND YOUR SUCCESS!**





THANK YOU, INDIES!

Chris

PHILIP

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Hilly Kelly

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Miriam

Sandra Tucker

Jess

Jasha Valentin Jucius

Susan

Paul

John

Jamie

Sharon Radke

Abby

Abby

Merritt

Heather





PET SPECIALTY IS OUR SPECIALTY

Launching, growing & selling the world's most successful pet brands since 1984.

Through category expertise and deep retailer relationships, we are optimally positioned to provide sales, marketing, service, and MAP compliance management across national pet chains, independent pet retail, farm & feed, and eCommerce.

CLA proudly supports IndiePet.



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For more information visit CLAREps.com

Safe travels.



You shouldn't have to guess about the safety of your pet's products. Sleepypod products are thoughtfully made for more comfortable, safer living with your furry best friends. From the tensile testing of our leash and collar lines to the crash testing of our carrier and harness lines at U.S., Canadian, and E.U. child safety seat standards, Sleepypod devotes careful and caring attention to each detail in every product. Pets travel safer with Sleepypod.
Sleepypod.com





THANK YOU INDEPENDENTS!

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Committed to Your Success

Helping your business succeed is
not a job to us, it's our passion.

At BSM Partners, we have been in your shoes, navigating the wide chasm between a dream and reality. This is what drives us. We succeed by seeing you succeed.

We are a proud founding sponsor and
continuing supporter of Indiepet.org



BSMPartners.net

