

# Inside a pet parent's mind

FRANCE, UK, USA, CANADA, BRAZIL, MEXICO

A consumer study to decode pet parents' thoughts and behaviors toward pet food, identify "personality" profiles that shape the market and detect opportunities for pet food brands

Global overview | January 2024

# Summary

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A woman with long hair, wearing a red and orange patterned shirt, is leaning over a wooden table. She is petting a dark brown tabby cat with her right hand. The cat is eating from a silver metal bowl filled with brown kibble. The bowl sits on a black circular mat. The background is a plain, light-colored wall.

# Introduction

# Context & objectives

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**Changes in consumer trends within the pet food market** illustrate a transition regarding people's motivations toward pets: shifting emotional awareness from “pet owner” to “pet parent”.

As the **pet-parent bond evolves**, so too does the demand for change when it comes to pet food.

This study provides a **comprehensive understanding of the relationship between pet parents and pet food**, revealing the different target groups that shape the market.

In particular, it provides:

- A rational and quantitative **diagnosis of the population of pet parents worldwide**: their needs, uses, purchase habits, levers of influence,
- A deep understanding of **differences between cat and dog parents**,
- The different **pet parent “personality profiles”** which could be used to identify new business opportunities and adapt marketing efforts to the selected targets for your brands.



# Principle: consumer typology



## Typology of pet owners:

Consumer segmentation is a market research technique that involves **dividing a diverse market into distinct groups of consumers with similar characteristics, needs, or behaviors.**

The purpose of consumer segmentation is to **enable businesses to tailor their marketing efforts and products/services to specific segments**, thereby increasing the effectiveness of their campaigns and enhancing customer satisfaction.

By understanding the unique preferences, behaviors, and demographics of different consumer groups, **businesses can create targeted marketing messages, develop products that meet specific needs, and optimize their overall strategies.**

Objectives: identify the different consumer segments that shape the pet food market, according to their needs, usages and purchase habits when it comes to pet food. The ultimate goal is to provide the industry with global pet owner profiles to allow you to identify the best target for your brands and understand how to communicate with them.

Analysis: advanced statistical methods have been used to analyze the collected data and identify patterns and similarities among consumers. This step aims to group consumers who share common characteristics or behaviors.

Market opportunities: some examples of market opportunities are included in this report to address the unique needs and preferences of each identified segment. The list is not exhaustive, and all segments may not be equally viable or profitable. **Dedicated meetings can be planned to better align with your company's objectives and brands.**



# Methodology: U&A survey



Online quantitative Usage & Attitudes study conducted via Explorer in November 2023



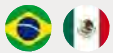
**Locations: 6 countries, 3 regions:**



**EUROPE:** France, UK



**NORTH AMERICA (NA):** USA, Canada



**LATAM:** Brazil, Mexico



39 close-ended questions  
N=2,669 respondents



**Target:** 100% cat and/or dog owners (46% cat/54% dog), aged 18+, in charge of purchasing pet products for the household



**Methodological note:**

Results are presented per pet type with **statistical comparisons between cats & dogs:**



All questions have been crossed by specific subgroups (the country/region, the age group\* of the respondents, the type of pet food used, the purchase channel) for analysis purposes.

Statistical differences between subpopulations are highlighted as follows:



++ significant @95% confidence level  
+ tendency @90% confidence level



# Discover our story and meet Explorer, our proprietary panel exclusively dedicated to the pet world



**EXPLORER**  
YUMMYPETS

**You have questions. We have answers.**  
Uncover them with tailored market research and make smarter decisions.

Explorer connects with 3 million pet parents and is the leading consumer insights provider exclusively dedicated to the pet industry.

FRANCE UNITED KINGDOM BELGIUM UNITED STATES CANADA BRAZIL MEXICO

- Proprietary panel
- 100% pet owners
- High targeting
- Quick and responsive data collection
- Trustworthy online community
- GDPR compliant

**Want to see what we can do?**  
We can send you our latest consumer report for free.  
Send us an email: [matthieu.glayrouse@symrise.com](mailto:matthieu.glayrouse@symrise.com)

**Sustainability**  
origin of the ingredients

YUMMYPETS © 2011-2023

## 2012 | THE SOCIAL NETWORK

In the early years, we developed YUMMYPETS, the social network with a strategic vision around data collection and enrichment.

We currently connect with more than 3.3 million pet parents from around the world.

## 2018 | THE PANEL

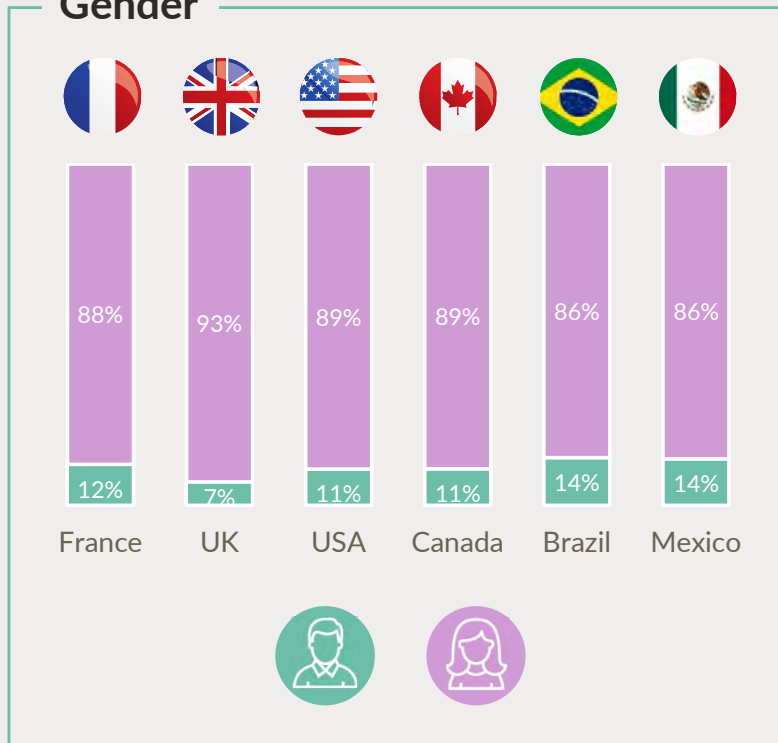
Because we had access to an abundance of data and because our community is highly engaged, we created EXPLORER, a dedicated and proprietary panel of pet parents.

## 2023 | THE INTERFACE WITH THE INDUSTRY

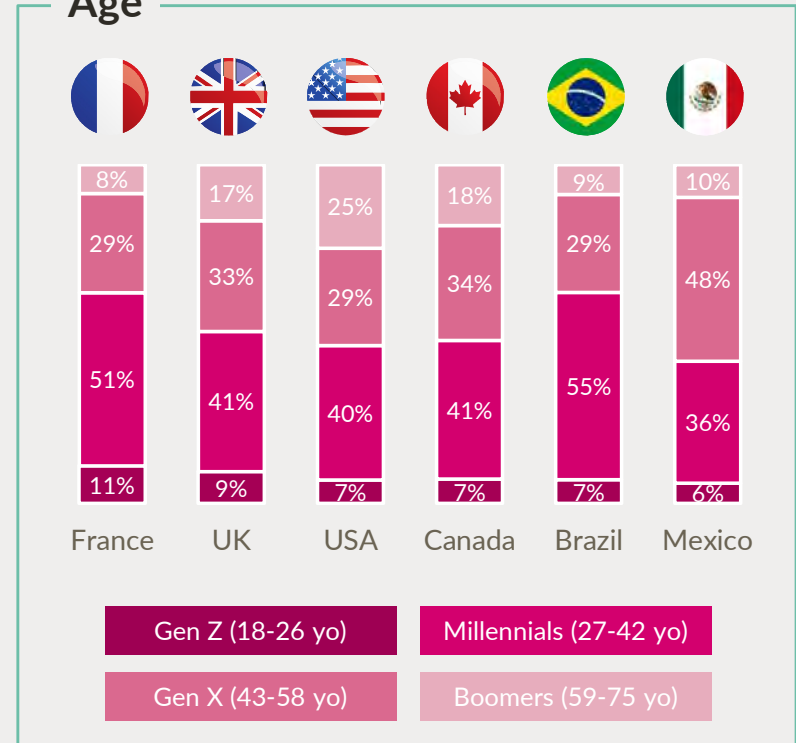
We launch a customized platform for our clients: LOOP.  
The first one-stop shop to access all our pet parent insights.

# Sample profile

## Gender

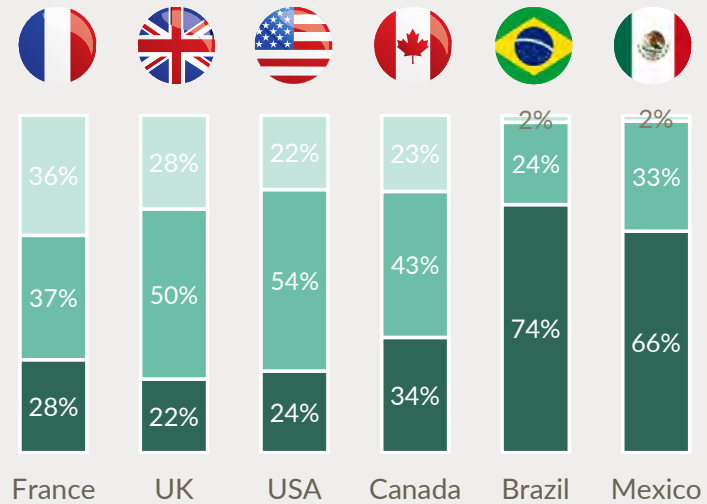


## Age



# Sample profile

## Place of residence

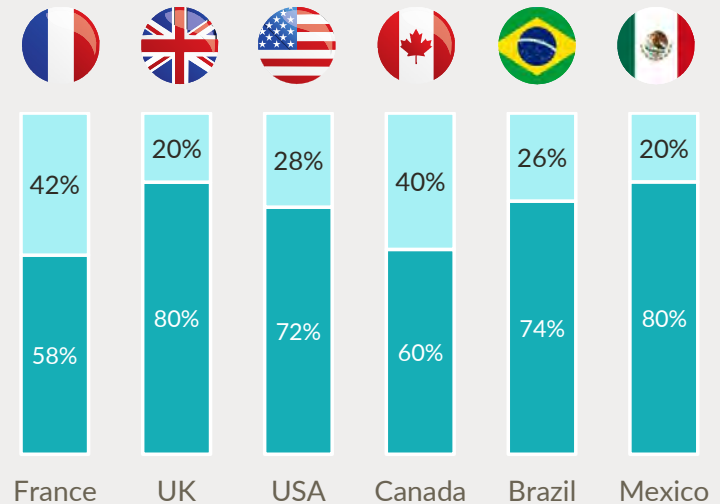


Big city

Small city

Countryside

## Type of housing



House



Apartment

# Key learnings

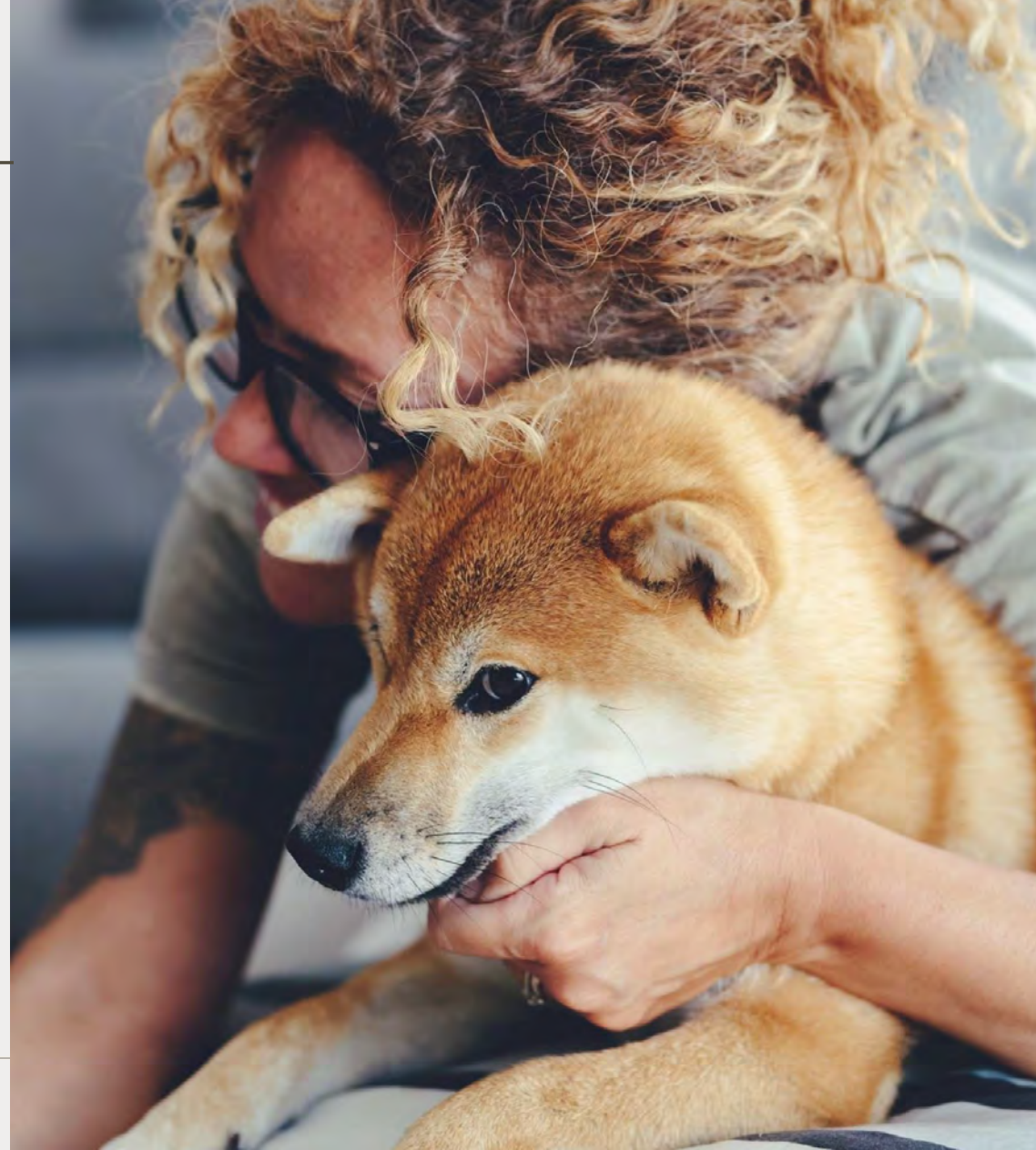
A close-up photograph of a person's hands gently petting a sleeping tabby cat. The person is wearing a light grey sweater and a dark blue scarf. The cat is resting on a blue fabric surface. The background is a plain, light grey wall.

# Attitudes toward pet food

## Key takeaways

### Overall, dog and cat parents share key similarities regarding pet food

- Pet owners face **one major challenge: choosing the right food** for their pet.
- **The amount of money spent** is another key priority, even more so during times of inflation.
- Correctly feeding pets taps into an **emotional awareness pertaining to happiness through health**.
- **Long-term benefits are prioritized over short-term pleasures**: desires for a healthy life outweigh desires for pleasurable meal experiences.
- Thus, a “good” pet food is primarily described as **healthy, nutritious and balanced**, which makes the choice dependent on the pet owners’ level of knowledge: **pet parents can have a different understanding of what a “healthy, nutritious and balanced” diet actually is.**

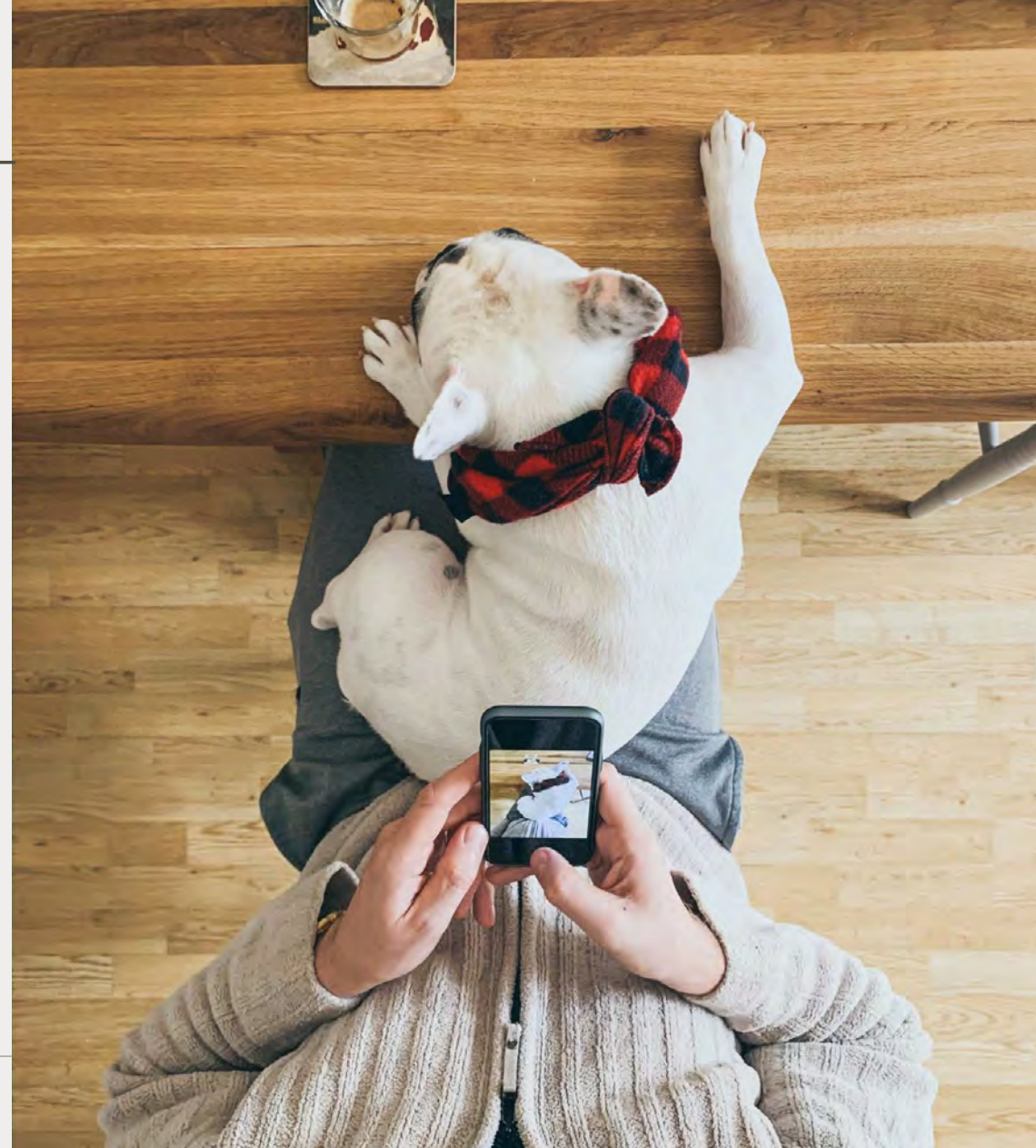


# The feeding routine

## Key takeaways

### Less controlled approach to feeding cats compared to dog feeding routines

- **Physiological specificities between species** influence the differences between cat and dog feeding routines:
  - The independent nature of cats, as well as their ability to better regulate their feeding habits, results in cat parents taking a less stringent approach to feeding routines than dog parents; natural feeding rhythms are more respected i.e. ad lib feeding or several small meals a day. Moreover, cat parents predominantly guesstimate feeding quantities.
  - With a more reliant nature and not able to regulate themselves, dogs are found to have more controlled feeding regimes set by parents i.e. 2 set meals a day, with quantities advised by vets or instructions on packaging.
- **Dry kibble is the most popular** type of pet food purchased and is given to both cats and dogs.
  - 3/4 of cat parents give wet food, mainly in conjunction with dry kibble.
  - 1/3 of dog parents cook for or give raw food to their pet (homemade food is especially popular in Mexico).
  - Treats are very popular in Europe and North America (where 62% of pet parents give treats to their pets), but still is still developing in Latam (only 20% of users).



