

PET OWNER SURVEY REPORT

March 2023



A British family business
caring for the
nation's pets
since 1921 

... to be a Member ... who first
one birds both JOHNSON'S PIGEON
RESTORERS—confident not only
big money, but also carrying all
Schemes? ... And now, here's your
about what we're doing ... All
stay like to Win, but he doesn't
on the advice is here for any who

4. **Dear funder writes** He was doing very badly as the Season, as I started to use JOHNSON'S TONIC and RESTORERS, I the five months and five birds ... wonderful Remedies.
 5. **Russ funder writes** April, I out of the price lists for your, your wonderful Remedies as I start a bird ... I used them for the first to birds but soon and to my about immediately set with Success—I in months and a third ... I am would need to a great Season this year JOHNSON'S TONIC and RESTORE
 6. **Motherwell funder writes** A only a novice at Pigeon. He had three last year being my first I only completed in five. Hence, to JOHNSON'S wonderful Remedies well, getting good positions in all three stalling lot and had from "Marqueet".
- PIGEON TONIC: 7/6, 1/2, 5/- RESTOR 1/-, 5/- PURE COD LIVER OIL CAPSU 2/6, 5/-, 10/-, Cats Shows most loved Street, 4d. extra.**

SPECIAL ANTI-SCOURGE

... to be used on all birds ...

... to be used on all birds ...

... to be used on all birds ...

HELLO PAL

Here's your friend

OLD BILL.

NEWCOMERS NOTE!

... to be used on all birds ...

Lads, I've just paid a visit to Johnson's, and believe me I've fairly had my eyes opened ...

AMAZING TESTIMONIALS

... on thankful funder ...

THE GREATEST AIDS TO PIGEON REPAIRS EVER KNOWN!

... could not do that because ...

Next Week

... on will see just four or five of these testimonials ...

OLD BILL

IN TONIC: 7/6, 1/2, 5/- RESTORERS, 4d., 1/-, 1/6 Stores, most towns. Posted direct 4d. extra.

JOHNSON BROTHERS,
Medicine Manufacturers, West Bromwich

JOHNSON BROTHERS

Poultry, Dog and Pigeon
Medicine Manufacturers

RAGNALL STREET
WEST BROMWICH

... to be used on all birds ...



THE RACING PIGEON

GOLD MEDAL PIGEON CORN

SUPREME RACING CONDITION

THIS IS THE SECRET OF SUCCESS

SKILLS & BE LAST, LTD

JOHNSON BROTHERS

TAPE - WORM POWDERS

MELBINE PILLS

FOR DOGS & CATS OVER SIX MONTHS

FOR THE PEOPLE.

HELPFUL HINTS

Do Not Overfeed. Give daily only as much food as fish will clear in 5 minutes. Left-over food will foul water.

Do Not Overcrowd. A good size fish bowl is sufficient for only two average size goldfish. Overcrowding shortens life.

Do Not Handle Handling fish damages protective mucous and en-

... and what leads me is their birds seem to improve all the time ... so you can let your life I'm going to use JOHNSON'S continually from now. Yours,

59% of all
pet owners
care more about their
pet's wellbeing
than their own





Since Johnson's Veterinary products was founded as a family business in 1921, it has been at the forefront of providing a wide range of healthcare products that help pets and their owners live better lives.

Driving our success for more than 100 years has been our ongoing commitment to produce products that are not only high quality and highly effective, but are inexpensive and readily available through local pet shops and pet stores.

This last point is central to the future of our business and remains as important today as it was before the internet. We believe pet owners should spend time in pet stores and benefit from the vast experience and specialist knowledge available freely over the counter.

We recognise the power of online selling and many of our retail customers choose to make products available to purchase online, but Johnson's Veterinary Products remains committed to supporting local pet stores with quality, effective, inexpensive care products, for pets large and small.

Innovation is important and we strive to deliver new products that compete with those available through veterinary practices, but at significantly lower cost. We also create products to soothe, bathe, beautify, treat and reward pets, for which we need to know what our customers need or want.

To move our business forward with products and services that better reflect the changing needs of our customers and pet owners, we need to understand where pet owners go for advice, what they look for when buying products and what they hope to see in future. So we asked them.

We recently surveyed more than a thousand pet owners, of all ages and across all regions of the UK. Their responses offer us valuable insights into their view of the pet healthcare world and over the following pages we share those responses and our interpretation, which will help shape our future.

