



HOLISTIC PET CARE SURVEY



A STUDY OF U.S. PET OWNERS PRACTICING HOLISTIC PET CARE

OBJECTIVES

The objectives of this research are to obtain insights on holistic pet care by dog and cat owners. Insights obtained include their awareness of brand manufacturers, perceptions of those brands, details on their current vehicle, plans and needs for their next vehicle, and how COVID-19 may or may not impact their decision-making process.

METHODOLOGY:

TECHNIQUE:

Online Survey

AUDIENCE:

- Survey was conducted using an online panel.
- Participants have to currently own a cat, dog or both. They must also currently use or feed their pet(s) natural or "holistic" food and products.

GEOGRAPHY:

United States

LENGTH:

- 5 minutes
- Survey fielded: March 9, - March 17 2021

SAMPLE SIZE:

- Survey was conducted using an online panel.
- Participants have to currently own a cat, dog or both. They must also currently use or feed their pet(s) natural or "holistic" food and products.

RELIABILITY:

Sample sizes produces a margin of error of + 6% at a 95% confidence level.



SUMMARY OF FINDINGS

- Most respondents (61%) consider their veterinarian a key source for learning about holistic and natural pet care.
- Other key sources include pet food or pet company product websites (35%) and webpages dedicated to holistic pet care (30%).
- Most respondents (59%) regularly purchase holistic dry dog food. Other regularly purchased holistic products include supplements (41%) and treats (34%).
- On a monthly basis, less than half (46%) spend less than \$50 and about a third (34%) spend between \$25 and \$49 on holistic pet care products.
- More than one-third (37%) would prefer their vet use holistic treatments and then use traditional methods as a last resort. About a third (32%) prefer a balanced approach of holistic and traditional treatments.
- Overall, most (85%) feel it is either very or somewhat important to have a veterinarian who is open to holistic and natural pet care.
- Two-Thirds (67%) need to see “All Natural” on the label to finalize their purchasing decision. Half of all respondents also need to see “Organic”, “Ingredients Sourced in the USA” and “Grain Free” on the label to finalize their purchase decision.
- The most prevalent condition they treat holistically is digestive issues (33%). Other prevalent conditions they treat holistically include skin issues (20%), anti-aging (16%) and dental care (13%).