# Purchase habits and triggers

## Key takeaways

**Overall, pet parents have a need for guidance regarding their purchasing decisions, despite having a higher awareness than a few years ago**

- **Pet food purchase decisions have become an entire thought process** (less so an immediate one), which shows pet parents' need for guidance and reassurance; it appears they are a little lost when it comes to choosing the best food for their pets.
- Even those **pet parents who always buy the same brand hesitate between variants**, while **others take time to read nutritional information and ingredients** before choosing. Some **others rely on their vet's recommendations** to guide their purchase decision.
- **The major purchasing criteria are the quality of ingredients and health benefits.** This refers to what pet parents believe makes a good pet food: healthy overall (gut health as a key priority), nutritious and well-balanced. But **awareness about pet food quality differs from one pet owner to another.**
- While **price is another key concern** for pet parents and the 3rd top criterion in the purchase process, emotional concerns regarding correctly feeding their pets tend to surpass financial concerns (at least for some pet parents).
- **Overall, pet owners have different motivations and expectations toward pet food, and different "personality profiles" emerge.**



# Pet parent typologies

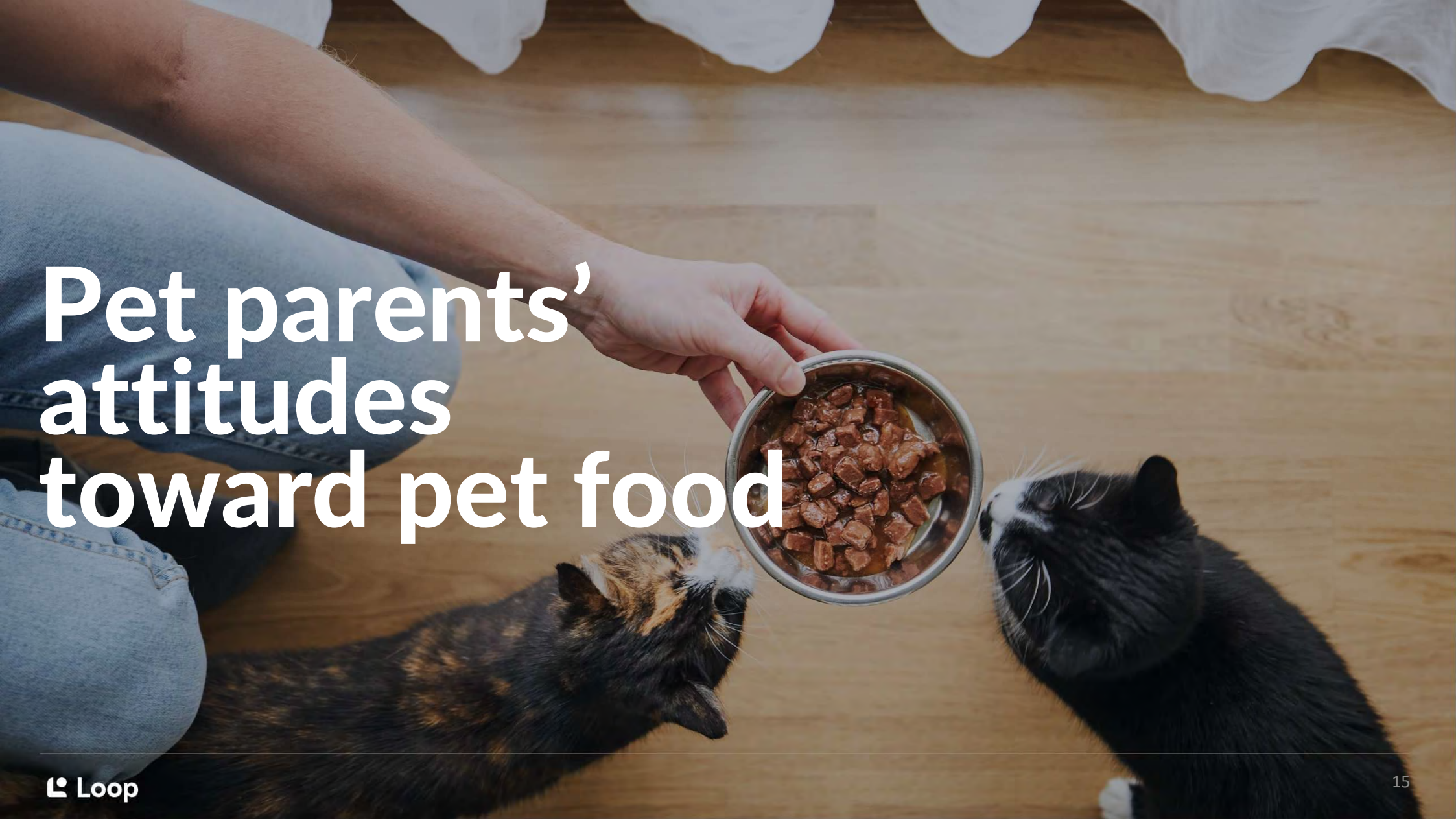
## Key takeaways

### How to tackle the right targets for your brands and guide your business decisions with pet parent insights

- Because the “average consumer” does not exist, taking advantage of the **pet owner segmentation can help the industry make smart decisions**: identify your priority targets, focus on the most promising market segments for your brands, enhance your competitiveness, build stronger customer relationships...
- At a global level, this study reveals **6 types of pet parents that shape the pet food market**. Pet owners firstly differ by their **expected benefits (generic to specific)** and **involvement in pet food choice (low to strong)**.
- 3 target groups make up **70% of the Worldwide market**:
  - **VERA, the Vet’s follower**: she looks for specific healthy pet food, while not being an expert on nutrition. She needs reassurance from her vet, who she believes can recommend the best dry kibble for her pet.
  - **RENEE, the Routine grocery shopper**: she looks for generic pet food and focuses on price and taste. As a routine shopper who is not very involved when choosing a pet food, Renee is the most loyal and continues to purchase the same brand, usually while purchasing groceries for her household.
  - **CECILIA, the Cheap health mirage**: she looks for specific healthy pet foods at the best price. While she gives special care to her pet food choice and spends time choosing the right diet, she actually has little knowledge about nutrition. However, she does her best to provide her pet with a healthy diet.
- 3 target groups make up **30% of the worldwide market**:
  - **ERIN, the Eco-conscious nutrition seeker**: as an eco-friendly consumer, she seeks healthy and all natural ingredients. For her, trust can only be built through brand transparency and product content. She is a key target for alternative nutrition.
  - **HELENA, the Home cook**: she is focused on her pet’s health and believes homemade food provides the most nutritional benefits. She uses natural ingredients and gives importance to high protein content, real meat, and the absence of controversial ingredients.
  - **TESS, the Tasty at a lower cost**: she is driven by the palatability of her pet’s food and has no real interest in the food’s content. She is enthusiastic and involved when it comes to choosing her pet’s food, despite her low budget.

Details about pet owner segments, as well as differences between geographical areas and market opportunities per segment are detailed in the last sections of this report.





# Pet parents' attitudes toward pet food

# Overall, pet parents face one key hurdle: pet food choice

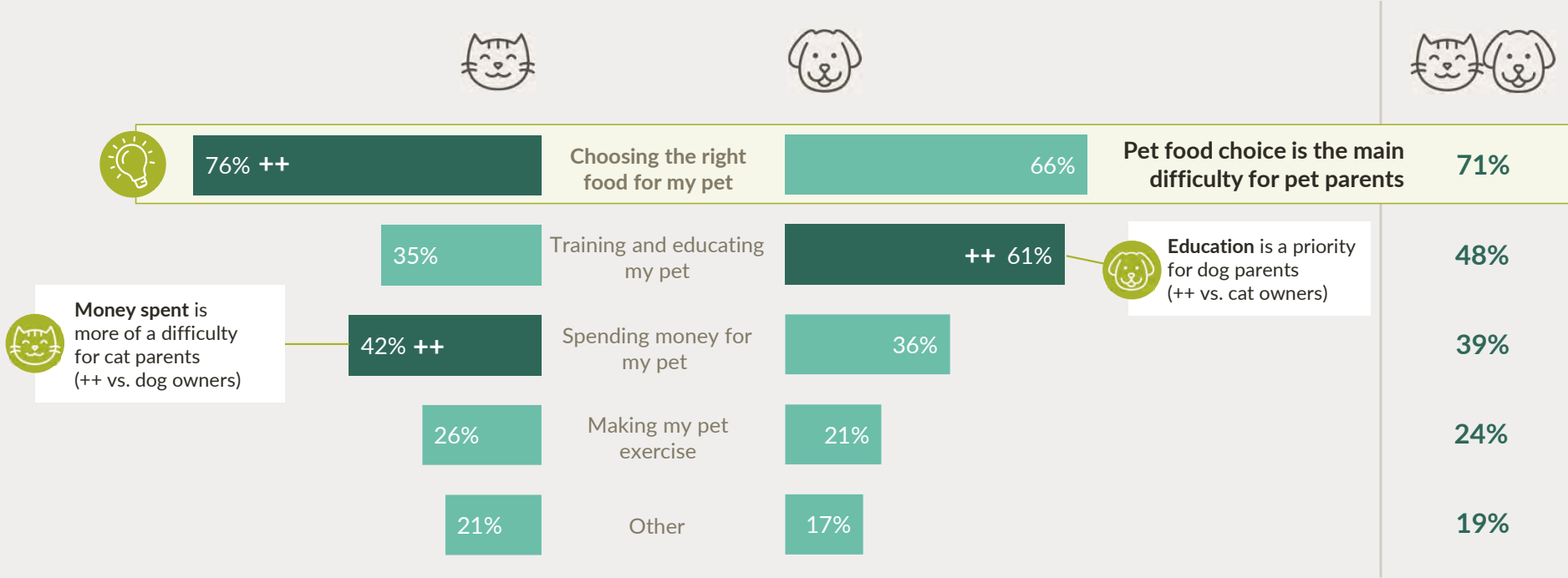
Especially among cat owners, for whom the amount of money is an additional concern

Training and education is more of a difficulty for dog owners

## ATTITUDES TOWARD PET FOOD | Difficulties faced by pet parents

In your opinion, what is the most difficult for you, as a pet owner?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669



# Overall, pet parents face one key hurdle in their role: pet food choice

## Detailed results per subgroup

### ATTITUDES TOWARD PET FOOD | Difficulties faced by pet parents

In your opinion, what is the most difficult for you, as a pet owner?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America | Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL Dog & Cat	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
		EU	NA	LATAM	Younger	Older	Dry & Wet	Dry only	Grocery	Online	Specialists
Respondent base	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
Choosing the right food for my pet	71%	75% ++	62% --	77% ++	70% -	73% +	73% ++	69% --	73% +	71%	71%
Training and educating my pet	48%	49%	44% --	50%	51% ++	44% --	43% --	54% ++	48%	46%	47%
Spending money for my pet	39%	34% --	48% ++	33% --	40% +	37% -	39%	38%	40%	41%	38%
Making my pet exercise	24%	22% -	24%	25%	24%	24%	25%	23%	21% --	23%	26% ++
Other	19%	19%	22% ++	14% --	16% --	22% ++	20% ++	17% --	18%	20%	18%

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents. It is important to take into consideration the percentages to draw overall conclusions per subgroup.



Choosing the right pet food is even more difficult for European and Latin American pet owners. Money spent is more of a topic for North American pet parents. In this area, other topics are also more important (i.e. health, vet expenses, death).

Education and money spent are more important for younger pet parents. Older pet owners are facing more difficulties with pet food choice and other topics (health, death).

Pet owners feeding their pet dry food only (dog ++), have more difficulties with education than those who mix-feed their pet (cat ++), who focus more on pet food choice and other topics (i.e. litter).

Choosing the right food is a key hurdle for pet parents who purchase pet food in grocery stores (cat ++). Pet owners who purchase their pet food in specialized stores (pet shops, vet) are more sensitive to their pet's exercise.

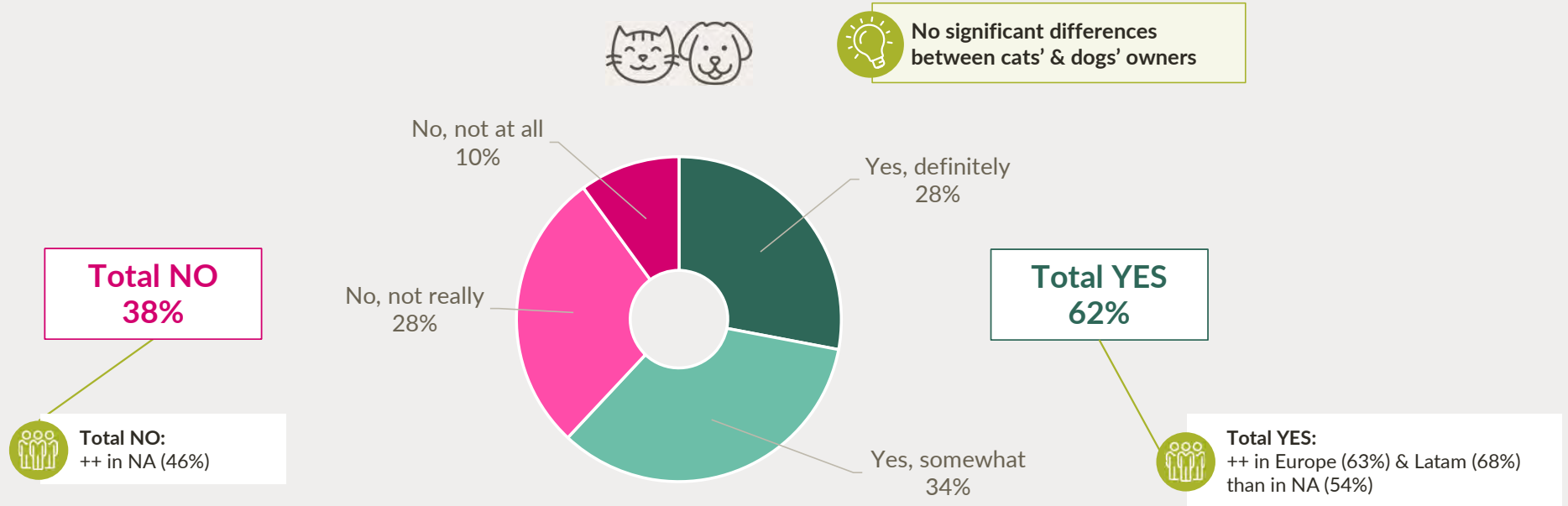
# 3 in 5 pet parents believe that correctly feeding their pet is difficult

This proportion decreases in North America where, still, 1 in 2 pet parents face this difficulty

## ATTITUDES TOWARD PET FOOD | Difficulty in feeding pets correctly

Do you think feeding your pet correctly is more difficult than feeding yourself correctly?

Respondent base: Total Cat & Dog owners 2,669

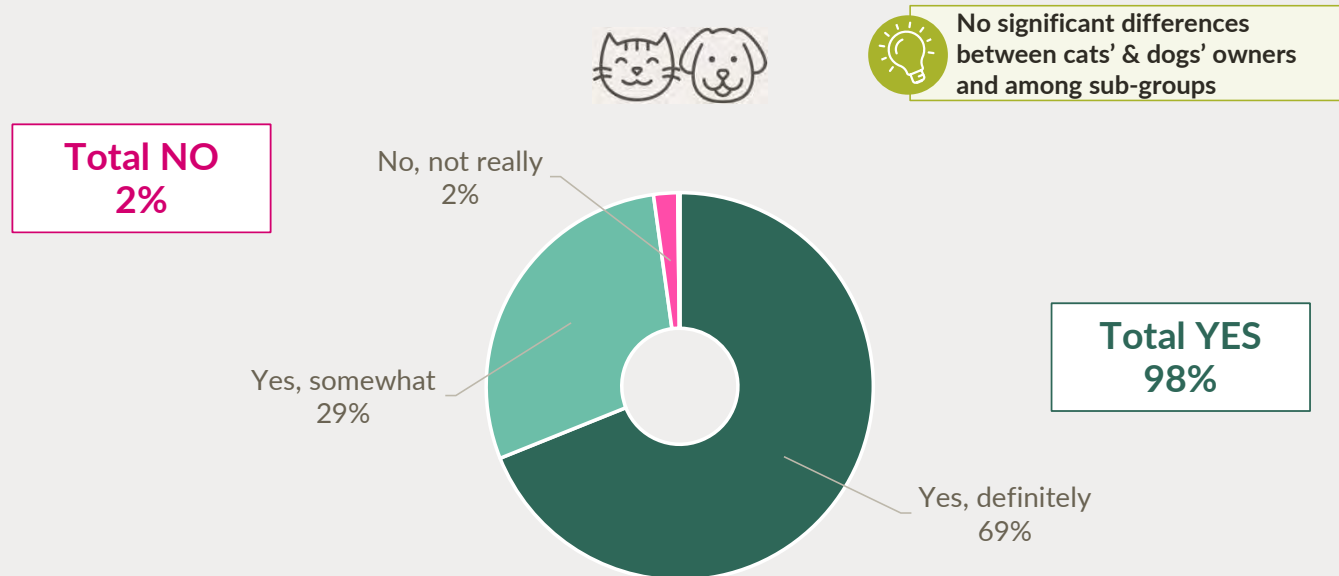


# Correctly feeding pets is a key emotional concern for pet parents: according to almost all owners, food contributes to their pet's happiness

## ATTITUDES TOWARD PET FOOD | Pet food contribution to pet happiness

Do you think pet food contributes to your pet's happiness?

Respondent base: Total Cat & Dog owners 2,669



# Pet happiness is then inextricably linked to pet health

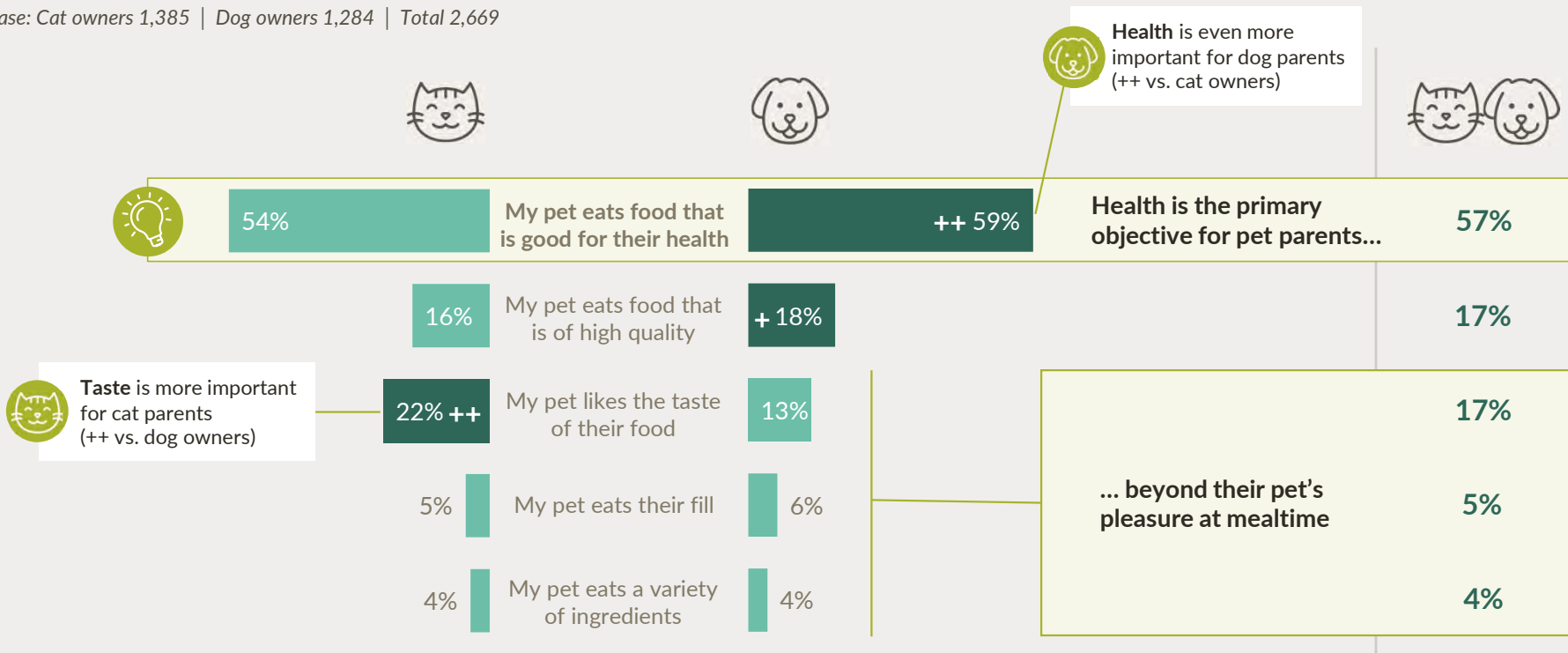
Health plays the primary role in the perceptions of pet food: pet parents seek pet food that is good for their pet's health, far more than their pet's experience during the meal.

