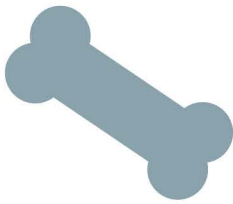


Data-Driven

Pet Parent Profiles

January 2020



INTRODUCTION

Americans love their pets, and they show their love with their wallets. An estimated \$75 billion was spent on pets in 2019, according to the American Pet Products Association, including \$32 billion on pet food and \$16 billion on pet supplies/OTC medicine. Of that, pet parents in the U.S. spent \$321 million on CBD pet products in 2019, an increase of 946% from the \$31 million spent in 2018.

The CBD pet product category is diverse; pet parents have the option of administering CBD to their pet via treats (edibles), tinctures (oils), capsules, topicals, and powders. Additionally, CBD pet products are widely available; major pet retailers and ecommerce options allow pet parents to buy pet CBD just like they'd buy pet food.

We conducted a study with the goal of understanding the purchasing decisions of pet parents in regards to CBD pet products. Our sample included pet parents that currently use CBD for their pets and pet parents that are interested in using CBD for their pets but currently don't.

Our research explores usage and purchase habits of current pet CBD consumers, as well as attitudes from both current and interested pet CBD consumers.



MANNY + MAXIE



THE STORY

Manny is a 36 year old working professional who loves his dog Maxie. She's been keeping him company at home for 3 years now, and he values seeing her fluffy face when he comes home each day. He keeps her pampered, and three months ago started giving her CBD to improve her anxiety while he is away at work.

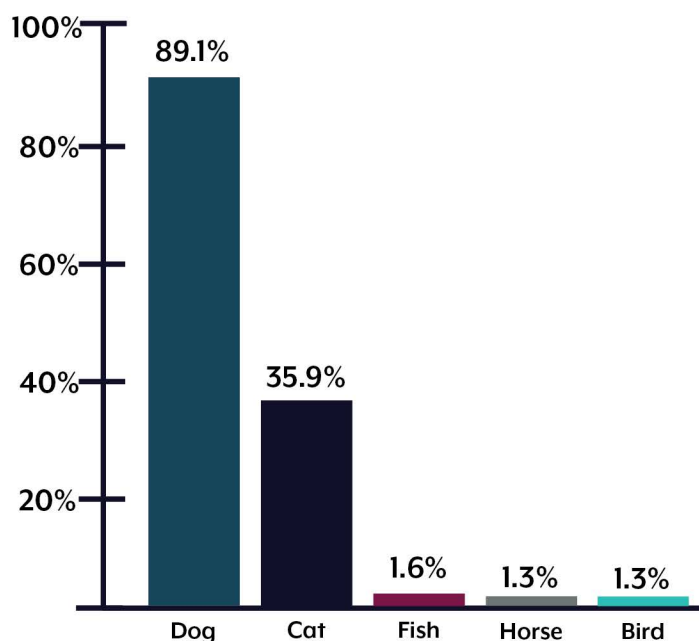
Before leaving in the morning, Manny adds a 5mg tincture dose to Maxie's food. He buys one bottle of tincture per month from a local specialty pet store. After using the CBD for three months, Manny believes it has been very effective and will continue using it in Maxie's food. He notices that she is calmer when he comes home from work and hasn't had his neighbors complain about Maxie whining since starting the CBD.

THE DATA

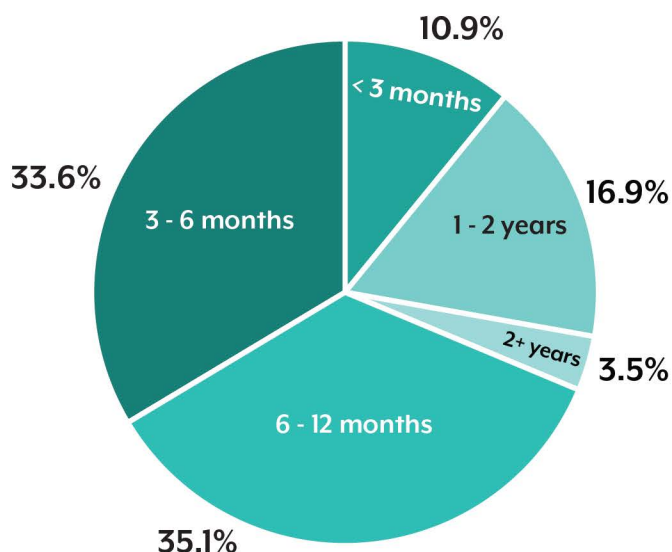
54%

completely agree that pets deserve to be pampered

WHICH PETS DO YOU GIVE CBD TO?