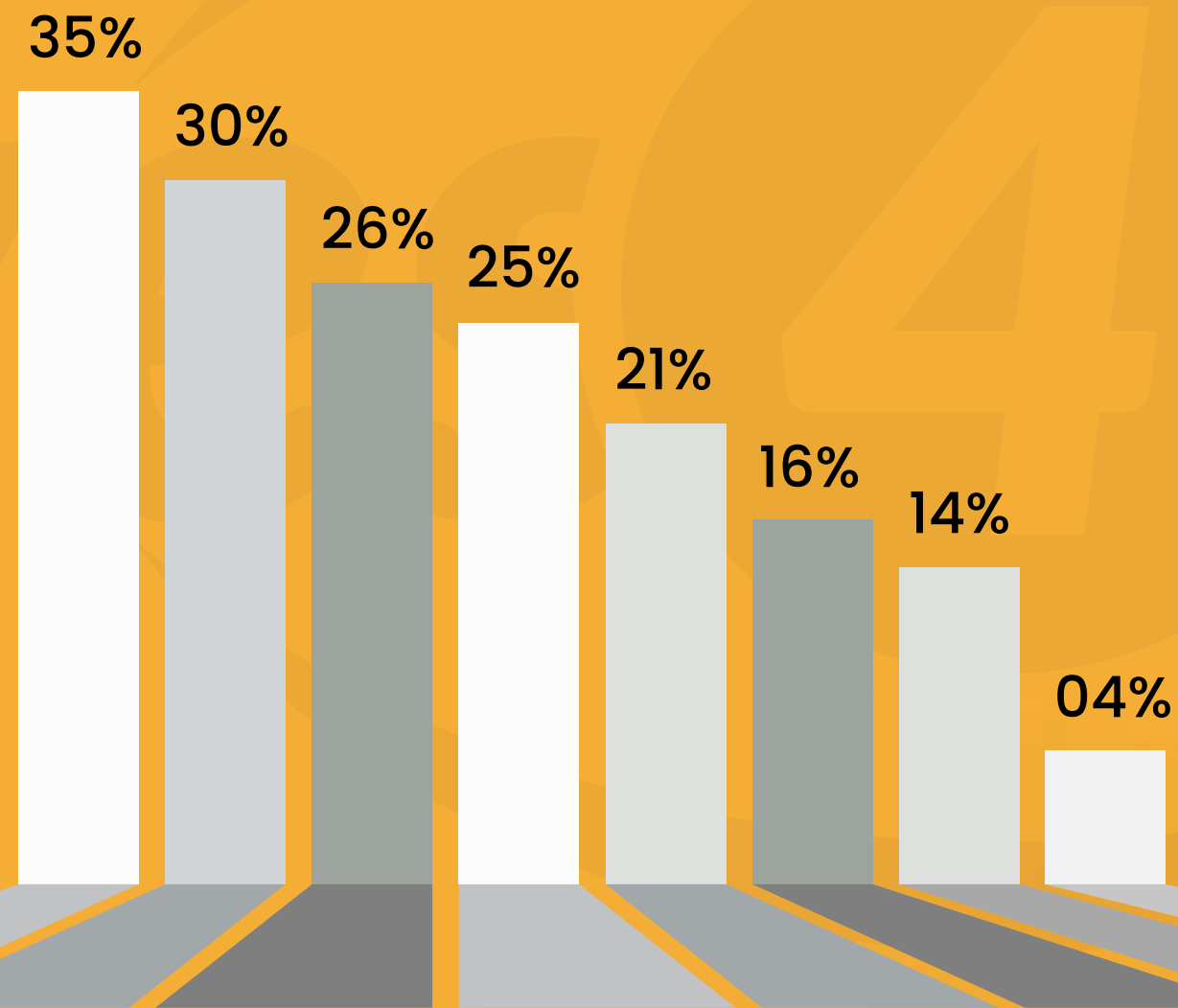
61%



KEY SOURCES FOR LEARNING ABOUT HOLISTIC PET CARE

Most respondents (61%) consider their veterinarian a key source for learning about holistic and natural pet care.

Other key sources include pet food or pet company product websites (35%) and webpages dedicated to holistic pet care (30%).



- 61% My veterinarian
- 35% Pet food or product company sites
- 30% Web pages dedicated to holistic pet care
- 26% Product recommendations and ratings from online shopping sites
- 25% Internet message boards and blogs
- 21% Social media sites like Facebook or Reddit
- 16% Veterinary organizations and/or publications
- 14% Books and Magazines
- 04% Other



HOLISTIC PRODUCTS PURCHASED AND MONTHLY SPEND

Most respondents **(59%)** regularly purchase holistic/ natural dry dog food.

Other regularly purchased holistic products include supplements **(41%)** and treats **(34%)**.