Note that cat owners give more importance to the taste of their pet food than dog owners.

## ATTITUDES TOWARD PET FOOD | Key pet food criteria

What is most important to you when feeding your pet?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669



# Pet happiness is then inextricably linked to pet health

## Detailed results per subgroup

### ATTITUDES TOWARD PET FOOD | Key pet food criteria

What is most important to you when feeding your pet?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America | Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL Dog & Cat	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
		EU	NA	LATAM	Younger	Older	Dry & Wet	Dry only	Grocery	Online	Specialists
Respondent base	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
My pet eats food that is good for their health	57%	56%	55%	60% ++	58%	55%	54% --	61% ++	50% --	57%	60% ++
My pet eats food that is of high quality	17%	14% --	17%	21% ++	17%	17%	16%	17%	11% --	20% ++	20% ++
My pet likes the taste of their food	17%	20% ++	19%	13% --	17%	18%	20% ++	13% --	25% ++	16%	13% --
My pet eats their fill	5%	7% ++	5%	3%	6%	5%	5%	6%	8% ++	3%	4%
My pet eats a variety of ingredients	4%	4%	5%	3%	3%	5% ++	4%	3%	6% ++	4%	2%

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents.

It is important to take into consideration the percentages to draw overall conclusions per subgroup.



In Latam, pet owners are more sensitive to healthy and high-quality pet food than the total population, and less driven by taste. On the contrary, European pet parents are more sensitive to taste and less to quality.

No significant differences according age group, except a higher expectation for the variety of ingredients among older owners (but still low scores).

Pet food taste is more important for owners who mixed-feed their pet (dry and wet), whereas health is a stronger expectation for owners feeding their pet dry food only.

Pet owners who purchase their pet food in specialized stores or online are more sensitive to healthy and high quality pet food, whereas pet parents who purchase in grocery stores have higher expectations toward their pet's pleasure (taste, fill, variety).

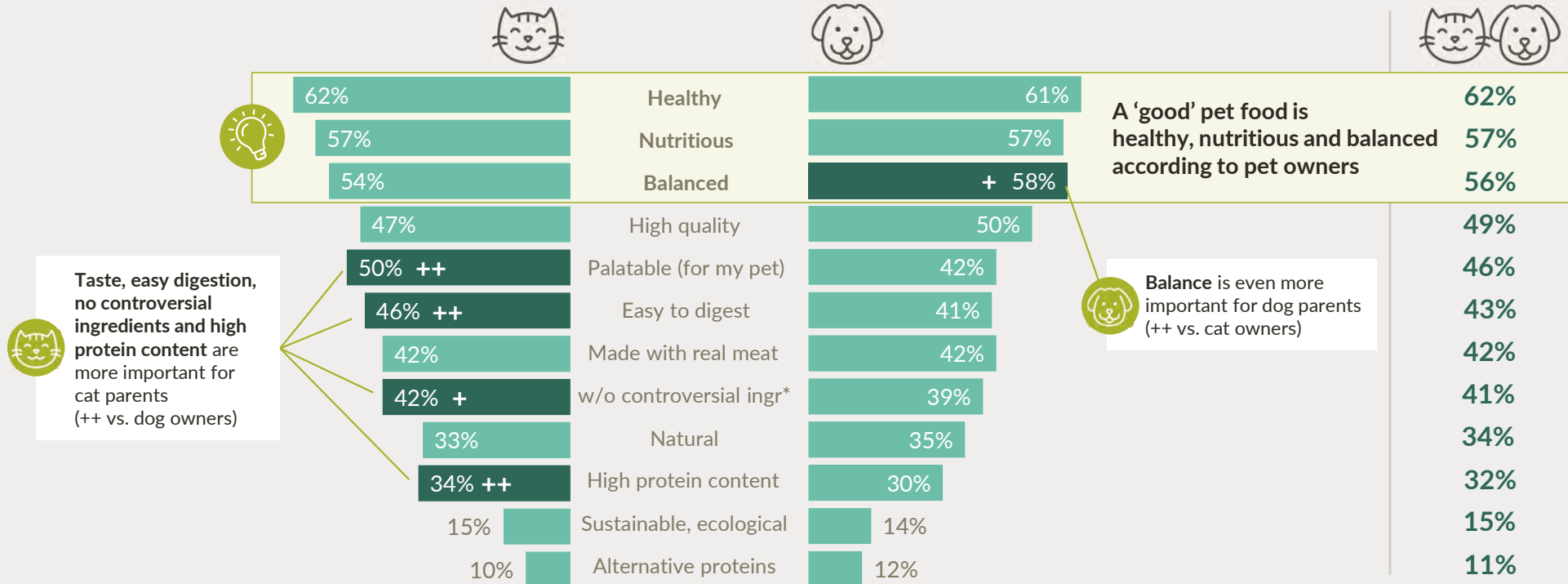
# Pet health is associated with nutritious and balanced pet food

Taste, digestibility and ingredients (no controversial ingredients, high protein content) are also important for cat owners, whereas a pet food's overall balance is more important for dog parents

## ATTITUDES TOWARD PET FOOD | A good pet food is...

Which words do you associate with a "good" pet food?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669



# Pet health is associated with nutritious and balanced pet food

## Detailed results per subgroup

### ATTITUDES TOWARD PET FOOD | A good pet food is...

Which words do you associate with a "good" pet food?

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Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

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		EU	NA	LATAM	Younger	Older	Dry & Wet	Dry only	Grocery	Online	Specialists
<i>Respondent base</i>	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
Healthy	62%	65% ++	62%	58% --	63% ++	60% --	65% ++	58% --	62%	66% ++	64% ++
Nutritious	57%	50% --	61% ++	59%	58%	55%	61% ++	53% --	58%	62% ++	59% ++
Balanced	56%	59% ++	55%	54% --	57%	55%	59% ++	52% --	57%	59% ++	58% ++
High quality	49%	48%	54% ++	44% --	52% ++	45% --	52% ++	44% --	45% --	58% ++	53% ++
Appetizing, palatable (for my pet)	46%	46%	47%	44%	48% +	44% -	53% ++	38% --	50% ++	51% ++	47%
Easy to digest	43%	45%	51% ++	34% --	45% ++	41% --	50% ++	36% --	46% ++	50% ++	45% +
Made with real meat	42%	46% ++	52% ++	27% --	46% ++	36% --	46% ++	34% --	41%	53% ++	43% +
Without controversial ingredients	41%	43% +	42%	36% --	42% +	39% -	45% ++	34% --	36% --	51% ++	44% ++
Natural	34%	38% ++	35%	30% --	37% ++	30% --	36% ++	30% --	33%	41% ++	38% ++
With high protein content	32%	28% --	35% ++	32%	35% ++	28% --	35% ++	28% --	30% -	38% ++	35% ++
Sustainable, ecological	15%	13%	16% +	14%	16% ++	13% --	16% ++	13% --	15%	20% ++	17% ++
With alternative proteins	11%	5% --	8% --	20% ++	13% ++	9% --	11%	11%	9% --	10%	15% ++

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents. It is important to take into consideration the percentages to draw overall conclusions per subgroup.



Europeans more associate a good pet food with a 'naturally healthy' diet. North Americans value nutrition through real meat & high protein level. Latin Americans are less involved in pet food composition, while being the most open to alternative proteins.

Overall, younger pet parents are more invested in pet food composition. In particular, they value alternative & natural ingredients.

Pet parents who feed their pet dry food only are less involved in composition. *Probably because they follow their vet's recommendation?*

Pet owners who purchase their pet food in grocery stores are less interested in quality and ingredients, focusing more on taste and digestive health. Parents who purchase online or in specialized stores are more aware.



# The feeding routine

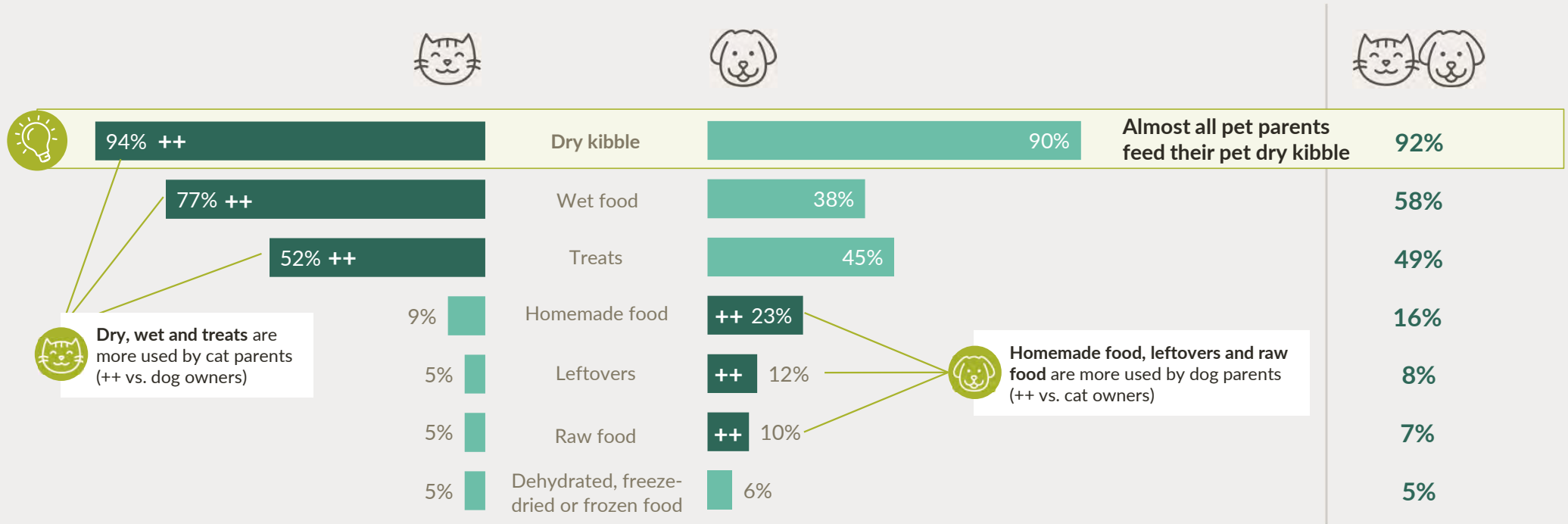
# Almost all pet parents feed their pet dry kibble

Cat owners are more prolific users of wet food (72% mixed feed dry & wet food) and treats, whereas dog owners give more homemade food, leftovers and raw food than cat parents

## THE FEEDING ROUTINE | Types of pet food used

What kind of food do you give to your pet?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669



# Almost all pet parents feed their pet dry kibble

## Detailed results per subgroup

### THE FEEDING ROUTINE | Types of pet food used

What kind of food do you give to your pet?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America | Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
	Dog & Cat	EU	NA	LATAM	Younger	Older	Dry & Wet	Dry only	Grocery	Online	Specialists
Respondent base	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
Dry kibble	92%	89% --	92%	96% ++	94% ++	91% --	100% ++	100% ++	94% ++	92%	94% ++
Wet food	58%	70% ++	59%	46% --	58%	59%	100% ++	0% --	68% ++	69% ++	58%
Treats	49%	62% ++	62% ++	21% --	51% ++	46% --	67% ++	27% --	56% ++	62% ++	49%
Homemade food	16%	15%	12% --	20% ++	16%	15%	15%	14% --	17% ++	17%	15%
Leftovers	8%	13% ++	9%	2% --	10% ++	7% --	10% ++	7% --	12% ++	9%	6% --
Raw food	7%	9% +	8%	5% --	9% ++	6% --	6% --	5% --	6% --	10% ++	8% -
Dehydrated, freeze-dried or frozen food	5%	4% --	10% ++	2% --	7% ++	4% --	6% ++	3% --	4% --	8% ++	7% ++

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents. It is important to take into consideration the percentages to draw overall conclusions per subgroup.



Europeans are more used to combine different foods (dry, wet, treats, leftovers, raw food). Latin Americans are the most exclusive to dry food, but also cook the most for their pets and the lowest treats users. Americans are more sensitive to treats and new processes.

Younger pet parents are more eager to pet food diversity than older owners. A signal for a higher investment from younger generations of pet owners?

Pet parents who mix-feed their pets (dry and wet) are more open to pet food diversity than those feeding their pets dry only (dry and not wet).

Pet parents who purchase pet food in grocery shops are more sensitive to pet food diversity. Online shoppers are stronger users of wet, treats, raw food and new processes. Those using specialized stores are more users of dry and new processes (dehydrated etc.).

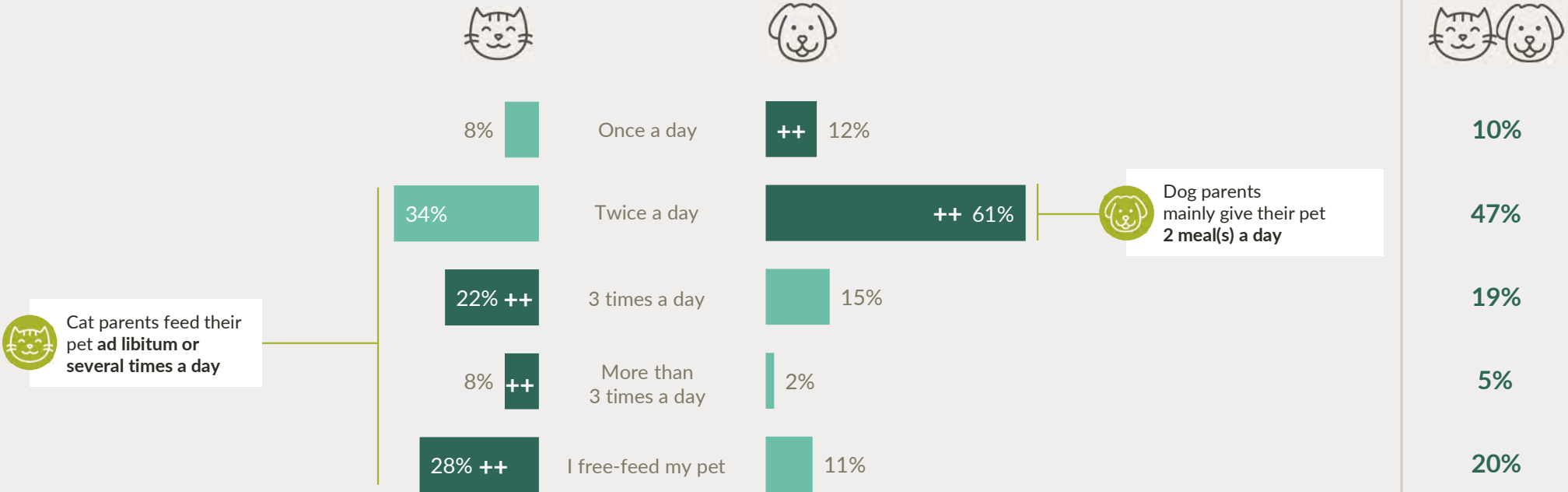
# Cats and dogs have different feeding routines

Pet parents tend to respect the natural feeding rhythms of their pet i.e. ad lib or several meals a day for cats, and two meals a day for dogs

## THE FEEDING ROUTINE | Number of meals per day

How many times a day do you feed your pet?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669




# Subgroups have different feeding routines

## Detailed results per subgroup

### THE FEEDING ROUTINE | Number of meals per day

How many times a day do you feed your pet?

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Respondent base	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
Once a day	10%	12% ++	11% +	6%	9%	10%	8% --	11% ++	10%	8%	9% -
Twice a day	47%	50% ++	48%	43% --	46%	48%	44% --	51% ++	44% --	50% ++	48%
3 times a day	19%	15% --	15% --	26% ++	19%	18%	20% +	15% --	19%	19%	20% ++
More than 3 times a day	5%	4%	4%	7% ++	6% ++	4% --	7% ++	3% --	5%	6%	6% +
I free-feed my pet	20%	18%	22% ++	18%	19%	20%	21% ++	20%	22% ++	17% --	17% --
		 <p>In <u>Europe</u>, more pet parents give 1 or 2 meals a day, whereas in <u>Latam</u>, they are more likely to give 3 meals or more. Free-feeding is more popular in <u>North America</u>.</p>			<p>No significant differences according age group, except a higher number of meals per day among <u>younger</u> owners (but still low scores).</p>		<p>Pet owners who combine <u>dry and wet</u> food tend to give more meals or free-feed their pet, whereas those who give <u>only dry</u> food restrict to 1 or 2 meals a day.</p>		<p>Pet owners who purchase pet food in <u>grocery</u> stores more free-feed their pets. <u>Online</u> shoppers give 2 meals a day. Those who shop in <u>specialized stores</u> tend to give more meals a day.</p>		

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents.

It is important to take into consideration the percentages to draw overall conclusions per subgroup.



++ -- Statistical difference: significant @95% confidence level

+ - Statistical difference: tendency @90% confidence level

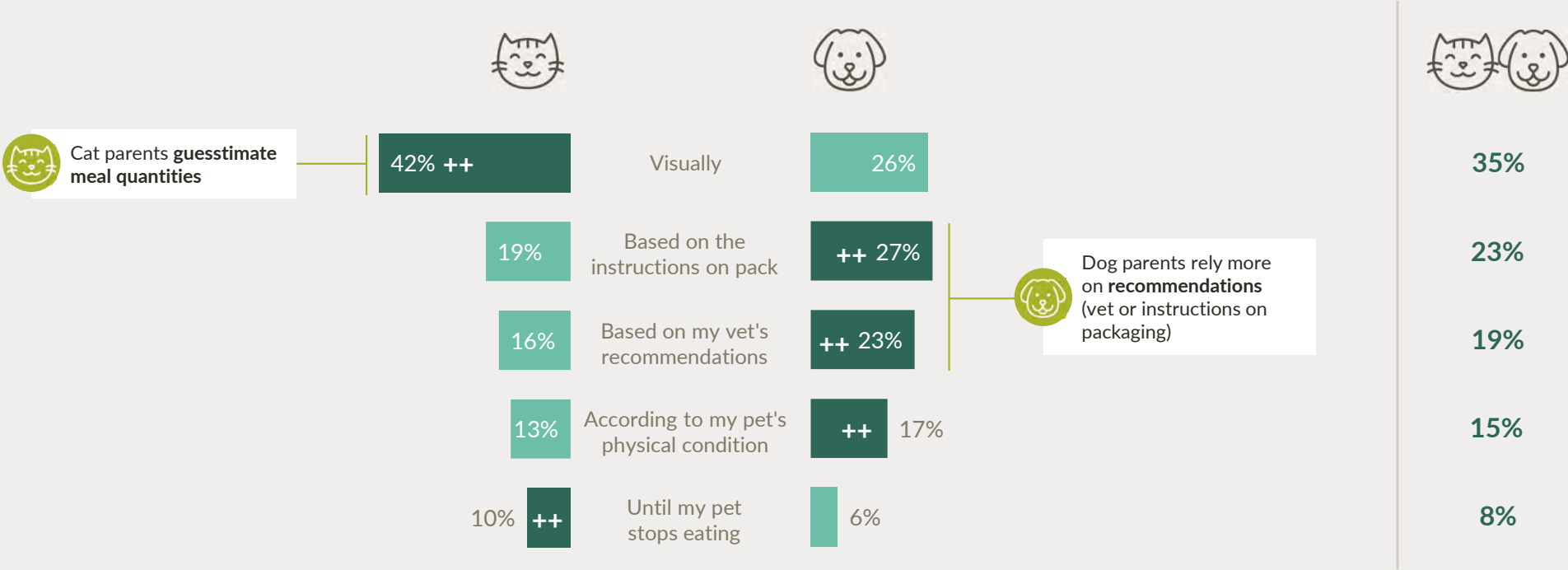
# Cat and dog parents have different behaviors regarding food distribution

Cat owners mainly fill their pet's bowl intuitively, while dog owners rely on recommendations (vets or instructions on packaging)

## THE FEEDING ROUTINE | Food quantity

How do you decide how much food to give to your pet for each meal?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669




# Subgroups have different behaviors regarding food distribution

## Detailed results per subgroup

### THE FEEDING ROUTINE | Food quantity

How do you decide how much food to give to your pet for each meal?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America | Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
	Dog & Cat	EU	NA	LATAM	Younger	Older	Dry & Wet	Dry only	Grocery	Online	Specialists
Respondent base	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
Visually	35%	32% --	34%	38% ++	34%	36%	37% ++	33%	41% ++	31% --	31% --
'Based on my vet's recommendations	19%	16% --	19%	23% ++	18%	21%	18% --	20%	16% --	19%	24% ++
'Based on the instructions on the packaging	23%	27% ++	20% --	23%	26% ++	19% --	22%	26% ++	19% --	24%	24% +
According to my pet's physical condition	15%	21% ++	17% +	8% --	15%	16%	16%	12% --	14%	19% ++	14%
Until my pet stops eating	8%	5% --	11% ++	8%	7%	9%	8%	8%	10% ++	6% -	6% --
		 <p>In <u>Latam</u>, more pet owners fill pet's bowl visually or based on their vet's recommendations. In <u>Europe</u>, they are more to consider the instructions on the packaging or adapt to their pet's condition. In <u>NA</u>, more pet parents give ad lib food quantities.</p>			<p>Instructions on the packaging are more used by <u>younger</u> generations of pet parents to determine food quantities per meal.</p>		<p>Visual determination of food quantities are more made by pet owners who <u>mix-feed</u> their pets, while instructions on packaging are more followed by owners giving <u>only dry</u>.</p>		<p><u>Grocery</u> shoppers have a less controlled approach (++) visual or ad lib) than pet parents who shop <u>online</u> (++) according to pet's condition) or in <u>specialized stores</u> (++) based on vet's recommendations or instructions on packaging).</p>		

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents. It is important to take into consideration the percentages to draw overall conclusions per subgroup.