I hope you find the results as fascinating as we did, but if you have any specific questions about the information contained within this report, please get in touch.

Regards

Paul Gwynn
Managing Director

Over the following pages you will see the questions we asked our audience and their responses in graphical format, with a summary of the data for you to read through, if you prefer.

We have also added our own conclusions at the end, explaining what the findings of this report mean to Johnson's and what we believe they mean for the wider pet care industry.



Where would pet owners go for advice to cure minor conditions such as fleas?

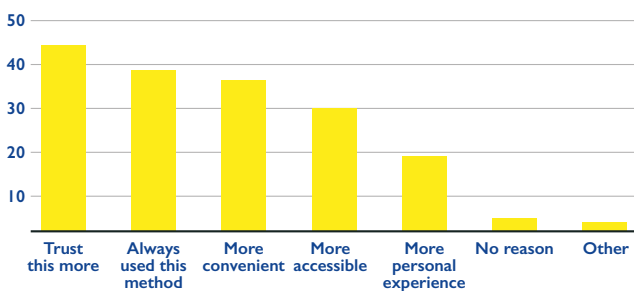
What propensity of pet owners seek advice for common, minor ailments from a qualified veterinarian rather than rely on the experience or feedback of others, including pet store owners, or online forums?

Where, if anywhere, would you go for advice if your pet got fleas?



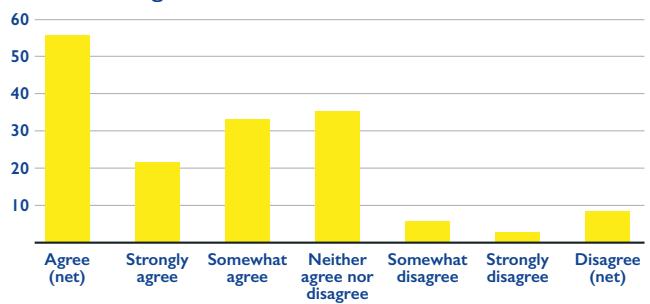
An overwhelming majority (57%) would prefer to speak to the vet in order to remedy a pet's flea issue, whilst 35% opt to search for help online. Interestingly those aged between 16 and 24 were far more likely to visit a vet (66%) than they were to search online (34%), disproving any assumption that youngsters would be more inclined to turn to digital channels to answer their queries. 49% of this age group said they would ask the vets for advice for fleas because they trusted this method more, whilst 41% said it was because it was more convenient.

And why would you go to where you go, to get advice about fleas?



Crucially, 27% of all 16 to 24 years olds questioned, said that they would rather buy a product directly from the Vet because they believed the products there have medical approval. And this is despite 31% believing that their local pet store was 'knowledgeable' and that their opinion could be trusted, and 67% stating that they would rather support their local pet shop than big stockists. However, a quarter did state that if there was a greater choice of independent stores available in more central locations, they would be more likely to shop there, mirroring their need for convenience.

To what extent do you agree or disagree with the following statement? I would rather support my local pet store than big stockists.



Those aged between 25 and 44 sought remedies online most frequently (44 - 46%), suggesting that this was the age group most likely to research solutions before committing to purchasing either a service or product.

Around a third of those asked would simply opt to use products they had used before and that they trusted to get the issue solved.

Those living in the North West were the most likely to consult their local pet store for a solution (49%), whilst just 23% of respondents in the West Midlands would opt to do the same.

Trust (43%), habit (39%), convenience (37%), and accessibility (30%) were the primary drivers behind how all groups chose their preferred course of action.



Sentiment surrounding pet stores and products

How do pet owners perceive independent pet stores, their product selection and service provisions when judged in comparison with other pet product stockists?

Overall, 28% of survey respondents believed that their local pet store was 'knowledgeable' and had opinions that could be 'trusted', with 22% believing that the pet store workers cared 'more about me and my pet than bigger stores'.

However, 22% found them to be overpriced, whilst 13% suggested that they would rather buy from a supermarket as they could then do all my grocery shopping at the same time, 12% thought it was inconvenient to make a special journey to a pet store, and 12% responded that they'd rather shop at a major pet chain as there would be other services offered on-site. This implies that pet owners value their time and convenience, with a desire to multi-task when making their purchasing decisions.