HOW LONG HAVE YOU BEEN GIVING CBD TO YOUR PET?



NICK + NATHAN & NORA



THE STORY

Nick loves his family pets. Nick has had his dog, Nathan, for 4 years, and a few months ago, Nick got married and welcomed another pet into his life: his wife's cat, Nora. Although the pets will tolerate each other, Nick wanted to do everything he could to keep the dog and cat happy. He uses CBD so decided to talk to his veterinarian about CBD for pets. Although they did not prescribe it, the vet left the decision to Nick and explained the potential benefits for Nathan and Nora that some studies show.

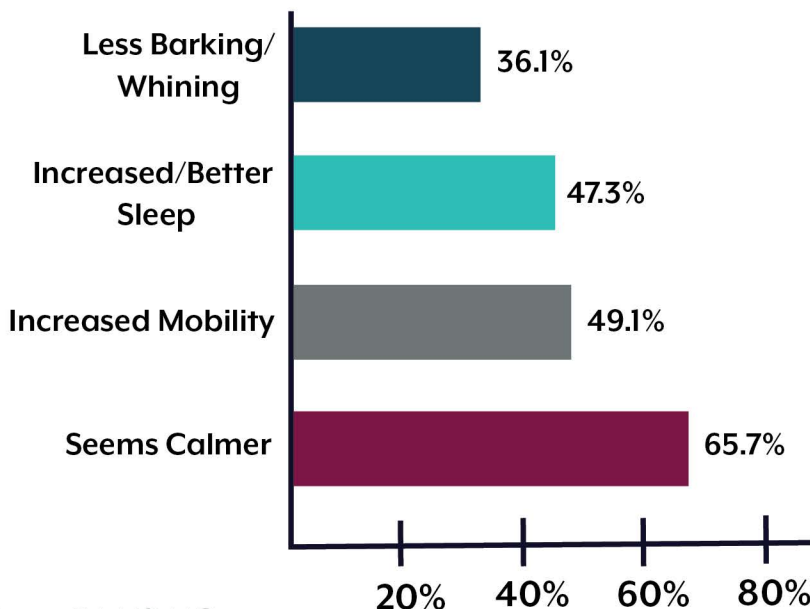
Now, Nick buys bags of CBD treats online each month. He wants the very best for his pets, so makes sure to buy full spectrum CBD treats that cost him \$60 a month. Each morning, Nathan and Nora each get a 2.5mg CBD treat. He thinks that both animals seem calmer, and it has definitely reduced Nathan's barking at Nora.

THE DATA

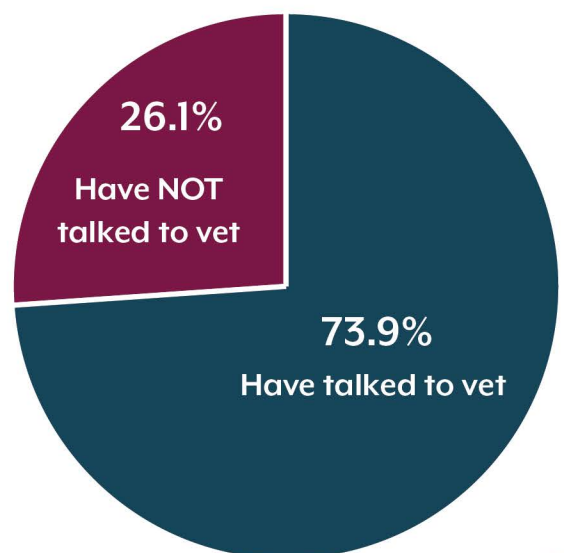
43%

completely agree that they will pay whatever to ensure their pet has a good life

HOW DO YOU KNOW CBD IS HELPING YOUR PET?