++ -- Statistical difference: significant @95% confidence level  
+ - Statistical difference: tendency @90% confidence level

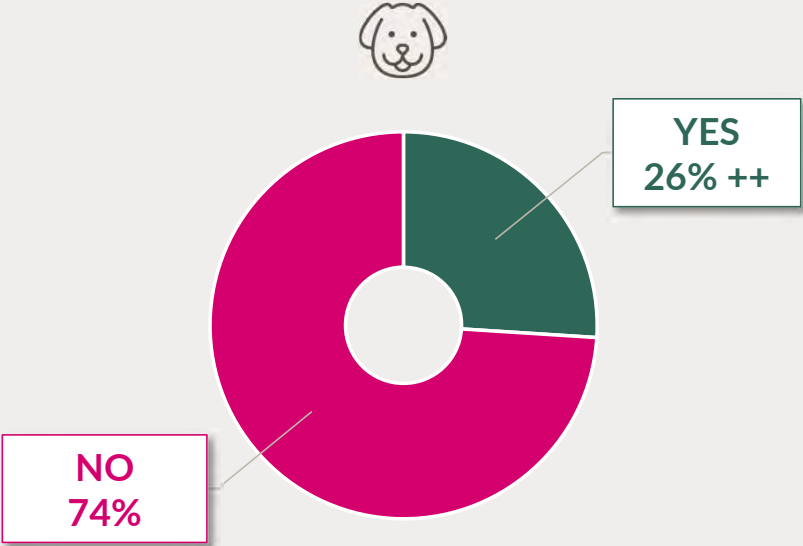
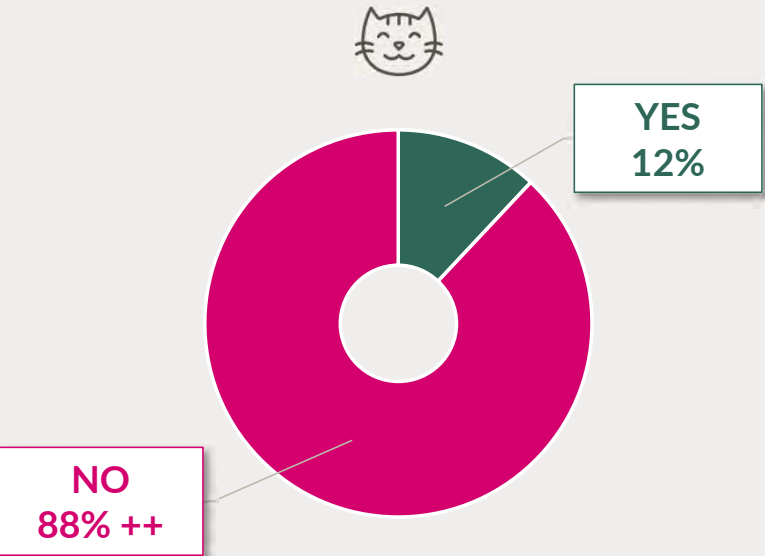
# Most pet parents do not weigh their pet food before serving

Around 1/4 of dog owners weigh their pet food, significantly more than cat owners

## THE FEEDING ROUTINE | Food quantity

Do you weigh the food you give to your pet?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669




# Most pet parents do not weigh their pet food before serving

Detailed results per subgroup

## THE FEEDING ROUTINE | Food quantity

Do you weigh the food you give to your pet?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America | Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
	Dog & Cat	EU	NA	LATAM	Younger	Older	Dry & Wet	Dry only	Grocery	Online	Specialists
Respondent base	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
Yes	19%	28% ++	11% --	18%	22% ++	15% --	15% --	21% ++	12% --	22% ++	21% ++
No	81%	72% --	89% ++	82% ++	78% --	85% ++	85% ++	79% --	88% ++	78% --	79% --
		 <p>More pet owners in <u>Europe</u> weigh pet food quantities, less in <u>North America</u>.</p>			<p><u>Young</u> pet parents weigh more pet food than older ones.</p>		<p>Pet owners who give <u>only dry</u> food weigh more the food given to their pets.</p>		<p>Pet owners who shop <u>online</u> or in <u>specialized stores</u> have a more controlled approach and weigh more the food given to their pets.</p>		

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents. It is important to take into consideration the percentages to draw overall conclusions per subgroup.



# Purchase habits & triggers

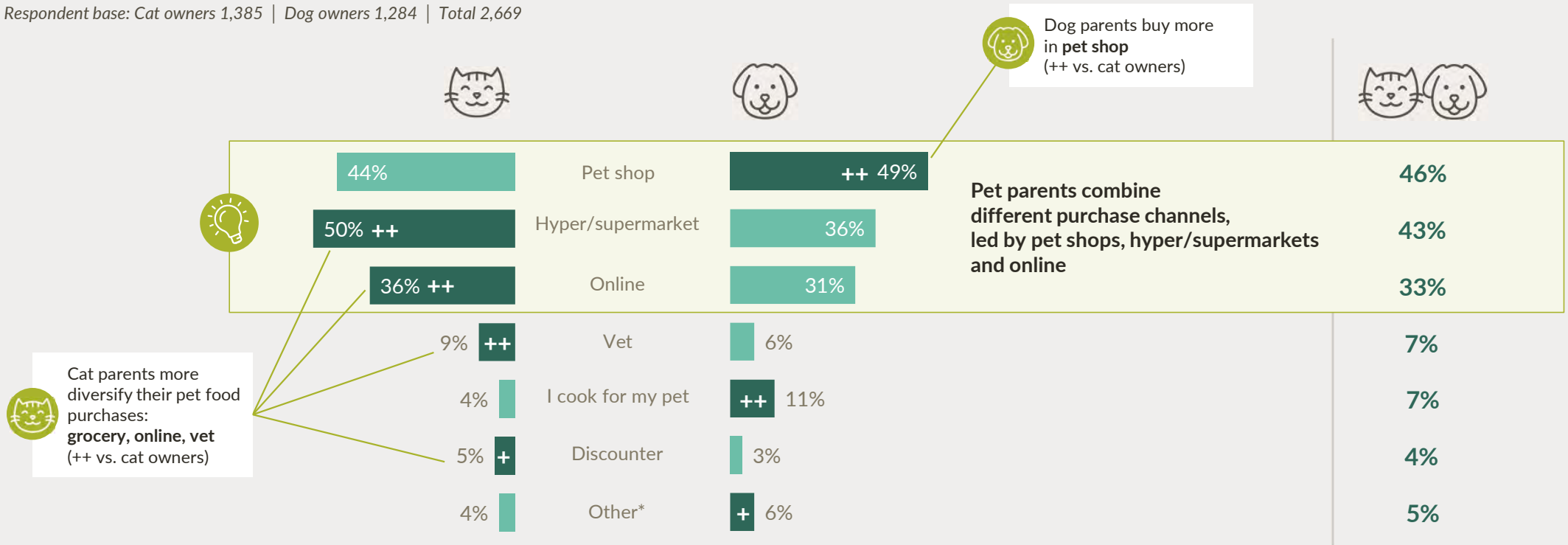
# Pet parents combine brick-and-mortar and online to purchase pet food

Pet shops (esp. for dogs) and hyper/supermarkets (esp. for cats) still take the lead, the online channel has been growing since the pandemic and represents 1/3 of purchases

## PURCHASE HABITS | Distribution channels

Where do you usually purchase pet food?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669



# Pet parents combine brick-and-mortar and online for pet food purchases

## Detailed results per subgroup

### PURCHASE HABITS | Distribution channels

Where do you usually purchase pet food?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America | Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL Dog & Cat	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
		EU	NA	LATAM	Younger	Older	Dry & Wet	Dry only	Grocery	Online	Specialists
Respondent base	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
Pet shop	46%	38% --	45%	56% ++	52% ++	40% --	46%	48%	28% --	35% --	92% ++
Hypermarket, supermarket	43%	49% ++	44%	36% --	41% -	45% +	51% ++	33% --	96% ++	31% --	25% --
Online	33%	47% ++	34%	19% --	37% ++	30% --	39% ++	25% --	24% --	100% ++	25% --
Vet	7%	6% --	8%	8%	7%	7%	8% ++	6% -	4% --	6% -	14% ++
I cook for my pet myself	7%	6%	5% --	10% ++	7%	7%	6% --	6%	7%	7%	7%
Discounter	4%	3%	5%	4%	4%	4%	4%	4%	9% ++	4%	3%
Other	5%	2% --	6%	7% ++	4% --	6% ++	4% --	6%	3% --	1% --	2% --

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents. It is important to take into consideration the percentages to draw overall conclusions per subgroup.



In Europe, pet parents mainly use super/hypermarket and online to purchase pet food. Pet shops are more popular in Latam, where pet owners also cook the most for their pet, and use other distribution channels.

Pet shops and online purchases are more popular among younger pet owners.

Pet owners who mix-feed their pets are more likely to use different purchase channels ( ++ hyper/supermarkets, online, vet).

Overall, pet parents make multi-channel purchases for pet food.

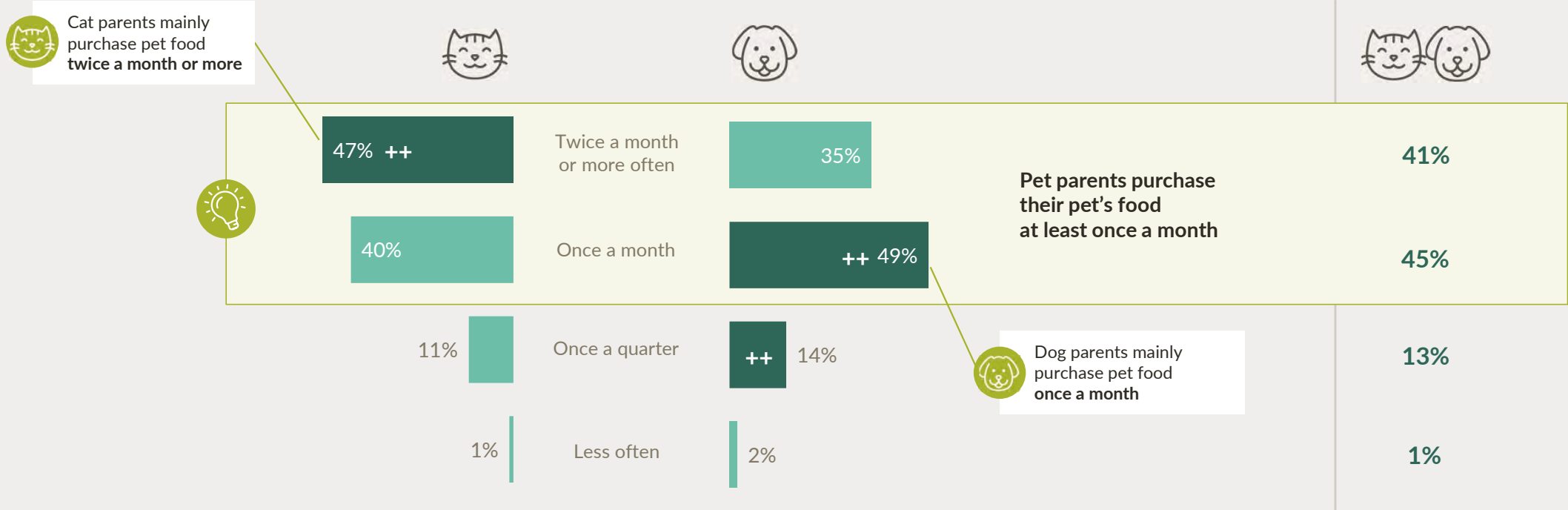
# Pet parents purchase pet food once a month or more often

Cat owners are more frequent shoppers than dog owners

## PURCHASE HABITS | Frequency of purchase

How often do you purchase pet food?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669



# Pet parents purchase pet food once a month or more often

## Detailed results per subgroup

### PURCHASE HABITS | Frequency of purchase

How often do you purchase pet food?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America | Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL Dog & Cat	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
		EU	NA	LATAM	Younger	Older	Dry & Wet	Dry only	Grocery	Online	Specialists
Respondent base	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
Twice a month or more often	41%	41%	36% --	47% ++	37% --	46% ++	45% ++	31% --	56% ++	33% --	39% --
Once a month	45%	46%	49% ++	38% --	48% ++	41% --	43% --	51% ++	36% --	49% ++	46% +
Once a quarter	13%	12%	14%	13%	14% ++	11% --	11% --	16% ++	7% --	16% ++	13%
Less often	1%	1%	1%	2%	1%	1%	1%	2%	1%	2%	1%



In Latam, pet owners are more frequent purchasers ( ++ twice a month or more).

Older pet parents are more frequent purchasers ( ++ twice a month or more).

Younger space out their purchases more: probably because they buy online more?

Higher frequency of purchase among owners who purchase both dry and wet food ; lower among those who do not purchase wet food.

Higher frequency of purchase among owners who purchase in grocery stores ; lower among those who shop online.

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents. It is important to take into consideration the percentages to draw overall conclusions per subgroup.

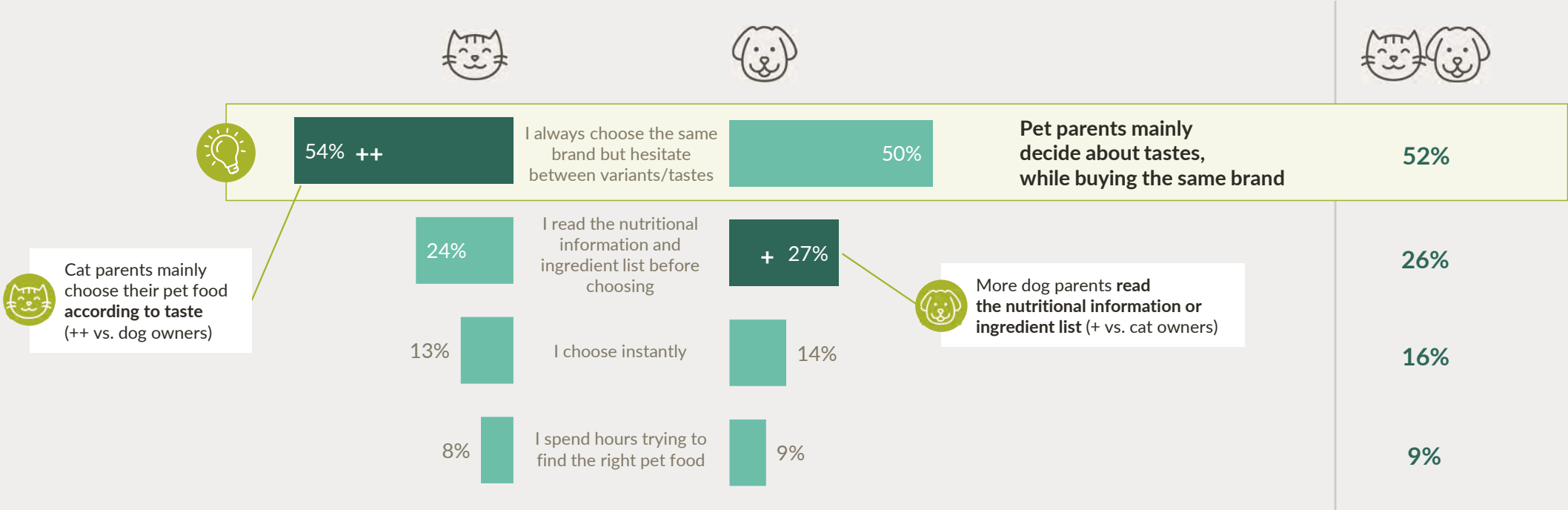
# The purchase decision process is not immediate

Half of all pet owners declare purchasing the same brand and making their choice according to taste (esp. for cats). Nutritional information or ingredient list help 1/4 of parents in their choice (esp. for dogs)

## PURCHASE HABITS | Decision process

How do you decide which pet food you will purchase?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669



# The purchase decision process is not immediate

## Detailed results per subgroup

### PURCHASE HABITS | Decision process

How do you decide which pet food you will purchase?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America | Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL Dog & Cat	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
		EU	NA	LATAM	Younger	Older	Dry & Wet	Dry only	Grocery	Online	Specialists
Respondent base	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
I always choose the same brand but hesitate between variants/tastes	52%	48% --	51%	58% ++	49% --	55% ++	53%	53%	58% ++	45% --	51%
I read the nutritional information and ingredient list before choosing	26%	24%	25%	27%	26%	25%	26%	25%	23% --	30% ++	29% ++
I choose instantly	14%	17% ++	16% ++	7% --	14%	13%	12% --	15%	14%	12%	11% --
I spend hours trying to find the right pet food	9%	11% ++	8%	8%	11% ++	7% --	9%	8%	5% --	14% ++	9%



**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents.

It is important to take into consideration the percentages to draw overall conclusions per subgroup.

In Latam, more pet owners purchase the same brand, but hesitate between tastes. Instantaneous choice is more common in Europe and NA. In Europe, long process of choice is also more common.

Older pet parents tend to always choose the same brand, but hesitate between tastes, whereas younger are more likely to spend time to decide.

No significant differences according age group, except a less instantaneous choice among purchasers of dry and wet food.

More grocery shoppers always choose the same brand, but hesitate between tastes, whereas pet owners who shop online and in specialized stores are more likely to look for information before choosing pet food.