How, if at all, do you feel about independent pet stores in comparison to other stockists?



Rather concerning for independent pet store owners, 26% of all respondents, and 39% of those aged 16 to 24, admit to having never visited a small local outlet. This reflects their belief that products purchased at the vet are more likely to have medical approval than those acquired elsewhere.

With 67% of this demographic stating that they would rather support their local pet shop than big stockists, these results indicate that it is veterinary practices themselves that are the primary competition for small store owners over large pet chains when it comes to selling products to younger pet owners. Meanwhile, just 11% of respondents aged 45 to 50 believed products sold over the counter at the vet to be 'medically' certified. A quarter of this age group also found pet stores to be more genuinely caring than the alternatives, and 59% shop there regularly.

Cost was perhaps understandably the greatest influencer for product selection (50%) on the whole, however, this was more of a factor for the age groups over 35 years old, where over half of those asked said it was the most important factor, whereas this dropped to 47% for 16 to 24 year olds. For

respondents aged 55+, how effective the products are (57%) took precedence over price cost (51%).

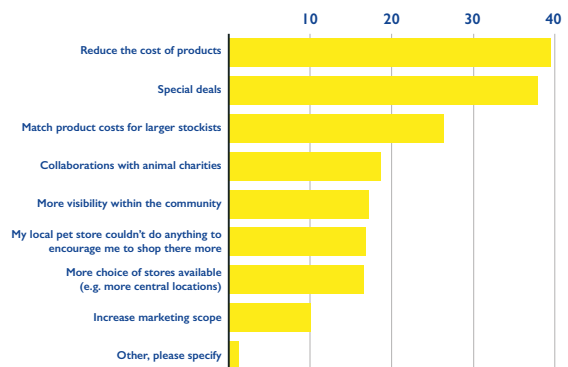
What are the main factors that influence your purchasing decisions for your pet products?



39% said they would be more likely to shop at their local pet store if prices were reduced, and 38% said they would if special offers were introduced, meaning a pet owner's shopping habits could likely be swayed by promotions or incentives. Considering that trust (43%) and habit (39%) are the primary drivers behind how pet owners choose to source advice on caring for their animals, incentivising loyalty could well be a feasible hook for securing return customer visits.

Over half of those asked in the East of England, West Midlands, and North West prioritised quality above all else, whilst females (51%) were more likely to be concerned by how well a product works than males (33%).

What could your local pet store do to encourage you to shop there more?



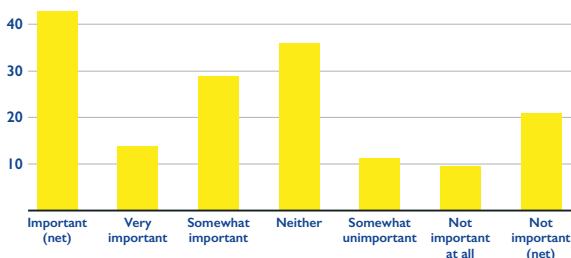
Good reviews were most likely to influence the product selection of 25 to 34 year olds, mirroring the fact that this is the age group most likely to research online before making treatment or purchasing decisions.

Dog owners (62%) would rather support their local pet store over going to big stockists, cat owners (52%), or people with pet fish (57%).

Ethics and sustainability

Ensuring a brand is both ethical and sustainable is high on the agenda for many businesses, but how does this advocacy translate with their customer base? What bearing do the environmental credentials of products have on the purchasing decisions of pet owners, and how should product manufacturers and pet stores reflect this in their offerings?

When thinking about the environmental impact of a product, is it important whether it is organic or not?

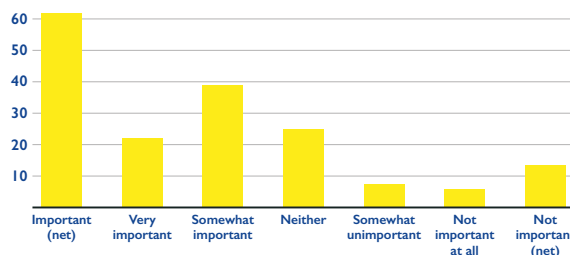


A product's cruelty-free credentials are more important to younger demographics with 27% of 16 to 24 year olds, and 25% of 25 to 34 year olds stating that it is a consideration when selecting products, whilst this drops to 20% for 35 to 44 year olds and 17% for those aged 45 to 54. Interestingly, despite all respondents being pet owners, animal welfare does not seem to be the primary concern for any age group, and there are several other factors which they prioritise over and above a product being cruelty-free.