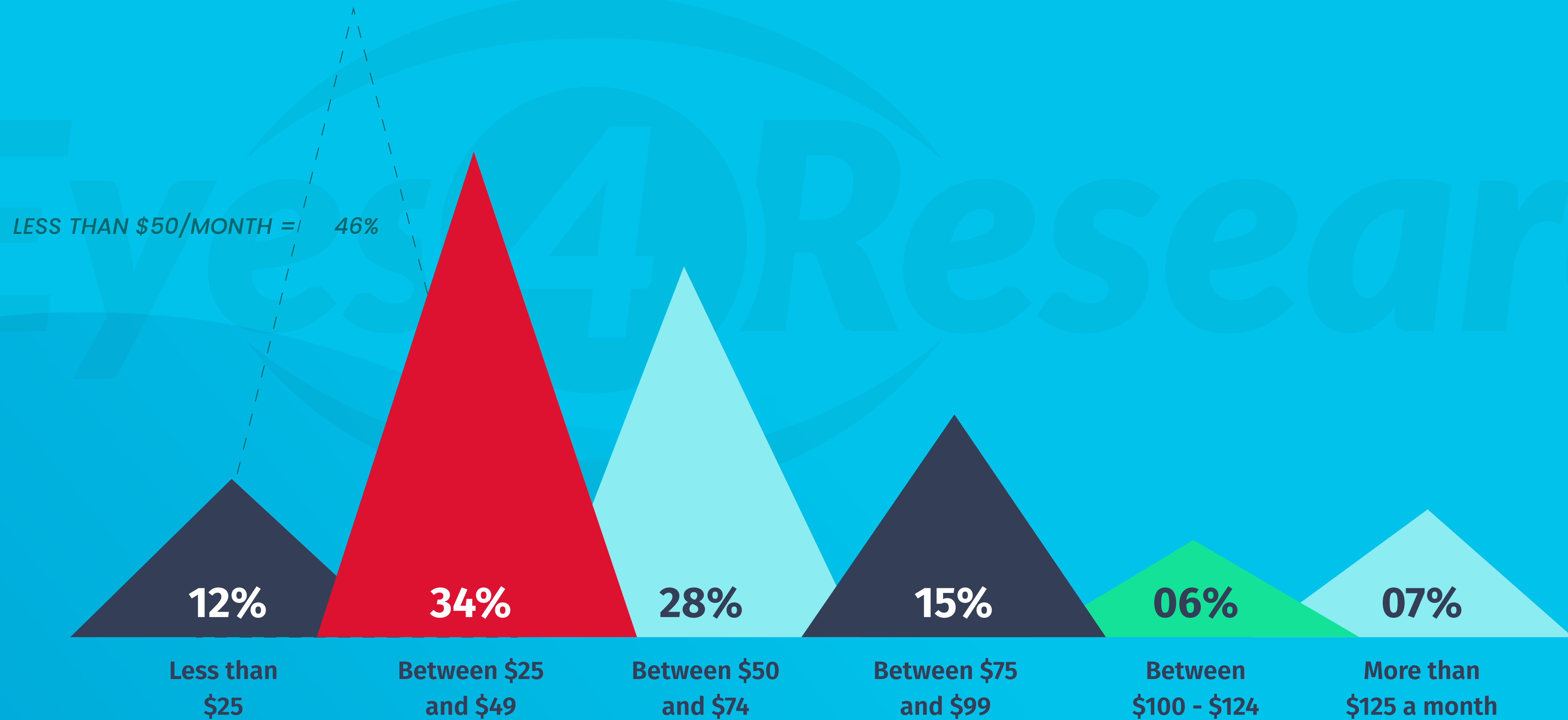
On a monthly basis, less than half (46%) spent less than \$50 and about a third (34%) spend between \$25 and \$49 on holistic pet care products.



Q WHICH OF THE FOLLOWING HOLISTIC ITEMS DO YOU REGULARLY PURCHASE, USE AND/OR PREPARE FOR YOUR DOG OR CAT? SELECT ALL THAT APPLY.



Q: ON A MONTHLY BASIS, HOW MUCH MONEY DO YOU SPEND ON HOLISTIC, ORGANIC OR ALL-NATURAL PRODUCTS FOR YOUR PETS?