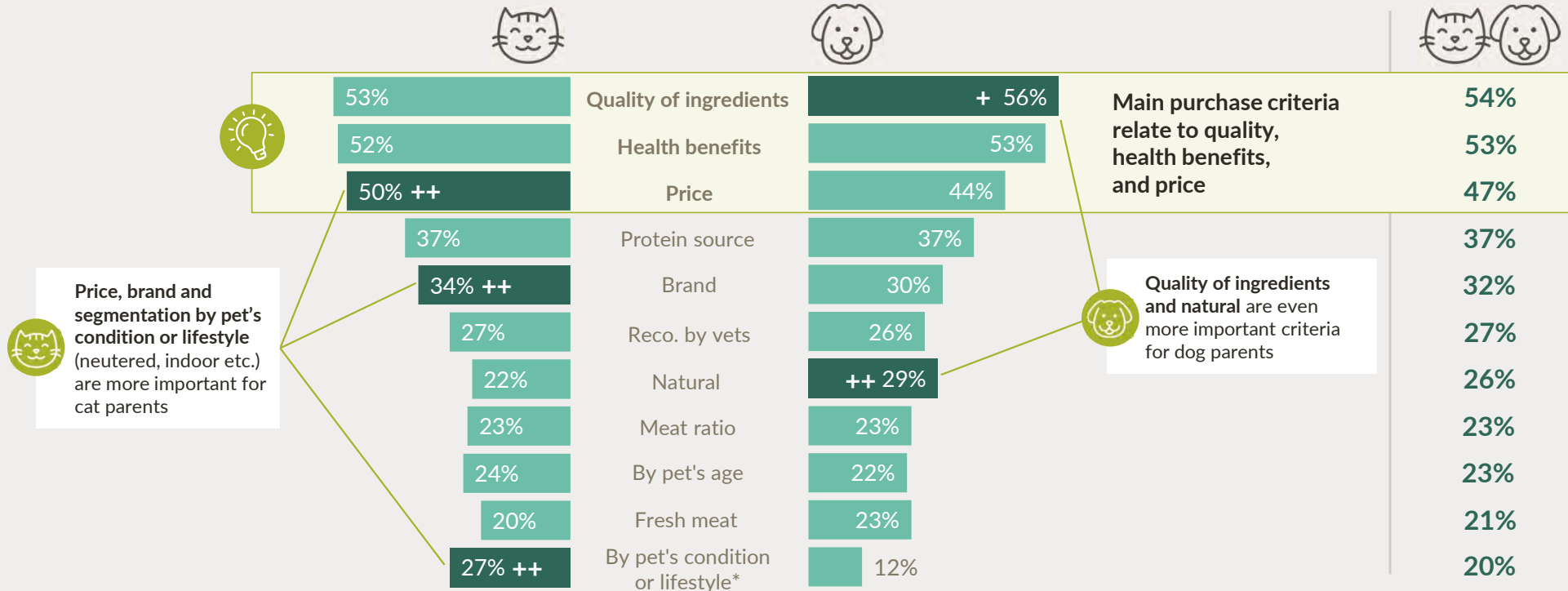
# Quality of ingredients, health benefits and price are key in pet food choice. Proteins/Meat criteria are also important in owners' decision

Cat parents are more sensitive to price/brand/generic claims (i.e. neutered, indoor), whereas dog owners focus more on natural ingredients

## PURCHASE TRIGGERS | Criteria of purchase – TOP 11

Among the criteria listed below, which of them help you choose your pet food?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669

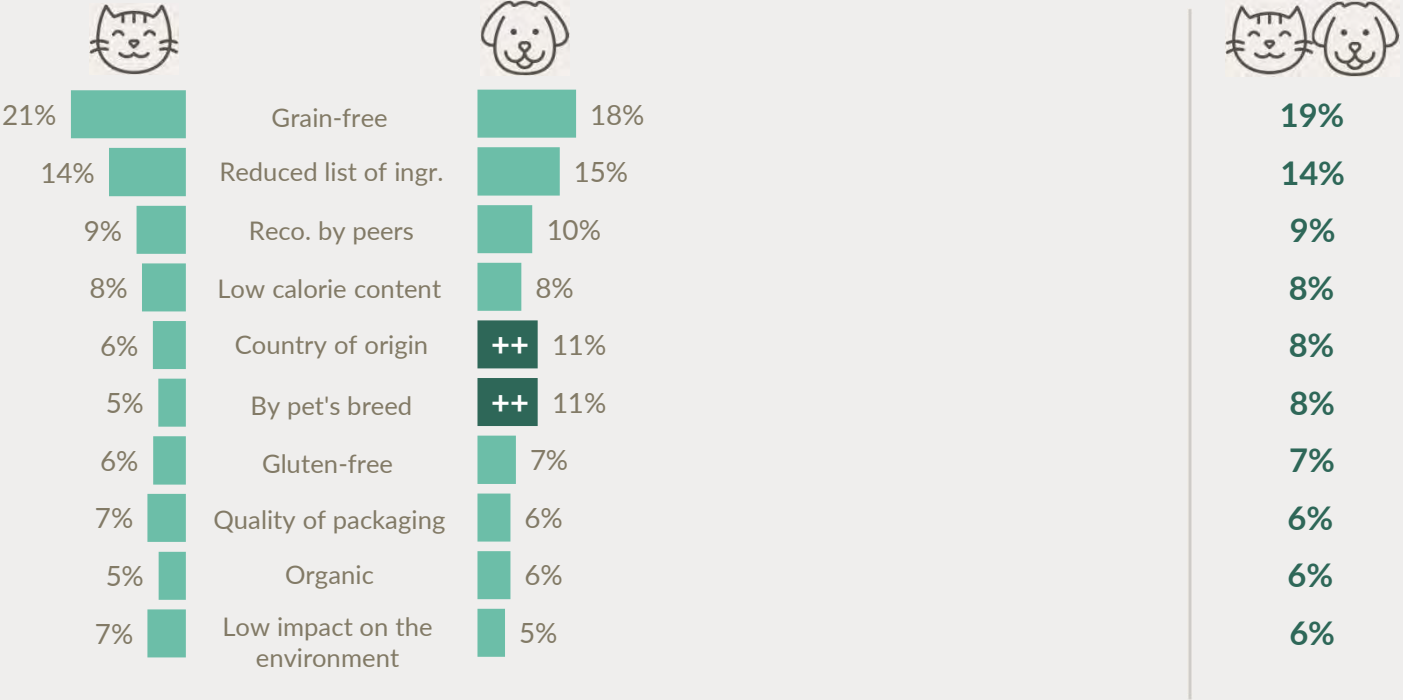


# Sustainable claims and “free-from” ingredients are less important for pet parents during the decision-making process

## PURCHASE TRIGGERS | Criteria of purchase – BOTTOM 10

Among the criteria listed below, which of them help you choose your pet food?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669



# Quality of ingredients, health benefits and price are the main criteria of pet food choice. Proteins/Meat criteria are also important in the decision

## Detailed results per subgroup

### PURCHASE TRIGGERS | Criteria of purchase – TOP 11

Among the criteria listed below, which of them help you choose your pet food?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America | Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL Dog & Cat 2,669	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
		EU 885	NA 924	LATAM 860	Younger 1,390	Older 1,279	Dry & Wet 1,444	Dry only 1,023	Grocery 1,197	Online 892	Specialists 1,344
Quality of ingredients	54%	54%	58% ++	50% --	55%	54%	57% ++	51% --	51% --	64% ++	58% ++
Health benefits	53%	47% --	55%	56% ++	53%	53%	55% ++	50% --	49% --	60% ++	58% ++
Price	47%	49%	50% +	43% --	50% ++	44% --	50% ++	44% --	58% ++	50% +	42% --
Protein source	37%	31% --	39% +	40% ++	40% ++	33% --	39% ++	33% --	33% --	42% ++	42% ++
Brand	32%	28% --	37% ++	30%	31%	33%	35% ++	29% --	36% ++	34%	32%
Recommendations by vets	27%	19% --	26%	36% ++	28% +	25% -	27%	28%	20% --	30% ++	35% ++
Natural	26%	30% ++	24%	23% --	29% ++	22% --	27% +	21% --	23% --	32% ++	30% ++
Meat ratio	23%	33% ++	19% --	16% --	26% ++	19% --	26% ++	17% --	21%	29% ++	23%
Segmentation by pet's age	23%	23%	18% --	30% ++	24%	22%	26% ++	21% --	23%	26% ++	27% ++
Fresh meat	21%	26% ++	22%	16% --	24% ++	18% --	23% +	15% --	20%	27% ++	22%
Segmentation by pet's condition or lifestyle*	20%	20%	17% --	22% ++	21% ++	18% --	24% ++	15% --	20%	22% +	21% ++

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents. It is important to take into consideration the percentages to draw overall conclusions per subgroup.



Europeans are the most sensitive to 'natural' and 'meat' criteria. North Americans value more the quality of ingredients/protein, price and brand. Latin Americans focus more on health benefits and protein source. They rely more on their vet or use simpler parameters (pet's age or condition).

Overall, younger pet parents are more sensitive to pet food details.

Pet parents who feed their pet dry food only are less involved in pet food choice. Probably because they follow their vet's recommendation?

Pet owners who purchase their pet food in grocery stores focus more on price or brand. Parents who purchase online or in specialized stores are more sensitive to ingredients, benefits etc.

# Sustainable claims and “free-from” ingredients are less important for pet parents during the decision-making process

## Detailed results per subgroup

### PURCHASE TRIGGERS | Criteria of purchase – BOTTOM 10

Among the criteria listed below, which of them help you choose your pet food?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America | Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL Dog & Cat 2,669	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
		EU 885	NA 924	LATAM 860	Younger 1,390	Older 1,279	Dry & Wet 1,444	Dry only 1,023	Grocery 1,197	Online 892	Specialists 1,344
Grain-free	19%	28% ++	21%	9% --	20%	19%	22% ++	14% --	15% --	29% ++	22% ++
Reduced list of ingredients	14%	16% +	20% ++	6% --	16% ++	12% --	15%	13% -	13% -	22% ++	15%
Recommendations by peers	9%	9%	10%	10%	12% ++	6% --	9%	10%	9%	11%	11% ++
Low calorie content	8%	7%	6% --	10% ++	8%	7%	8%	8%	6% --	10% ++	10% ++
Country of origin	8%	9%	13% ++	2% --	7% --	10% ++	9%	7% --	7% --	12% ++	9%
Segmentation by pet's breed	8%	5% --	4% --	14% ++	9% +	7% -	7%	10% ++	7% -	8%	10% ++
Gluten-free	7%	6%	5% -	8% ++	7%	6%	7%	5% -	6%	7%	8% ++
Quality of packaging	6%	5% --	6%	9% ++	8% ++	4% --	8% ++	5% --	7%	7%	7% +
Organic	6%	4% --	7% +	6%	7% ++	4% --	6%	4% --	5% --	8% ++	8% ++
Low impact on the environment	6%	7% +	5% --	6%	7%	5%	7% ++	4% --	6%	8% ++	7% ++



Europeans and North Americans are the most sensitive to environmental claims (grain-free, reduced list of ingredients, country of origin, organic, low impact on environment). Latin Americans focus more on segmentation by pet's breed, low calorie content, quality of packaging.

Overall, younger pet parents are more sensitive to pet food details.

Pet owners feeding their pets dry only more use simple criteria like pet's breed to choose pet food.

Pet owners who purchase their pet food in grocery stores are less involved in pet food detailed criteria. Parents who purchase online or in specialized stores are more aware, especially on environmentally friendly criteria.

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents.

It is important to take into consideration the percentages to draw overall conclusions per subgroup.

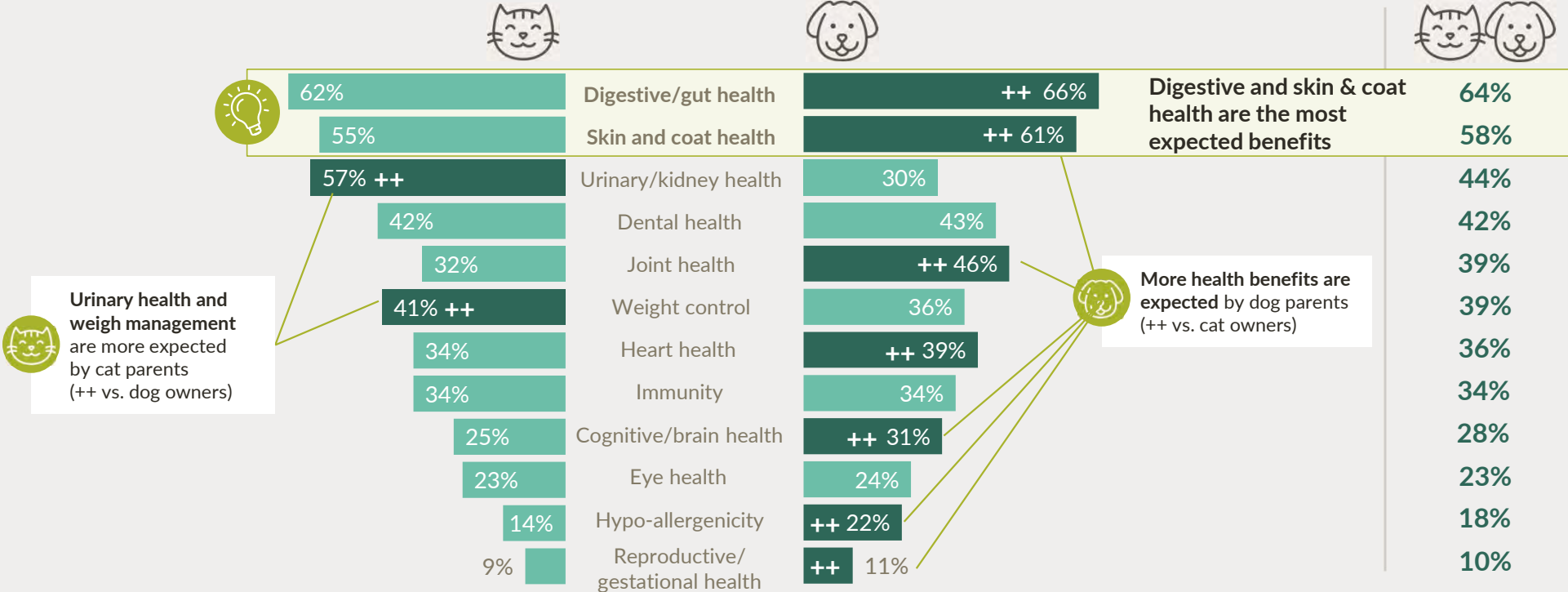
# Gut health is the main pet food benefit that pet parents value

Skin & coat health is also very popular. The pet's specie drives different expectations: more urinary and weight control for cats, more joint/heart/brain/reproductive health and hypo-allergenicity for dogs

## PURCHASE TRIGGERS | Health benefits

Which health benefits do you value the most in your pet food?

Respondent base: Cat owners 1,385 | Dog owners 1,284 | Total 2,669



# Gut health is the main pet food benefit that pet parents value

## Detailed results per subgroup

### PURCHASE TRIGGERS | Health benefits

Which health benefits do you value the most in your pet food?

Respondent base: Total 2,669 | Area: EU=Europe; NA=North America; LATAM=Latin America |  
Age group: Younger=Gen Z + Millennials; Older=Gen X + Boomers | Type of pet food | Purchase channel

	TOTAL Dog & Cat	AREA			OWNER'S AGE		PET FOOD		PURCHASE CHANNEL		
		EU	NA	LATAM	Younger	Older	Dry & Wet	Dry only	Grocery	Online	Specialists
<i>Respondent base</i>	2,669	885	924	860	1,390	1,279	1,444	1,023	1,197	892	1,344
Digestive/gut health	64%	59% --	63%	69% ++	64%	63%	66% ++	61% --	65%	69% ++	65%
Skin and coat health	58%	53% --	56%	64% ++	60% ++	56% --	60% +	57%	58%	62% ++	61% ++
Urinary/kidney health	44%	37% --	40% --	55% ++	45%	43%	50% ++	37% --	44%	47% ++	48% ++
Dental health	42%	42%	44%	41%	44% +	41% -	46% ++	37% --	44%	47% ++	46% ++
Joint health	39%	41%	42% ++	34% --	37%	40%	40% +	35% --	38%	43% ++	41% ++
Weight control	39%	39%	35% --	43% ++	38%	40%	42% ++	37% --	38%	41%	43% ++
Heart health	36%	32% --	39% ++	38%	37%	35%	37%	34% -	37%	39% +	39% ++
Immunity	34%	27% --	29% --	47% ++	36% ++	32% --	35%	33%	34%	36%	38% ++
Cognitive/brain health	28%	24% --	31% ++	28%	30% ++	26% --	30% ++	24% --	27%	32% ++	30% ++
Eye health	23%	20% --	25% +	25%	24%	23%	25% ++	20% --	24%	25%	26% ++
Hypo-allergenicity	18%	16% --	17%	21% ++	20% ++	16% --	18%	19%	15% --	21% ++	22% ++
Reproductive/gestational health	10%	10%	11%	9%	12% ++	8% --	10%	9%	10%	12% ++	11%

**Note:** this table and the conclusions provided below highlight significant differences between subgroups and the total population of respondents. It is important to take into consideration the percentages to draw overall conclusions per subgroup.



Europeans are the least sensitive to health claims.  
North Americans focus more on joint, heart and cognitive health.  
Latin Americans are the most sensitive to various health claims (incl. immunity and weigh control).

Overall, younger pet parents are more sensitive to health claims than older owners.

Overall, pet owners who mix-feed their pets are more sensitive to health claims.  
Probably because they are more invested in pet food choice?

Overall, pet owners who purchase pet food online or in specialized stores are more sensitive to various health claims.

# Dry cat brands differ across areas, but Nestlé group is leading all markets

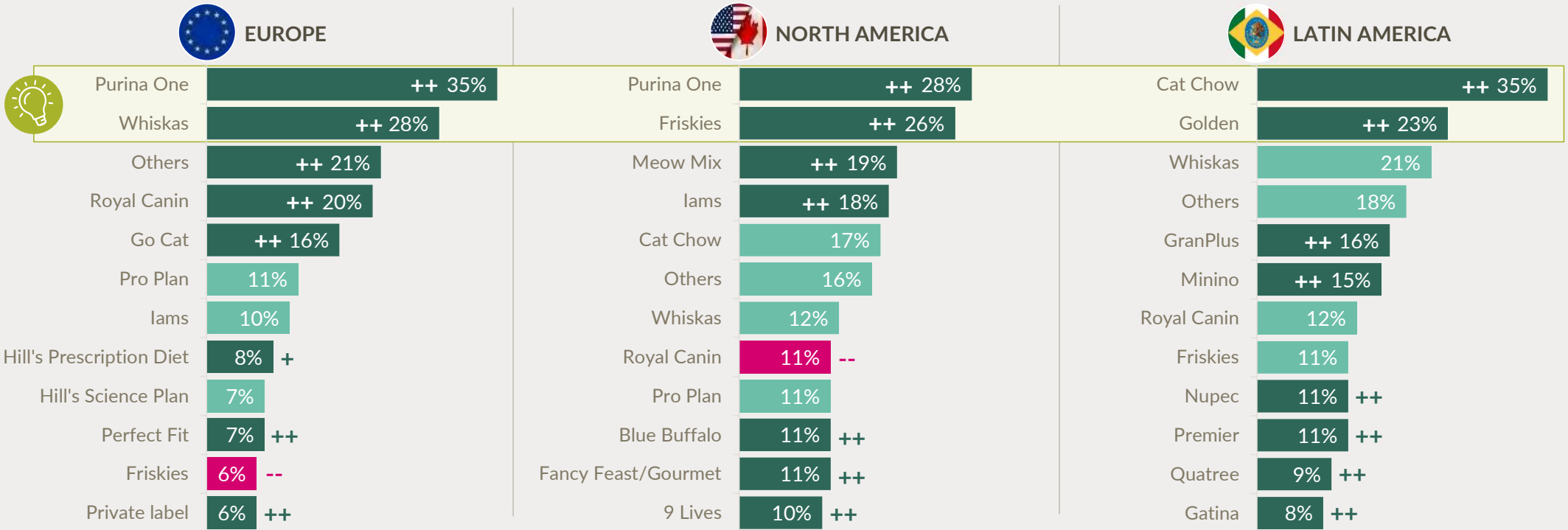
In all areas, Nestlé leads with Purina One, Friskies and/or Cat Chow. In Europe, Mars Pet Care is also strong (Whiskas, Royal Canin). The Latam market is mainly made of local brands (Golden, primarily)

## PURCHASE HABITS | Top Dry Cat brands

Which dry cat food brands have you bought within the last 6 months?