For example, the youngest age group were more likely to concern themselves with the organic nature of a product (63%), and whilst the importance of such falls as the age of the respondents increases, it is still broadly considered to be a more significant issue than cruelty.

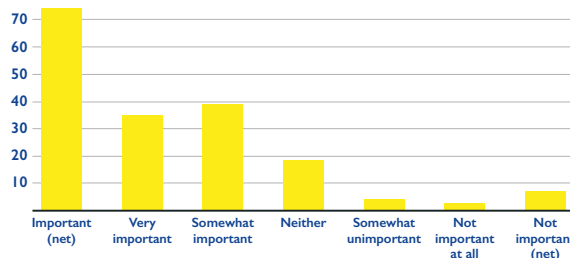
What appears to be the most important issue for pet owners is the product's ingredients, with 74% of all respondents noting this was significant for them. It is particularly relevant to the over 55's age group, with 82% concerned by ingredients and 76% by the chemicals used in their production.

When thinking about the environmental impact of a product, is it important what the product packaging is made from (glass, cardboard)?



Women are also considerably more likely to be bothered by this, with 82% prioritising ingredients, and 80% worried by chemical content, against 66% in both respects for male respondents.

When thinking about the environmental impact of a product, is it important what ingredients are used in the product?



From a sustainability perspective, overall, 61% thought that packaging materials are important. But when asked what was more crucial to their purchasing decisions, packaging barely even factored when considered against cost. So whilst there is a clear demand for manufacturers to introduce more sustainable packaging (eg, glass or cardboard), this should not be done at the expense of the customer as this could be a turn-off.



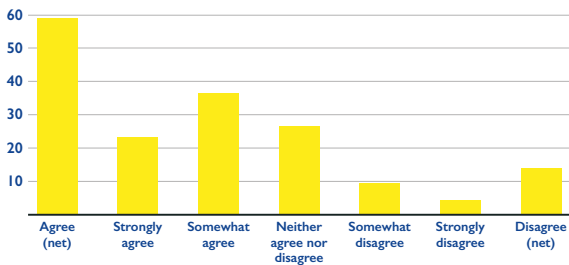
pet owners
would rather pet products have
organic
ingredients

The relationship between dog owners and their pets

The key to understanding the behaviours of pet owners is understanding the relationship they share with their animals. In this survey, we specifically focussed on dog ownership.

This survey revealed that 66% of dog owners care more about their pet's wellbeing than their own, perhaps unsurprising given the companionship that many dog owners enjoy with their animals.

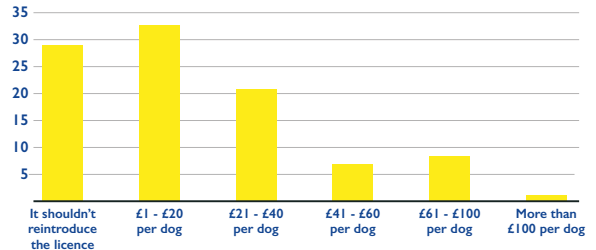
To what extent do you agree or disagree with the following statement? I care more about my pets' wellbeing than my own.



With this in mind, we wanted to understand how the canine-owning community felt about the prospect of paying to regulate dog possession in the UK, asking them about the potential reintroduction of dog licencing.

33% said they would be willing to pay between £1 to £20 per dog, and 21% between £21 to £40, with 38% of all respondents hoping that such a licence would deter unsuitable dog owners. Those aged 45 to 54 were most against the idea with 31% believing the reintroduction of a dog licence was a bad idea, whilst only 20% of 16 to 24 years were opposed to the concept. This age group was on the whole the most amenable to paying up to £40 per dog (33% of all respondents in this bracket). However, on average, dog owners across all demographics would be willing to pay approximately £38 per year, per animal.

At what annual cost should the Government reintroduce the dog licence?



There was some concern about the potential adverse effects of the Government making such a move, with a quarter of those asked believing that having a dog licence would decrease demand meaning more dogs would end up homeless or in kennels, and 31% fearing that abandonment would likely increase. Those aged over 45 were most fearful about abandonment (39%), whilst those aged 24 and under were the least concerned.