HAVE YOU EVER TALKED TO YOUR VET ABOUT PET CBD?



Source: Brightfield Group
Current Buyers: N = 1,001
Interested: N = 500

CATHLEEN + CHARLIE

THE STORY

Cathleen has had Charlie in her family since she was a teenager. With Charlie turning 12, Cathleen wants to make sure he's healthy and not in pain. While searching online for ways to improve Charlie's wellness, she discovered CBD for pets and decided to research it further.

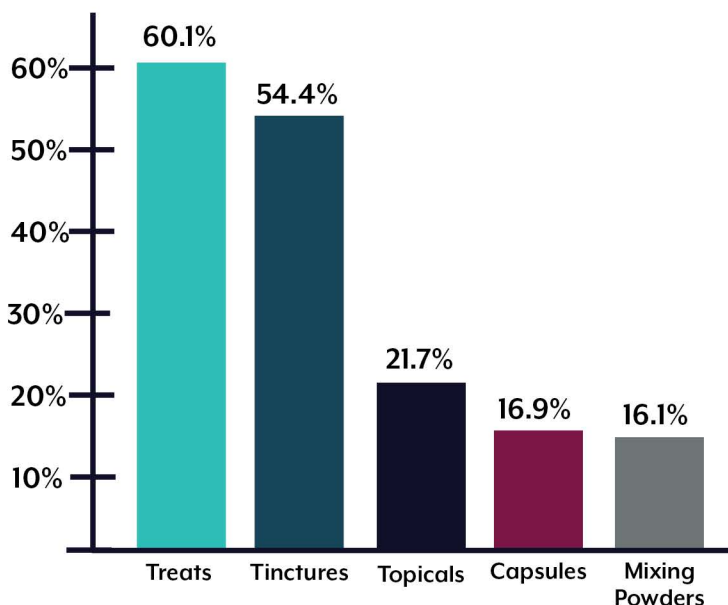
Cathleen now buys a large bag of chicken-flavored CBD dog treats each month online for \$35. She tried out a few brands before landing on her favorite product. She gives Charlie a CBD treat twice a day - when she leaves for work and when she gets home from work.

THE DATA

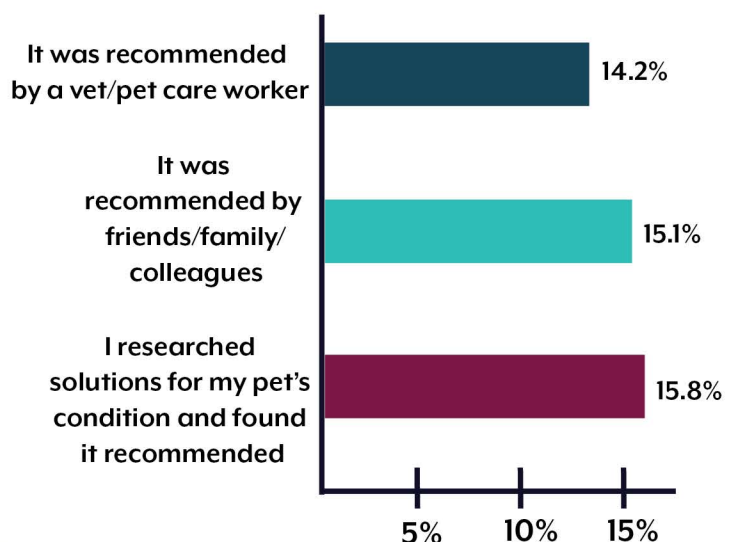
68%

completely agree that their pet is an important part of their family

WHAT TYPE OF CBD DO YOU TYPICALLY GIVE YOUR PETS?



HOW DID YOU FIRST HEAR ABOUT CBD?



We're Brightfield Group, and we provide consumer insights and market intelligence for the CBD and Cannabis industries. Fusing intelligent machines with real human analysis, we help you navigate the dynamic CBD and Cannabis markets as data-driven storytellers. With us, you don't just get the numbers; you get a trusted partner, providing a robust picture of the landscape and an actionable plan for the road ahead. See what we can do for you at www.brightfieldgroup.com.



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