Respondent base: Total Cat owners 1,307 | Europe 455 | North America 435 | Latin America 417



# On the wet cat market, Nestlé group and Mars Pet Care are leading

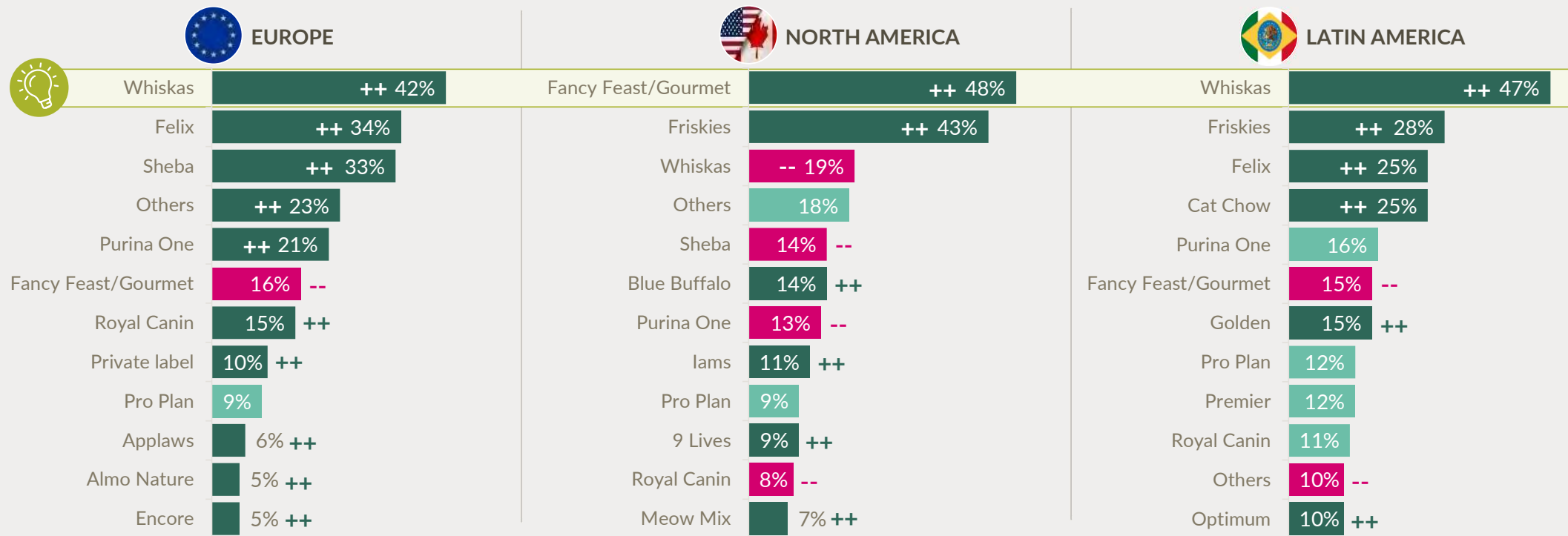
Nestlé has a strong presence thanks to various brands (Fancy Feast/Gourmet, Friskies, Felix, Purina One, Pro Plan, Cat Chow), whereas Mars leads with fewer brands (Whiskas, Sheba, Royal Canin)

## PURCHASE HABITS | Top Wet Cat brands

Which wet cat food brands have you bought within the last 6 months?



Respondent base: Total Cat owners 1,070 | Europe 434 | North America 374 | Latin America 262



# The dry dog market landscape is very fragmented, made of both local and leading brands

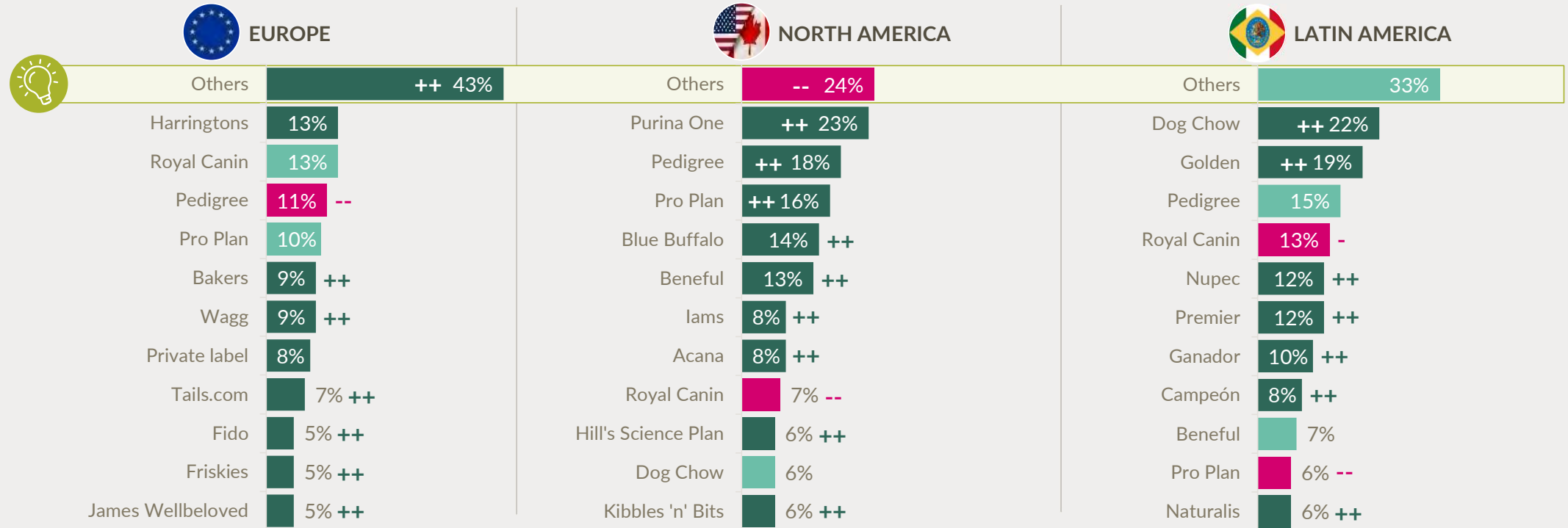
Is the strong presence of “other” brands a signal of a change of habits? A consequence of inflation?

## PURCHASE HABITS | Top Dry Dog brands

Which dry dog food brands have you bought within the last 6 months?



Respondent base: Total Dog owners 1,160 | Europe 337 | North America 418 | Latin America 405



# Mars Pet Care dominates the wet dog market with Pedigree

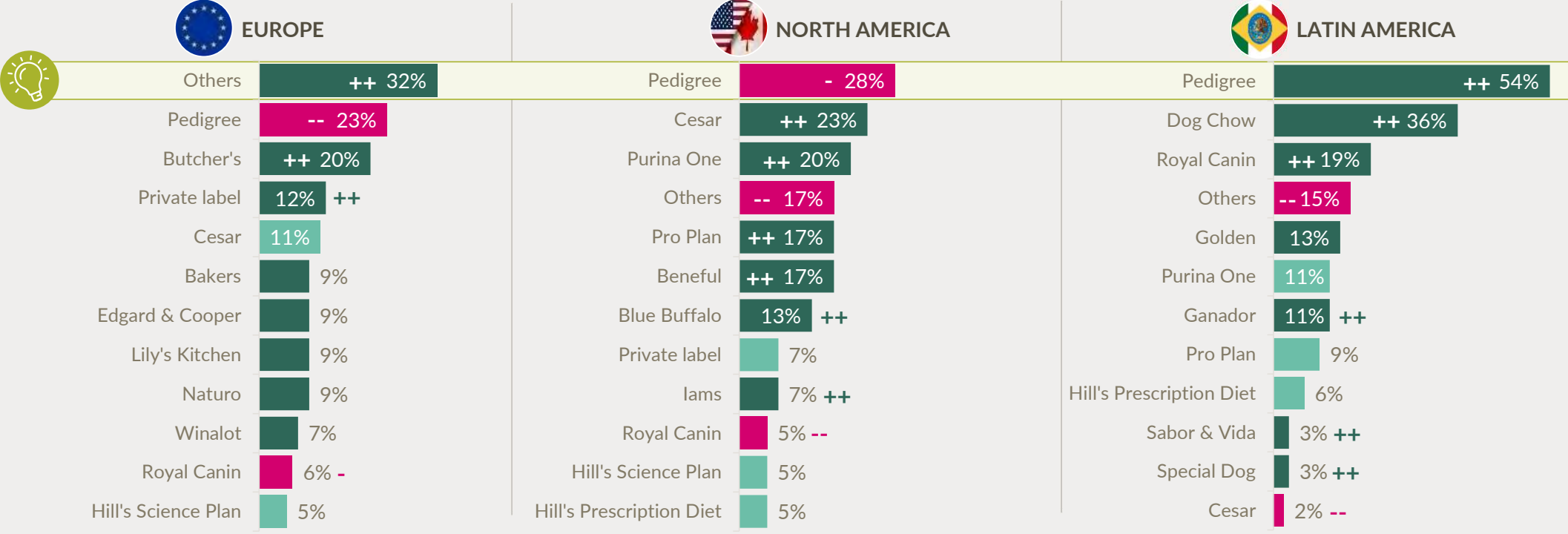
The group is also present with Cesar (NA) and Royal Canin (Latam). The European market is more fragmented (local brands). Nestlé is strong in Americas (NA: Purina One, Pro Plan; Latam: Dog Chow)

## PURCHASE HABITS | Top Wet Dog brands

Which wet dog food brands have you bought within the last 6 months?



Respondent base /!\ weak bases per area: Total Dog owners 487 | Europe 186 | North America 168 | Latin America 133



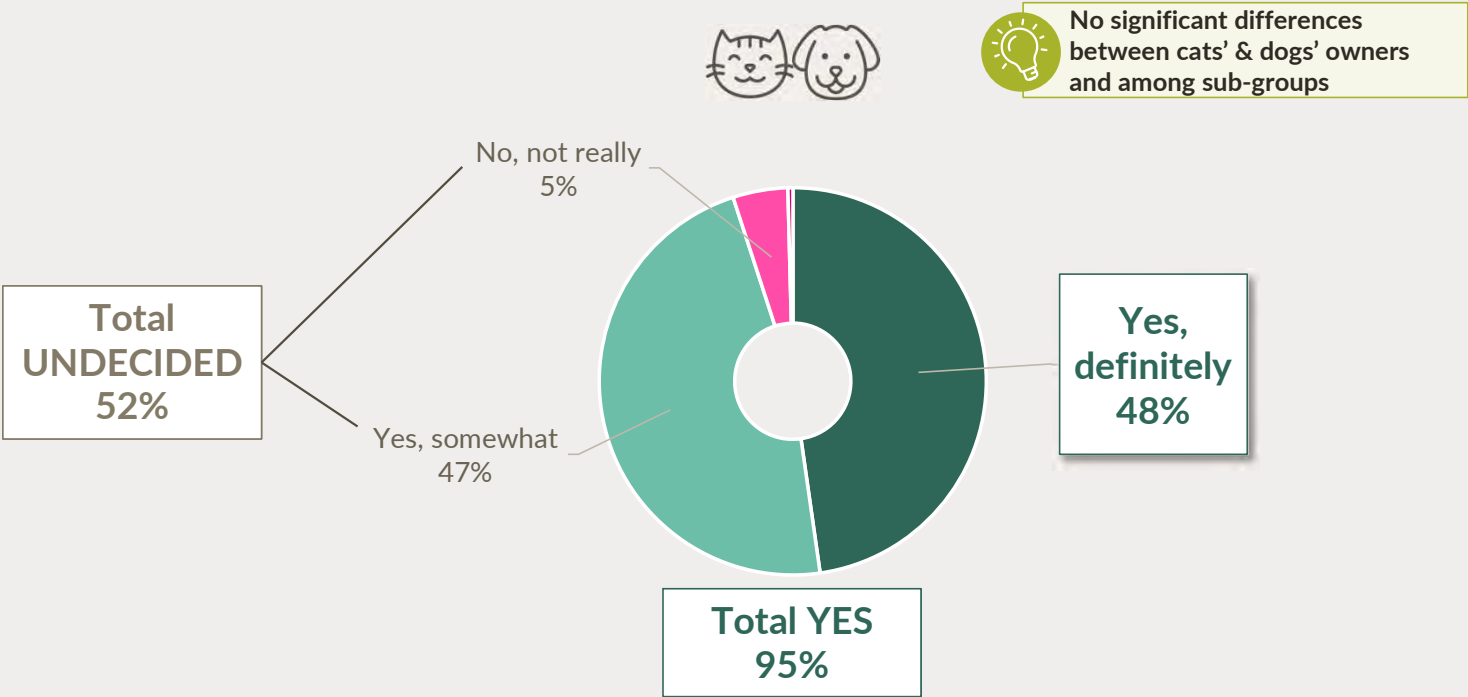
# Overall, most pet owners are satisfied with their current pet food

But half of them are not fully convinced

## ATTITUDES TOWARD PET FOOD | Perception of current pet food

Would you say your pet's current food suits them?

Respondent base: Total Cat & Dog owners 2,669



# This year, nearly half of all pet parents changed their pet food


North Americans are more loyal, whereas Latin Americans are more prone to change.

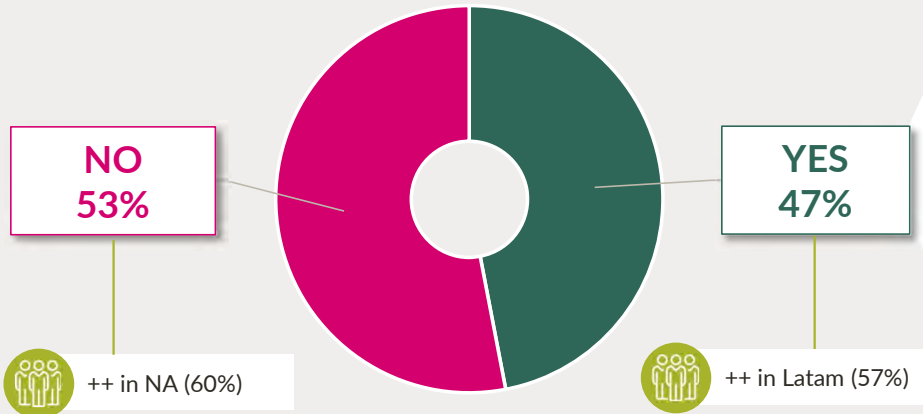
The switch is mainly made for a pet food from a different brand, at the same price or more expensive.

## PURCHASE HABITS | Brand loyalty

Have you changed your pet food within the past year?

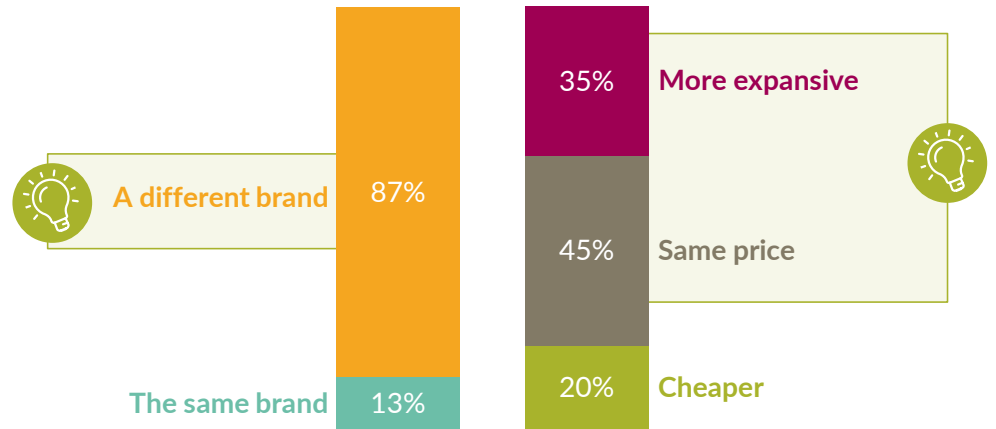
Respondent base: Total Cat & Dog owners 2,669

 No significant differences between cats' & dogs' owners



If YES: When you changed your pet food, it was for...

Respondent base: Cat & Dog owners who changed their pet food within the past year 1,261



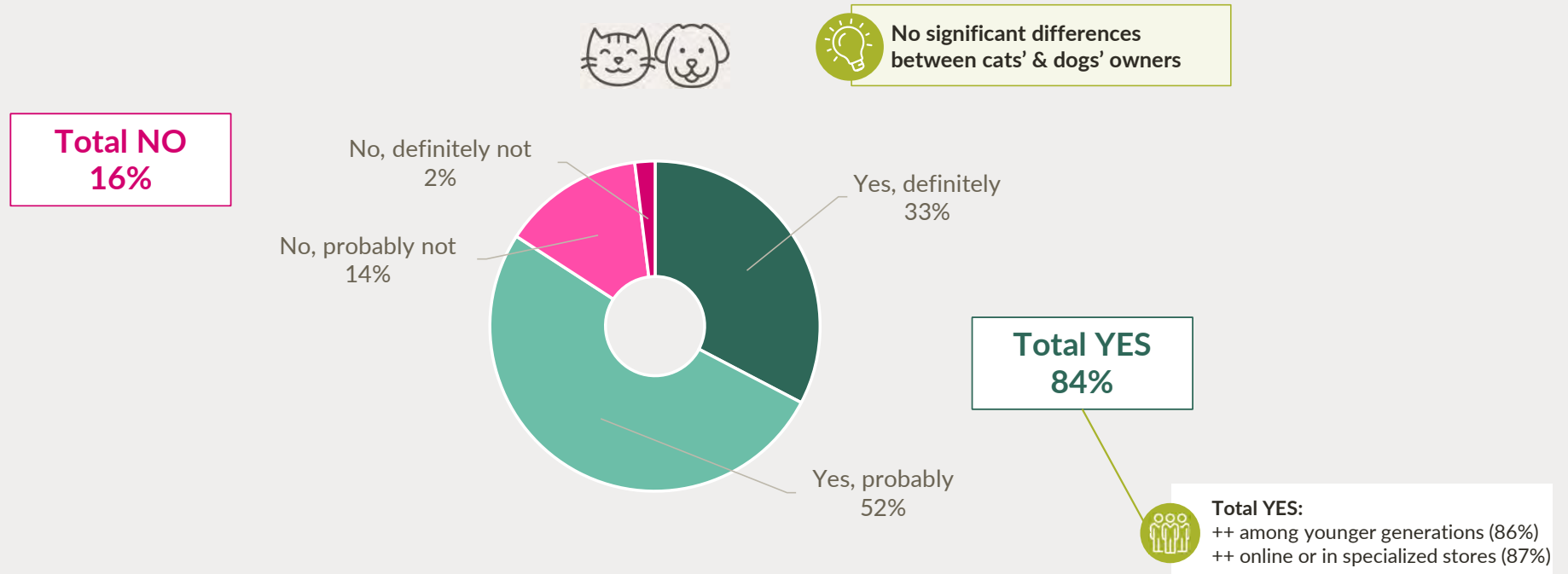
# In the future, most pet owners would be willing to pay more for a pet food that is better suited to their pets' needs

Especially among younger generations, and owners who buy online or at specialized stores

## PURCHASE HABITS | Readiness to pay more for a better pet food

Would you be willing to pay more for a diet that is better suited to your pet's needs?