If the Government were to reintroduce the dog licence, what do you believe the results would be?



However, the perceived benefits including minimising over-breeding or stopping puppy farming (31%) and encouraging better standards of care or training (24%) were also prevalent amongst respondents, whilst 16% hoped that the funds raised would help support local street or highway upkeep.

38% of UK dog owners would reintroduce the **dog licence** to deter unsuitable dog owners





Conclusions

There is clearly a desire to support local pet stores across the board, but for younger people at least there is a level of caution and misinformation that is driving their decision to favour direct veterinary support rather than head to other pet product stockists to purchase remedies or ask for help.

Cost does not appear to be so much of a concern for this group, but considering that the PFMA's most recent report highlighted that this age group is the most likely to relinquish their pets, it does seem to point towards the fact that there is an education job to be done amongst young adults as to the true impact of pet ownership, both from a lifestyle and financial perspective, so that they can make more informed decisions.

The older pet owners become, the more likely they are to stick to what they know, so engaging with younger pet owners to attract their loyalty at the start of their ownership journey will be key to forming long-lasting consumer relationships for pet stores.

There is a clear demand for convenience and having a 'one-stop shop' so that customers are able to make better use of their valuable time. But with cost being key, and a rising demand for sustainable packaging, there are opportunities for pet stores to rethink their sales strategies, perhaps considering bulk purchase or refillable product options to make product selection more affordable, accessible and convenient.

The importance of online reviews for businesses continues to be paramount, as between 44 - 46% of those aged between 25 and 44 will search online before committing to procuring a service. Investing in websites, engaging on social media, and encouraging Google reviews will all help boost online presence locally, and promote the services, products, offers and knowledge to prospective customers.

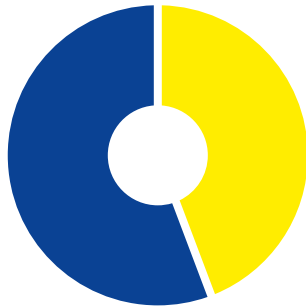
When it comes to pets, an owner's commitment to their animal's wellbeing is clear, with over half admitting to putting their pet's wellbeing above their own. Specifically in the case of dogs, where 71% of those asked would be willing to pay a sum of money to hold a dog licence, with the hope of improving care standards.

With an estimated 12.5 million dogs kept as pets in the UK as of 2021, and dog owners willing to pay up to £38 in licensing per animal, reintroduction could result in a £475m boost to the economy. Whilst it would undoubtedly be an unpopular move for many, particularly in the South East where 43% were against it, at a time of economic crisis, these kinds of figures may well pique the interest of those in both central and local government looking to bolster budgets or better balance the books.

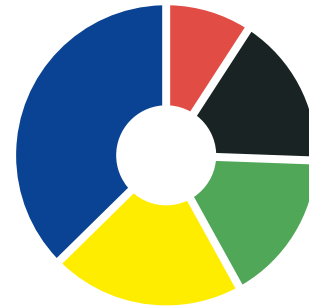
We will undertake our next survey in the coming months, asking equally important questions to get into the minds of the pet-owning public and will again share the responses with you in due course. In the meantime, if you have any questions, please get in touch.

The survey

The survey was undertaken on behalf of Johnson's Veterinary Products Ltd., by Censuswide Ltd. We asked the questions to 1,000 pet owners and began by finding out their age, gender, region, city and pets that they currently have.

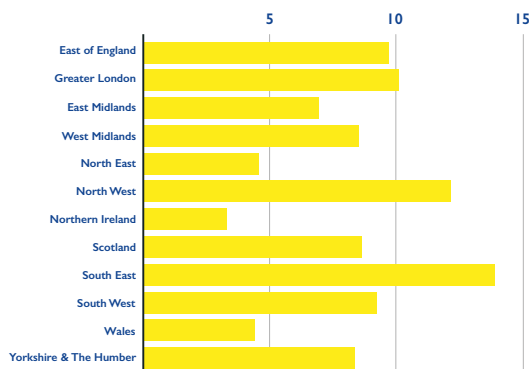


Female Male

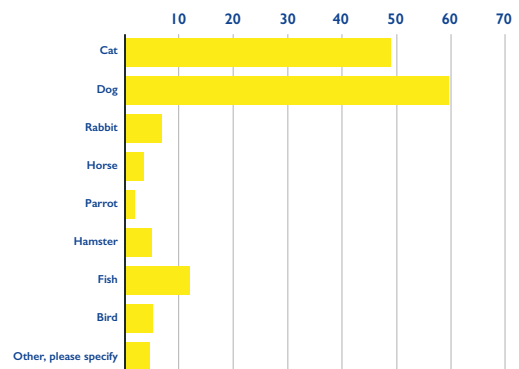


16-24 25-34
35-44 45-54 55+

Where do you live?