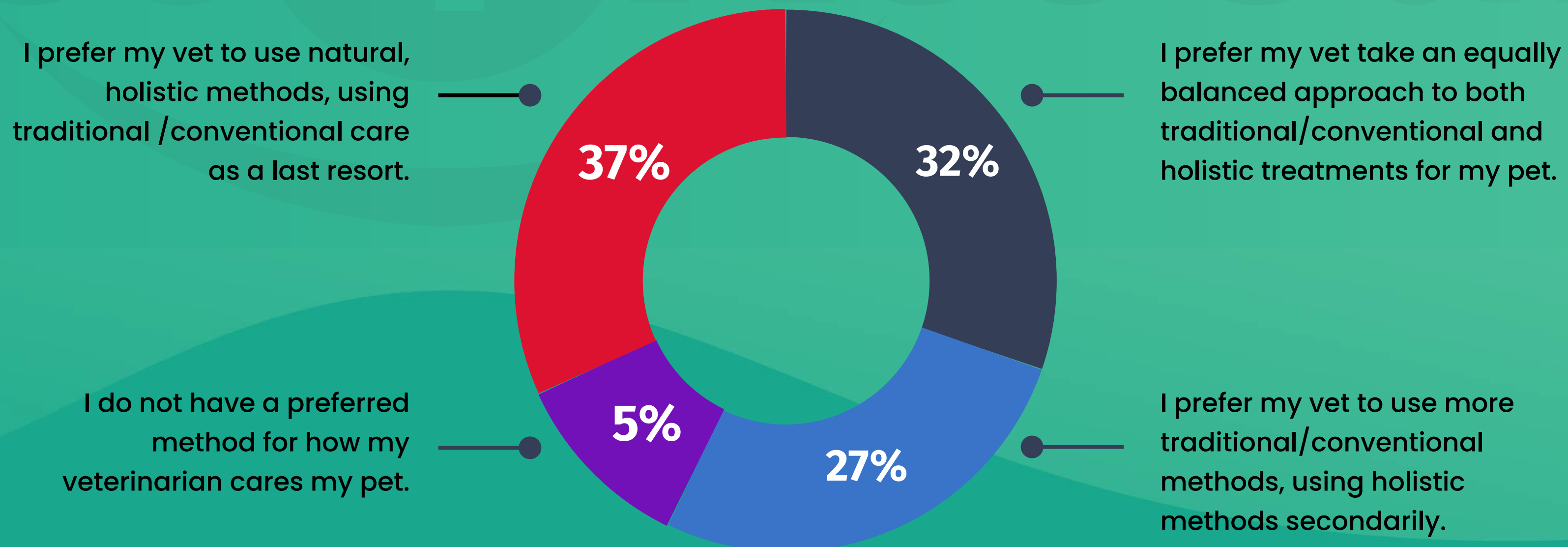


HOLISTIC CARE FROM VETERINARIANS

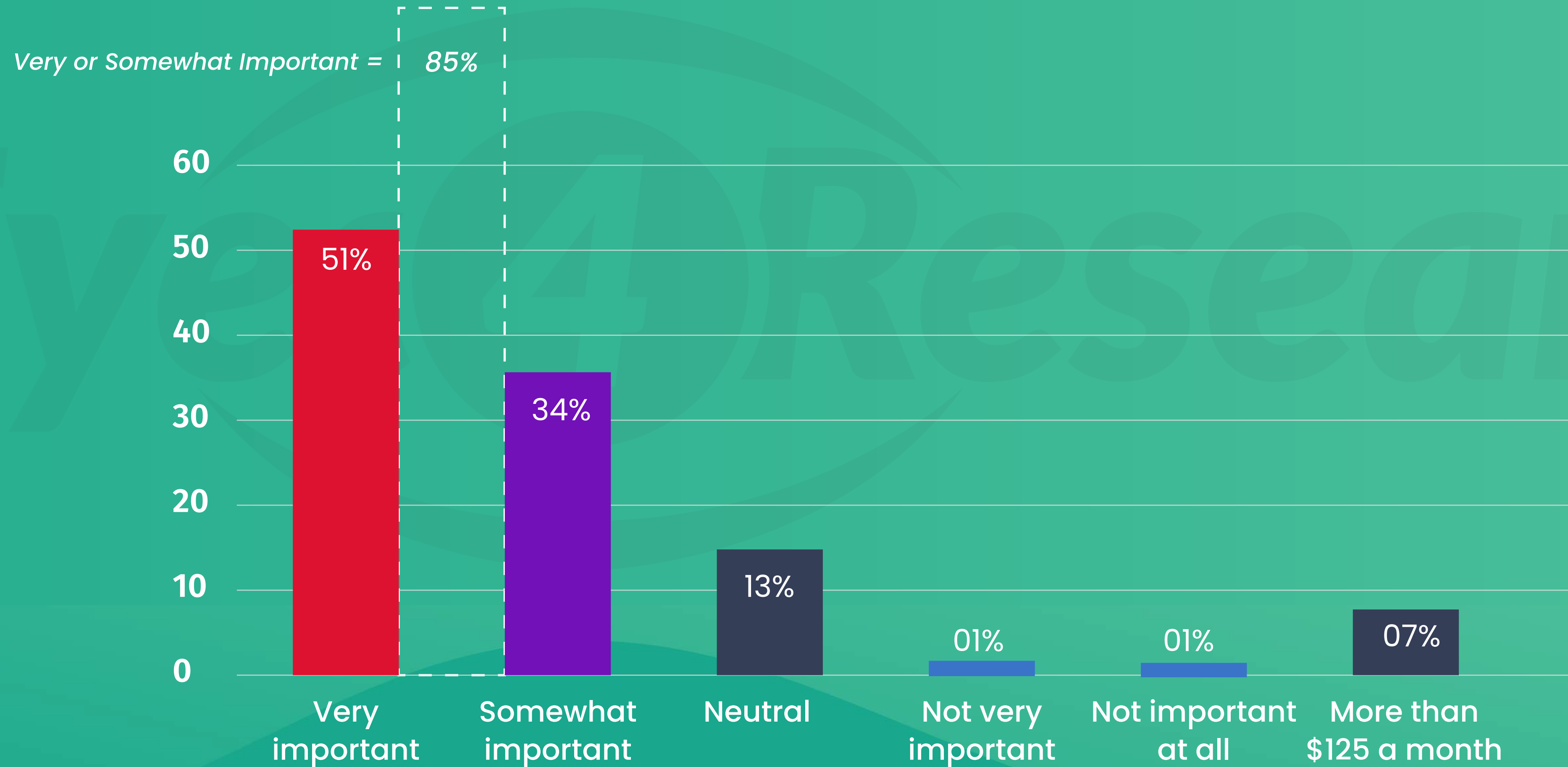
More than one-third (**37%**) would prefer their vet use holistic treatments and then use traditional methods as a last resort. About a third (32%) prefer a balanced approach of holistic and traditional treatments.

Overall, most (85%) feel it is either very or somewhat important to have a veterinarian who is open to holistic and natural pet care.

Q: WHEN SEEKING VETERINARY CARE, DO YOU PREFER YOUR VET TO USE MORE HOLISTIC METHODS, OR MORE TRADITIONAL/CONVENTIONAL METHODS?



Q: HOW IMPORTANT IS IT TO YOU TO HAVE A VETERINARIAN WHO IS OPEN TO HOLISTIC AND NATURAL TREATMENTS, PRODUCTS AND DIETS?? *N-301*