Respondent base: Total Cat & Dog owners 2,669

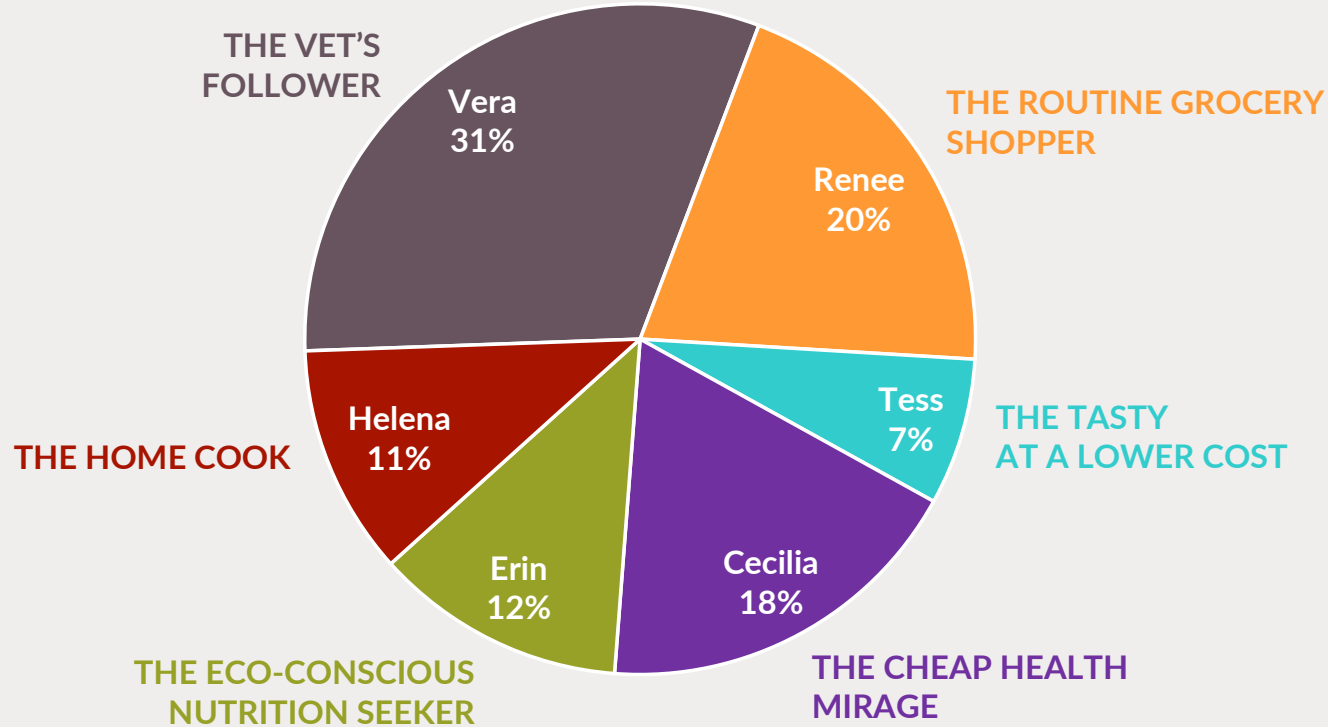




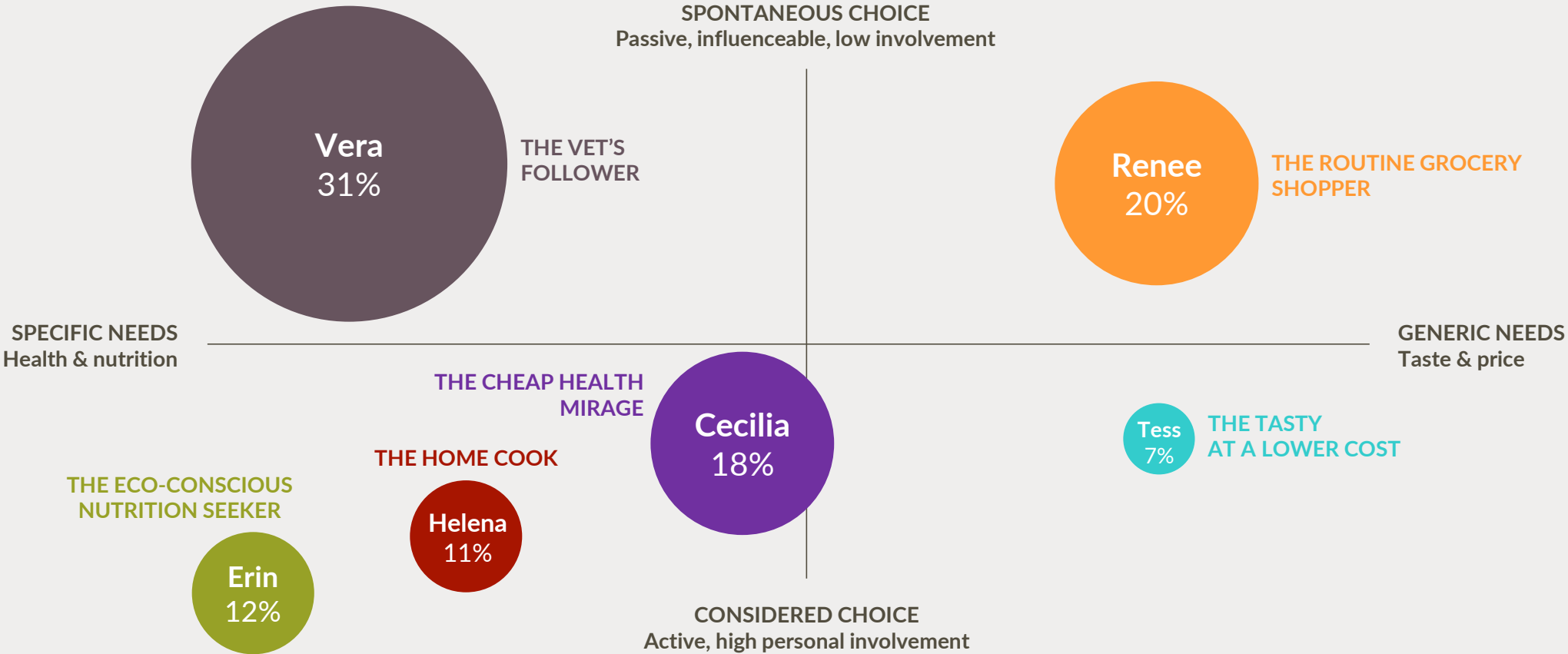
# Pet parent typologies

# 6 types of pet parents shape the pet food market

3 target groups make up 70% of the market: VERA, RENEE and CECILIA



# The pet parent profiles are characterized by their expected benefits and involvement when choosing a pet food



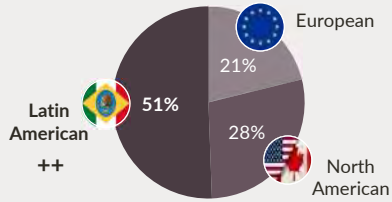
# Vera, the Vet's follower | 31% of pet owners Worldwide

## Market size in EU 20%; NA 26%; LATAM 49%

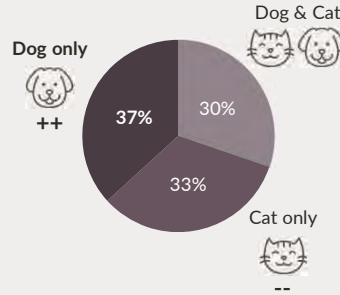


Mainly from Gen X and living in a big city, Vera is driven by her pet health. She usually feeds her pet dry kibble, follows veterinarian recommendations about pet food (brand and quantities), and rarely gives other additional foods to her pet e.g. leftovers and treats. In fact, she is the lowest user of wet foods and treats. Although Vera wants a healthy, nutritious, balanced pet food, nutrition is not her field of expertise, therefore she prefers to trust her vet and rely on them to assist her with her pet food choices. She is brand loyal to her chosen premium to super premium kibble, which she shops for in specialized stores (pet shops or vet clinics). She is also least driven by price and taste. With a veterinarian recommendation, she would be ready to pay more for a diet better adapted to her pet's needs.

### Cultural repartition (% of Cluster sample)



### Pet ownership



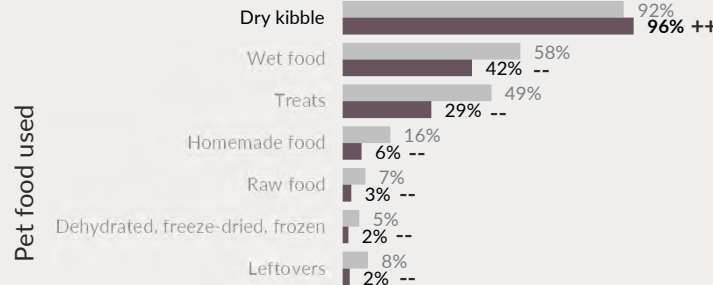
### Brands used

- Dry**
- Royal Canin (20% ++)
  - Golden (17% ++)
  - Pro Plan (9% =)
  - Hill's Presc. Diet (8% ++)
  - Premier (6% ++)

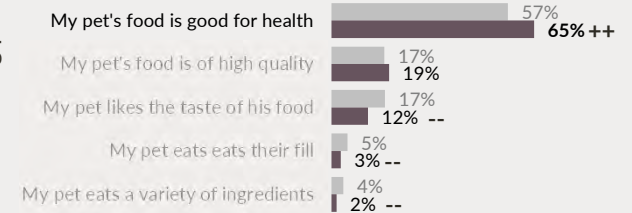
### Pet food criteria of choice

- Top criteria:
  - Health benefits: 50%
  - Quality of ingredients: 45%
  - Reco. by vets: 38%
- Other significant criteria: (--) on almost all criteria

### Pet food usage & motivations



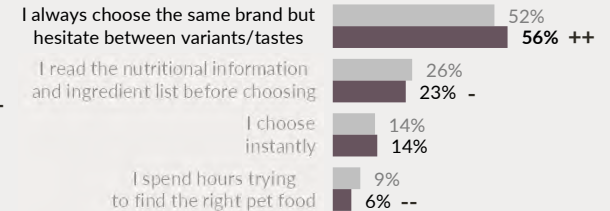
### Motivations when feeding pets



### Purchase channels & triggers



### Decision process



■ TOTAL Pet parents (N=2,631)  
■ CLUSTER Vera (N=827)

++/-- Statistical difference vs. Total: significant @95% confidence level  
+/- Statistical difference vs. Total: tendency @90% confidence level

# Renee, the Routine grocery shopper | 20% of pet owners Worldwide

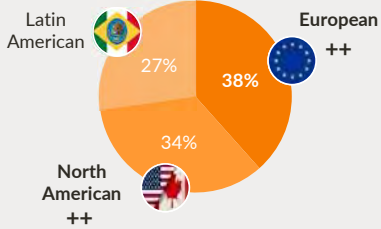
Market size in EU 24%; NA 20%; LATAM 17%



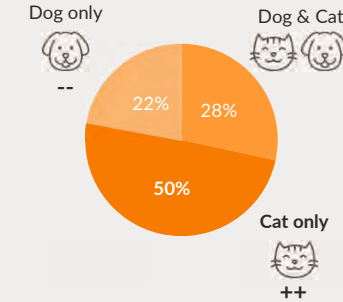
Renee is the older pet parent (Gen X or Boomer) and mainly owns a cat. Choosing the right pet food is difficult for her. She doesn't know what a good pet food is and is more driven by taste than health benefits. She gives her pet both dry kibble and wet food and occasionally treats. Her main levers of choice are price, then brand. She purchases eco to mid-priced pet food, that she shops in super/hypermarket, probably while shopping goods for her household. Renee is a routine shopper. She is the most brand loyal and usually chooses the same brands, instantly. And when she changes her pet food, she selects a product at the same price or cheaper. She is one of the least willing to pay more for a diet better suited to her pet.

## Cultural repartition

(% of Cluster sample)



## Pet ownership



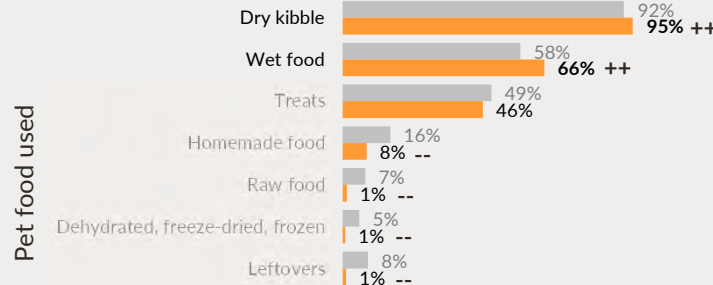
## Brands used

- Dry**
- Whiskas (27% ++)
  - Purina One (27% ++)
  - Pedigree (21% ++)
  - Cat/Dog Chow (20%/14% ++)
- Wet**
- Pedigree (41% =)
  - Whiskas (40% ++)
  - Felix (29% ++)
  - Fancy Feast/Gourmet (26% =)
  - Sheba (24% ++)

## Pet food criteria of choice

- Top criteria:**
- Price (59% ++)
  - Brand (33%)
  - Health benefits (32% --)
- Other significant criteria:**  
(-- on all criteria but price (++) and brand (=))

## Pet food usage & motivations



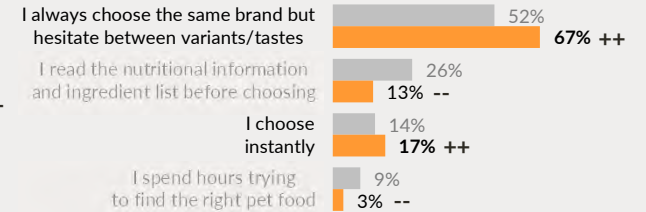
## Purchase channels & triggers



## Motivations when feeding pets



## Decision process



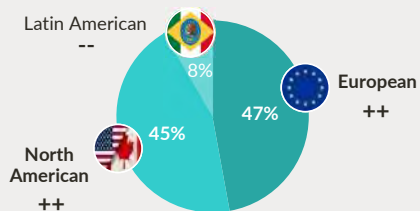
# Tess, the Tasty at a lower cost | 7% of pet owners Worldwide Market size in EU 10%; NA 9%; LATAM 2%



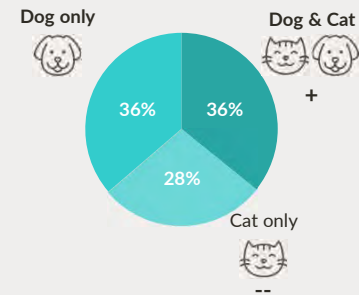
Living in a small city or in the countryside and more professionally inactive, Tess is enthusiastic and involved in pet food choice, although she has low budget. Driven by taste at cheap price, she is the opposite of control freak, and she feels that feeding pets correctly is not so difficult. Tess feeds her pet many types of food (dry, wet, treats), shares her plate with them (leftovers), and even cook for them (homemade). She purchases eco to mid-priced brands that she shops in super/hyper-market, online or at the discounter. Tess has no real interest in product content and just seeks for balanced, nutritious and palatable products, easy to digest. She is one of the least ready to pay more for a diet better suited to her pet.

## Cultural repartition

(% of Cluster sample)



## Pet ownership



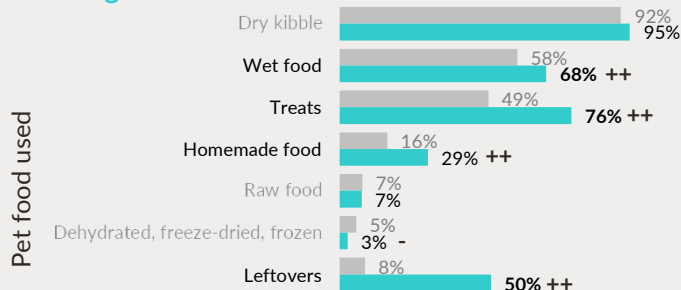
## Brands used

- Dry**
- Purina One (44% ++)
  - Whiskas (36% ++)
  - Go Cat (24% ++)
  - Friskies (23% ++)
  - Pedigree (23% ++)
  - Iams (21% ++)
- Wet**
- Whiskas (58% ++)
  - Pedigree (41% =)
  - Felix (40% ++)
  - Sheba (29% ++)
  - Cesar (27% ++)

## Pet food criteria of choice

- **Top criteria:**
- | Criteria               | Percentage | Significance |
|------------------------|------------|--------------|
| Price                  | 69%        | ++           |
| Quality of ingredients | 54%        |              |
| Health benefits        | 50%        |              |
| Brand                  | 40%        | ++           |
- **Other significant criteria:** (--) on "naturally healthy" criteria: protein source, natural, fresh meat, grain-free, reduced list of ingredients, country of origin

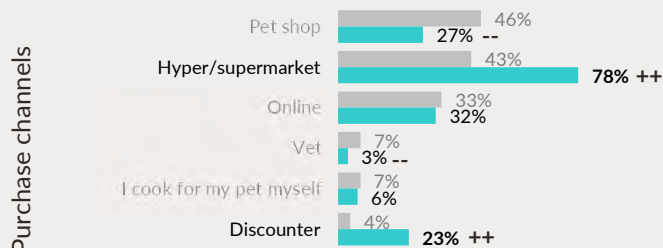
## Pet food usage & motivations



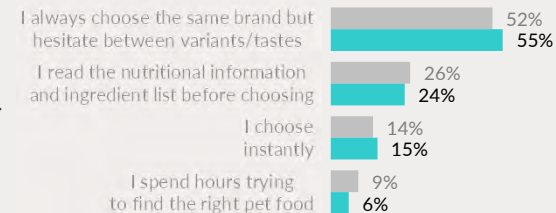
## Motivations when feeding pets



## Purchase channels & triggers



## Decision process

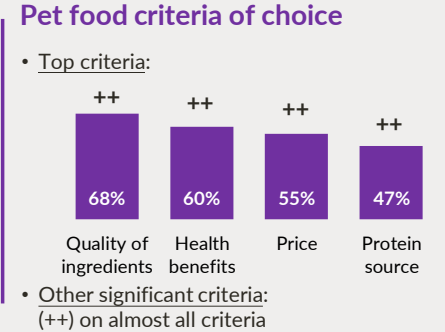
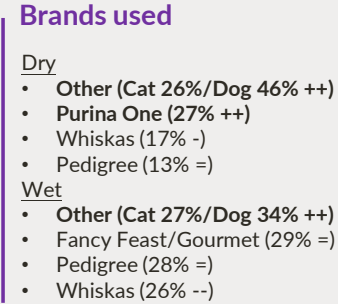
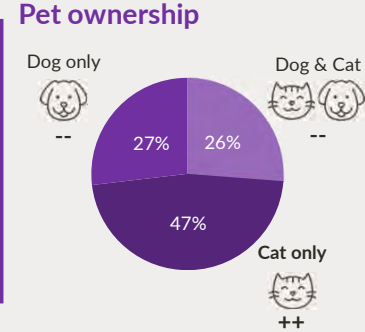
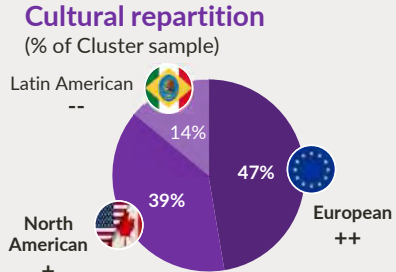


# Cecilia, the Cheap health mirage | 18% of pet owners Worldwide

Market size in EU 26%; NA 20%; LATAM 8%



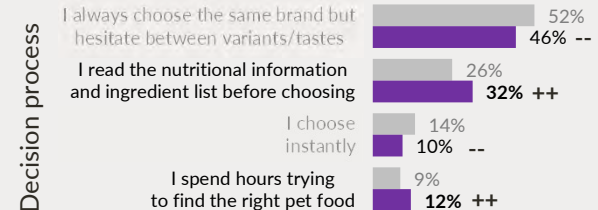
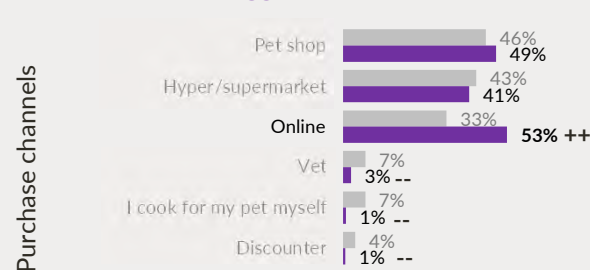
Cecilia is a Millennial without kids, strongly invested in the bond with her pet (mainly cat). She gives special care to her pet food choice. Driven by health, she spends time to select the good diet for her pet. She reads information on the packaging and online where she shops. She gives her pet dry and the most wet food, and treats. She is also the most satisfied with her current pet food. Cecilia gives high importance to the quality of the ingredients and seeks for meat (real meat protein source, meat ratio, fresh meat). She is also sensitive to ecology (natural, grain-free, reduced list of ingredients, country of origin). Nevertheless, she declares purchasing premium products while shopping standard brands, what signals her illusions about pet food knowledge.



### Pet food usage & motivations



### Purchase channels & triggers



# Erin, the Eco-conscious nutrition seeker | 12% of pet owners Worldwide Market size in EU 11%; NA 12%; LATAM 13%



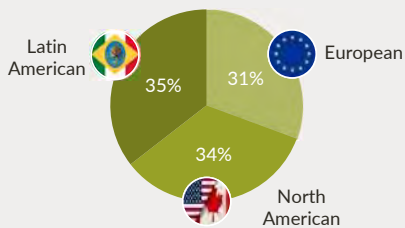
Erin is a young city girl (Gen Z or Millennial), who feels strongly about feeding her pet correctly. Healthy and natural ingredients are key drivers for her.

Eco-conscious, she spends time investigating nutritional information and food quality (source of protein, meat ratio, limited ingredients list, low impact on environment...).