What kind of pet(s) do you currently have?



Sampling theory, incentives & accuracy

The research is conducted online, with respondents sourced via online access panel. All respondents are double opted in (with an opt in and validation process) and complete a profiling questionnaire when joining. Their data is then stored anonymously and specific sectors and demographics can be targeted easily. Respondents are invited to participate in surveys via email. All surveys are incentivised according to the specialism of the panel, rewards include; points for prizes, cash, charity donations, loyalty schemes and air miles all of which vary in value depending on the survey length. We include geo-IP checks to ensure respondents are completing from the right country, and cookie checks to ensure the same respondent isn't completing the research more than once.

Accreditation

Censuswide.com complies with the MRS Code of Conduct which is based upon the ESOMAR principles (for more information visit www.esomar.org).

Main principals listed below:

- Market researchers will confirm to all relevant national and international laws.
- Market researchers will behave ethically and will not do anything which might damage the reputation of market research.
- Market researchers will take special care when carrying out research among children and other vulnerable groups of the population.

The questions

Q1. Where, if anywhere, would you go for advice if your pet got fleas?

- 🐾 Online
- 🐾 Vets
- 🐾 Local Pet Store
- 🐾 Ask a friend
- 🐾 Just use trusted products I've used before
- 🐾 Other, please specify
- 🐾 N/A I have never looked anywhere for advice

Q2. In answer to Q1, you said X, why is this?

- 🐾 It is more convenient
- 🐾 It is a more personal experience
- 🐾 They are more accessible for me
- 🐾 I have always used this method for advice
- 🐾 I trust this more
- 🐾 Other, please specify

Q3. How, if at all, do you feel about independent pet stores in comparison to other stockists?

- 🐾 I find them overpriced
- 🐾 They are inconvenient as I have to make a special journey
- 🐾 They are knowledgeable and I trust their opinion
- 🐾 They care more about me and my pet than bigger stores
- 🐾 I'd rather shop at a major pet store chain as they offer other services on site
- 🐾 I'd rather buy from the Vet because I believe the products there have medical approval
- 🐾 I'd rather buy from a supermarket as I can do all my grocery shopping there
- 🐾 Other, please specify

Q4. What are the main factors that influence your purchasing decisions for your pet products? (tick up to 3)

- 🐾 The cheapest product
- 🐾 Cost
- 🐾 Quality
- 🐾 Shopping locally
- 🐾 Good reviews
- 🐾 How well they work
- 🐾 Packaging
- 🐾 Sustainability
- 🐾 Cruelty free
- 🐾 Size
- 🐾 Other, please specify

Q5. When thinking about environmental impact of a product, how important or unimportant are the below factors?

Rows:

- 🐾 Whether the product is recyclable
- 🐾 If it is made locally
- 🐾 What the product packaging is made from (glass, cardboard)
- 🐾 What ingredients are used in the product
- 🐾 What chemicals are used to make the product
- 🐾 If it is organic or not

Columns:

- 🐾 Very important
- 🐾 Somewhat important
- 🐾 Neither important nor unimportant
- 🐾 Somewhat unimportant
- 🐾 Not important at all

Q6. To what extent do you agree or disagree with the following statement? "I care more about my pet's wellbeing than my own"

- 🐾 Strongly agree
- 🐾 Somewhat agree
- 🐾 Neither agree nor disagree
- 🐾 Somewhat disagree
- 🐾 Strongly disagree

Q7. At what annual cost should the Government reintroduce the 'Dog Licence'?

- 🐾 It shouldn't reintroduce the licence
- 🐾 £1 - £20 per dog
- 🐾 £21 - £40 per dog
- 🐾 £41 - £60 per dog
- 🐾 £61 - £100 per dog
- 🐾 More than £100 per dog with discounts for multiple ownership homes.