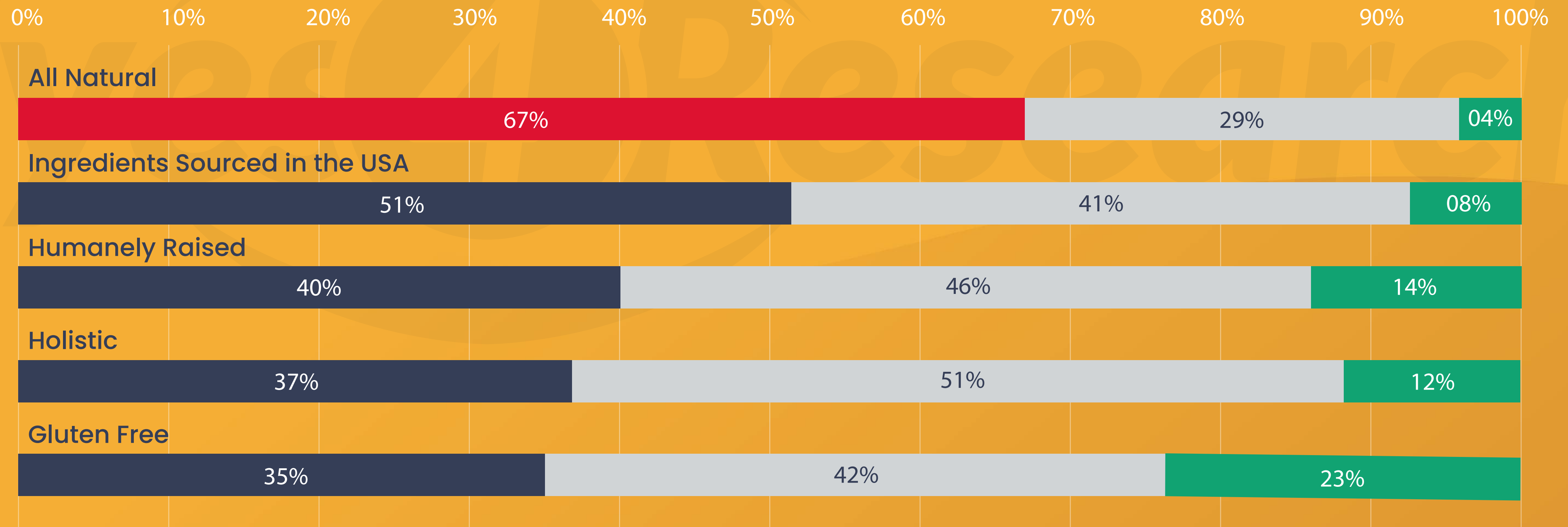




SHOULD IT BE ON THE PRODUCT LABEL?

Two-Thirds (**67%**) need to see "All Natural" on the label to finalize their purchasing decision.

Half of all respondents also need to see "Organic", "Ingredients Sourced in the USA" and "Grain Free" on the label to finalize their purchase decision.

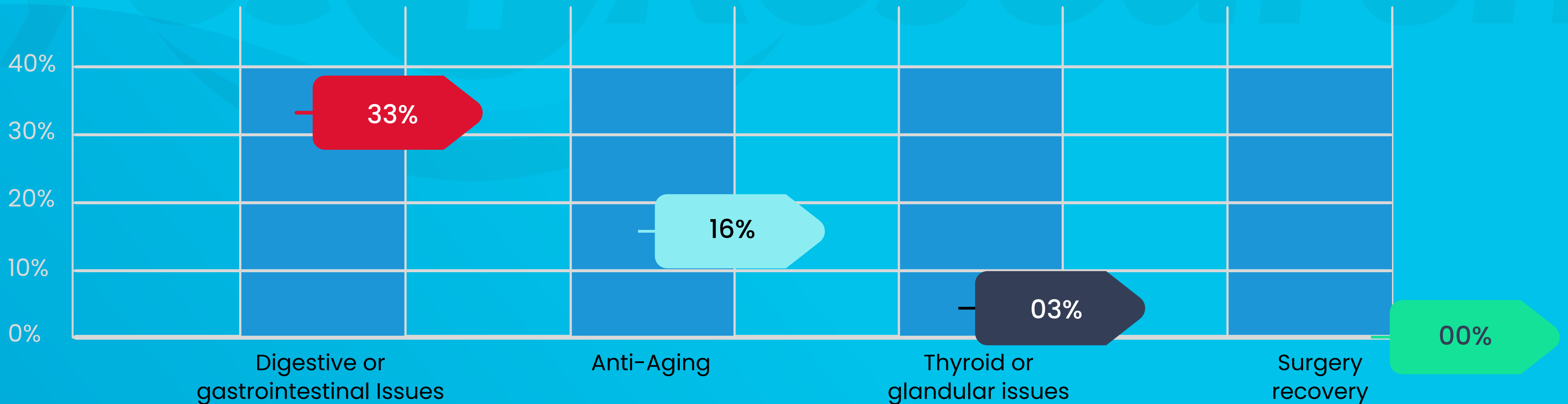




MAIN CONDITIONS TREATED WITH HOLISTIC PET CARE

The most prevalent condition they treat holistically is digestive issues (33%).

Other prevalent conditions they treat holistically include skin issues (20%), anti-aging (16%) and dental care (13%).



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