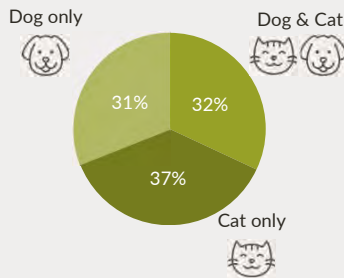
She carefully selects the products she purchases, whether dry, wet or treats, and usually buys premium to super premium food online or in pet shops.

Erin is strongly driven by real meat, organic and free-from products. She can cook for her pet and regularly adds supplements to cover all facets of health and nutrition. She is the best target for alternative proteins and new pet food technologies (dehydrated, freeze-dried, frozen). She is the readiest to change brand for a more expansive diet that is better adapted to her pet's needs.

## Cultural repartition (% of Cluster sample)



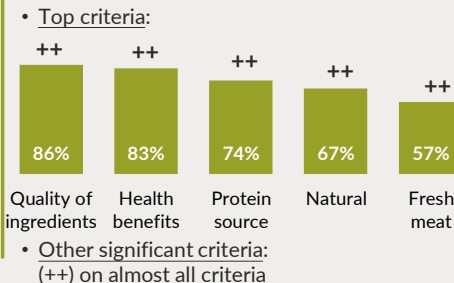
## Pet ownership



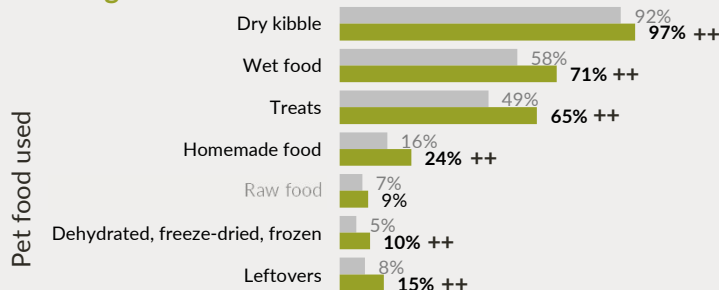
## Brands used

- Dry / Wet
- Other (Cat 26%/Dog 38% ++)
  - Royal Canin (20% ++)
  - Pro Plan (16% ++)
  - Blue Buffalo (10% ++)
  - Golden (10% +)
  - Premier (9% ++)

## Pet food criteria of choice



## Pet food usage & motivations



## Purchase channels & triggers



# Helena, the Home cook | 11% of pet owners Worldwide

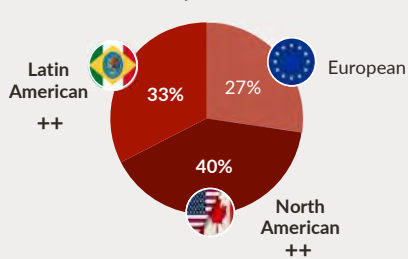
Market size in EU 9%; NA 13%; LATAM 11%



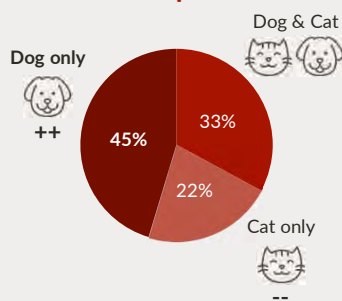
Helena is a Millennial or Gen X pet parent (mainly dog), who is not influenced by others and trusts herself about feeding her pet, for whom she prepares homemade meals. She is driven by health (primarily gut health) and nutrition. She uses natural ingredients and gives importance to high protein content, real meat, absence of controversial ingredients (non-GMO, grain-free, gluten-free, no preservatives). She regularly adds dietary supplements to cover her pet's needs. Helena does not often purchase pet food but is a good target for new technologies (dehydrated, freeze-dried, frozen). She is also ready to pay more for a diet better suited to her pet.

## Cultural repartition

(% of Cluster sample)



## Pet ownership



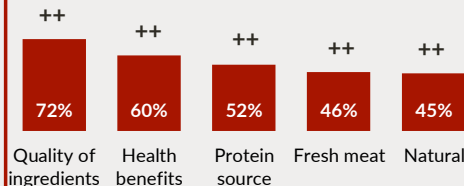
## Brands used

Dry / Wet

• Other (Cat 29%/Dog 44% ++)

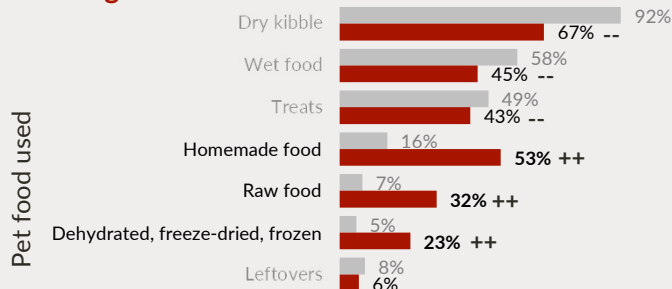
## Pet food criteria of choice

• Top criteria:



• Other significant criteria: (++) on many criteria, excl. price (--), brand & vet advice (-)

## Pet food usage & motivations



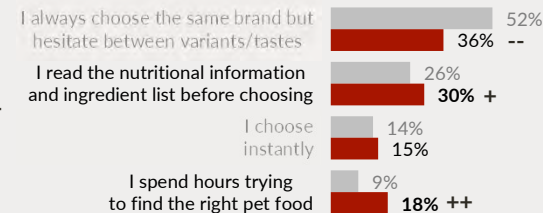
## Motivations when feeding pets



## Purchase channels & triggers

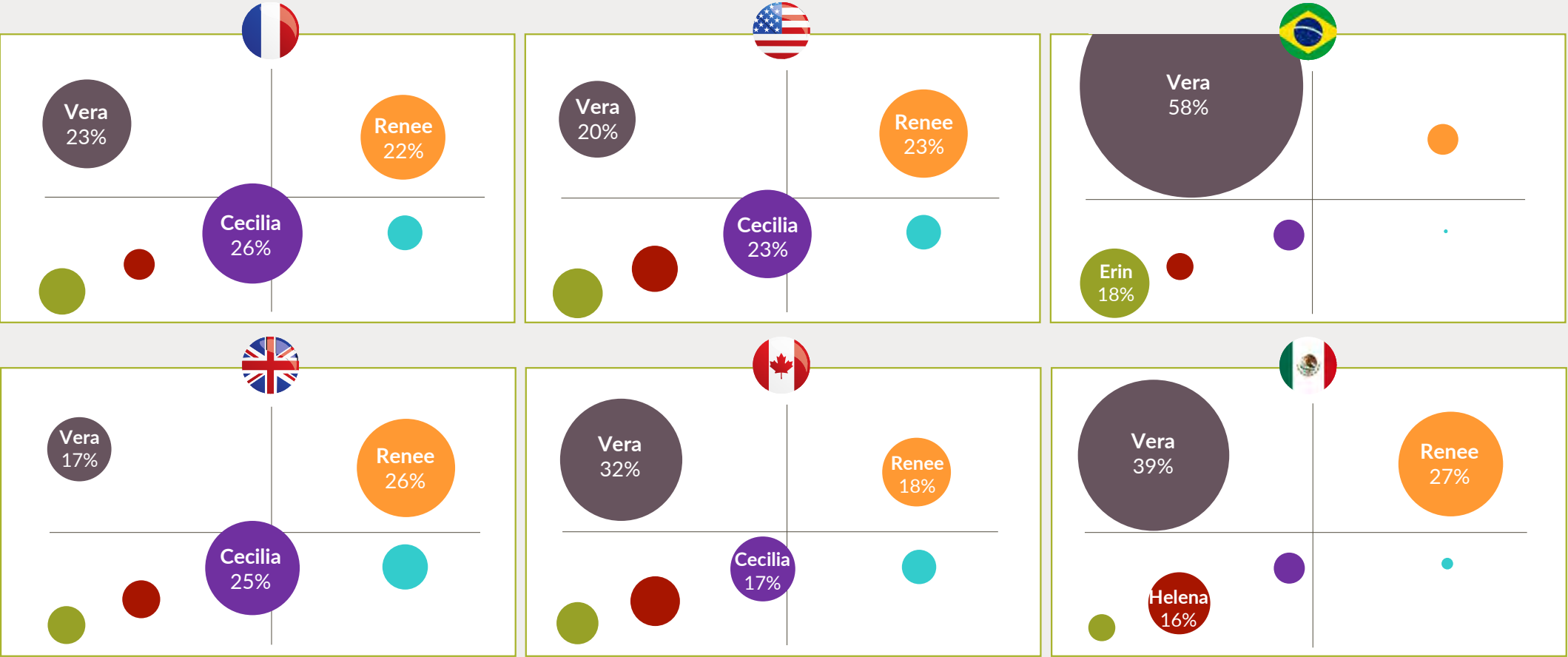


## Decision process



# European and North American markets are mainly made up of Cecilia, Renee and Vera (esp. in Canada), whereas Latam is strongly driven by Vera







In Latam, other priority targets differ: Erin in Brazil, Renee and Helena in Mexico





# Market opportunities for pet food brands

# Summary of pet parents' profiles

	VERA	RENEE	TESS	CECILIA	ERIN	HELENA
	The Vet's follower	The Routine grocery shopper	The Tasty at a lower price	The Cheap health mirage	The Eco-conscious nutrition seeker	The Home cook
Market weight	31%	20%	7%	18%	12%	11%
Pet ownership	 ++	++ 		++ 		 ++
Primary target for	Premium/Super premium vet pet food	Eco/mid-priced leading pet food	Eco/mid-priced leading pet food	Mid-priced/Premium leading or alternative pet food & supplements	Premium/Super premium alternative pet food & supplements	Premium/Super premium alternative food & supplements
Brand loyalty	High	High	Medium	Medium	Low	Low
Motivations*	Security Convenience	Money Convenience	Money Novelty	Self-esteem Security	Ecology Security	Security Novelty
Purchase triggers	Better nutrition Vet's recommendations	Price Brand Simplicity	Price Brand Diversity	Price Brand Natural ingredients	Better nutrition Natural ingredients Transparency	Better nutrition Natural ingredients Diversity
Main pet food used						
Dry food	● ● ●	● ● ●	● ●	● ● ●	● ● ●	
Wet food		● ●	● ●	● ● ●	● ●	
Treats			● ● ●	● ●	● ●	
Homemade food			●		●	● ● ●
Leftovers			● ●		●	
Main purchase channels						
Department store		● ● ●	● ● ●			
Discounter			●			
Online				● ●	● ●	
Pet shops	● ●			●	● ● ●	●
Vet	●					

# Market opportunities according to pet parent profile



Mainly from Gen X and living in a big city, Vera is driven by her pet health. She usually feeds her pet dry kibble, follows veterinarian recommendations about pet food (brand and quantities), and rarely gives other additional foods to her pet e.g. leftovers and treats. In fact, she is the lowest user of wet foods and treats.

Although Vera wants a healthy, nutritious, balanced pet food, nutrition is not her field of expertise, therefore she prefers to trust her vet and rely on them to assist her with her pet food choices. She is brand loyal to her chosen premium to super premium kibble, which she shops for in specialized stores (pet shops or vet clinics).

She is also least driven by price and taste. With a veterinarian recommendation, she would be ready to pay more for a diet better adapted to her pet's needs.

## VERA, the Vet's follower | 31% of pet owners Worldwide

Market size in EU 20%; NA 26%; LATAM 49%

Focus on selective purchase channels and capitalize on the reassurance about nutrition expertise provided by veterinarians

- Use vets as brand advisors / ambassadors:
  - promote health benefits and differentiate from competitors.
- Emphasize the **quality** of the products that have been **adapted to the pet's specific needs**:
  - each and every need, its product (focus on dry food),
  - health & nutrition first!
- Legitimize **higher prices through nutrition and health benefits**. Be careful of high price increases and bad recommendations from pet shops, which can lead to brand switch (observed in the last year).
- Strengthen **communication in vet clinics**.
- Post vet recommendations on **dedicated websites and social media channels**.
- Promote both **wet and dry food** through vets.
- Offer **healthy treats** through vets, distribute treat line samples.

# Market opportunities according to pet parent profile



**RENEE**, the **Routine** grocery shopper | **20%** of pet owners Worldwide  
Market size in **EU 24%**; **NA 20%**; **LATAM 17%**

**Focus on mass market purchase channel and capitalize on a simple shopping experience and the pleasure around the meal**

Renee is the older pet parent (Gen X or Boomer) and mainly owns a cat. Choosing the right pet food is difficult for her. She doesn't know what a good pet food is and is more driven by taste than health benefits. She gives her pet both dry kibble and wet food and occasionally treats. Her main levers of choice are price, then brand. She purchases eco to mid-priced pet food, that she shops in super/hyper-market, probably while shopping goods for her household. Renee is a routine shopper. She is the most brand loyal and usually chooses the same brands, instantly. And when she changes her pet food, she selects a product at the same price or cheaper. She is one of the least willing to pay more for a diet better suited to her pet.

- Emphasis on **price, on-the-shelves promotions** and **visibility** for dry and wet food.
- Keep it **simple**, focus on **basic needs**: taste, pet bond, convenience. Avoid complex messages and health benefits.
- Push ads and promotions and visibility through **mass retailers**:
  - targeted marketing using mass market retailer loyalty programs,
  - “meal of the month” campaigns in store: to push new products, products trial, and brand trust.
- Push **treats** products through **direct marketing tactics**.

# Market opportunities according to pet parent profile



Living in a small city or in the countryside and more professionally inactive, Tess is enthusiastic and involved in pet food choice, although she has low budget. Driven by taste at cheap price, she is the opposite of control freak, and she feels that feeding pets correctly is not so difficult.

Tess feeds her pet many types of food (dry, wet, treats), shares her plate with them (leftovers), and even cook for them (homemade). She purchases eco to mid-priced brands that she shops in super/hyper-market, online or at the discounter.

Tess has no real interest in product content and just seeks for balanced, nutritious and palatable products, easy to digest. She is one of the least ready to pay more for a diet better suited to her pet.

**TESS**, the Tasty at a lower cost | 7% of pet owners Worldwide

Market size in EU 10%; NA 9%; LATAM 2%

Focus on mass market purchase and online channels  
and capitalize on the pleasurable experience around the meal

- Emphasis on **price**, **on-the-shelves promotions** and **visibility** for dry and wet food.
- Showcase **pet's pleasure** with new tastes and break parent's routine with **novelty and fun**, at **lower price**:
  - seasonal recipes, limited editions (dry kibbles, wet food, treats),
  - experiential diets and toppings: dry & wet mixed feeding range with sensorial combinations, inspired from kid's deserts (i.e. Danone mix), sauces for extra tastes...
  - varied packaging formats & labeling: dual compartment, cans, squeezable pouches, exciting designs...
- Push ads and promotions through **mass retailers and social media channels**:
  - targeted marketing using mass market retailer loyalty programs,
  - "meal of the month" campaigns through social media: to push new products, products trial, and discuss hot topics.
- Push **treats** products through **direct marketing tactics**.

# Market opportunities according to pet parent profile



## CECILIA, the Cheap health mirage | 18% of pet owners Worldwide

Market size in EU 26%; NA 20%; LATAM 8%

### Focus on online and pet shops and take opportunities of the in-between functional & emotional territories, for marketing-led health products

*Cecilia is a Millennial without kids, strongly invested in the bond with her pet (mainly cat).*

*She gives special care to her pet food choice. Driven by health, she spends time to select the good diet for her pet. She reads information on the packaging and online where she shops.*

*She gives her pet dry and the most wet food, and treats. She is also the most satisfied with her current pet food.*

*Cecilia gives high importance to the quality of the ingredients and seeks for meat (real meat protein source, meat ratio, fresh meat). She is also sensitive to ecology (natural, grain-free, reduced list of ingredients, country of origin).*

*Nevertheless, she declares purchasing premium products while shopping standard brands, what signals her illusions about pet food knowledge.*

- Promote **health** benefits, **quality** of ingredients, **true meat** and **environmental** compliance.
- Showcase **pet's pleasure** with new tastes and break parent's routine **with novelty and fun, while highlighting health benefits**:
  - seasonal recipes, limited editions (dry kibbles, wet food, treats),
  - experiential and healthy diets and toppings: dry & wet mixed feeding range with sensorial combinations, inspired from kid's deserts (i.e. Danone mix), sauces for extra tastes...
  - varied packaging formats & labeling: dual compartment, cans, squeezable pouches, exciting designs...
- Push ads and promotions through **mass retailers and social media channels**:
  - targeted marketing using mass market retailer loyalty programs,
  - "meal of the month" campaigns through social media: to push new products, products trial, and discuss hot topics.
- Step-by-step **guidance and support through a dedicated app**, with menus and advice for fun activities and healthy nutrition.
- Push **treats** products through **direct marketing** tactics.

# Market opportunities according to pet parent profile



Erin is a young city girl (Gen Z or Millennial), who feels strongly about feeding her pet correctly. Healthy and natural ingredients are key drivers for her.

Eco-conscious, she spends time investigating nutritional information and food quality (source of protein, meat ratio, limited ingredients list, low impact on environment...).

She carefully selects the products she purchases, whether dry, wet or treats, and usually buys premium to super premium food online or in pet shops.

Erin is strongly driven by real meat, organic and free-from products. She can cook for her pet and regularly adds supplements to cover all facets of health and nutrition. She is the best target for alternative proteins and new pet food technologies (dehydrated, freeze-dried, frozen). She is the readiest to change brand for a more expansive diet that is better adapted to her pet's needs.

## ERIN, the Eco-conscious nutrition seeker | 12% of pet owners Worldwide

Market size in EU 11%; NA 12%; LATAM 13%

### Focus on online presence and alternative brands, and capitalize on trust generated from transparent information

- Promote **the specificity of your diet**, be forthcoming in **product formulation** and **environmental** compliance: details on real meat, true meat, grain free, meat ratio and protein source, organic, country of origin, limited ingredients list...
- **Tell your story online** (your brand ethos) to better reach consumers:
  - be honest and differentiate from major brands (remember distrust toward mass market brands),
  - build a community of dedicated followers to engage pet parents.
- Emphasize **product features** and **adaptations to pet needs** (even human and environmental impact):
  - identify all key needs for which the product range meets (for dry and wet food, treats and supplements),
  - concentrate on holistic health and well-being through all-natural ingredients,
  - focus on real meat and quality.
- Legitimize **higher prices through superior, eco-friendly ingredients and their health benefits.**
- Create a dedicated, small (organic) brand.
- Develop **fresh food kits, true meat portions**:
  - personalized meals and service offering (home delivery),
  - range of true meat portions tailored to pet species and breeds.
- Communicate through **“without” claims**: no GMO, grain free, gluten free, no additives, no preservatives, etc. ALL natural!
- Pave the way for **newer and more alternative (natural) ingredients**: plant-based, eggs, insect proteins...
- Focus on **digital media and rich content marketing.**

# Market opportunities according to pet parent profile



*Helena is a Millennial or Gen X pet parent (mainly dog), who is not influenced by others and trusts herself about feeding her pet, for whom she prepares homemade meals.*

*She is driven by health (primarily gut health) and nutrition.*

*She uses natural ingredients and gives importance to high protein content, real meat, absence of controversial ingredients (non-GMO, grain-free, gluten-free, no preservatives).*

*She regularly adds dietary supplements to cover her pet's needs.*

*Helena does not often purchase pet food but is a good target for new technologies (dehydrated, freeze-dried, frozen).*

*She is also ready to pay more for a diet better suited to her pet.*

**HELENA**, the **H**ome cook | **11%** of pet owners Worldwide  
Market size in EU 9%; NA 13%; LATAM 11%

**Capitalize on indirect targeting  
to capture emotional triggers e.g. love and sharing, control**

- Offer a wide variety of **DIY meal boxes** filled with **fresh and natural** ingredients and **real meat** portions:
  - ready-to-use ingredients to assist with homemade cooking,
  - meal program and recipe ideas to ignite cooking appeal,
  - ensure simplicity and safety of ingredients.
- Emphasize **health benefits** and ingredient **quality**.
- Provide **natural supplements** (fish oil, brewer's yeast, vitamins, probiotics...).
- Propose **other pet food technologies** (dehydrated, freeze-dried, frozen).

# Thank you

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