Q8. If the Government was to reintroduce the 'Dog Licence' what do you believe the results would be? (select all that apply)

- 🐾 Raise more funds for street or highway upkeep
- 🐾 Deter unsuitable dog owners
- 🐾 Minimise the number of dogs people own
- 🐾 Minimise over breeding or stop puppy farming
- 🐾 Encourage better standards or care or training
- 🐾 Increase abandonment
- 🐾 Decrease demand meaning more dogs would end up homeless or in kennels
- 🐾 Decrease standards of care
- 🐾 Other, please specify

Q9. What, if anything, could your local pet shop do to encourage you to shop there more?

- 🐾 Reduce the cost of products
- 🐾 Special deals
- 🐾 Match product costs for larger stockists
- 🐾 Increase marketing scope
- 🐾 More visibility within the community
- 🐾 Collaborations with animal charities
- 🐾 More choice of stores available (e.g. more central locations)
- 🐾 Other, please specify
- 🐾 N/A nothing could encourage me

Q10. To what extent do you agree or disagree with the following statements?

Rows:

- 🐾 The pandemic has made me more likely to shop locally for my pet products
- 🐾 I have never visited my local pet shop
- 🐾 I would rather support my local pet shop than big stockists

Columns:

- 🐾 Strongly agree
- 🐾 Somewhat agree
- 🐾 Neither agree nor disagree
- 🐾 Somewhat disagree
- 🐾 Strongly disagree

Johnson's

First, Second, Third

Dear Sirs, In your letter we are deeply impressed with your appreciation of the value of Johnson's...

Johnson's COCCIDIOSIS TABLETS for Chickens & Turkey Poults

SYMPTOMS OF COCCIDIOSIS CHICKENS. Coccidiosis should be suspected immediately when chickens become pale...

TURKEY POULTS. When these birds become drooping, cease eating, and the comb becomes flaccid...

- RULES OF HYGIENE 1. Bear Chickens away from dirt, deep ground, 2. House chickens in clean, dry...

MIND YOU DON'T LOSE YOUR BIRDS

... Discover always comes to the man who knows his birds... Battle thro' Storm... BRING THEM THRO' ANYTHING TO WIN

Johnson's COCCIDIOSIS TABLETS (Nitrofurazone) for CHICKENS & PIGEONS

SYMPTOMS OF COCCIDIOSIS Coccidiosis should be suspected immediately when...

Johnson's STOP-PEK For CHICKS and FOWL

HARM YOUR BIRDS JOHNSON'S PIGEON TONIC... EXTRA ENERGY... LIGHTNING SPEED... WONDERFUL HOUST... JOHNSON'S RESTORERS... GREAT STRENGTH... NIGHTY NIGHTY POWER...

Bad After Effects Hound Me Out OLD BILL JOHNSON RESTORERS

Johnson Brothers DRY-PIGEON-CAGE BIRD-POO-EAT MEDICINE MANUFACTURERS

Johnson's World famous REMEDIES PEP TONIC RESTORERS TER OIL CAPSULES

Johnson's COCCIDIOSIS TABLETS (Nitrofurazone) for CHICKENS & PIGEONS

Johnson's veterinary www.johnsons-vet.com

JOHNSON'S ARE NOTHING AT A BIRDS ORDINARY REMEDIES!... JOHNSON'S PIGEON TONIC... EXTRA ENERGY... LIGHTNING SPEED... WONDERFUL HOUST... JOHNSON'S RESTORERS... GREAT STRENGTH... NIGHTY NIGHTY POWER...

Johnson Brothers MORE POSITIVE PROOF

1. Johnson's... 2. Johnson's... 3. Johnson's... 4. Johnson's... BIG WINNERS

Drop Hen Specs... The success of the first... DROPPING SPEC

Johnson's PIGEON TONIC & RESTORERS

WINNERS CLUB... 1. Johnson's... 2. JOHNSON'S PIGEON... 3. Johnson's... REMEDIES

OLD BILL FOOD OR WATER Full directions enclosed. Store in cool dry place. SIZES AVAILABLE

AZINESS A DISEASE... Don't Blame Them

MELBINE PILLS

first change water, then do half teaspoon Tonic... Do not overdose.



www.johnsons-vet.com

the way to VICTORY!